

# Creating a Culture of Assessment in Financial Aid

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# Goals for the Presentation

- Define Assessment and Its Importance
- Creating a Culture of Assessment
- Planning and Assessing
- Maintaining the Culture
- Managing and Anticipating Change and Risks
- Communicate!

# Assessment

- What is Assessment?
- Defining it...
- Why do you think assessment is intimidating?
  
- Assessment requires us to: set goals, determine the outcomes we want, collect data, analyze data and then use the data to make decisions/changes

# Assessment

- Why does this matter?
  - It allows you to make data-informed decisions regarding
    - Staffing
    - Student volume
    - Effective ways to use funding sources



# Priming for a Culture of Assessment

- Start with Good Leadership
  - Selecting Leadership Members
    - Finding people to lead is important- the leader sets the tone for the office
  - Servant Leadership (Robert Greenleaf)
    - Everyone assumes a leadership role at some point
    - Emphasis on influencing people and building relationships
    - About authority, not power
    - Gain authority by building relationships, trust and respect



# Priming for a Culture of Assessment

- Creating buy-in
  - Use staff meetings to talk about assessment
- Get your staff involved!
  - Think about strengths/weaknesses of each staff member
  - Engage front-line staff... they know the day to day
  - Ask them to participate in areas of assessment
- Update staff on where you are in the process

# Priming for a Culture of Assessment

- Have a Mission
  - This is who we are and what we do
- Have a Vision
  - This is what we aspire to look like
- And, add in some Core Values
  - What defines your office's moral code?
- Set goals to support your Mission and reach your Vision

# Setting Goals

- Set broad goals to support your mission and reach your vision
  - make them SMART
    - Specific
    - Measurable
    - Attainable
    - Realistic
    - Timely



# Creating Measurable Outcomes

- Outcomes are the end results that allow you to personalize the goal of the program or service
- Create measurable outcomes that:
  - Define your end result (action oriented)
  - Gives you something to measure for success
- Understand
  - Operational = measures what we are doing (i.e. how many students, how many SAPs, etc.)

## VERSUS

- Student Learning = what do we want students to learn after interacting with our office

# Types of Assessment Methods

- Surveys
- Tests and Quizzes (effective for student learning outcomes)
- Focus Groups
- Interviews
- Historical information
- Feedback boards

# Planning and Accountability

- Create an assessment plan appropriate with what you are trying to achieve – not too much!
  - Systematic and part of your weekly, monthly or annual processes
  - Whatever you collect needs to give you information to educate the institution, legislators, the community, students and parents
  - Set the schedule and frequency – do not try to assess everything, every year
  - It should fit in the fabric of your job
  - Demonstrate your effectiveness and the necessities of your program/service – or additional resources

# Obtaining, Interpreting and Using the Results

- What do you do with your results????
- Make Decisions
  - What did the data reveal?
    - Remember it's data-informed decisions, not data-driven... YOU are still the professional and make the ultimate decision
  - Is the outcome acceptable based on the criterion you set?
    - Remember that even not meeting your goal gives you valuable information!
  - Do you make changes or continue and watch for patterns?

# Reporting Results and Revising

- Communicate the Results
  - Share your thoughts, ideas, and plans with staff, students, and other offices
  - Communicate in a way that facilitates understanding and promotes involvement and ownership
  - Demonstrate Successes; especially those that work well
- **IMPORTANT:** Learn from Your Mistakes

# Managing and Anticipating Change

- Stay abreast of your field
- Keep your front line staff involved in the field
  - This broadens your perspective and gives you insight into how students may react to changes.
  - Include various levels of staff in the planning process and then LISTEN!
  - Involving staff gives them a better idea of the bigger picture.
  - If you include staff in any kind of change discussion, it creates buy-in and actively involves them.
  - It's important to follow through on what you hear from staff, otherwise they only feel heard but do not feel what they've contributed is valued.

# Managing and Anticipating Change

- Consider the impact of change (from all perspectives)
- Receive feedback from YOUR students
- Do not be happy with the Status Quo
- Successful leaders don't wait for things to happen, they make the office successful by being proactive and anticipating change!

# Thank you!!!

- Questions?
- Please contact me with any additional questions or information requests!

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