| TASKS (Steps to be taken that   | INDIVIDUALS/<br>GROUPS  | INDICATORS THAT THE TASK  | EXPECTED DATE OF ACCOMPLISHMENT | DESIRED OUTCOME THAT ILLUSTRATES   | PROGRESS<br>REPORT   |
|---|---|---|---------------------------------|--|--|
| will lead to the  | RESPONSIBLE   | HAS BEEN  | OF THE TASK                     | COMPLIANCE WITH THE  |  |
|   |   | ACCOMPLISHED  |                                 | STANDAND   |  |
| desired outcome)  Finalize Financial Literacy and Debt Management Program | Assistant Director of MU SOM Office of Student Financial Assistance | Plan will be approved by the Associate Dean for Student Affairs.  Plan will provide detailed outline of programs designed to educate all medical students in financial planning and debt management prior to and throughout medical school and post-graduation. | April 2012                      | At least 70% of students indicating satisfied or very satisfied with financial aid administrative services and overall debt management counseling in the Student Services Annual Survey. At least a 15% increase each year in students indicating satisfied or very satisfied with financial aid administrative services and overall debt management counseling in the Graduation Questionnaire (GQ) beginning with 2012 | The Financial Literacy and Debt Management Program was introduced in August of 2011 and after evaluation, was finalized and approved by the Associate Dean of Student Affairs in August 2012. The program structure will be implemented across all four years and defined by (3) three core educational components of Financial Aid Processes, Personal Finance, and Debt Management with emphasis in individual counseling. |
|   |   | post-graduation.  |                                 | with the goal of exceeding the "all schools" average by 2016.  | Evaluation: 31% Increase of satisfied/very satisfied in the 2012 GQ Financial Services and 35% increase in Debt Counseling services as compared to the 2011 GQ.  |

| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS          | EXPECTED DATE OF | DESIRED OUTCOME              | PROGRESS                         |
|------------------|-------------------|---------------------|------------------|------------------------------|----------------------------------|
| be taken that    | GROUPS            | THAT THE TASK       | ACCOMPLISHMENT   | THAT ILLUSTRATES             | REPORT                           |
| will lead to the | RESPONSIBLE       | HAS BEEN            | OF THE TASK      | COMPLIANCE WITH THE          |                                  |
| desired          |                   | ACCOMPLISHED        |                  | STANDARD                     |                                  |
| outcome)         |                   |                     |                  |                              |                                  |
| Financial Aid    | Assistant         | Newsletter is       | February 2012    | At least 70% of students     | The JCESOM New Student           |
| Newsletter for   | Director of       | emailed annually    |                  | indicating satisfied or very | Newsletter was completed in      |
| Newly Admitted   | JCESOM Office of  | to all newly        | First year of    | satisfied with Financial     | February 2012. This was the      |
| Students         | Student Financial | admitted students.  | development of   | Assistance Newsletter in     | first year for this program. All |
|                  | Assistance        |                     | newsletter       | the Student Services         | newly admitted students were     |
|                  |                   | All newly admitted  |                  | Annual Survey (SSAS)         | emailed a copy through the       |
|                  | MU Office of      | students will       |                  | beginning with the 2013      | Office of Admissions new         |
|                  | Student Financial | receive a           |                  | survey.                      | student correspondence and is    |
|                  | Assistance Staff  | newsletter prior to |                  |                              | available on the JCESOM          |
|                  |                   | the beginning of    |                  | The GQ data for the Class    | Financial Aid Website at         |
|                  |                   | school with         |                  | of 2016 indicating satisfied | http://musom.marshall.edu/st     |
|                  |                   | information on the  |                  | or very satisfied with       | udents/osfa/                     |
|                  |                   | basic financial aid |                  | financial aid administrative |                                  |
|                  |                   | steps of            |                  | services exceeding ratings   | <b>Evaluation:</b> Appointments  |
|                  |                   | application, MU     |                  | commensurate with "All       | with new students for            |
|                  |                   | processes and       |                  | Schools".                    | individual financial counseling  |
|                  |                   | related deadlines.  |                  |                              | prior to New Student             |
|                  |                   |                     |                  |                              | Orientation doubled in 2012 as   |
|                  |                   |                     |                  |                              | compared to 2011 and there       |
|                  |                   |                     |                  |                              | was a noticeable increase in     |
|                  |                   |                     |                  |                              | new student correspondence       |
|                  |                   |                     |                  |                              | via emails and phone.            |
|                  |                   |                     |                  |                              |                                  |
|                  |                   |                     |                  |                              |                                  |
|                  |                   |                     |                  |                              |                                  |
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| TASKS (Steps to   | INDIVIDUALS/      | INDICATORS                         | EXPECTED DATE OF   | DESIRED OUTCOME                               | PROGRESS  |
|-------------------|-------------------|------------------------------------|--------------------|---|---|
