Title.

Middle Georgia State University Administrative Assessment

Instructions. This form is used to collect administrative assessments for each budgeted unit at Middle Georgia State University (academic and nonacademic units). Departments should include a brief mission statement (describing what they do and who they serve), goals the department or unit is working to accomplish (in a 5 year time frame. Your goals and objectives should be reported out individuals, linked to the plan imperatives and strategies, align with the measurable objectives from the previous year , and defined and measurable objectives for the upcoming year. This form should be completed by each budgeted unit no later than the end of July. NOTE: All fields are required, please place NA or O in response field ONLY if the numbered objective is not being utilized, otherwise full responses are required. Provide ALL necessary information requested to the fullest extent possible, such that a peer reviewer is not required to assume any information not provided. Utilize the provided assessment scoring rubric drafting guideline to evaluate your report prior to submission. https://www.mga.edu/institutional-research/docs/IEB_Administrative_Score_Card.pdf

Please SUBMIT the form within 30 minutes of opening this page. If you wait too long to submit you may lose your work In the event that you need to edit your submission, you may contact the Faculty Affairs Manager to secure a custom link to edit and resubmit.

Q1. Submitters Email

erika.clark@mga.edu

Q2. Who is the person responsible for this report?

Erika Clark

Q3. For which year are you completing this report?

- ( ) FY 23 (July 2022-June 2023)
- ( ) FY 24 (July 2023-June 2024)
- (x) FY 25 (July 2024-June 2025)

Q4. To which division of the University is your unit assigned?

- ◯ Office of the President
- ◯ Advancement
- ◯ Academic Affairs
- ◯ Fiscal Affairs
- ◉ Enrollment Management
- ◯ Student Affairs

Q5. For which department or area are you reporting? (Ex. Financial Aid, Library, OTR, Athletics, etc)

Financial Aid

Q6. The mission and goals of the department should be consistent over a 5 year period, although some institutional changes may necessitate and prompt a change in mission or goals for specific departments. In this section, report the mission statement for your department.

The Office of Financial Aid is a teaching office, where reading is compulsory, critical thinking ability is required, and good faith dialogue is encouraged. All team members are expected to be great stewards of institutional, federal, and state aid, while also providing great customer service to students, families, and the university community.

Q7. What are the goals for this department? These should be the "big things" the department/area intends to accomplish within 5 years.

Maximize financial aid funding; Proactively and efficiently move students through the financial aid process; Decrease student debt; Increase financial literacy; Positively impact enrollment; Ensure compliance of federal and state regulations.

0. Each year, every department should identify objectives the department hopes to accomplish in the next year. These should align with departmental goals and the MGA strategic plan. In the next section you will be reporting on the objectives you set and whether or not you achieved them in FY25. Later in the document you will report on objectives you hope to accomplish in the coming fiscal year, FY26.

8. Objective 1: What was this department's first objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.

Reorganization of the financial aid office with emphasis on the audit team. This will be measured by our performance on state and federal audits.

9. Objective 1: Detail specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort, etc)

Achievement of the desired outcome was determined by maintaining MGA's monetary liability for the 2024 GSFC under $3,000.

10. Objective 1: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)

The target outcome for this objective was to complete the GSFC audit with minimal deficiencies and decreased monetary liabilities. The financial liability of the GSFC audit was $2,698.

11. Objective 1: Provide details for your target performance level established (i.e. accreditation requirement, past performance data, peer program review, etc)

The target performance level was established based on the outcome of the 2021 GSFC audit.

12. Objective 1: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)

The financial liability of the GSFC audit decreased by 6% from 2021 to 2024.

13. Objective 1: Did your department meet this objective?

- ○ The department did not meet this objective.
- ○ The department met this objective.
- ◉ The department exceeded this objective.

14. Objective 1: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?

Through increased training and increasing collaborative efforts within university departments, the Office of Financial Aid improved efficiencies which led to a positive outcome of the GSFC audit.

15. Objective 2: What was this department's second objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.

To improve the financial aid awarding process, we are seeking to increase process automation of awarding state funds.

16. Objective 2: Detail specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort, etc)

This was measured by the number of processes changed from manual to automated.

17. Objective 2: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)

A target amount was not set for this objective.

18. Objective 2: Provide details for your target performance level established (i.e. accreditation requirement, past performance data, peer program review, etc)

No specific target amount was established for the objective.

19. Objective 2: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)

We were able to change seven processes from manual to automated.

20. Objective 2: Did your department meet this objective?

- ( ) The department did not meet this objective.
- (•) The department met this objective.
- ( ) The department exceeded this objective.

