

# Planning Objective Report

## Objective Report:

**Objective ID:** 1407

**Objective Title:** Student participation in College's outsourced services

**Unit Manager:** Polanco, Guillermo

**Planning Unit:** 00215 - Accounting Services

**Obj. Status:** Approved

**Obj. Purpose:** Student Learning Outcome

**Unit Purpose:**

## Objective Description:

Once the marketing effort is implemented, the Office of Financial Services will facilitate increasing participation by students in the College's outsourced services. This will improve students capacities to pay their expenses and receive financial refunds in a timely manner

## Institutional Goals

A. Allocate financial resources aligned with College priorities

A. Develop a shared understanding, application and accountability of learning-centered culture

C. Engage faculty and staff to create a comprehensive plan that will provide the necessary technolog

## Objective Types

No Objective Types to Display

## Planning Priorities

No Planning Priorities to Display

## Tasks

Due Date	Status	Priority	Task
08/15/2011	In Progress	High	Ensure that TIP and HigherOne advertising materials have been distributed to the students, via email, edisonstatements, website, hard copy, etc. and are being included in Orientation materials.
09/30/2011	In Progress	High	Request that Nelnet (TIP) and HigherOne create the necessary surveys that will be carried out every semester.

## Assessment Measures

Date	Assessment Measure
02/01/2012	HigherOne program activation counts and dates of activation
07/14/2011	Counts of TIP program contracts (percentage change over previous year)
07/14/2011	Results of financial services survey (in collaboration with Nelnet)

## Intended Results

Date	Intended Results
02/01/2012	By the end of FY 2011-2012, we will establish baseline student satisfaction information with outsourced services (developed through Nelnet survey)
07/14/2011	By the end of FY 2011-12, students (without financial aid) participation in TIP will increase by 5% over the FY 2010-11
07/14/2011	By 6/30/2012, the College will increase the percentage of students activating their HigherOne cards within 30 days by 5%.

## Status Reports

Report Date	Status Report
3/6/2012	The Higher One survey will be administered in April of 2012
1/31/2012	Nelnet and HigherOne have created the necessary surveys that will assist in assessing the final outcome.
1/31/2012	The pertinent reports have been identified and obtained from Nelnet and Higher to quantify the goals to reach the outcome..
1/31/2012	Advertising material have been ordered and distributed to students via email, edisonstatements, website, and hard copy.

## Actual Results

Date	Actual Results
03/02/2012	All necessary reports have been developed and will be analyzed to compare fall over fall for both Nelnet and Higher One.
03/06/2012	As of February 2012, we have 2,787, active TIP contracts. This is equivalent to 35% of the total number of TIP contracts for the entire 2011 fiscal year. Our expectation is to exceed last year's count. With this in mind, we are slightly behind the goal
03/06/2012	55.4% of Nelnet survey respondents indicated that they found the NBS automatic payment plan helpful; 74.29% indicated that they intended to use the NBS payment plan next term; 82.8% of the respondents indicated that they were satisfied or very satisfied with the NBS payment plan (for full results, see uploaded power point)

## Use of Results

Date	Use of Results
03/02/2012	Although enrollment is not increasing, we are still expecting to enroll more students in the TIP program. To meet this expectation, we will continue our marketing efforts especially within the new orientation sessions to enhance our likelihood of meeting this goal.
03/06/2012	We find that student satisfaction with the NBS Automated payment plan is at goal. We will continue surveying our students to ensure that this level of satisfaction is maintained

## Gap Analysis

## SWOT

## Units Impacted

No Units Impacted data

## Associated Standards

## Associated Outcomes

## Documents

<b>File Name</b>	<b>File Size</b>	<b>Date Modified</b>
Edison State College Survey Results.ppt	506.88 KB	1/31/2012
Higher One Survey.docx	11.754 KB	3/2/2012
TIP Brochure.pdf	313.324 KB	1/31/2012
TIP Report for fy 11.pdf	266.137 KB	3/2/2012
TIP Report for fy 12.pdf	996.97 KB	3/2/2012
TIP Survey Questions.doc	25.088 KB	1/31/2012

## Target Dates To Enroll By

### Fall 2011

*e-Cashier available on July 1, 2011.*

Last day to enroll online	Required down payment	Number of payments	Months of payments	Enrollment fee
July 18	none	3	July-Sept	\$35
Aug 9	25%	2	Aug & Sept	\$40
Aug 22	50%	1	Sept only	\$40

### Spring 2012

*e-Cashier available on October 25, 2011.*

Last day to enroll online	Required down payment	Number of payments	Months of payments	Enrollment fee
Nov 17	none	4	Nov-Feb	\$30
Dec 7	25%	3	Dec-Feb	\$35
Jan 6	50%	2	Jan & Feb	\$40
Jan 10	50%	1	Feb only	\$40

### Summer 2012

*e-Cashier available on March 21, 2012.*

Last day to enroll online	Required down payment	Number of payments	Months of payments	Enrollment fee
Apr 18	none	4	Apr-July	\$30
May 17	none	3	May-July	\$35
June 7	25%	2	June & July	\$40
June 22	50%	1	July only	\$40

**NOTE:** All down payments are processed immediately!

**If you are not current on your payments with Nelnet Business Solutions by August 29th for the fall, January 17th for the spring and June 29th for the summer you will be dropped from the payment plan.**

### Balance Adjustments

Please do not assume your balance will automatically be adjusted if financial aid is received or a class is dropped or added. You should review your agreement balance online through My FACTS Account or call the Edison State College Cashier's Office at 239.489.9386 to confirm the change.



BUSINESS SOLUTIONS  
formerly FACTS Management Co.

