I. Unit Title: Bursar’s Office

Unit Administrator: Teresa I. Houston, Director

II. Data and information for department: The Bursar’s Office is responsible for the cashiering functions of the university, including but not limited to students’ accounts receivables, assessing of tuition and fees, and administering the functions of the Okra Kard which include meal plans, Okra Green debit accounts, door access, and pay for print.

III. Personnel: Marcia Lishman, Jerry M. Taylor, Marjorie Gladden and Barbara McKnight
*See Attachment A for Section III

Noteworthy activities and accomplishments: During 2004-2005 the one card system was implemented with the following functionalities: meal plans, debit card, pay for print, activities access and door access.

New position(s) requested, with justification:

Recommended change of status:
IV. Department Goals for 2004 or 2004-05

**Goal #1:** Assist students to better afford their education by offering them a more flexible payment plan then the 3 pay plan that the university has been offering them in the past.

**Institutional Goal which was supported by this goal:** Catalyzing partnerships that bring benefits to the region.

**Expected Results:** Students will respond in a timely manner to indebtedness with Delta State University and therefore reduce the possibility of being purged from their classes.

**Evaluation Procedure(s):** We will have partnered with a third-party payment provider.

**Actual Results of Evaluation:** Beginning in the Fall of 2004, Delta State University partnered with Tuition Management Systems (TMS) to offer our students a monthly payment option. Students enrolled more in the Spring as they became more aware of the services offered by TMS.

**Use of Evaluation Results:** Marketing information was delivered to the students earlier than the previous year. As a result more students are enrolled in the plan as of July 2005.

**Goal #2:** Ensure a smooth transition in phasing the one-card system into full operation into the Bursar’s Office

**Institutional Goal which was supported by this goal:** Introducing the latest in knowledge and technology to the region.

**Expected Results:** Students will benefit from the debit plan and available options in meal plans. Community users will benefit from the offering of services at Delta State University. The DSU campus will benefit from the security and management reporting available through the one-card system.

**Evaluation Procedure(s):** Evaluation is not complete as the implementation of the one-card was completed during the 04-05 year.

**Actual Results of Evaluation:** As indicated earlier, the Bursar’s Office has been restructured to accommodate the changes imposed by the implementation of the one-card system. Job titles and descriptions have been changed, and a new employee has been hired to meet the needs of the students. The office has been renamed to Student Business Services.

**Use of Evaluation Results:** The growth of the one-card system will be monitored and planned to deliver requested services to the students and the community.
Goal #3: On-line payments.

Institutional Goal which was supported by this goal: Introducing the latest in knowledge and technology to the region.

Expected Results: Students will benefit from opportunity to pay tuition and fees on line instead of standing in long lines during the first week of school.

Evaluation Procedure(s): The Touchnet gateway software will be implemented.

Actual Results of Evaluation: Beginning in the Spring of 2005, Delta State University installed the Touchnet software and payments on line became available to students.

Use of Evaluation Results: During the period of February 2005 (go live month) through June 2005, credit card payments on line were $55,385.58 and ACH payments on line were $9,711.85 for a total of $65,097.44 in on line payments. These payments occurred without any marketing to the students of the availability of on line payments. Plans are to use students during registration to market the availability of on line payments.

Goal #4: To redirect the issuances of decals to the Bursar’s Office while improving the efficiency of registration.

Institutional Goal which was supported by this goal: Creating programs specific to individuals and communities in the region.

Expected Results: Students will benefit from by not having to stand in two different lines during registration – the Bursar’s lines to pay for the decal, then the Police Department’s lines to pick up the decal. Students will be able to pay for the decal and pick it up at the Bursar’s Office.

Evaluation Procedure(s): Cooperation from the Police Department in implementing this procedure.

Actual Results of Evaluation: The Police Department agreed to assisting in the issuance of parking decals by sending staff members to the Bursar’s Office during registration. Students were able to pay for and receive their decal at the Bursar’s Office.

Use of Evaluation Results: The Police Department and the Bursar’s Office worked well in implementing this procedure. The procedure will be used during future registrations.
V. Learning Outcome Assessment Plan

A. Learning Outcome #1: Demonstrate financial responsibility of their student account. 
   What should a learner know, value, or be able to do as a result of this outcome?

B. Assessment Tools and Methods 
   What assessment tools and/or methods will you use to determine achievement of the learning outcome? 
   Limit measures to three.

