Goal and desired outcomes of the program or service:
The goal of counseling is to provide education and guidance in matters of personal finance.

Goal of assessment:
To discover more about the individual and what they need before we meet with them allowing us to provide better counseling. Also learn more about the population we see in counseling and to assess why they are using our services and where they heard about us.

Population sampled:
U Students, faculty and staff with appointments

How many people were asked (if known)? 212
Respondents: 99
Response Rate: 46.7%
Administration Type: Department-sent e-mail

Summary of Key Findings
Our assessment goal to provide it we remembered to look at the intake survey before counseling. We did learn that the majority of students hear about us through our posters and marketing, followed by presentations and faculty/staff members. It always helps us to learn what advertising gets the word out best so we can decide where to concentrate our efforts. The majority of our student population is grad students, followed by freshman, and then seniors. Ninety-one percent of our students said personal finance is either important or very important to their experience at the University of Utah. Our most common reason to visit the PMMC is building a budget, planning for the future, and then tied are managing debt and understanding student loans.

Actions Taken/Planned based on the findings from this assessment:
We learned that we may need to implement a new system to ensure we read the intake survey before the appointment and that we make sure each client fills out the survey before the appointment. This will also help our response rate. We will plan more printed marketing materials this year since that was how the majority of our students heard about us last year. We learned the students who are most interested in our services are freshman, seniors and grad students so those are the classes we may want to reach out to and offer presentations. We may need to change our intake survey questions based on the data
we really want to know and what we plan to do with that data. We will plan our future programming on the most frequented topics like budgeting and managing debt.

**Alignment**

**Student Affairs Key Activity:** [still in process]

**Departmental Key Activity:** Student Support

**Departmental goal this project addresses:** The intake survey helps us identify student needs before they visit for their counseling session. This helps us in being prepared with knowledge and resources that will be needed during their session.

**Student Affairs Learning Domain Connection:** *Practical Competence*

*Please explain how this project connects to this Learning Domain:* We assist the student by giving them the knowledge and skills to solve their financial issue. Examples of this are working with them to discern between their wants and needs, how to compare consumer options and make the best decision, how to establish their priorities in paying the most important bills first, teaching them to write down their goals and accomplish them, and how to make a plan for their school years.