**For additional help,  
please call us at  
800.609.8056.**

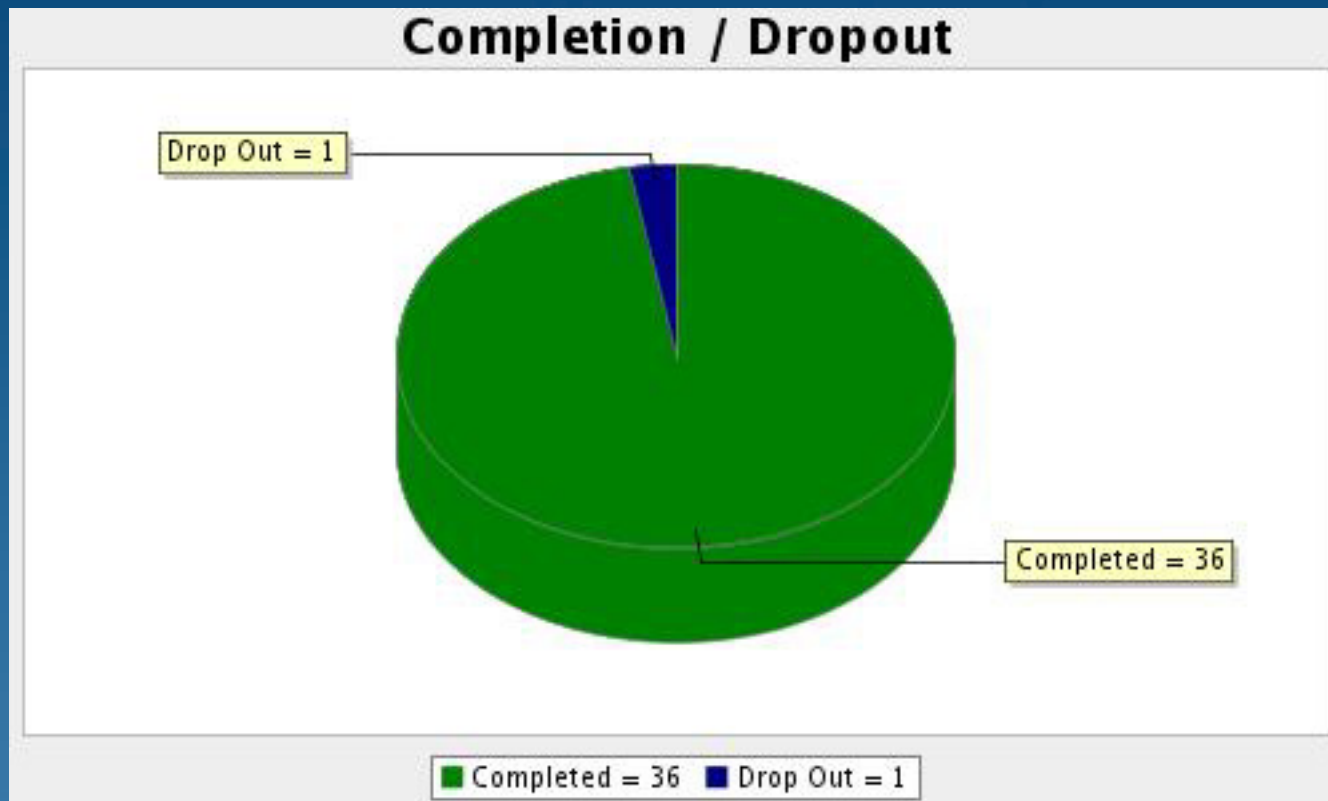
Customer service representatives are available  
Monday through Thursday, 7:30 am to 7:00 pm (CST),  
and Friday, 7:30 am to 5:00 pm.

# Edison State College

## Survey Results

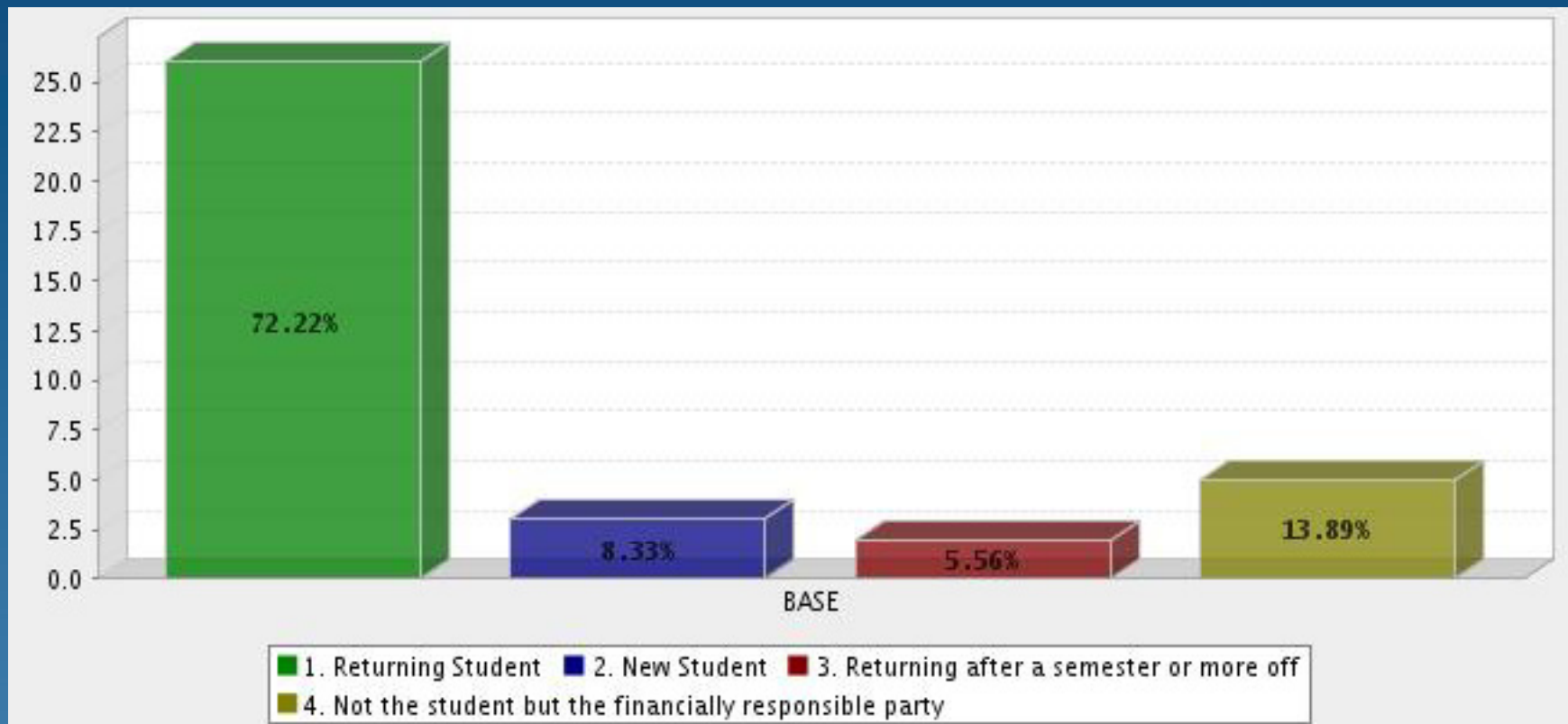
QuestionPro®

# Survey Overview



QuestionPro®

For this semester were you a (please select one):



