

Federal Student Aid 2015 In-School Financial Aid Satisfaction Survey

(Items in **BOLD** are interviewer instructions, and are not intended to be read to the respondent)
(Items marked *i.e. or e.g.* should only be read if respondent needs clarification)

(NOTE - ITEMS TO PULL FROM COD FOR INCLUSION IN SAMPLE: SCHOOL TYPE (2/4 YR.; PUBLIC/PRIVATE/PROPRIETARY), STUDENT PROGRAM YEAR, DATE OF BIRTH, EFC, LOAN/GRANT FLAGS)

Introduction (Do not read)

INTRO1. Hello, this is _____ calling from _____ on behalf of the United States Department of Education Federal Student Aid. May I please speak to **(name from list)**?
(If necessary: We're conducting a survey and are trying to contact people who are currently pursuing post-high school education at a college, university, community college, or trade school.)

- 1 **(Named person is on the phone, continue at INTRO4)**
- 2 **(Named person is available, proceed at INTRO3. when respondent comes to phone)**
- 3 **(Named person is unavailable, schedule callback)**
- 4 **(Named person is no longer this number, use INTRO2.)**
- 5 Refused/Hung Up

INTRO2. Is there another number at which I could reach him/her? **(If necessary: We're conducting a survey and are trying to contact people who are currently pursuing post-high school education at a college, university, community college, or trade school.)**

- 1 **(Will provide new number)** >> Thank you and have a good day! (Contact new number)
- 2 **(Refused to provide new number)** >> Thank you and have a good day!

INTRO3. **(When respondent comes to phone)**
Hello, this is *(interviewer name)* calling from (data vendor), a research firm calling on behalf of **United States Department of Education** Federal Student Aid. **(Continue)**

INTRO4. We're calling as part of an initiative Federal Student Aid has undertaken to understand how people who are pursuing post-high school education feel about the financial aid information and services they receive. During the 2014-2015 academic year were you enrolled in a post-high school study program at a college, university, trade school or community college?

- 1 Yes **(Continue at)**
- 2 No **(Thank you, but, for purposes of this study, we would like to talk to people who are currently pursuing a post-high school education. Have a nice day.)**
- 8 Don't know
- 9 Refused

INTRO5. Federal Student Aid is conducting this survey with students such as you to measure satisfaction with the information and support services for financial aid that you receive. I'd like to take some time now to go through this survey with you. Your comments will, of course, remain strictly confidential. The discussion will take about 10 minutes. Is this a good time?

- 1 Yes **(Continue with Next Question)**
- 2 No **(When would be a more convenient time for you to complete this study?)**

(Interviewer: Read Statement below prior to beginning survey).

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. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, and completing and reviewing the collection of information. The obligation to respond to this collection is voluntary. If you have comments or concerns regarding the status of your individual submission of this survey, please contact Federal Student Aid/Customer Experience Office/Customer Analytics Group at 830 First Street, NE Washington, DC 20202 or customersurveys@ed.gov directly.

Information (Do not read)

INFOHOW Now I'd like to ask you about how you get information about financial aid for your education since you started your program. I am going to read a list of potential sources of information, for each please tell me if you have received information from that source. **(Read list; check all that apply)**

- 1 A counselor you had in high school
- 2 Printed materials from your school's office of financial aid or from a government entity, such as the Department of Education
- 3 Printed materials from a lending institution such as a bank or credit union
- 4 Social media resources (such as Twitter, YouTube and Facebook) from your school's office of financial aid or from a government entity, such as the Department of Education
- 5 Other online resources from your school's office of financial aid or from a government entity, such as the Department of Education
- 6 Online resources from a lending institution such as a bank or credit union
- 7 Talking with financial aid counselors at your college or university
- 8 Talking with other staff or faculty at your school (e.g., resident advisors, academic counselors)
- 9 Talking with friends or family about financial aid
- 10 Information in the media (i.e., TV, radio, print ads)
- 11 Other **(specify)**

INFOPREF Thinking of the list we just went through, what would you say is your most preferred way to get information about financial aid for your studies? **(Listen and code per below)**

- 1 Counselor (HS or college) or staff at College or University
- 2 Printed materials
- 3 Social media resources
- 4 Other online resources (such as websites)
- 5 Media
- 6 Other people (family, teachers)
- 7 Other

Now please think about all the different types of information you may get about financial aid, regardless of the source. On a scale from 1 to 10, where “1” means “poor” and “10” means “excellent”, in general how would you rate the information you get about financial aid on...