| be taken that     | GROUPS            | THAT THE TASK                      | ACCOMPLISHMENT     | THAT ILLUSTRATES                              | REPORT  |
| will lead to the  | RESPONSIBLE       | HAS BEEN                           | OF THE TASK        | COMPLIANCE WITH THE                           |   |
| desired           |                   | ACCOMPLISHED                       |                    | STANDARD                                      |   |
| outcome)          |                   |                                    |                    |   |   |
| Update JCESOM     | Assistant         | Once all financial                 | Ongoing            | At least 50% of students                      | The JCESOM Office of Student                              |
| Office of Student | Director of       | literacy/debt                      |                    | indicating satisfied or very                  | Financial Assistance (OSFA)                               |
| Financial         | JCESOM Office of  | management                         | 2011 was the first | satisfied with JCESOM                         | website is expected to be                                 |
| Assistance        | Student Financial | education and                      | year for launch of | office of Student Financial                   | completed by November 1,                                  |
| Website           | Assistance        | links are                          | website devoted to | Assistance website in the                     | 2012. Since the launch of the                             |
|                   |                   | determined and                     | JCESOM students    | SSAS with an increase of at                   | website in the summer of 2011,                            |
|                   | JCESOM            | posted on the                      |                    | least 25% in 2013 with                        | additional financial aid links                            |
|                   | Information       | website.                           |                    | expectations to at least                      | have been posted  |
|                   | Technology        | All at also to 11                  |                    | 80% in 2014.                                  | incorporating the OSFA                                    |
|                   |                   | All students will                  |                    | At least a 150/ increase                      | financial literacy presentations for students' reference. |
|                   |                   | have online access to a variety of |                    | At least a 15% increase each year in students | for students reference.                                   |
|                   |                   | financial resources                |                    | indicating satisfied or very                  | Annual review of the website                              |
|                   |                   | and education via                  |                    | satisfied with financial aid                  | occurs every January to update                            |
|                   |                   | the JCESOM                         |                    | administrative services and                   | the following academic year's                             |
|                   |                   | website.                           |                    | overall debt management                       | financial information and                                 |
|                   |                   |                                    |                    | counseling in the Graduate                    | forms.  |
|                   |                   |                                    |                    | Questionnaire beginning                       |   |
|                   |                   |                                    |                    | with 2012 with the goal of                    |   |
|                   |                   |                                    |                    | exceeding the "all schools"                   |   |
|                   |                   |                                    |                    | average results by 2016.                      |   |
|                   |                   |                                    |                    |   |   |
|                   |                   |                                    |                    |   |   |
|                   |                   |                                    |                    |   |   |
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| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS          | EXPECTED DATE OF     | DESIRED OUTCOME              | PROGRESS                         |
|------------------|-------------------|---------------------|----------------------|------------------------------|----------------------------------|
| be taken that    | GROUPS            | THAT THE TASK       | ACCOMPLISHMENT       | THAT ILLUSTRATES             | REPORT                           |
| will lead to the | RESPONSIBLE       | HAS BEEN            | OF THE TASK          | COMPLIANCE WITH THE          |                                  |
| desired          |                   | ACCOMPLISHED        |                      | STANDARD                     |                                  |
| outcome)         |                   |                     |                      |                              |                                  |
| MS-I             | Assistant         | All MS-I students   | Ongoing throughout   | Checklist that all students  | The Class of 2016 during         |
| (beginning with  | Director of MU    | will have met       | first year; required | have met with the            | Orientation was advised of the   |
| Class of 2016)   | SOM Office of     | individually with   | completion by end of | Assistant Director of        | mandatory requirement to         |
|                  | Student Financial | the Assistant       | first year           | Student Financial            | meet with the Assistant          |
| One-to-one       | Assistance        | Director of Student |                      | Assistance.                  | Director of JCESOM Office of     |
| Financial        |                   | Financial           | First year of        |                              | Student Financial Assistance     |
| Counseling       |                   | Assistance for      | mandatory program    | At least 70% of students     | (OSFA).                          |