QuestionPro®

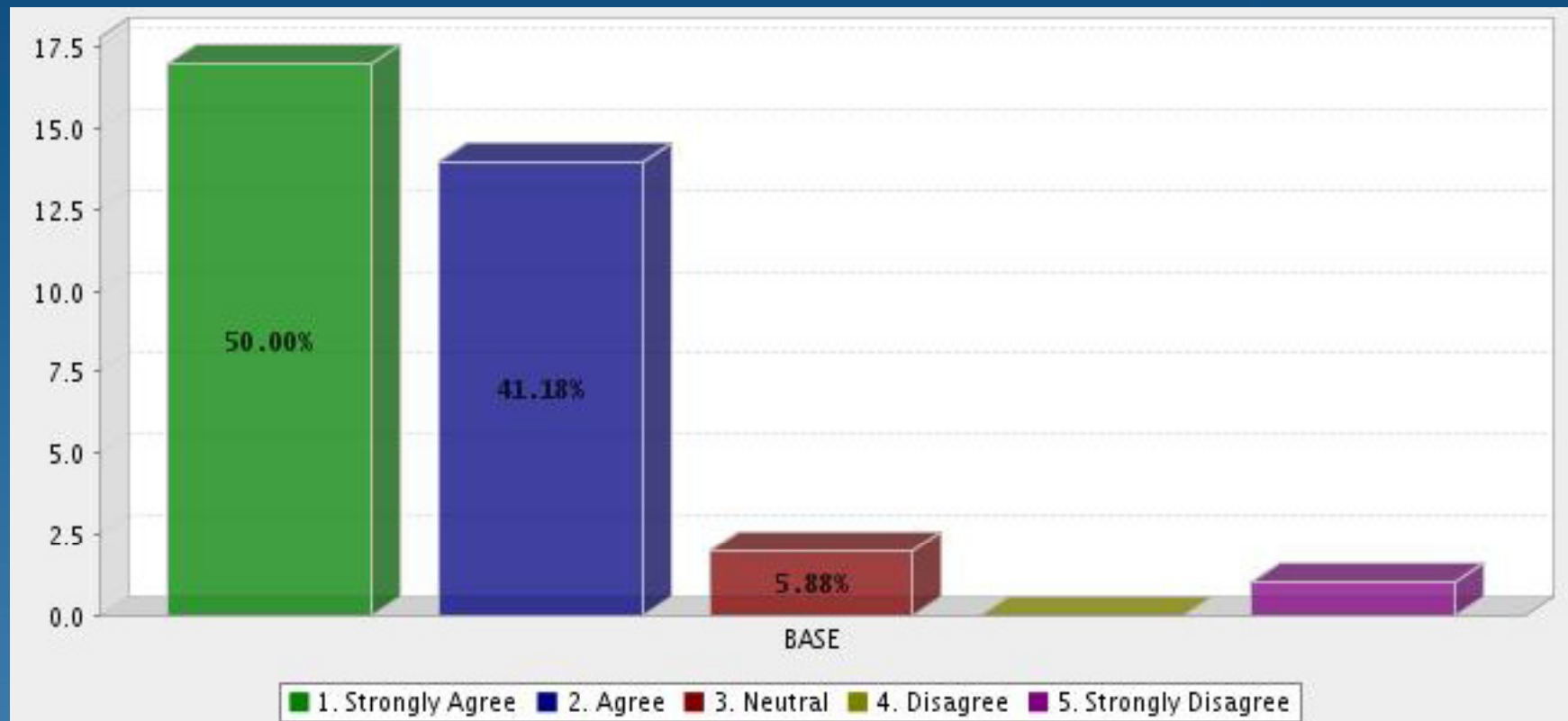
# **What is the most effective way to notify you about the payment plan?**

84% of students surveyed prefer to be notified via email  
(6 students did not respond)

