**Administrative Unit**

**Assessment Plan**

**The University of New Mexico**

**A. UNM-Los Alamos**

1. Unit (if relevant): Financial Aid

2. Department/Division: *Student Services*

3. Submission Date: *26 October 2016*

**B. Contact Person(s) for the Assessment Plan**

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| --- | --- | --- |
| First and Last Name | Title | UNM Email Address |
| 1. Elizabeth Rademacher | Academic Student Success Manager | eradema@unm.edu |
| 1. Jenny Duran | Financial Aid Officer | jenduran@unm.edu |

C. **Mission Statement**

The mission of UNM-Los Alamos financial aid office is to provide accurate, timely, and proficient support and services and information to students in completing their financial aid packages to ensure that students receive the appropriate financial aid awards to successfully pursue their education.

**D. Unit Goal(s), Outcomes & Assessment Matrix**

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| --- | --- | --- | --- | --- | --- | --- |
| **Broad Goals** | **Student Learning and/or Administrative Unit Outcomes** | **Univ. Goals/**  **UNM Strategic Plan/LA Strategic Plan** | **When Assessed**  **\*\*** | **Assessment Method(s)/**  **Activity, unit, etc. if relevant** | **Direct/**  **Indirect** | **\*Criteria to determine success** |
| Goal 1: To provide the prospective and current students, parents/guardians and relevant school representatives with current and accurate information regarding the financial aid process at UNM –LA | *AUO1.1: Visit local schools and/or participate in local college fairs to meet with relevant school representatives and/or prospective students and parents/guardians regarding the financial aid opportunities at UNM-LA* | *Goals 2 & 3* | *Fall, Spring & Summer*  *Fall & Spring* | *Formally track visits (i.e., excel file tracking visits, etc.)*  *Collaborate with Office of Recruitment per semester on finalizing a schedule for visiting local schools (i.e., meeting agendas, emails, copy of schedule, etc.)* | Direct  Direct | Visit participate at least 10 local school and/or participate in at least three college fairs per semester  Consult with the Office of Recruitment at least once per semester regarding the schedule |
| *AUO 1.2: Present information regarding the financial aid process, etc. to new students and/or parents/guardians at the New Student Orientation per semester* | *Goals 2 & 3* | *Fall, Spring & Summer*  *Fall, Spring & Summer*  *Fall and Spring* | *Develop PPT and financial aid information packets for attendees*  *Track attendance via sign-up sheets*  *NSO Survey (i.e., financial aid questions on survey)* | Direct  Direct  Indirect | Update PPT and informational packets, as needed, annually  At least 50% of the new students will attend the NSO financial aid session per semester  At least 80% of the respondents will indicate that they found the information provided about financial aid helpful |
| *AUO1.3: Conduct one-on-one financial aid consultations with prospective and/or current students upon request* | *Goals 2 & 3* | *Fall, Spring & Summer*  *Fall, Spring & Summer* | *Schedule in appointments in LoboAchieve*  *Provide notes regarding each appointment in LoboAchieve* | Direct (staff schedule apt.)/Indirect (i.e., student schedule apt.)  Direct | At least 80% of the appointments will be scheduled in LoboAchieve per semester  Notes will be included in LoboAchieve for at least 80% of the appointments per semester |

1. **Who**: All clients will be targeted.

2. **When will the outcomes be assessed? *When and in what forum will the results of the assessment be discussed*?**

*UNM-LA* Office of Financial Aid will use a one-year cycle of assessment. The type of data and evidence that will be collected will be highlighted below.

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| --- | --- | --- | --- |
| **Student Learning and/or Administrative Unit Outcomes** | **When Assessed**  **\*\*** | **Assessment Method(s)/**  **Activity, unit, etc. if relevant** | **Direct/Indirect** |
| *AUO1.1: Visit local schools and/or participate in local college fairs to meet with relevant school representatives and/or prospective students and parents/guardians regarding the financial aid opportunities at UNM-LA* | *Fall, Spring & Summer*  *Fall & Spring* | *Formally track visits (i.e., excel file tracking visits, etc.)*  *Collaborate with Office of Recruitment per semester on finalizing a schedule for visiting local schools (i.e., meeting agendas, emails, copy of schedule, etc.)* | Direct  Direct |
| *AUO 1.2: Present information regarding the financial aid process, etc. to new students and/or parents/guardians at the New Student Orientation per semester* | *Fall, Spring & Summer*  *Fall, Spring & Summer*  *Fall and Spring* | *Develop PPT and financial aid information packets for attendees*  *Track attendance via sign-up sheets*  *NSO Survey (i.e., financial aid questions on survey)* | Direct  Direct  Indirect |
| *AUO1.3: Conduct one-on-one financial aid consultations with prospective and/or current students upon request* | *Fall, Spring & Summer*  *Fall, Spring & Summer* | *Schedule in appointments in LoboAchieve*  *Provide notes regarding each appointment in LoboAchieve* | Direct (staff schedule apt.)/Indirect (i.e., student schedule apt.)  Direct |

3. **What is the unit’s process to analyze/interpret assessment data and use results to improve and/or maximize**

**performance on the outcomes?**

*Briefly describe:*

*1.* UNM-LA Financial Aid Officer will participate in the gathering of information, analysis and recommendations.

*2. what is the process for considering the implications of assessment/data for change:*

*a. to assessment mechanisms themselves.* Each year we will evaluate how helpful our data gathering strategies are and consider ways, other than tracking matrices where we might improve reliability of data.With each survey, we will review survey questions and revise the survey annually. This will help us develop an appropriate survey instrument for our student population.

*b. in the interest of improving services, resources, unit, etc.* The process of collecting data on the support provided in financial aid will allow us to discern which programs are effective and which ones need improvement.

*3. How, when, and to whom will recommendations be communicated?* Results of the surveys and data will be reviewed by staff in Financial Aid, and by the Academic student Success Manager who will summarize the results and present their recommendations to the UNM-LA Institutional Effectiveness Committee. The committee will then make recommendations In subsequent year, the staff will focus on 2 to 3 areas the committee recommended on improving. First, they will develop a strategy for improving those areas, targets, and ways to effectively measure their improvement.

All data, recommendations, will be saved in the S: drive and a summary will be available online.