

**Common Services for Borrowers  
Customer Satisfaction**

**School Annual Survey  
Web Survey Requirements**

**FINAL**

**Version 8  
March 3, 2008**

# Annual School Customer Satisfaction Survey

1. **Purpose:** The School Survey is designed to gauge satisfaction with the CSB project among post-secondary institutions participating in Federal Student Aid's Direct Loan program.

## 1. General Requirements

- 1.1 Satisfaction shall be measured via a web-based survey.
- 1.2 Communication with survey participants shall be conducted via email.
  - 1.1. The survey shall consist of benchmark questions that are standard for each year the survey is conducted. It may include elective questions that may vary from year to year, and comments.
- 1.3 The system shall record one set of responses for each participant.
  - 1.2. Training Technologies, Inc. (TTI) shall provide reports on the results of the survey to Federal Student Aid and ACS.

## 2. Email Notifications

### 2.1 Publicity Email

- 2.1.1 An email announcing the survey and encouraging participation shall be emailed to School contacts identified by Federal Student Aid.
- 2.1.2 Federal Student Aid shall provide a list of respondents with valid email addresses to TTI.
  - 1.2.1. TTI shall send a publicity email to individuals on the list provided by Federal Student Aid.
  - 1.2.2. The publicity email shall contain a confidentiality statement.
  - 1.2.3. Publicity email text is contained in Appendix A.

### 1.3. Initial Email

- 1.3.1. An invitation to participate in the survey shall be emailed to School contacts identified by Federal Student Aid.
- 1.3.2. Federal Student Aid shall provide a list of respondents with valid email addresses to TTI.
- 1.3.3. TTI shall send an initial email to individuals on the list provided by Federal Student Aid.
- 1.3.4. The initial email shall contain a confidentiality statement.
- 1.3.5. The initial email shall contain a link to the survey.
- 1.3.6. The initial email shall contain directions for contacting the survey administrator.
- 1.3.7. Initial email text is contained in Appendix B.

### 1.4. Reminder Emails

- 1.4.1. TTI shall send a predetermined amount of reminder emails to all individuals who received the initial email.
- 1.4.2. The first reminder email shall be sent one week after the initial email.
- 1.4.3. Additional reminders may be sent depending on survey response rates.
- 1.4.4. Reminder emails shall contain a confidentiality statement.
- 1.4.5. Reminder emails shall contain a link to the survey.

- 1.4.6. Reminder emails shall contain directions for contacting the survey administrator.
- 1.4.7. Reminder email text is contained in Appendix C.

1.5. Undelivered and Contact Email

- 1.5.1. TTI shall capture email addresses from all undelivered/rejected/returned emails.
- 1.5.2. TTI shall provide the list of email addresses to the ACS survey coordinator.
- 1.5.3. Federal Student Aid and ACS shall jointly determine the appropriate action for each undelivered/rejected/returned email address on a case-by-case basis.
- 1.5.4. All emails received by TTI in its capacity as survey administrator shall be forwarded by TTI to the ACS survey coordinator.

2. **Web Survey Design**

2.1. General Format

- 2.1.1. The first page of the web survey shall be an introduction page.
- 2.1.2. The introduction page shall contain a confidentiality statement.
- 2.1.3. Introduction page text is contained in Appendix D.
- 2.1.4. The survey shall consist of benchmark questions that are standard for each year the survey is conducted. It may also include elective questions that may vary from year to year, and comments.
- 2.1.5. Web page background shall be white with black lettering.
- 2.1.6. Each web page shall display the current Federal Student Aid logo, contained in Appendix E.
- 2.1.7. The survey shall be 508 compliant.

2.2. Survey Participation

- 2.2.1. Participants shall have a choice of survey topics.
- 2.2.2. Participants shall be able to choose one, several, or all survey topics.
- 2.2.3. A warning icon/notice shall be displayed if no topic is chosen.
- 2.2.4. All survey questions shall be optional.
- 2.2.5. The system shall count each respondent's answers only once.
- 2.2.6. The system shall allow respondents to retake the survey but previous responses shall be overwritten.
- 2.2.7. At the end of the survey, a button that allows participants to submit the survey shall be displayed.
- 2.2.8. A notification that the survey has been received shall be displayed.
- 2.2.9. The notification text is contained in Appendix I.