QuestionPro®

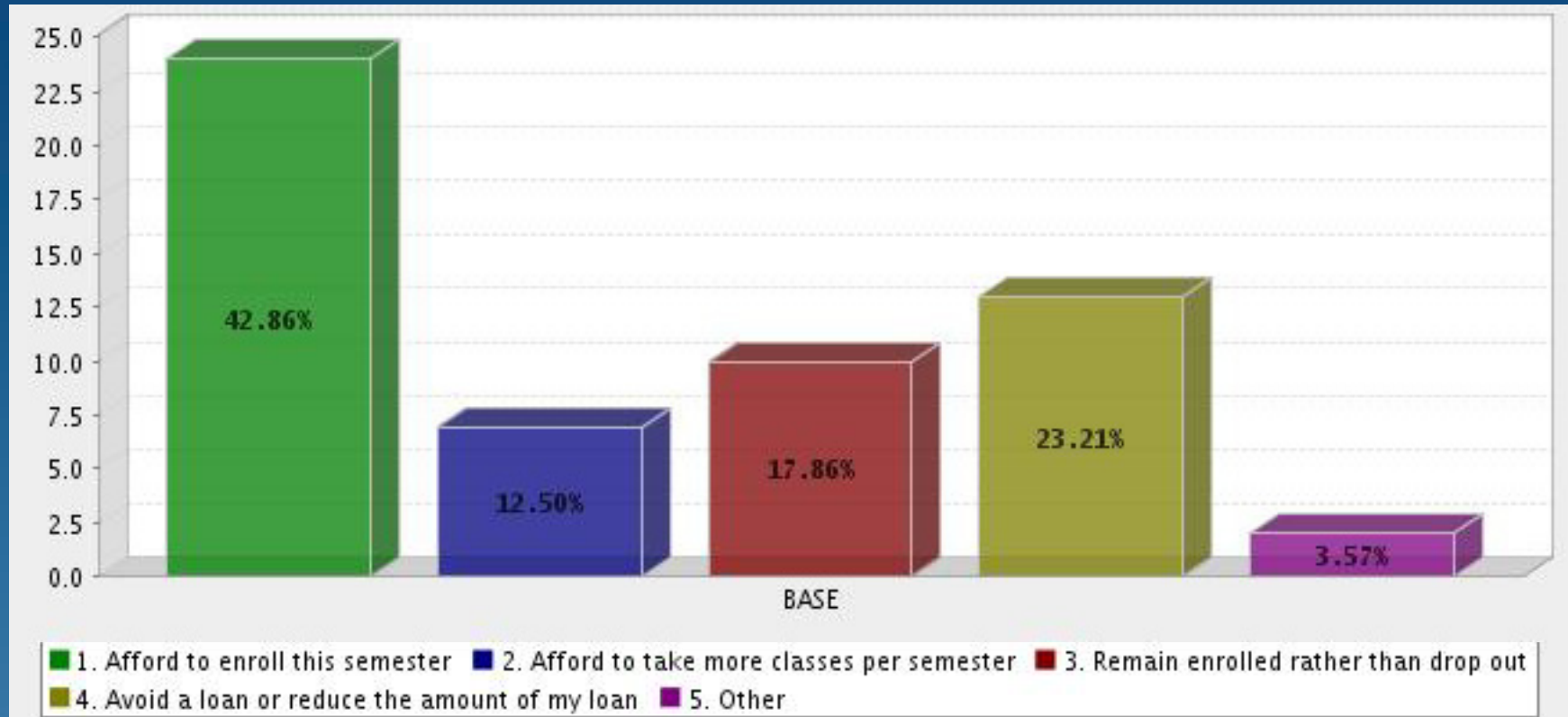


# The e-Cashier enrollment site was user friendly.



QuestionPro®

# Having the NBS Automatic Payment Plan helped me: (select all that apply)

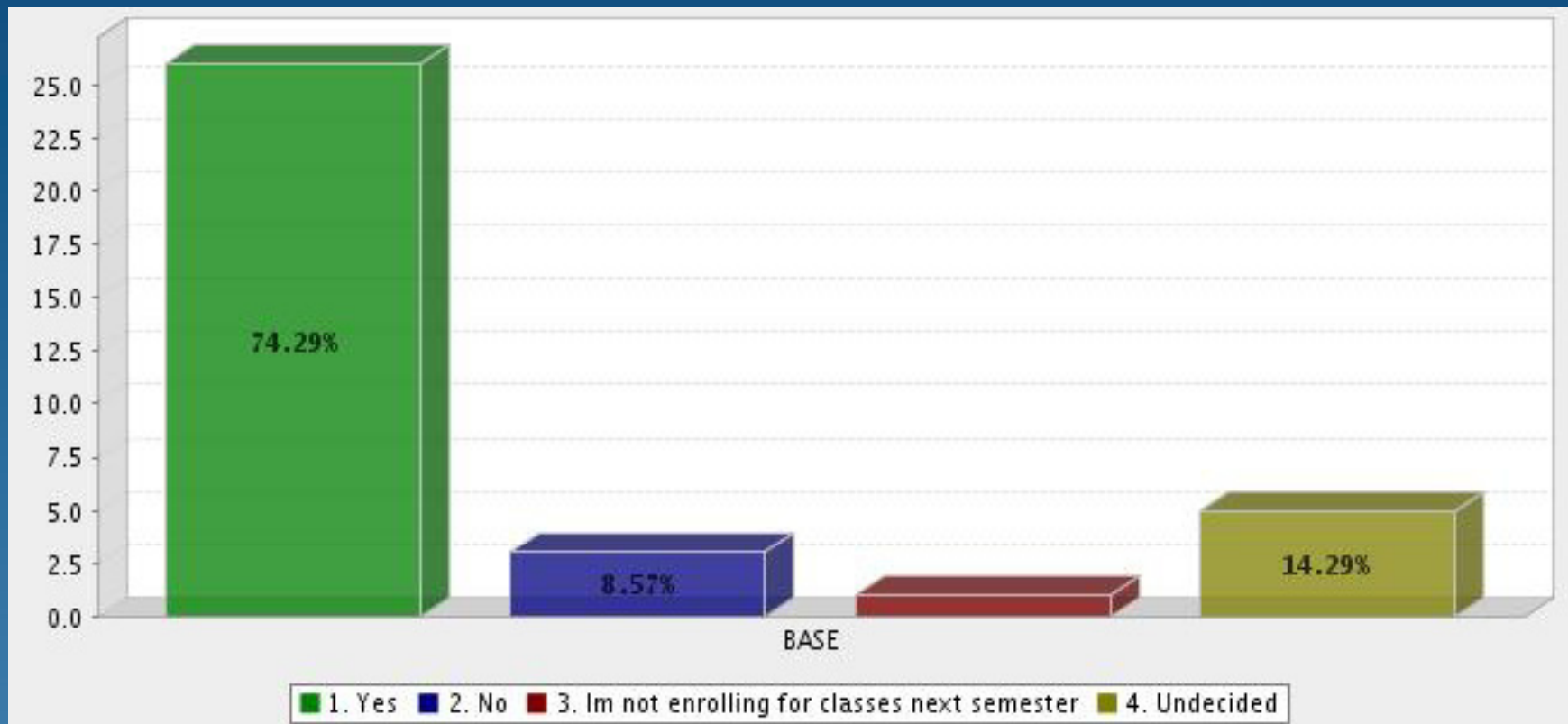


Other:

- The NBS automatic payment plan is horrible
- Wait until financial aid came in

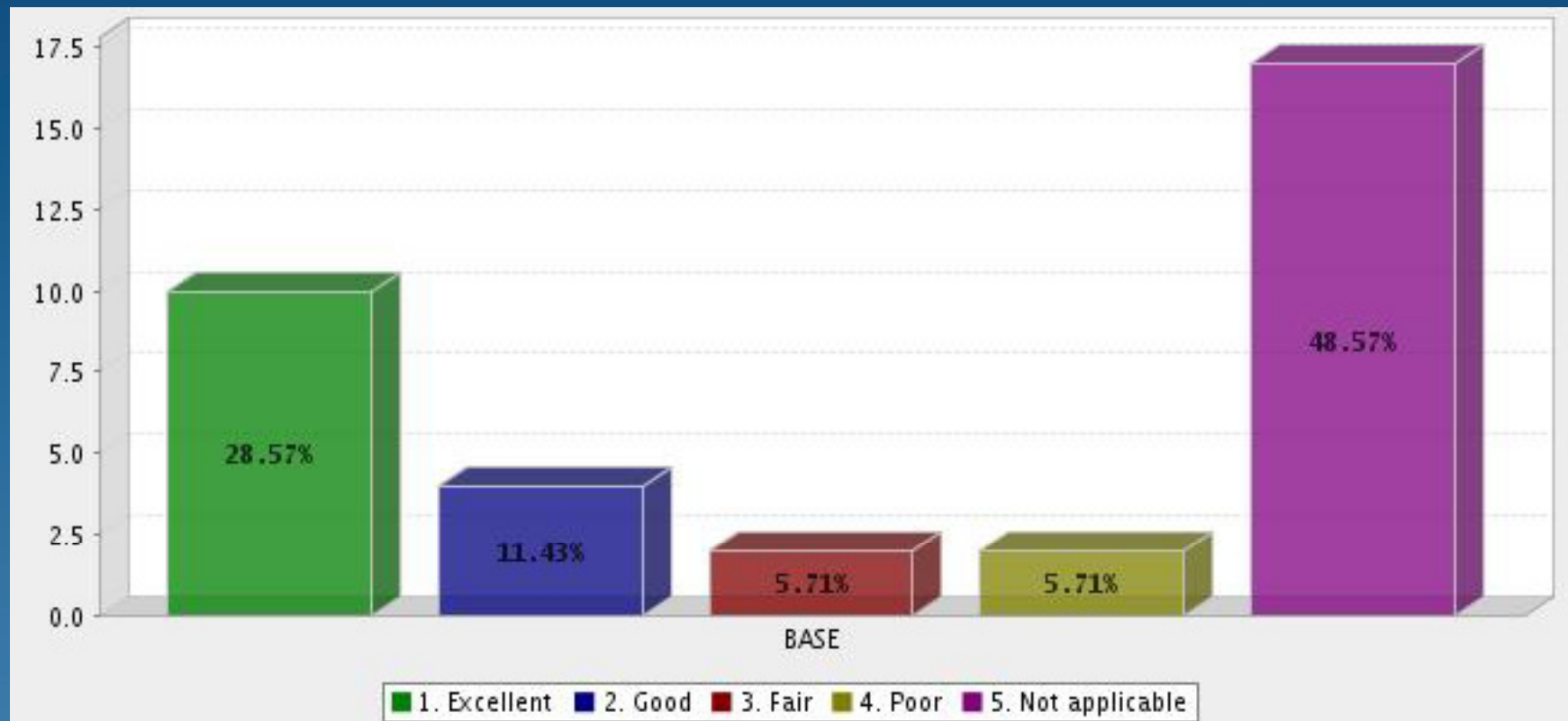
QuestionPro®

# I plan to use the payment plan next term.



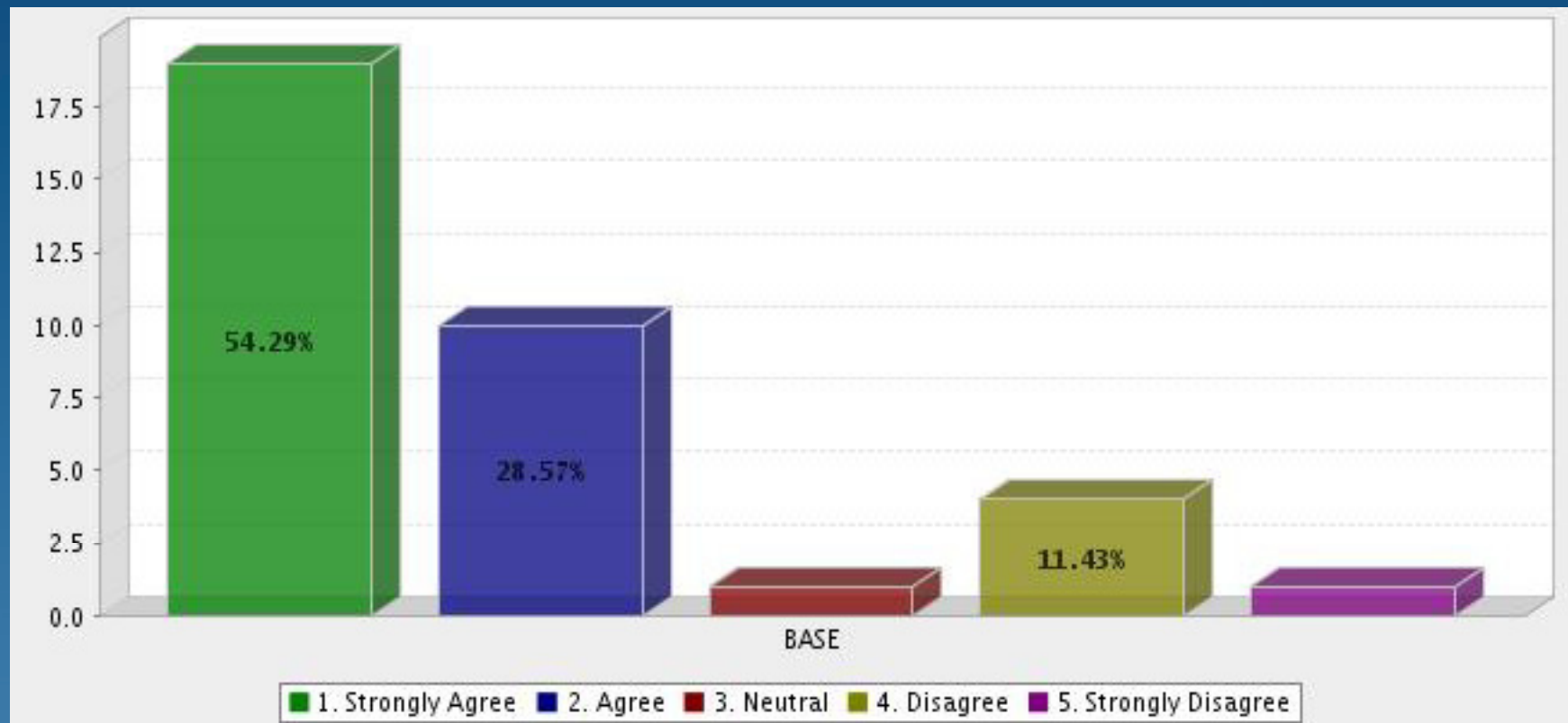
QuestionPro®

If you contacted Nelnet Business Solutions for assistance with your NBS Automatic Payment Plan how was the service you were provided?



