



Enhancing Financial Aid Customer Service through Satisfaction Surveys

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One leader's thoughts on customer service...



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Customer Service in Higher Education

Higher Education is a business


- Education is the commodity, your institution is the supplier, students/families are the customers
- Our direct interactions have a direct effect on student enrollment
- Regardless of your role, you have an impact on student enrollment



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Customer Service - A few reminders


- No matter how many times you have answered the question, it's the first time they have asked it
- We are the experts, which is why we have jobs.
- Keep this in mind during your high-volume seasons



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OSFA Customer Service Survey - The Basics


- Survey distribution
 - 2022-23 enrollment
 - 29,969 students
 - Distributed survey to 2022-23 FSA recipients
 - Approximately 16,000 students
 - Sent it out the week prior to Finals Week for the Spring term
 - Sent to all aid recipients for the Spring 2023 term



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Results

Gender		Race		Age	
Male	71	Asian	5	18-19	64
Female	155	Black/African American	16	20-21	81
Non-binary/third gender	3	Hispanic/Latino/Spanish-origin	13	22-23	53
Prefer not to answer	6	Native Hawaiian/Other Pacific Islander	1	24+	32
Did not answer	7	White/Caucasian	189	Did not answer	12
		Other	1		
		Prefer not to answer	10		
		Did not answer	7		




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Results

Year in School	
First-year	45
Sophomore	44
Junior	45
Senior	71
Graduate	20
Veterinary Medicine	10
Did not answer	7

Current GPA	
4.0-3.0	187
2.9-2.0	38
1.9-0.0	3
Did not answer	14




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Regulations		
Estimated Family Contribution	Any mention of a student's EFC affecting their finances	5
FAFSA	Any mention of the FAFSA's difficulty or our ability to help students (positive or negative)	12
Verification	A student talking about verification (positive or negative)	6
Confusion		
Miscommunication	A student stating they received multiple answers to questions from different staff	10
Misdirection	Any mention of being referred to different, incorrect departments	6
Excitements		
General Compliments	Any type of compliment given to a person or our office	73
Benefits	A student mentioning that our office helped the student in a positive manner with their college experience	6
Providing Assistance	Any mention that our office provided assistance with their financial aid	19
Frustrations		
General Compliments	Any negative comment about our department	54
Insults	Any specific insult that is towards our department	11
	Total	202

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Regulations – EFC



- "Why does the amount of financial aid I receive based on my parents income not mine. They don't pay for my school I do."
- "ESTIMATED FAMILY CONTRIBUTION IS REDICULOUS! I AM MARRIED AND HAVE 0 FINANCIAL TIES WITH MY FAMILY AND THEREFORE, YOU HAVE STEREOTYPED ME BASED ON MY CULTURE AND ETHNIC BACKGROUND!"



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Regulations – FAFSA



- "The office of financial aid needs to do better when helping students file for FAFSA especially those with a farm family."
- "Listen to personal needs of the students rather than just looking at the fafsa and saying there's nothing they can do."

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Regulations – Verification



- "I had a complicated situation during the FAFSA review process. When I would try to submit a form, they would tell me that it was not accepted, but would not tell me why or how to submit an accepted form. I would only receive generalized emails that were unhelpful for my situation. The financial aid advisors should take the time to respond in a way that considers that each financial aid situation is unique."
- "It would be helpful to my situation if I didn't have to verify my FAFSA every year. I don't have a great relationship with my parents and getting them to confirm information is very difficult and time consuming."
- "The Parent Verification I have had to do the last few years is incredibly difficult, and time consuming. My dad and I spent hours trying to figure out how to connect all the verification documents, nothing worked. When we called the financial aid office for help. We said "this is incredibly difficult and hard to do" the response from financial aid was "we know." I believe you should address known snags and complications. I have been "randomly" selected for further verification the last 2 years and it has been incredibly frustrating."