|                  |                   | personal            |                      | indicating satisfied or very |                                  |
|                  |                   | introductory debt   |                      | satisfied with financial aid | Four (4) students to date have   |
|                  |                   | counseling          |                      | administrative services and  | completed the individual         |
|                  |                   |                     |                      | overall debt management      | interview consisting of a series |
|                  |                   | Students will be    |                      | counseling in the SSAS       | of questions, primarily focusing |
|                  |                   | provided            |                      | beginning with 2013          | on personal budget and           |
|                  |                   | personalized        |                      | survey.                      | student's level of financial     |
|                  |                   | financial education |                      | The GQ data for the Class    | literacy, incorporating basic    |
|                  |                   | focusing on         |                      | of 2016 indicating satisfied | financial education during the   |
|                  |                   | personal budget;    |                      | or very satisfied with       | interview including personal     |
|                  |                   | online access to    |                      | financial aid administrative | non-educational debt.            |
|                  |                   | personal records;   |                      | services and overall debt    |                                  |
|                  |                   | counseling of pre-  |                      | management counseling        | Students must complete their     |
|                  |                   | medical and         |                      | exceeding ratings            | personal interview by the end    |
|                  |                   | personal non-       |                      | commensurate with "All       | of the following spring          |
|                  |                   | educational debt.   |                      | Schools".                    | semester (May).                  |
|                  |                   |                     |                      |                              |                                  |
|                  |                   |                     |                      |                              |                                  |
|                  |                   |                     |                      |                              |                                  |
|                  |                   |                     |                      |                              |                                  |

| TASKS (Steps to  | INDIVIDUALS/  | INDICATORS   | EXPECTED DATE OF             | DESIRED OUTCOME  | PROGRESS   |
|--|---|--|------------------------------|--|--|
| be taken that  | GROUPS  | THAT THE TASK  | ACCOMPLISHMENT               | THAT ILLUSTRATES   | REPORT   |
| will lead to the   | RESPONSIBLE   | HAS BEEN   | OF THE TASK                  | COMPLIANCE WITH THE  |  |
| desired  |   | ACCOMPLISHED   |                              | STANDARD   |  |
| outcome)   |   |  |                              |  |  |
| MS-I (beginning with Class of 2016)  Orientation to Financial Assistance | Assistant Director of JCESOM Office of Student Financial Assistance JCESOM Office of Admissions | All MS-I students will have participated in the mandatory session during JCESOM Orientation.  Students will learn overall financial education expectations and | August 2012 Offered Annually | At least 70% of students indicating satisfied or very satisfied with financial aid administrative services in the SSAS beginning with 2013 survey.  The GQ data for the Class of 2016 indicating satisfied or very satisfied with financial aid administrative | Presented a (1) one hour, basic financial aid overview titled "Marshall Money 101" at New Student Orientation Class of 2016 in August 2012. Students were provided basic education Marshall University processes and policies, including financially related website links. The presentation is posted on the JCESOM Office of |
|  |   | basic aid processes & policies, personal budgeting, cost of attendance and introduction to AAMC's FIRST program.   |                              | services exceeding ratings commensurate with "All Schools".  | Student Financial Assistance website at http://musom.marshall.edu/st udents/osfa/ .  |

| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS          | EXPECTED DATE OF | DESIRED OUTCOME                 | PROGRESS                       |
|------------------|-------------------|---------------------|------------------|---------------------------------|--------------------------------|
| be taken that    | GROUPS            | THAT THE TASK       | ACCOMPLISHMENT   | THAT ILLUSTRATES                | REPORT                         |
| will lead to the | RESPONSIBLE       | HAS BEEN            | OF THE TASK      | COMPLIANCE WITH THE             |                                |
| desired          |                   | ACCOMPLISHED        |                  | STANDARD                        |                                |
| outcome)         |                   |                     |                  |                                 |                                |
| MS-I             | Assistant         | 61 (85%) MS-I       | August 2012      | Desired outcome was met         | AAMC's Money Management        |
| (beginning with  | Director of       | students            |                  | with October 2012 in-           | was presented to the Class of  |
| Class of 2016)   | JCESOM Office of  | participated in     | Offered annually | session evaluations             | 2016 on October 5, 2012.       |
|                  | Student Financial | mandatory group     |                  | meeting at least 70% of         | Session provided a basic       |
| AAMC Money       | Assistance        | entrance interview  |                  | new students indicating         | overview of federal loans and  |
| Management-      |                   | session. 11 (15%)   |                  | information as helpful or       | federal repayment options.     |
| Loan Entrance    | AAMC 's           | students did not    |                  | very helpful and indicate       |                                |
| Interview        | presentation      | attend, but will be |                  | more knowledgeable of           | Students received a hard copy  |