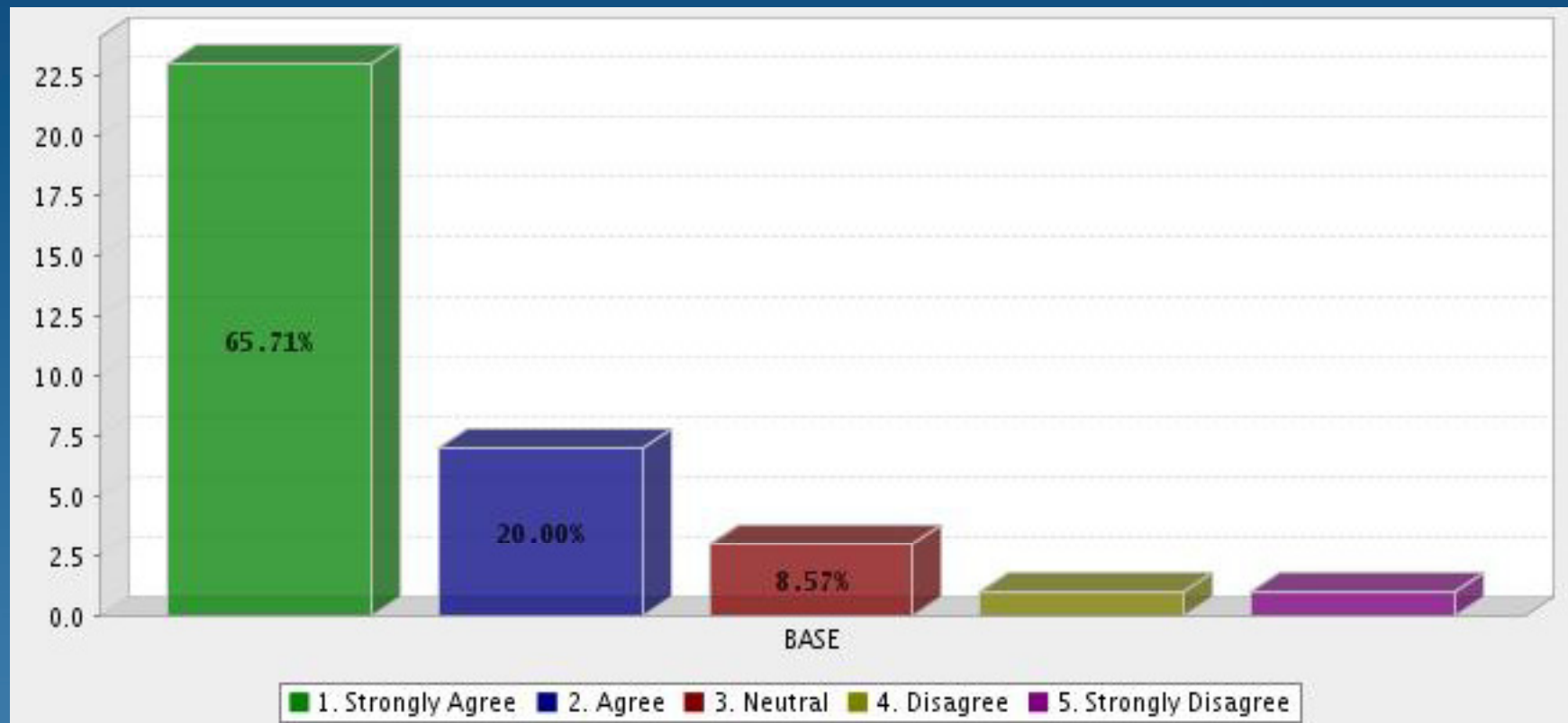
QuestionPro®

# Overall, I am satisfied with the NBS Automatic Payment Plan.



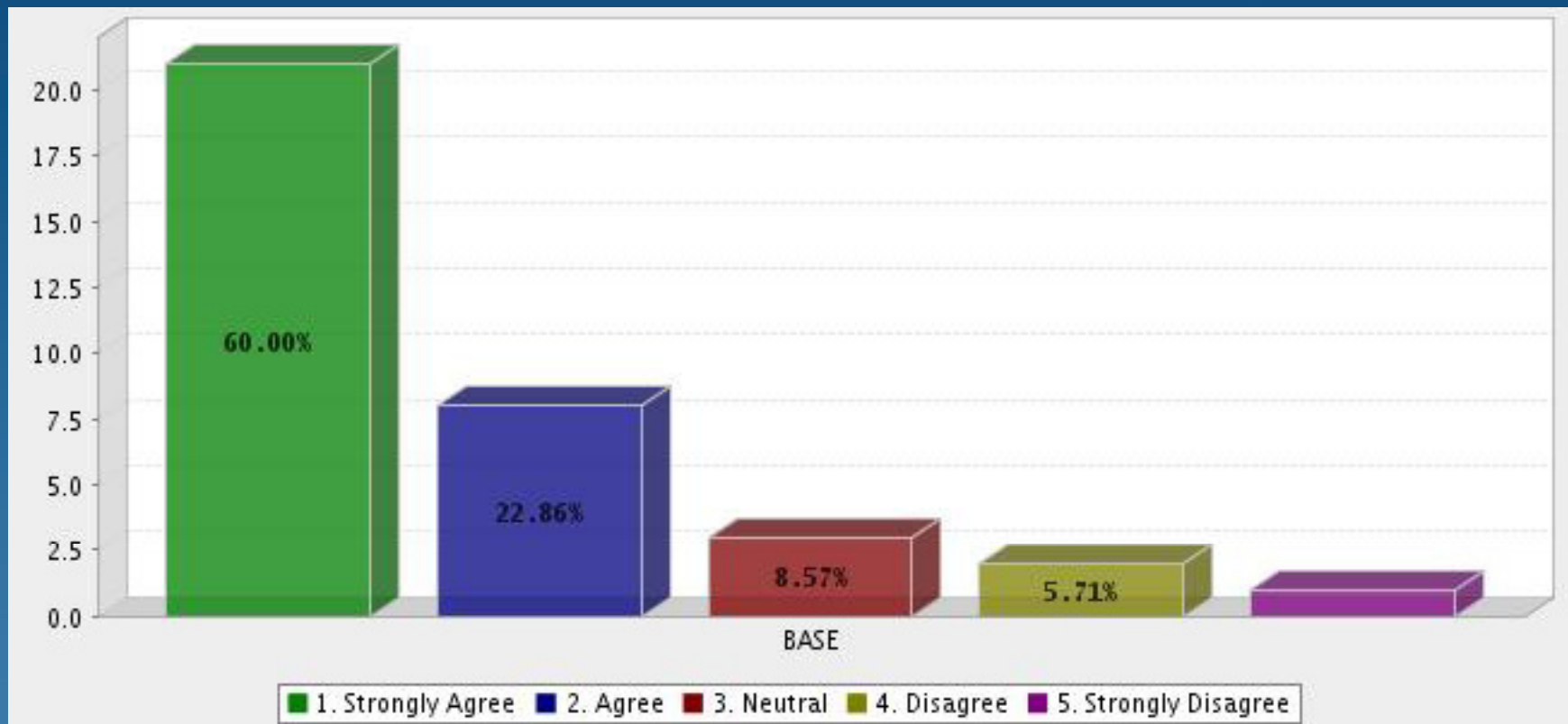
QuestionPro®

I would choose to use the NBS Automatic Payment Plan if I needed a similar service in the future.