2.2 Response Ratings

4.3.1 The following response ratings table shall be displayed on each survey page:

You will be evaluating on a scale of 1 to 5 where:

|                                    |   |
|------------------------------------|---|
| Extremely Satisfied                | 5 |
| Very Satisfied                     | 4 |
| Satisfied                          | 3 |
| Neither Satisfied nor Dissatisfied | 2 |
| Dissatisfied                       | 1 |

**2.2.1** Functionality to choose “Not Applicable” (NA) shall be provided in the survey response selections, but this option shall not be displayed in the response ratings table.

NA shall be recorded as a “null” response.

NA responses shall NOT be recorded as zero (0).

### **3. Survey Questions**

#### **5.1 Benchmark Questions**

5.1.1 Benchmark Questions shall consist of the following topics:

- Phone
- Email
- Web site
- Overall

5.1.2 Introductory text shall be displayed before each topic.

5.1.3 Benchmark Questions and Introductory text are contained in Appendix F.

#### **5.2 Elective Questions**

5.2.1 The survey may contain elective questions pertaining to one or more topics of special interest to Federal Student Aid and/or ACS.

5.2.2 Elective topics may address recent systems development efforts and/or ongoing operations.

5.2.3 Elective topics and questions shall be determined annually.

5.2.4 Introductory text shall be displayed before each elective topic.

5.2.5 Elective Questions and Introductory text for the current survey are contained in Appendix G.

#### **3.1 Comments**

3.1.1 Participants shall have the option to enter comments.

3.1.2 Comments shall be formatted as a text box.

3.1.3 Comments fields shall not be limited in size.

5.3.1 Comments text and format are contained in Appendix H.

#### **3.2 Incentive / Disincentive Calculation**

5.4.1 Responses to Benchmark questions shall accrue to the incentive/disincentive calculation.

5.4.2 Responses to Elective questions shall not accrue to the incentive/disincentive calculation.

5.4.3 Comments shall not accrue to the incentive/disincentive calculation.

5.4.4 Response ratings of “4” or “5” shall accrue to the incentive calculation.

5.4.5 Response ratings of “1” or “2” shall accrue to the disincentive calculation.

5.4.6 Response ratings of “3” shall not accrue to either the incentive or the disincentive calculation.

#### **4. Reporting**

6.1 TTI shall provide daily response rate data to the ACS survey coordinator.

6.2 TTI shall provide standard reports of results of the School survey at the end of the survey period.

6.2.1 Detail, Summary, Raw Data, and Comments reports shall be provided.

6.2.2 The count of NA responses shall not be presented.

#### **4.1 Detail Reports**

6.3.1 Detail Reports shall list each question and its responses by rating category.

6.3.2 Detail reports shall contain a count of responses in each rating category for each question.

4.1.1 Both Benchmark and Elective questions shall be included in Detail Reports.

#### **4.2 Summary Reports**

4.2.1 Summary reports shall contain data for Benchmark questions that accrue to the incentive/disincentive only.

**4.2.2** Summary reports shall contain the following calculations:

6.4.1.1 Percent of responses scored as 5. The formula is: total responses for 5 divided by the number of responses greater than N/A or blank.

6.4.1.2 Percent of responses scored as 4. The formula is: total responses for 4 divided by the number of responses greater than N/A or blank.

6.4.1.3 Percent of responses scored as 3. The formula is: total responses for 3 divided by the number of responses greater than N/A or blank.

6.4.1.4 Percent of responses scored as 2. The formula is: total responses for 2 divided by the number of responses greater than N/A or blank.

6.4.1.5 Percent of responses scored as 1. The formula is: total responses for 1 divided by the number of responses greater than N/A or blank.

#### **4.3 Comments Report**

6.5.1 A report containing all comments shall be provided.

6.5.2 Comments shall not be edited by TTI.

6.5.3 Comments shall be sorted by:

6.5.3.1 Dissatisfied or "1" rated response comments

6.5.3.2 Improvement comments

6.5.3.3 Compliment comments

#### **4.4 Raw Data**

6.6.1 At the end of the survey period, a file containing the raw data collected by TTI shall be delivered to Federal Student Aid and ACS simultaneously.