21. Objective 2: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?

Our ability to strategically award financial aid has improved. We learned the importance of evaluating our daily processes to identify opportunities to become more efficient.

22. Objective 3: What was this department's third objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.

The goal was to improve customer service and use the Salesforce CRM platform to measure results.

23. Objective 3: Detail specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort, etc)

Reduction in student calls; improved and proactive communication efforts; improved the response rate to student emails

24. Objective 3: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)

To reduce inbound student calls during the peak season by 5%; Increase outbound communication; Respond to emails within two days.

25. Objective 3: Provide details for your target performance level established (i.e. accreditation requirement, past performance data, peer program review, etc)

Enhancements were implemented in the Salesforce ticketing system, resulting in a one-day reduction in response times for cases. Cases were also re-categorized to more effectively identify and address student issues, which contributed to faster resolution times. Additionally, all emails sent to the main financial aid office account received responses by the end of each business day. A new communication plan has also been launched within Salesforce to further streamline outreach and engagement.

26. Objective 3: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)

During the peak call season between May-July, the total number of inbound phone calls decreased from 375 in 2024 to 210 for the same time period in 2025. Call volume during the peak season decreased by 44%.

27. Objective 3: Did your department meet this objective?

- ○ The department did not meet this objective.
- ◉ The department met this objective.
- ○ The department exceeded this objective.

28. Objective 3: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?

By working on this objective, our department learned through identifying student concerns in a more strategic manner, we were able to increase our response time to inquiries, which allowed students to complete the financial aid process in a shorter period of time.

29. Objective 4: What was this department's fourth objective for this fiscal year? Objectives should be specific, measurable, and achievable within one year.

N/A

30. Objective 4: Detail specifically how your department measured this objective? (Survey, budget number, number of participants, jobs completed, measurable time and/or effort, etc)

N/A

31. Objective 4: What was your target outcome for this objective? (1.e. 80% participation, 5% enrollment growth, 7% change in engagement)

N/A

32. Objective 4: Provide details for your target performance level established (i.e. accreditation requirement, past performance data, peer program review, etc)

N/A

33. Objective 4: At what level did the department/area achieve on this objective? (This should be a number, i.e. 82%, 6%, 345 attendees, 75% engagement)

N/A

34. Objective 4: Did your department meet this objective?

- (x) The department did not meet this objective.
- ( ) The department met this objective.

- [ ] The department exceeded this objective.

35. Objective 4: Improvement Plans and Evidence of changes based on an analysis of the results: What did your department learn from working toward this objective? What changes will you make based on this effort next year?

N/A

36. Based on your goals and objectives listed above please indicate their connection with MGA's Strategic Plan (https://www.mga.edu/about/strategic-plan/docs/Strategic_Plan_2023-2028.pdf) by checking all associated and relevant Strategies from the list below. (Check all the apply)

- [ ] Champion Student Success 1. Demonstrate standards of excellence in all academic programs
- [ ] Champion Student Success 2. Grow student engagement at all degree levels
- [x] Champion Student Success 3. Expand enrollment and graduation
- [ ] Lead Innovation and Economic Opportunity 4. Ensure high-demand programs for workforce and career alignment
- [ ] Lead Innovation and Economic Opportunity 5. Use Center for Middle Georgia Studies to drive University outreach
- [ ] Lead Innovation and Economic Opportunity 6. Coordinate faculty scholarship and grant awards to build University reputation
- [ ] Build Culture and Identity 7. Plan, resource, and promote campus roles and identities
- [ ] Build Culture and Identity 8. Pursue great-place/college -to-work designation
- [ ] Build Culture and Identity 9. Promote culture of wellness throughout the MGA community
- [ ] Build Culture and Identity 10. Compete and win at the NCAA Division II level
- [ ] Sustain Fiscal Resilience and Brand Value 11. Apply data-driven accountability to all operations
- [ ] Sustain Fiscal Resilience and Brand Value 12. Maintain access, affordability and value for all students
- [ ] Sustain Fiscal Resilience and Brand Value 13. Grow and diversity streams of revenue

37. Please indicate which of the following actions you took as a result of the 2023/2024 Assessment Cycle **(prior cycle)** (Note: These actions are documented in reports, memos, emails, meeting minutes, or other directives within the reporting area)(Check all the apply)