|                  | materials         | assigned a make-    |                  | subject after participating.    | of AAMC's "Education Debt      |
|                  |                   | up session.         |                  |                                 | Manager" booklet.              |
|                  |                   |                     |                  | October 5 <sup>th</sup> Session |                                |
|                  |                   | Students will learn |                  | evaluations indicated 86%       | Copy of presentation was       |
|                  |                   | the overall         |                  | of participants thought         | emailed to all MS1 as a follow |
|                  |                   | description of the  |                  | presentation was helpful        | up.                            |
|                  |                   | federal student     |                  | or very helpful and 82%         |                                |
|                  |                   | loan programs;      |                  | indicated more                  |                                |
|                  |                   | how to access       |                  | knowledgeable of federal        |                                |
|                  |                   | National Student    |                  | loan programs.                  | AAMC's Money Management –      |
|                  |                   | Loan Database       |                  |                                 | Loan Entrance Interview group  |
|                  |                   | System (NSLDS),     |                  |                                 | session for MS-I students was  |
|                  |                   | repayment           |                  |                                 | held for the first time during |
|                  |                   | options, loan       |                  |                                 | the 2011 fall semester and all |
|                  |                   | forgiveness, and    |                  |                                 | MS-I students attended.        |
|                  |                   | financial           |                  |                                 |                                |
|                  |                   | definitions.        |                  |                                 |                                |
|                  |                   |                     |                  |                                 |                                |
|                  |                   |                     |                  |                                 |                                |

| TASKS (Steps to      | INDIVIDUALS/          | INDICATORS                  | EXPECTED DATE OF                        | DESIRED OUTCOME                          | PROGRESS  |
|----------------------|-----------------------|-----------------------------|---|--|---|
| be taken that        | GROUPS                | THAT THE TASK               | ACCOMPLISHMENT                          | THAT ILLUSTRATES                         | REPORT  |
| will lead to the     | RESPONSIBLE           | HAS BEEN                    | OF THE TASK                             | COMPLIANCE WITH THE                      |   |
| desired              |                       | ACCOMPLISHED                |   | STANDARD                                 |   |
| outcome)             |                       |                             |   |  |   |
| MS-I (beginning with | Assistant Director of | All MS-I students will have | Ongoing throughout first year; required | By accessing AAMC's administrator login, | The Class of 2016 during Orientation was advised of the |
| Class of 2016)       | JCESOM Office of      | participated in the         | completion by end of                    | participation will be                    | mandatory requirement to                                |
| Class of 2010)       | Student Financial     | online AAMCs                | first year                              | documented.                              | complete AAMC's Financial                               |
| The Basics –         | Assistance            | Financial Literacy          | in se year                              | a de damente di                          | Literacy 101, The Basics, by the                        |
| AAMC FIRST           |                       | 101 program, The            | First year of                           | At least 70% of students                 | end of the spring semester.                             |
| program              | AAMC Website          | Basics, by the end          | mandatory program                       | indicating satisfied or very             |   |
|                      |                       | of the academic             | ,, -                                    | satisfied with AAMC's                    | The program consists of                                 |
|                      |                       | year.                       |   | FIRST program in the SSAS                | approximately 10 short, online                          |
|                      |                       |                             |   | beginning with 2013                      | modules on basic financial                              |
|                      |                       |                             |   | survey.                                  | literacy.   |
|                      |                       |                             |   | The GQ data for the Class                |   |
|                      |                       |                             |   | of 2016 indicating satisfied             | Students must have completed                            |
|                      |                       |                             |   | or very satisfied with                   | personal interview by the end                           |
|                      |                       |                             |   | overall debt management                  | of the following spring                                 |
|                      |                       |                             |   | counseling exceeding                     | semester (May).   |
|                      |                       |                             |   | ratings commensurate                     |   |
|                      |                       |                             |   | with "All Schools".                      | Approximately 40% have                                  |