QuestionPro®

# I would recommend the NBS Automatic Payment Plan to others.



QuestionPro®

# **We welcome suggestions for improving the NBS Automatic Payment Plan in future semesters. Please provide your comments or feedback.**

- Thank you for making this available for students during this hard financial time.
- Everything is perfect
- My ACH authorization was rejected by BOA as the routing numbers were from the area of the check that NBS highlighted was not the real R/T. BOA uses a different number. NBS canceled our contract, even though NBS KNEW THE PROBLEM AND HAD THE CORECT R/T NUMBER. Edison because of an arcane problem with Edison's computers would not allow me to correct the mess. we barely got my wife enrolled paid by shifting bill priorities. NBS knew of the BOA issue and did not automatically fix the R/T number. That stinks!!
- I feel that there should be more payment options, what I mean by that is more time to pay as opposed to 3 months... why not 4 months?? That's how long our semesters are!!!
- They do not take visa and to alter the plan is a nightmare. It takes months to get funds returned.
- I was billed by collections for the money I already paid using this system. I eventually got it worked out, but was an inconvenience.

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**Report:** e-Cashier Agreements  
**School ID:** 00343 Edison St Clg - Nonc  
**Sort Order:** Agreement Number

**Edison St Clg - Nonc**  
**Payment Date:** 5th/20th  
**Payment Method:** ACH/CC  
**Agreement Status:** Active/Inactive/Terminated  
**Remaining Balance:** To  
**Enrollment Dates:** 07/01/2010 To 06/30/2011

	Summary		Total
	5th	20th	
ACH:	2	6,192	6,194
CC:	1	1,750	1,751
<b>Totals:</b>	3	7,942	7,945

**Current Selection:** 3,588

Agr No	Status	Pmt Day	Pmt Meth	Responsible Party	Original Contract	Full/Down Payment	Remain Balance	Monthly Payment Amount	Original No Of Payments	Remain No Of Payments	1st Pmts Date	Enrolled Date
FMS759	Active	20	ACH	Cheryl Rosario @00110766	350.70	.00	.00	116.90	3	.0	07/20/2010	07/01/2010
FMS802	Active	20	ACH	Kraig Mcivor @00028258	1,685.00	.00	.00	561.67	3	.0	07/20/2010	07/01/2010
FMTCL6	Active	20	ACH	Enrique Marquez @00016632	731.30	.00	.00	243.77	3	.0	07/20/2010	07/01/2010
FMTCL45	Active	20	ACH	Susan Jones @00264280	651.40	.00	.00	217.14	3	.0	07/20/2010	07/01/2010
FMTCL82	Active	20	ACH	Tami Koller @00019570	1,937.28	.00	.00	645.76	3	.0	07/20/2010	07/01/2010
FMTD36	Terminated	20	CC	Mindy Key @00052001	2,619.32	.00	.00	674.95	3	.0	07/20/2010	07/01/2010
FMTF21	Terminated	20	ACH	Melanie Large @01076567	743.30	.00	.00	247.77	3	.0	07/20/2010	07/01/2010
FMTF50	Terminated	20	ACH	Angela Cooper @01136428	2,385.68	.00	.00	566.43	3	.0	07/20/2010	07/01/2010
FMTF87	Active	20	ACH	Caroline Otsieno @00014944	3,196.45	.00	.00	1,065.49	3	.0	07/20/2010	07/01/2010
FMTF99	Active	20	ACH	Deanna Bennett @00060074	1,307.70	.00	.00	435.90	3	.0	07/20/2010	07/01/2010
FMTK29	Active	20	CC	Kristy Larreategui @00060540	606.40	.00	.00	202.14	3	.0	07/20/2010	07/02/2010
FMTM35	Terminated	20	CC	Christine Incardona @01130397	606.40	.00	.00	202.14	3	.0	07/20/2010	07/02/2010
FMTF93	Active	20	CC	Carolyn Keiling @00309497	768.30	.00	.00	47.30	3	.0	07/20/2010	07/02/2010
FMTQ21	Active	20	ACH	Julieth Gonzalez @00021901	1,640.05	.00	.00	546.69	3	.0	07/20/2010	07/02/2010
FMTF31	Active	20	CC	Marvin Torres @01122852	2,075.84	.00	.00	402.30	3	.0	07/20/2010	07/03/2010
FMTT83	Active	20	ACH	Michael Epperson @00114070	1,095.92	.00	.00	365.31	3	.0	07/20/2010	07/03/2010
FMTV08	Active	20	ACH	Tamara Bastien @00063016	646.40	.00	.00	215.47	3	.0	08/05/2010	07/03/2010
FMTY49	Active	20	ACH	Michelle Caraway @00037211	1,648.40	.00	.00	549.47	3	.0	07/20/2010	07/04/2010
FMT143	Active	20	ACH	Jennifer Ott @00039871	1,159.90	.00	.00	386.64	3	.0	07/20/2010	07/05/2010
FMT162	Active	20	ACH	Graeme Brown @00039406	4,385.80	.00	.00	1,461.94	3	.0	07/20/2010	07/05/2010
FMT404	Active	20	ACH	Nicole Grant @01113054	933.10	.00	.00	311.04	3	.0	07/20/2010	07/05/2010
FMT767	Active	20	ACH	Alison Stewart @00023679	711.30	177.83	.00	266.74	2	.0	08/20/2010	07/06/2010
FMT812	Active	20	ACH	Josiane Moraes @00063716	930.10	.00	.00	310.04	3	.0	07/20/2010	07/06/2010
FMT883	Active	20	ACH	Penny Miller @00046812	611.40	.00	.00	19.30	3	.0	07/20/2010	07/06/2010
FMT951	Active	20	ACH	Jessica Smith @00119005	339.70	.00	.00	113.24	3	.0	07/20/2010	07/06/2010

Report: e-Cashier Agreements  
 School ID: ALL School IDs  
 Sort Order: Agreement Number

Edison St Clg - Spr  
 Payment Date: 5th/20th  
 Payment Method: ACH/CC  
 Agreement Status: Active/Inactive/Terminated  
 Remaining Balance: To  
 Enrollment Dates: 07/01/2011 To 03/01/2012

