1. **Support Services Report Template**

**Report Info**
- Name of the person completing this report: Rhonda Johnson
- Title of the person completing this report: Executive Director, Financial Aid
- Supervisor/dean reviewing report: Greg Smih
- Name of second reviewer (if necessary): Linda Dalton
- Service: Coordination of Scholarships
- Division/College: Financial Aid

3. **Mandated Service**

**Link to Scoring Rubric**

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

- Federal Law: Yes
- State Law: Yes
- Campus Policy: Yes

**Provide a brief explanation, if necessary, in < 60 words.**

As part of its mission to administer federal and state financial aid programs in accordance with federal and state regulations, the Financial Aid Office must coordinate all forms of educational assistance to ensure that students are not receiving aid in excess of their cost of attendance.

4. **Importance of Service**

**Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words**

The intent of this service is to ensure compliance with federally mandated regulations pertaining to the coordination of financial resources. In addition, this position is assuming responsibility for the oversight of all scholarships awarded by the University.

**Link to Scoring Rubric**

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

- Students: 65%
- Faculty: 5%
- Administrators/staff: 15%
- Colleges/departments: 12%
- Alumni: 1%
- Community outside University: 2%
- Total: 100%

**Link to Scoring Rubric**

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).
<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

**Provide a brief narrative (<60 words each) explaining your selection for each area.**

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Because prospective students are eager for resources pertaining to scholarships, our outreach activities include information on scholarship opportunities.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>In addition to the oversight of all campus scholarships, we currently administer over twenty scholarships that assist students in financing their East Bay education and more will be added with the new coordination role.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>The scholarships we oversee and deliver act to diminish the need for students to assume high student loan debt. Less debt after graduation gives students greater freedom to live without the burden of high student loan repayments.</td>
</tr>
</tbody>
</table>

**Link to Scoring Rubric**

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th></th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>✔</td>
</tr>
</tbody>
</table>

**Provide a brief narrative (<60 words each) explaining your choice.**

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>We know that knowledge about the availability of scholarships drives students’ college choices, and that receiving an East Bay scholarship can definitely influence a student’s decision to choose our campus.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Although many students would be able to enroll and pay tuition without scholarship assistance, scholarship dollars definitely fund tuition and drive robust enrollment.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>While scholarships can help strengthen the bond between East Bay and our alums, no identifiable action would be impacted at this level.</td>
</tr>
</tbody>
</table>
### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with **any** of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>The coordination of scholarships and the associated dollars delivered to students support learning, inquiry and distinguished scholarship by providing students the financial freedom to pursue these ideals. Further, academic merit is often at least one criterion for scholarship awards.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>Oversight of campus scholarships ensures that scholarship award opportunities are available to our diverse student body.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and life-long learner</td>
<td>We seize the opportunity to publicize University scholarships during Preview Day, Welcome Day, and during community outreach to prospective students.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Because the Scholarship Coordinator is accountable to and interacts with all campus entities, including all departments and programs, we have designed a process that involves collaboration, feedback, and responsiveness.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

As the University develops additional gift opportunities, the need for the coordination of additional scholarships is anticipated.

### 5. Quality of Service

<table>
<thead>
<tr>
<th>Do you assess the quality of the service you provide?</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service
quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

Not at this time, as the coordination role is just being expanded.

Link to Scoring Rubric

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

We developed an on-line form which is used to notify appropriate campus entities, including Financial Aid, when a scholarship is awarded. Scholarships can not be paid until this form is completed and routed, which ensures that we are aware of all campus awards.

Link to Scoring Rubric

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

None, as the coordination role has just been expanded

Link to Scoring Rubric

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

One full-time position was recently allocated to this service. This addition will allow us to better serve students and departments and will allow for the expansion of this service.

Link to Scoring Rubric

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

We solicit informal feedback from campus department during meetings.

Link to Scoring Rubric

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

This specific service was not included in the survey.

Link to Scoring Rubric

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain

Consistent with the PEMSA culture of service we encourage and reinforce staff behavior that respects the students and departments we serve and fosters a partnership between scholarship recipients and the individuals on our staff. We offer continued training and feedback to staff and use the Interpersonal Skills section of the annual staff evaluation to rate personnel in this area.
3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

Yes

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Our target is to process all scholarship award/disbursement forms with five days of receipt.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

No

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Since the demand for this service is driven by external entities, we do not have quantity goals. (In contrast, the University’s comprehensive campaign has goals for increasing scholarships that this service in Financial Aid will support.)

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

25476

Attach your allocated spreadsheet here.
Financial Aid Allocations.xlsx

4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

0

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

91

Attach your allocated spreadsheet here.
Financial Aid Allocations.xlsx

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing
4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Not applicable because the expansion of the coordination role is so recent.

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Fortunately, a staff position was recently allocated to this service.

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

No

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Not applicable because the expansion of the coordination role is so recent.

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

In addition to the 20 scholarships administered directly by Financial Aid, this service has coordinated aid for over 150 scholarship recipients this year.

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

The reason that scholarship management is being coordinated by the Financial Aid office is to move away from the previously fragmented approach that sometime impeded coordination across campus.
5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

A portion of this service is mandated by a federal regulation requiring the Financial Aid Office to be aware of all educational resources received by financial aid recipients.

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

A new Scholarship Coordinator position was recently allocated to Financial Aid. A project is currently underway intended to identify gaps in our current scholarship process. The project has analyzed our entire process, beginning with the initial gift from donors and ending with the actual payment of scholarship awards to students. A comprehensive solution will be recommended to the President and Cabinet prior to the end of this year.

Note: Salary for the new Scholarship Coordinator is not reflected on our spreadsheet.