|                      |                       |                             |   |  | completed or begun program                              |
|                      |                       |                             |   |  | by end of October 2012.                                 |
|                      |                       |                             |   |  |   |
|                      |                       |                             |   |  |   |
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| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS          | EXPECTED DATE OF | DESIRED OUTCOME              | PROGRESS                        |
|------------------|-------------------|---------------------|------------------|------------------------------|---------------------------------|
| be taken that    | GROUPS            | THAT THE TASK       | ACCOMPLISHMENT   | THAT ILLUSTRATES             | REPORT                          |
| will lead to the | RESPONSIBLE       | HAS BEEN            | OF THE TASK      | COMPLIANCE WITH THE          |                                 |
| desired          |                   | ACCOMPLISHED        |                  | STANDARD                     |                                 |
| outcome)         |                   |                     |                  |                              |                                 |
| MS-I             | Assistant         | MS-I students will  | March 2013       | In session evaluations, at   | In collaboration with JCESOM    |
|                  | Director of       | have participated   |                  | least 70% of students        | Robert C. Byrd Center for Rural |
| Financial Forum  | JCESOM Office of  | in a program to     | Offered annually | indicate information as      | Health, the first Financial     |
| - WV & National  | Student Financial | discuss WV          |                  | helpful or very helpful and  | Forum was held on February      |
| Financial        | Assistance        | Financial incentive |                  | indicate more                | 22, 2012. All MS-I and MS-II    |
| Incentive        |                   | and loan            |                  | knowledgeable of subject     | students attended.              |
| Programs/        | WV State          | forgiveness         |                  | after participating.         |                                 |
| Service Loan     | Financial Aid     | programs with       |                  |                              | WV representatives presented    |
| Forgiveness      | Program           | state               |                  | At least 70% of students     | information on state and        |
|                  | Representatives   | representatives,    |                  | indicating satisfied or very | federal financial incentive     |
|                  |                   | including state and |                  | satisfied with overall debt  | programs to MS-I and MS-II      |
|                  | JCESOM            | federal service     |                  | management counseling in     | students.                       |
|                  | Robert C. Byrd    | agreement and       |                  | the Student Services         |                                 |
|                  | Center for Rural  | loan forgiveness    |                  | Annual Survey.               | Evaluation:                     |
|                  | Health            | programs.           |                  |                              | 2012 Session evaluations        |
|                  |                   |                     |                  | The GQ data for the Class    | indicated at least 70% of       |
|                  |                   |                     |                  | of 2016 indicating satisfied | students indicated the          |
|                  |                   |                     |                  | or very satisfied with       | information was helpful or very |
|                  |                   |                     |                  | overall debt management      | helpful.                        |
|                  |                   |                     |                  | counseling exceeding         |                                 |
|                  |                   |                     |                  | ratings commensurate         | 2012-13 Financial Forum is      |
|                  |                   |                     |                  | with "All Schools".          | scheduled for March 2013.       |
|                  |                   |                     |                  |                              |                                 |
|                  |                   |                     |                  |                              |                                 |
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| TASKS (Steps to   | INDIVIDUALS/  | INDICATORS   | EXPECTED DATE OF                | DESIRED OUTCOME  | PROGRESS   |
|---|---|--|---------------------------------|--|--|
| be taken that   | GROUPS  | THAT THE TASK  | ACCOMPLISHMENT                  | THAT ILLUSTRATES   | REPORT   |
| will lead to the  | RESPONSIBLE   | HAS BEEN   | OF THE TASK                     | COMPLIANCE WITH THE  |  |
| desired   |   | ACCOMPLISHED   |                                 | STANDARD   |  |
| outcome)  |   |  |                                 |  |  |
| MS-II* Understanding Credit Scores and Credit Reports  *The Class of 2015 participated in | Assistant Director of JCESOM Office of Student Financial Assistance | MS-II students will have participated in a mandatory group session.  Students will learn the impact of positive and negative credit on personal credit | September 2012 Offered annually | In session evaluations, at least 70% of students indicate information as helpful or very helpful and indicate more knowledgeable of subject after participating.  At least 70% of students indicating satisfied or very          | "Understanding Credit Cards" was presented to MS-II students in November 2011 and all students were required to attend.  Since the Class of 2015 participated in a group session in September 2011 on "Managing Credit", as a  |
| this program in 2011. Another related topic will be substituted for 2012.                 |   | report/scores.   |                                 | satisfied with overall debt management counseling in the SSAS.  The GQ data for the Class of 2016 indicating satisfied or very satisfied with overall debt management counseling exceed ratings commensurate with "All Schools". | replacement, an introduction to AAMC's Medloans Organizer and Calculator will be presented to the Class of 2015 as a group session on Friday, November 9, 2012.  Students will be provided a demonstration on how to organize student loans and the benefits of looking ahead at the impact of interest on borrowing. Students will be encouraged to participate by bringing laptops to session. |

| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS           | EXPECTED DATE OF | DESIRED OUTCOME              | PROGRESS                       |
|------------------|-------------------|----------------------|------------------|------------------------------|--------------------------------|
| be taken that    | GROUPS            | THAT THE TASK        | ACCOMPLISHMENT   | THAT ILLUSTRATES             | REPORT                         |
| will lead to the | RESPONSIBLE       | HAS BEEN             | OF THE TASK      | COMPLIANCE WITH THE          |                                |
| desired          |                   | ACCOMPLISHED         |                  | STANDARD                     |                                |
| outcome)         |                   |                      |                  |                              |                                |
| MS-III           | Assistant         | MS-III students will | January 2013     | At least 70% of students     | Dates to meet with MS-III      |
|                  | Director of       | have participated    |                  | indicating satisfied or very | students will be scheduled for |
| Planning for     | JCESOM Office of  | in mandatory         | Offered annually | satisfied with overall debt  | the spring semester for        |
| Residency/Reloc  | Student Financial | Rising MS-IV         |                  | management counseling in     | Planning for                   |
| ation Expenses   | Assistance        | meeting or small     |                  | the SSAS.                    | Residency/Relocation Expenses  |
|                  |                   | group sessions       |                  |                              | sessions. Dates will be        |
|                  |                   | scheduled during     |                  | The GQ data for the Class    | announced to the MS-III class  |
|                  |                   | clerkship            |                  | of 2016 indicating satisfied | by November 1, 2012.           |
|                  |                   | meetings.            |                  | or very satisfied with       |                                |
|                  |                   |                      |                  | overall debt management      |                                |
|                  |                   | Students will learn  |                  | counseling that exceed       |                                |
|                  |                   | what is covered      |                  | ratings commensurate         |                                |
|                  |                   | and not covered in   |                  | with "All Schools".          |                                |
|                  |                   | the federal          |                  |                              |                                |
|                  |                   | financial aid        |                  |                              |                                |
|                  |                   | programs during      |                  |                              |                                |
|                  |                   | MS-IV year; tips on  |                  |                              |                                |
|                  |                   | financial planning   |                  |                              |                                |
|                  |                   | for residency        |                  |                              |                                |
|                  |                   | interviews and       |                  |                              |                                |
|                  |                   | relocation.          |                  |                              |                                |
|                  |                   |                      |                  |                              |                                |
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| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS          | EXPECTED DATE OF    | DESIRED OUTCOME              | PROGRESS                          |
|------------------|-------------------|---------------------|---------------------|------------------------------|-----------------------------------|
| be taken that    | GROUPS            | THAT THE TASK       | ACCOMPLISHMENT      | THAT ILLUSTRATES             | REPORT                            |
| will lead to the | RESPONSIBLE       | HAS BEEN            | OF THE TASK         | COMPLIANCE WITH THE          |                                   |
| desired          |                   | ACCOMPLISHED        |                     | STANDARD                     |                                   |
| outcome)         |                   |                     |                     |                              |                                   |
| MS-IV            | Assistant         | All MS-IV students  | March/April 2013    | In session evaluations, at   | The Financial Community Panel     |
|                  | Director of       | will have been      |                     | least 70% of students        | will be scheduled for late spring |
| Financial        | JCESOM Office of  | provided an         | Offered annually    | indicate information as      | and dates will be announced to    |
| Planning for the | Student Financial | opportunity to      |                     | helpful or very helpful and  | the graduating class by January   |
| Future-          | Assistance        | attend panel        | First year to offer | indicate more                | 1, 2013.                          |
| Community        |                   | discussion with     | this session.       | knowledgeable of subject     |                                   |
| Panel            | Outside           | various community   |                     | after participating.         |                                   |
|                  | community         | representatives in  |                     |                              |                                   |
|                  | organizations/    | post-graduate       |                     | The GQ data for the Class    |                                   |
|                  | businesses        | financial planning. |                     | of 2016 indicating satisfied |                                   |