	Summary		
	5th	20th	Total
ACH:	0	2,228	2,228
CC:	0	559	559
Totals:	0	2,787	2,787

Current Selection: 2,787

Agr No	Status	Pmt Day	Pmt Meth	Responsible Party	Original Contract	Full/Down Payment	Remain Balance	Monthly Payment Amount	Original No Of Payments	Remain No Of Payments	1st Pmts Date	Enrolled Date
FSC670	Inactive Hold	20	ACH	Kendyl Godwin @01137402	482.92	.00	.00	160.98	3	.0	07/20/2011	07/06/2011
FSDA89	Inactive Hold	20	ACH	Tiffany Vanselow @00051371	1,358.76	.00	.00	452.92	3	.0	07/20/2011	07/06/2011
FSDB38	Inactive Hold	20	CC	Marian Flaker @00211043	482.92	.00	.00	160.98	3	.0	07/20/2011	07/06/2011
FSDL05	Inactive Hold	20	ACH	Julianna Kaim @00086939	1,441.78	.00	.00	480.60	3	.0	07/20/2011	07/06/2011
FSDY15	Terminated	20	ACH	Graciela Rostran @00049537	1,726.12	.00	.00	575.38	3	.0	07/20/2011	07/06/2011
FSD302	Inactive Hold	20	ACH	Tammy Bennett @00306101	852.36	.00	.00	54.16	3	.0	07/20/2011	07/06/2011
FSD813	Inactive Hold	20	CC	Katherine Chauvin @00070283	1,146.50	.00	.00	382.17	3	.0	07/20/2011	07/06/2011
FSFG18	Inactive Hold	20	ACH	Josiane Moraes @00063716	759.88	.00	.00	253.30	3	.0	07/20/2011	07/07/2011
FSFG77	Inactive Hold	20	ACH	Heather Starr @01100307	484.92	.00	.00	168.14	3	.0	07/20/2011	07/07/2011
FSFP84	Inactive Hold	20	CC	Colleen Hughes @00177589	774.36	.00	.00	258.12	3	.0	07/20/2011	07/07/2011
FSFT94	Inactive Hold	20	ACH	Ashley Lapaglia @00068347	1,095.58	.00	.00	197.34	3	.0	07/20/2011	07/07/2011
FSFX07	Inactive Hold	20	CC	Alejandra Paipilla @01085325	1,124.80	.00	.00	427.17	3	.0	07/20/2011	07/07/2011
FSF159	Inactive Hold	20	CC	Rodery Perez @00079480	1,102.80	.00	.00	367.60	3	.0	07/20/2011	07/07/2011
FSF244	Terminated	20	ACH	Briana Shipe-Ross @00082474	1,438.24	.00	.00	479.42	3	.0	07/20/2011	07/07/2011
FSF754	Inactive Hold	20	ACH	Shannon Gallops @01053857	1,869.82	.00	.00	534.27	3	.0	07/20/2011	07/07/2011
FSGL39	Inactive Hold	20	ACH	Stephanie Delgado @00059247	965.32	.00	.00	321.78	3	.0	07/20/2011	07/07/2011
FSGN38	Inactive Hold	20	ACH	Alexander Gonzalez @00076412	1,092.80	.00	.00	364.27	3	.0	07/20/2011	07/08/2011
FSHQ99	Inactive Hold	20	ACH	Fleurestil Pierre @01001607	2,133.70	.00	.00	711.24	3	.0	07/20/2011	07/09/2011
FSHR20	Inactive Hold	20	CC	Damon Luker @00066672	745.88	.00	.00	248.63	3	.0	07/20/2011	07/09/2011
FSHR58	Inactive Hold	20	ACH	Matthew Steves @00138850	376.44	.00	.00	125.48	3	.0	07/20/2011	07/09/2011
FSHS38	Inactive Hold	20	ACH	Sarah Martinez @00070683	828.36	.00	.00	276.12	3	.0	07/20/2011	07/09/2011
FSHS76	Inactive Hold	20	ACH	Rachele Headrick @00036745	671.88	.00	.00	223.96	3	.0	07/20/2011	07/09/2011
FSHX30	Terminated	20	ACH	Jennifer Lohnes @00112282	2,280.18	.00	.00	760.06	3	.0	07/20/2011	07/10/2011
FSHX39	Inactive Hold	20	ACH	Bianca Agosto @00090728	789.36	.00	.00	263.12	3	.0	07/20/2011	07/10/2011
FSHX70	Inactive Hold	20	CC	Rose Ho @01077229	460.92	.00	.00	153.64	3	.0	07/20/2011	07/10/2011

### Edison State Survey

1. Are you aware of the refund choices available to you (via same-day transfer to a Higher One account, an online transfer to another bank account, or a mailed paper check)?
  - a. Yes
  - b. No
2. *(If yes to Q1)* How did you first learn about the refund choices available to you?
  - a. Open-ended response
3. Did you choose to receive your refund through the Higher One OneAccount?
  - a. Yes
  - b. No
4. Are you aware of the student-focused features that come with the account (such as EasyHelp, mobile deposit options, financial literacy tips and tools, and “Cash In” with Moneypak)?
  - a. Yes
  - b. No
5. *(If yes to Q4)* Do you enjoy these features? Why or why not?
  - a. Open-ended response

1. Were you a:
  - a. Returning student
  - b. New student
  - c. Returning after a semester or more off
  - d. Not the student but the financially responsible party
2. What is the most effective way to notify you about the payment plan?
3. e-Cashier was user friendly.
  - a. Strongly Agree
  - b. Agree
  - c. Neutral
  - d. Disagree
  - e. Strongly Disagree
4. Having the payment plan helped me to: (select all that apply)
  - a. Afford to enroll this term
  - b. Afford to take more classes to graduate earlier
  - c. Remain enrolled rather than drop out
  - d. Helped me to avoid a loan or reduce the amount of my loan
5. Do you plan to use the payment plan next term?
  - a. Yes
  - b. No
  - c. I'm not enrolling for classes next term
  - d. Undecided
6. When you contacted Nelnet Business Solutions for assistance with your payment plan how was the service you were provided?
  - a. Excellent
  - b. Good
  - c. Fair
  - d. Poor
  - e. Not Applicable
7. Overall, I am satisfied with the NBS automatic payment plan.
  - a. Strongly Agree
  - b. Agree
  - c. Neutral
  - d. Disagree
  - e. Strongly Disagree
8. I would choose to work with NBS if I need similar services in the future.
  - a. Strongly Agree
  - b. Agree
  - c. Neutral
  - d. Disagree
  - e. Strongly Disagree
9. I would recommend the NBS payment plan to others.
  - a. Strongly Agree
  - b. Agree
  - c. Neutral
  - d. Disagree
  - e. Strongly Disagree