6.6.2 The raw data file shall be in a comma delimited flat file or Excel spreadsheet format.

6.6.3 Test files shall contain: email address, unique link, survey attributes.

6.6.4 Production files shall contain: unique link, survey attributes.

6.6.5 TTI shall delete email addresses from production files prior to delivery to Federal Student Aid and ACS in order to maintain confidentiality of respondents.

# APPENDIX A

## Publicity Email Text

The U.S Department of Education, Federal Student Aid (FSA), is requesting feedback from Financial Aid Administrators (FAAs) who interact with School Services at the Direct Loan Servicing Center.

The results of this survey are used each year to measure the effectiveness and performance of the services provided by School Services at the Direct Loan Servicing Center and to identify areas that may need improvement.

Please note that this survey **does not relate** to your interaction with the **Common Origination and Disbursement (COD)** system or customer service representatives.

In a few days, you will receive an email from [insert company name], an independent survey company that will provide a web link to the survey.

Please be assured that your responses are completely confidential.

Thank you!  
U.S. Department of Education  
Federal Student Aid

# **APPENDIX B**

## **Initial Email Text**

### **EMAIL TEXT:**

#### **Please tell us what you think!**

We recently sent you an email announcing our customer satisfaction survey and asking for your feedback as a Financial Aid Administrator (FAA) who interacts with School Services at the Direct Loan Servicing Center.

Your suggestions are valuable. They help us improve our processes and systems and can lead to the development of new services and products.

Your responses are completely confidential.

Please note that this survey **does not relate** to your interaction with the **Common Origination and Disbursement (COD)** system or customer service representatives.

The web link to the survey is provided below. Please do not share your email link with anyone else. The link in the email is specific to your response. If you forward your email link to others and they take the survey, each survey entry will be overwritten and invalidated.

Please click on the following link to participate in this survey. <<link>>

Thank you for your participation! We are committed to providing you with quality service.

U.S. Department of Education  
Federal Student Aid

### **CONTACT DIRECTIONS:**

If you have problems accessing the survey web site, please download either Internet Explorer 6 or Netscape 6 or higher. For issues relating to the survey please contact us at [[TTI](#) email address]. This address should not be used to obtain information about direct student loans.

# APPENDIX C

## Reminder Email Text

**Your Opinion Matters!**  
**Don't forget to participate in our survey!**

On [***Date***] we sent you a request to participate in our customer satisfaction survey. The U.S Department of Education, Federal Student Aid (FSA), is requesting your feedback as a Financial Aid Administrator (FAA) who interacts with School Services at the Direct Loan Servicing Center.

If you have already taken the survey, thank you. If you have not, please take a minute to respond.

Your suggestions are valuable. They help us improve our processes and systems and can lead to the development of new services and products.

Your responses are completely confidential.

Please note that this survey **does not relate** to your interaction with the **Common Origination and Disbursement (COD)** system or customer service representatives.

Please click on the following link to participate in this survey <<link>>

Thank you for your participation! We are committed to providing you with quality service.

U.S. Department of Education  
Federal Student Aid

### **CONTACT DIRECTIONS:**

If you have problems accessing the survey web site, please download either Internet Explorer 6 or Netscape 6 or higher. For issues relating to the survey please contact us at [**TTI** email address]. This address should not be used to obtain information about direct student loans.



# APPENDIX D

## Introduction Web Page Text

### School Services at the Direct Loan Servicing Center Customer Satisfaction Survey for School Financial Aid Administrators

We are requesting feedback from Financial Aid Administrators (FAAs) who interact with School Services at the Direct Loan Servicing Center. We are asking FAAs to rate the level and quality of service that School Services at the Direct Loan Servicing Center provides. Your comments are important and help us identify areas that may need improvement.

Drawing upon your experiences over the last year, please evaluate your experiences specifically relating to School Services at the Direct Loan Servicing Center and those mechanisms used to manage your Direct Loan students such as the Direct Loan school web site and associated reports.

Please note that this survey **does not relate** to your interaction with the **Common Origination and Disbursement (COD)** system or customer service representatives.