|                  |                   |                     |                     | or very satisfied with       |                                   |
|                  |                   | Students are        |                     | overall financial aid        |                                   |
|                  |                   | provided            |                     | services that exceed         |                                   |
|                  |                   | education on        |                     | ratings commensurate         |                                   |
|                  |                   | financial planning  |                     | with "All Schools".          |                                   |
|                  |                   | including           |                     |                              |                                   |
|                  |                   | mortgages,          |                     |                              |                                   |
|                  |                   | investments, and    |                     |                              |                                   |
|                  |                   | insurances.         |                     |                              |                                   |
|                  |                   |                     |                     |                              |                                   |
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| TASKS (Steps to  | INDIVIDUALS/      | INDICATORS                   | EXPECTED DATE OF | DESIRED OUTCOME                         | PROGRESS                        |
|------------------|-------------------|------------------------------|------------------|---|---------------------------------|
| be taken that    | GROUPS            | THAT THE TASK                | ACCOMPLISHMENT   | THAT ILLUSTRATES                        | REPORT                          |
| will lead to the | RESPONSIBLE       | HAS BEEN                     | OF THE TASK      | COMPLIANCE WITH THE                     |                                 |
| desired          |                   | ACCOMPLISHED                 |                  | STANDARD                                |                                 |
| outcome)         |                   |                              |                  |   |                                 |
| MS-IV            | Assistant         | All MS-IV students           | February 2012    | At least a 15% increase of              | Individualized indebtedness     |
|                  | Director of       | with educational             |                  | satisfied/very satisfied                | reports were mailed to all MS-  |
| Mail             | JCESOM Office of  | debt are mailed              | Offered annually | rating on 2012 GQ Senior                | IV students in March 1, 2012    |
| individualized   | Student Financial | personal data of             |                  | Loan Exit Interview as                  | along with information          |
| indebtedness     | Assistance        | total student loan           |                  | measured by the 2011                    | regarding the senior loan exit  |
| reports to       | MU OSFA           | debt and exit                |                  | Graduate Questionnaire                  | interview workshop.             |
| students         | Applications      | interview instructions prior |                  | with the goal being satisfaction levels | 2013 Indebtedness reports are   |
|                  | Systems Analyst   | to participating in          |                  | commensurate with "All                  | scheduled for mailing for the   |
|                  | Systems / maryst  | the exit interview           |                  | Schools" data by Graduate               | Class of 2013 in February 2013. |
|                  |                   | process.                     |                  | Questionnaire 2016.                     | 0.000 0. 2020 00. 00. , 2020.   |
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| TASKS (Steps to  | INDIVIDUALS/                            | INDICATORS                     | EXPECTED DATE OF | DESIRED OUTCOME                                 | PROGRESS   |
|------------------|---|--------------------------------|------------------|---|--|
| be taken that    | GROUPS                                  | THAT THE TASK                  | ACCOMPLISHMENT   | THAT ILLUSTRATES                                | REPORT   |
| will lead to the | RESPONSIBLE                             | HAS BEEN                       | OF THE TASK      | COMPLIANCE WITH THE                             |  |
| desired          |   | ACCOMPLISHED                   |                  | STANDARD  |  |
| outcome)         |   |                                |                  |   |  |
| MS-IV            | Assistant                               | All MS-IV students             | March 2012       | In group session                                | Senior Loan Exit Interview                             |
| Canian Laan Evit | Director of                             | with educational               | Offered annually | evaluations, at least 70% of                    | group session was completed                            |
| Senior Loan Exit | JCESOM Office of                        | debt will have                 | Offered annually | students indicate                               | March 15, 2012 with 81% of                             |
| Interviews       | Student Financial Assistance            | participated in                |                  | information as helpful or                       | graduates with debt attending                          |
| AAMC Exit        | Assistance                              | mandatory exit interviews with |                  | very helpful and indicate more knowledgeable of | group interview session and 45% of graduates with debt |
| Interview        | MU OSFA                                 | options of one-to-             |                  | subject after participating.                    | participating in follow up one-                        |
| presentation     | Associate                               | one counseling,                |                  | Subject after participating.                    | to-one counseling.                                     |
| and publication  | Director and                            | attending group                |                  | At least a 15% increase of                      | to-one counseling.                                     |