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Confusion – Miscommunication

- "When I would email questions, sometimes they would answer a completely different question than what I asked."
- "It took several email to narrow down the question I was asking. It seemed when I contacted them that they didn't understand my issue and I didn't understand it either at the time."
- "Contacted this past spring and my questions about my financial aid being changed was not answered in the most understandable way."
- "I did not feel as though they had a full grasp of the question that I was asking, which was very frustrating for me."






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Confusion – Misdirection

- "I went in to ask a question and no one knew where I should go to get it answered. I was sent to so many departments for no reason."
- "I have been redirected several times when calling the financial aid, telling me I should contact scholarships, who tells me I should contact these three options."







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Excitements – General Compliments

- "Very helpful, never had a problem answering questions"
- "The Office of Financial Aid staff is incredibly easy to work with."
- "It was a very easy phone call, there was no hassle, and I left feeling better about my situation."
- "It was a pleasant experience, and I was satisfied with my experience when I left!"
- "I was pleased each time I emailed or stopped in. Everyone was so nice as I navigate going to a new university!"
- "I love how fast my advisors were able to communicate with me and how respectful they were about my situation. It overall made me feel welcomed."







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Excitements – Benefits

- "Financial Aid Office has been essential to my learning here at Iowa State."
- "I thought the office of student financial aid did a very good job helping me and others towards success while in college."







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Excitements – Providing Assistance

- “[Advisor name] is always a pleasure to talk to and handles all my needs within a timely manner. She is great at answering all my questions.”
- “[Advisor name] is the best! She walked me through all steps and answered all my questions, as well as any follow-ups I may have had. She was integral to helping me navigate the FAFSA and my financial situation to make my scholastic goals for the year work out. Thank you to [Advisor name]!”
- “My advisor let me know exactly what he was going to do and when I would see results. Super helpful!”







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Frustrations – General Complaints

- “They were very unhelpful in how to apply for scholarships and basically said that I would not get any so that was fun.”
- “Terrible.”
- “Sometimes the email responses made me feel dumb.”
- “Have a backup system when people are on vacation.”
- “Harder to reach in the summer”
- “Response time was often longer than 48 hours”
- “Give me more money”
- “College is too expensive.”







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Frustrations – Insults

- “Financial aid is all over the place. I have never had a good experience contacting your office.”
- “Literally all of my experiences with these clowns has been negative. During the 2020 fall semester they tried to force me to pay a \$6000 bill that didn’t even make sense. The moron on the other end told me to go to my bank and ask for a loan. They gave me like 2 weeks to do this.”






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Implications


- What can our office do to better serve our students?
- What are we doing right?
 - How can we continue these things?
- What are we doing wrong?
 - How can we resolve issues?



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How other schools can do what we did


- Determine what specific aspects of customer service are you want to know more about on your campus
- Develop survey (Qualtrics, Google Forms, Microsoft Forms, etc.)
- Deliver to intended audience




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Questions Asked

- Have you contacted the Office of Student Financial Aid this year?
- What method(s) do you most commonly use to contact the Office of Student Financial Aid?
- Approximately how many times have you contacted the financial aid office during the 2022–2023 academic year?





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Questions Asked

- Please rate your experience with the statements below regarding your contact with the Office of Student Financial Aid (1 – 5)
 - My questions were answered in an acceptable time period (within 48 business hours).
 - My questions were answered in a clear and concise manner.
 - The advisor was confident in providing a response to my question.



 

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Questions Asked

- Please rate your experience with the statements below regarding your contact with the Office of Student Financial Aid (1 – 5)
 - The advisor has an understanding of my situation.
 - The advisor took the time to ensure all of my questions were answered.
 - The advisor was pleasant and respectful.
 - The advisor seemed knowledgeable about my questions.



 

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Questions Asked

- Open Ended
 - Overall Comments / Suggestions
- Optional Demographic Info
 - Gender Identity
 - Race
 - Age
 - Grade Level
 - GPA

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Questions?

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