INFO1 Being easy to understand

INFO2 It's usefulness

INFO3 Being available in a format you prefer (e.g., printed materials, web pages, etc.)

INFO4 Being easy to find

Communications **(Do not read)**

Now please think about any communications you may receive from your school about financial aid, such as newsletters, notifications of application deadlines, and so on.

COMMHOW How does your school typically contact you about your financial aid package?

- 1 Mail
- 2 Email
- 3 Social media notification (Twitter tweet, Facebook)
- 4 Other **(specify)**

COMMPREF What would you say is your preferred way to get communications from your school about your financial aid package?

- 1 Mail
- 2 Email
- 3 Social media notification (Twitter tweet, Facebook)
- 4 Other **(specify)**

On a scale from 1 to 10, where “1” means “poor” and “10” means “excellent”, how would you rate the...

COMM1 Clarity of communications you receive

COMM2 Timeliness (i.e., arriving in time for you to take appropriate action)

COMM3 Effectiveness of the means used for communicating with you (e.g., mail, email, etc.)

Award Administration **(Do not read)**

Now please think about the process you need to go through to receive the financial aid you have been awarded. I'm thinking of things like the paperwork you may need to submit, visits to your school's financial aid office, getting your promissory notes signed, and so on.

Now think generally about your experiences with the award administration process at your school. On the 1 to 10 scale with 1 as “Poor” and 10 “Excellent”, please rate your school on:

AWRD1 The timeliness of your award notification

- AWRD2 The information they provide about your personal financial aid package
- AWRD3 Making clear the steps you need to take to get your awarded funds (e.g., course registration requirements, etc.)
- AWRD4 Making clear when your awarded funds will be available
- AWRD5 Helpfulness of the financial aid staff you interact with
- AWRD6 Knowledge of the financial aid staff you interact with

PROBLEM Have you ever had any problems with the award administration process?

- 1 Yes
- 2 No (**skip to Account Management**)

PROBTYPE What was the nature of the problem you experienced? (**capture verbatim**)

Account Management (Do not read)

Now I'd like you to think about the way your school manages your account, that is, how they keep track of your tuition payments and your financial aid such as grants, scholarships, loans and so on.

ACCTSYS Does your school give you access to an online account management tool where you can check your account status, look up loan or scholarship payments, or make payments?

- 1 Yes
- 2 No (**skip to ACCTHOW**)
- 3 Don't know (**skip to ACCTHOW**)

ACCTOFT How often would you say you use this system to get information on your account? (**capture verbatim**)

ACCTHOW How do you get information about your account? (**capture verbatim**)

Thinking about the way your school manages your account, and using the 1 to 10 scale, where "1" means "poor" and "10" means "excellent", how would you rate the...

- ACCT1 Availability of your account information
- ACCT2 Ease of accessing your account information
- ACCT3 Accuracy of the account balances
- ACCT4 Ease of understanding your account statements

Entrance/Exit Counseling (Do not read)

GETCOUN Have you received entrance and/or exit counseling regarding your student loans?

- 1 Entrance
 - 2 Exit
 - 3 Both
 - 4 Neither (**skip to FACT**)
- Don't know (**skip to FACT**)

(If GETCOUN=1) I would like to ask you a few questions about the ENTRANCE counseling you received.

(if GETCOUN=2 or 3) I would like to ask you a few questions about the EXIT counseling you received.

COUNFORM What was the format of the counseling session(s) you attended? **(read list and record one)**

1 Videotaped presentation

Follow-up if COUNFORM=1) Was the videotaped presentation for PLUS counseling?

