

## **PMMC Intake Form 2012-2013**

### **Brief description of project:**

We request that this survey be taken by students and staff before they come into the office for counseling so we can become prepared for our session. The questions cover topics such as what they are coming in for as well as what is their background in personal finances.

### **Who was asked to complete survey:**

Students and staff who request a counseling session are asked to complete the survey.

### **How many people were asked?** About 55-60

**Respondents:** 40 students

**Administration Type:** department-sent e-mail

### **Summary of Key Findings:**

Fifty percent of respondents heard about our services through marketing by the PMMC. Eighty-three percent believe that personal financial knowledge is very important to their experience at the University. Respondents' answers to the question of what has been their primary source of financial knowledge were widely varied with almost as many answers as respondents. About half of the respondents have a spending plan and have emergency savings. Half of the respondents wanted assistance with budgeting and about half wanted help with planning for the future (which includes loan repayment).

### **Actions Taken:**

I will describe who is using the PMMC and why in our Annual Report, as well as how they know about us. I have already stepped up our marketing knowing that that is our best outreach. We set our Fall Events schedule based on the wants and needs from this survey. We have scheduled a workshop on budgeting, one on financial aid and we have designed an investment series to assist students with planning for the future.

### **Which Student Affairs goals does this project align with?**

- 2. d. Encourage and support broad professional development (e.g. trainings, events, lectures and classes).
- 6. b. Annual reports will be based on departmental and Student Affairs strategic plans to formally document progress toward strategic objectives.
- 6. c. All assessment findings will be reported and documented with AER to develop data-driven best practices for Student Affairs.
- 6. d. Continue to increase assessment methods utilized in Student Affairs (e.g. data-mining, tracking, benchmarking and surveys).