I interact with School Services at the Direct Loan Servicing Center in the following ways:  
(choose all that apply)

- Phone
- Email
- Web site (dl.ed.gov/schools)

All survey questions shall be optional and you will be evaluating on a scale of 1 to 5 where:

|                                    |   |
|------------------------------------|---|
| Extremely Satisfied                | 5 |
| Very Satisfied                     | 4 |
| Satisfied                          | 3 |
| Neither Satisfied nor Dissatisfied | 2 |
| Dissatisfied                       | 1 |

# APPENDIX E

## Current Logo



# APPENDIX F

## Benchmark Questions

All survey questions shall be optional and you will be evaluating on a scale of 1 to 5 where:

|                                    |   |
|------------------------------------|---|
| Extremely Satisfied                | 5 |
| Very Satisfied                     | 4 |
| Satisfied                          | 3 |
| Neither Satisfied nor Dissatisfied | 2 |
| Dissatisfied                       | 1 |

### **PHONE - INTRODUCTORY TEXT:**

In rating the following qualities, think about your experience in calling School Services at the Direct Loan Servicing Center in the past year and rate your level of satisfaction with the response you received.

### **PHONE - QUESTIONS:**

How satisfied/dissatisfied were you:

|     |   |
|-----|---|
| 1.1 | With the timeliness of the response to your call?                   |
| 1.2 | With the knowledge of the School Services Representative (SSR)?     |
| 1.3 | That the SSR handled the issue in one call?                         |
| 1.4 | With the follow-up promised during your call?                       |
| 1.5 | With your overall experience calling the School's Servicing Center? |

### **EMAIL - INTRODUCTORY TEXT:**

If in the past year you corresponded with School Services at the Direct Loan Servicing Center via email, rate your level of satisfaction with the response received.

### **EMAIL - QUESTIONS:**

How satisfied/dissatisfied were you:

|     |  |
|-----|--|
| 2.1 | With the length of time it took to get a response to your request?                         |
| 2.2 | That the response provided accurate information that resolved the issue?                   |
| 2.3 | With the follow-up promised during your email?   |
| 2.4 | With your overall experience emailing School Services at the Direct Loan Servicing Center? |

**WEB SITE - INTRODUCTORY TEXT:**

In rating the following qualities, please think about your experience in the past year using the Direct Loan Servicing Online School Site (dl.ed.gov/schools) for matters relating to existing loans and generating reports.

**WEB SITE - QUESTIONS:**

How satisfied/dissatisfied were you:

|     |  |
|-----|--|
| 3.1 | With the availability of the web site?   |
| 3.2 | With the ease of use of the web site?  |
| 3.3 | With the information presented on the web site?                                      |
| 3.4 | With the "Help" function of the web site?  |
| 3.5 | With your overall experience using the Direct Loan Servicing Online School web site? |

**OVERALL - INTRODUCTORY TEXT:**

In rating the following qualities, please think about your overall experience in the past year with School Services at the Direct Loan Servicing Center.

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**OVERALL - QUESTION:**

|  |
|--|
| In the last year, how satisfied/dissatisfied were you with the overall performance of School Services at the Direct Loan Servicing Center? |
|--|

**APPENDIX G**  
**Elective Questions**

**There will be no elective questions added to the 2008 School survey.**

# APPENDIX H

## Comments

|  |
|--|
| For any qualities that you rated "Dissatisfied" or "1", please provide any comments that will help us improve the rating in the space below: |
| [text response]  |
|  |
| Please provide any other comments for improvement, especially about areas not addressed in the survey questions, in the space below:         |
| [text response]  |
|  |
| Please provide any compliments you have about our services or staff in the space below:  |
| [text response]  |

# APPENDIX I

## Survey Received Notification

Thank you for taking the Direct Loan Servicing Center survey. Your assistance will help us better serve you. Please be assured that all responses are confidential.

### Paperwork Burden Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is **1845-0045**. The time required to complete this information collection is estimated to average six minutes per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. **If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to:** U.S. Department of Education, Washington, D.C. 20202-4537. **If you have comments or concerns regarding the status of your individual submission of this form, write directly to:** Richard Dawkins, Federal Student Aid, Borrower Services, U.S. Department of Education, 600 Independence Avenue, S.W., UCP 44E3, Washington, D.C. 20202-5302.