

Financial Aid Department  
Assessment Plan

**MISSION:** To assist students in achieving their educational goals at Oregon Tech, by being a resource for financial aid assistance from initial contact through graduation and beyond.

**GOAL 1:** Increase communication to educate prospective students, current students, parents and alumni about borrowing and limits.

<b>Objective</b>	<b>Timeline</b>	<b>Action Plan</b>	<b>Outcome Measure</b>
1.1 Educate students on current loan indebtedness in the hope that they limit borrowing	Once a year-winter term	Send students an email/letter about their current loan debt and limits. ( all federal loans)	We hope to raise awareness and reduce individual borrowing. We hope to track emails and monitor response.
1.2 Educate parents on PLUS loan indebtedness.	Once a year	Send parent borrowers/students a letter about current PLUS loans and estimated repayment.	We hope to raise awareness on debt. We will monitor number of letters sent.
1.3 Inform students @450% that they are nearing the 600% Pell limit	Fall Term	Send students an email informing them of nearing their lifetime Pell limit.	Track emails, communicate with students about their Pell limit.
1.4 Provide resources for all students and parents on repayment.	Ongoing	Update our website and publications to provide additional information on repayment (new page).	Request that IT tracks hits on new page to monitor its use.

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GOAL 2: Broaden and strengthen relationships and collaboration with other departments and in all locations.

<b>Objective</b>	<b>Timeline</b>	<b>Action Plan</b>	<b>Outcome Measure</b>
2.1 Increase campus communications.	Ongoing	Create and send a newsletter to faculty and staff.	Increase communications, promote collaboration and strengthen relationships.
2.2 Work with other departments and faculty on outreach and events.	Ongoing	Co-host and plan joint events and activities.	Keep track of events and activities.
2.3 Boost financial aid presence in Wilsonville.	Ongoing	Hire and train .5 FTE professional staff for Wilsonville campus and provide more visits. Also hire and train a work-study student for Wilsonville.	Trained staff member and continued visits by Klamath Falls staff up north. (We have attended all orientations this year and made other visits as well).

GOAL 3: Strive to provide enhanced customer service.

<b>Objective</b>	<b>Timeline</b>	<b>Action Plan</b>	<b>Outcome Measure</b>
3.1 Using electronic methods to process and store all files to increase efficiency.	Ongoing	Archive all files.	Student files/ information available to staff at all locations which improves service to students.
3.2 Provide trained staff to assist students and families.	Ongoing	Hire and train professional and student staff on Wilsonville campus. Provide continued training to staff.	Track training events for all staff. Increase outreach activities?