   Measure One: The number of students delinquent with Tuition Management Systems (TMS)

   Measure Two: The default rate from Perkins Loans

   Measure Three: The percentage of students turned over to collections.

C. Data Collection and Analysis 
   Describe how the data from the assessment tools and methods will be collected. Explain the procedure to 
   analyze the data.

   Data Collection Procedure: Reports from TMS; Self reported data on Perkins Loans; Self 
   reported data on collections from General Revenue Corporation.

   Analysis Procedure: Staff analyzed data

D. Results of Evaluation 
   What were the findings of the Analysis Team? List any specific recommendations.

   Findings: Only 28 students were enrolled in the payment plan with TMS as of July 2004. 
   Perkins Loan default rate was at 17%. The percentage of students turned over to 
   collections has steadily increased.

   Recommendation 1: Market the option of a monthly payment plan through TMS earlier in 
   the year, i.e. May/June.

   Recommendation 2: Aggressively contact the students in default on Perkins Loans.

   Recommendation 3: Attempt to encourage students through orientation, etcetera to contact 
   Student Business Services before problems arise with their accounts or as soon as possible 
   to work out arrangements should problems arise.

E. Use of Evaluation Results 
   What changes in curriculum, courses, or procedures were made as a result of the program learning outcome 
   assessment process?
Response: Information from TMS was sent out in June of 2005. There is a closer monitoring of students accounts receivables to identify problem accounts before these accounts become candidate for collection. The default rate on Perkins loans has been reduced to 10.78% as a result of more aggressive efforts to contact students.

F. Assessment Team Members
List members of the Assessment Team.

Members: Teresa Houston, Marcia Lishman, Jerry Taylor, Marjorie Gladden, and Barbara McKnight

A. Learning Outcome #2: Solve any problems related to the Bursar's Office.
What should a learner know, value, or be able to do as a result of this outcome?

B. Assessment Tools and Methods
What assessment tools and/or methods will you use to determine achievement of the learning outcome? Limit measures to three.

Measure One: Self administered survey

Measure Two: Graduation survey

C. Data Collection and Analysis
Describe how the data from the assessment tools and methods will be collected. Explain the procedure to analyze the data.

Data Collection Procedure: Obtained graduation survey from Institutional Research.

Analysis Procedure: Staff analyzed data

D. Results of Evaluation
What were the findings of the Analysis Team? List any specific recommendations.

Findings: Establishing a baseline based on graduation survey which indicates that student occasionally to frequently use the Bursar's services and receive a good quality of service.

Recommendation 1:

Recommendation 2:

Recommendation 3:

E. Use of Evaluation Results
What changes in curriculum, courses, or procedures were made as a result of the program learning outcome assessment process?

Response: Attempt to track students who have contacted our office with an issue

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A. Learning Outcome #1: Illustrate awareness of services offered.
What should a learner know, value, or be able to do as a result of this outcome?

B. Assessment Tools and Methods
What assessment tools and/or methods will you use to determine achievement of the learning outcome? Limit measures to three.

Measure One: Graduation survey

Measure Two: Number of students participating in Okra Green debit accounts and meal plans using the Okra Kard.

C. Data Collection and Analysis
Describe how the data from the assessment tools and methods will be collected. Explain the procedure to analyze the data.

Data Collection Procedure: Graduation Survey from Institutional Research; Plan Summary Report from the Odyssey PCS database.

Analysis Procedure: Staff analyzed data

D. Results of Evaluation
What were the findings of the Analysis Team? List any specific recommendations.

Findings: Students are confused about the difference between the flex dollars connected to the meal plans and the Okra Green debit tenders.

Recommendation 1: Aggressively market the Okra Green debit accounts and meal plans through Freshmen Orientation, GST classes and other student groups.

E. Use of Evaluation Results
What changes in curriculum, courses, or procedures were made as a result of the program learning outcome assessment process?

Response: Marketing material for the meal plans and the Okra Green accounts were distributed at Freshmen Orientations. There were informational presentations held for the students, faculty and staff to attend. Teresa Houston met with several student organizations to explain the options and answer any questions related to the one card system.

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STUDENT BUSINESS SERVICES

William A. Morehead
Vice President for Finance

Teresa I. Houston
Director
Student Business Services

Graduate Assistant

Customer Service Rep
(Support)

Assistant
Director
Student Accounts

Customer Service Rep II
Perkins Loans

Customer Service Rep I

Customer Service Rep I

Work Studies and RSEs