- [ ] Disseminating/Discussing Assessment Results/Feedback to Appropriate Members of the Campus Community
- [ ] Disseminating/Discussing Assessment Results/Feedback to Appropriate External Stakeholders
- [ ] Faculty or Staff Support: Professional Development Activities, Trainings, Workshops, Technical Assistance
- [ ] Process Changes: Improve, Expand, Refine, Enhance, Discontinue, etc Operational Processes
- [ ] Request for Additional Financial or Human Resources
- [x] Customer Service Changes: Communication, Services, etc
- [ ] Making Improvements to Teaching Approach, Course Design, Curriculum, Scheduling, other
- [ ] Evaluating and/or Revising the Reporting Lines Internal Assessment Processes

- [ ] Other

38. Please indicate which of the following actions you will take as a result of the 2024/2025 Assessment Cycle **(current cycle)** (Note: These actions must be documented in reports, memos, emails, meeting minutes, or other directives within the reporting area)(Check all the apply)

- [ ] Disseminating/Discussing Assessment Results/Feedback to Appropriate Members of the Campus Community
- [ ] Disseminating/Discussing Assessment Results/Feedback to Appropriate External Stakeholders
- [x] Faculty or Staff Support: Professional Development Activities, Trainings, Workshops, Technical Assistance
- [x] Process Changes: Improve, Expand, Refine, Enhance, Discontinue, etc Operational Processes
- [ ] Request for Additional Financial or Human Resources
- [x] Customer Service Changes: Communication, Services, etc
- [ ] Making Improvements to Teaching Approach, Course Design, Curriculum, Scheduling, other
- [ ] Evaluating and/or Revising the Reporting Lines Internal Assessment Processes
- [ ] Other

39. Please provide a **comprehensive narrative** outlining how assessment results are utilized for continuous improvement in this field. Your narrative **should be of sufficient length and detail** to address the past, present, and future aspects of assessment, with specific emphasis on how these results inform decision-making and drive improvement efforts.

The results of the assessment will inform ongoing process improvements to better support students, families, and other MGA stakeholders. A significant improvement was achieved by transitioning from many awarding processes from manual to automated. This shift has streamlined the distribution of MGA Foundation scholarships and micro-grants, making the process more efficient. Previously, financial aid packages primarily included state and federal funds, with MGA Foundation support often failing to reach students with the greatest financial need because they had not completed a scholarship application. By automating the scholarship awarding process, most students no longer need to submit separate applications for foundation funds. As a result, aid is now distributed more strategically, benefiting a larger portion of the MGA student body.

40. Please indicate (if appropriate) any local, state, or national initiatives (academic or otherwise) that are influential in the operations, or goals, and objectives of your unit. (Complete College Georgia, USG High Impact Practice Initiative, LEAP, USG Momentum Year, Low-Cost No-Cost Books, etc)

USG Know More. Borrow Less.

41. Please identify and detail three to four measurable objectives for the next fiscal year. In listing the objectives, please use the format shown in these examples.1) The Department of X will improve services levels by 5% as measured by our satisfaction survey. 2) The department of X will provide training in ABC for at least 73 MGA faculty and staff.

*Promote continued education and professional growth by increasing the number of NASFAA Credentials earned by financial aid team members. *Sustain a Cohort Default Rate below 15% through proactive counseling and financial literacy initiatives. *Improve communication regarding student loan borrowing and budgeting by adding a Student Loan Coordinator to the financial aid staff. *Initiate awarding financial aid for the 2026–2027 academic year beginning January 2026 to give students a clear representation of the financial aid options available at Middle Georgia State University.

42. Optional Mindset Update (Academic Deans ONLY) Please provide an update on the implementation of your school based mindset plan/strategy. Include any adjustments to metrics for the FY24 as well as outcomes associated with your appraisal of your schools activities.

43. Did you use any of the following resources to support your data collection, analysis, and planning efforts? Please check all that apply and/or list any others you utilized:

- [ ] MGA Dashboards
- [ ] USG Dashboards
- [ ] MGA Institutional Reports
- [ ] USG System-Level Reports
- [ ] MGA Internal Surveys
- [ ] USG-Administered Surveys
- [ ] Academic Program Reviews
- [ ] Strategic Planning Documents (MGA and/or USG)
- [ ] Enrollment Reports (term-over-term, year-over-year)
- [ ] Retention/Graduation/Success Rate Reprots
- [ ] Budget or Financial Reports
- [ ] Assessment Reports of Institutional Effectiveness Documents
- [x] Faculty/Staff Workload Data
- [ ] Peer Institution Comparisons or Benchmarking Reports
- [ ] External Accreditor Data or Standards
- [ ] National or State Data Sets (IPEDS, NCES, Georgia Data System, etc.)
- [ ] Custom Data Requests (OIRDS or other offices)
- [ ] Other (please specify):

44. Optional: The following upload portal is available to supplement your report with supportive documentation should you wish to provide any (instruments, data, etc).