V1Yes

V2No

2 Online at Studentloans.gov

3 Private meeting with a financial aid counselor

4 Group meeting or discussion with financial aid counselor

5 Other **(specify)**

Using the 1 to 10 scale, how would you rate the...

COUN1 Helpfulness of the information provided

COUN2 Convenience of the counseling session (i.e.. time and place)

COUN3 Format of the counseling session (i.e., way the information was presented)

COUN4 Degree to which the counseling session made your rights and responsibilities clear to you

Financial Awareness Counseling Tool (FACT) **(Do not read)**

FACT Have you used the Financial Awareness Counseling tool on studentloans.gov?

1 Yes

2 No **(skip to ACSI)**

3 Don't know **(skip to ACSI)**

Using the 1 to 10 scale, how would you rate the...

FACT1 Helpfulness of the information provided

FACT2 The time it took to complete the counseling.

FACT3 Format of the counseling session (i.e., way the information was presented)

FACT4 Degree to which the counseling session made your rights and responsibilities clear to you

FACT5 The ease of completing the counseling.

ACSI Benchmark Questions **(Do not read)**

Now please think about your experiences this past academic year dealing with financial aid issues as your work on your post-high school education, including what we've discussed so far, and with anything else you can think of.

ACSI1. Using a 10-point scale on which "1" means "very dissatisfied" and 10 means "very satisfied", how satisfied are you with the financial aid process?

ACSI2. Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has the financial aid process met your expectations?

ACSI3. Imagine what an ideal process for financial aid for post-high school education would be like. How well do you think the financial aid process you deal with now compares with the ideal

you just imagined? Please use a 10-point scale on which "1" means "not at all close to the ideal," and "10" means "very close to the ideal."

Outcome Measures (Do not read)

- CONFFIN Using a scale of 1 to 10 where "1" means "not at all confident" and "10" means "completely confident," how confident are you that you will receive sufficient financial aid to meet your educational goals?
- CONFM On that same scale, how confident are you in your ability to manage your student loans both now and in the future?
- COMP1 Using a scale of 1 to 10 where "1" means "not at all important" and "10" means "very important," how important has the aid you have received been to your ability to complete your program of study?
- CLOSE1 In your own words, how do you think the financial aid process could be improved to better serve students such as yourself? **(enter verbatim response)**

Background (Do not read)

I'd like to finish up with just a few questions about you.

DEGCOMP What post-high-school degrees or certifications have you already completed, if any? **(listen and code per below)**

- 1 Certificate/Licensure – 1 year
- 2 Associate's Degree or 2-year Certificate
- 3 Bachelor's Degree
- 4 Master's Degree
- 5 Professional Degree (e.g., Law, Medicine)
- 6 Ph. D
- 7 None – first time student
- 8 None – but had some post-high school schooling previously
- 9 Other **(specify)**

WHYBACK **(if DEGCOMP ne 7 or 8)** Why have you decided to pursue additional higher education? **(listen and code per below; confirm code with respondent if necessary. Allow multiple responses.)**

- 1 Continuing studies in same field
- 2 Pursuing new field or academic interest/career change
- 3 Returning to school due to unemployment or economic hardship
- 4 Other **(specify)**

YEARPROG How many years does it take a full-time student to complete your program? **(capture number)**

YEAR How many full years of your current degree program would you say you have completed? **(capture number)**

STATUS Are you a full or a part-time student as of today?

- 1 Full time
- 2 Part time

WORK Are you presently employed either full or part time, looking for work, or not looking? **(probe if necessary and code per below)**

- 1 Not employed and not looking for work
- 2 Not employed and looking for work
- 3 Employed part time – one position
- 4 Employed part time – multiple positions
- 5 Employed full time
- 6 Self-employed

WRKSTD **(if WORK =3 or 4)** Is any of your work through a work-study program that is a part of your financial aid package?

- 1 Yes
- 2 No
- 3 Don't know/Not sure

Closing **(Do not read)**

Those are all the questions I had for you. Thank you for your time, and have a good day.