| and publication  | Applications                            | exit workshop, or              |                  | satisfied/very satisfied                        | Group session evaluations:                             |
|                  | Systems Analyst                         | online exit.                   |                  | rating on 2012 Graduate                         | 35 Responses   |
|                  | , |                                |                  | Questionnaire - Senior                          | 80% indicated helpful or very                          |
|                  | MU Office of the                        |                                |                  | Loan Exit Interview as                          | helpful  |
|                  | Bursar                                  |                                |                  | measured by the 2011                            | 97% indicated more                                     |
|                  |   |                                |                  | Graduate Questionnaire                          | knowledgeable  |
|                  |   |                                |                  | with the goal being                             |  |
|                  |   |                                |                  | satisfaction levels                             | Evaluation:  |
|                  |   |                                |                  | commensurate with "All                          | 31% Increase of satisfied/very                         |
|                  |   |                                |                  | Schools" data by Graduate                       | satisfied in the 2012 GQ Senior                        |
|                  |   |                                |                  | Questionnaire 2016.                             | Loan Exit Interview as                                 |
|                  |   |                                |                  |   | compared to the 2011 GQ.                               |
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| TASKS (Steps to  | INDIVIDUALS/         | INDICATORS                           | EXPECTED DATE OF | DESIRED OUTCOME              | PROGRESS                        |
|------------------|----------------------|--------------------------------------|------------------|------------------------------|---------------------------------|
| be taken that    | GROUPS               | THAT THE TASK                        | ACCOMPLISHMENT   | THAT ILLUSTRATES             | REPORT                          |
| will lead to the | RESPONSIBLE          | HAS BEEN                             | OF THE TASK      | COMPLIANCE WITH THE          |                                 |
| desired          |                      | ACCOMPLISHED                         |                  | STANDARD                     |                                 |
| outcome)         |                      |                                      |                  |                              |                                 |
| MS-I, MS-II and  | Assistant            | All MS-I, MS-II, &                   | March 2012       | At least 70% of students     | Individualized indebtedness     |
| MS-III           | Director of          | MS-III students                      |                  | indicating satisfied or very | reports to all MS-I, MS-II, and |
|                  | JCESOM Office of     | with educational                     | Offered annually | satisfied with overall debt  | MS-III students were mailed in  |
| Mailed           | Student Financial    | debt are mailed                      |                  | management counseling in     | May 2012 with additional        |
| individualized   | Assistance           | total personal debt                  |                  | the Student Services         | information on AAMC's           |
| indebtedness     | NALL OCEA            | accumulations to                     |                  | Annual Survey.               | Medloans Organizer and          |
| reports to       | MU OSFA<br>Associate | date for assistance                  |                  | The GQ data for the Class    | Calculator.                     |
| students         | Director and         | in monitoring debt totals throughout |                  | of 2014, 2015, and 2016      | 2013 indebtedness mailing is    |
|                  | Applications         | medical school.                      |                  | indicating satisfied or very | scheduled again for March       |
|                  | Systems Analyst      | Also provided                        |                  | satisfied with overall debt  | 2013.                           |
|                  | Systems / maryst     | information on                       |                  | management counseling        | 2013.                           |
|                  |                      | debt management                      |                  | that exceed ratings          |                                 |
|                  |                      | tools; specifically                  |                  | commensurate with "All       |                                 |
|                  |                      | AAMC's Medloans                      |                  | Schools".                    |                                 |
|                  |                      | organizer and                        |                  |                              |                                 |
|                  |                      | Calculator.                          |                  |                              |                                 |
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| TASKS (Steps to  | INDIVIDUALS/      |                      | EXPECTED DATE OF    | DESIRED OUTCOME              | PROGRESS                          |
|------------------|-------------------|----------------------|---------------------|------------------------------|-----------------------------------|
| be taken that    | GROUPS            | INDICATORS           | ACCOMPLISHMENT      | THAT ILLUSTRATES             | REPORT                            |
| will lead to the | RESPONSIBLE       | THAT THE TASK        | OF THE TASK         | COMPLIANCE WITH THE          |                                   |
| desired          |                   | HAS BEEN             |                     | STANDARD                     |                                   |
| outcome)         |                   | ACCOMPLISHED         |                     |                              |                                   |
| Revise JCESOM    | Assistant         | All medical          | Updated annually by | At least 70% of students     | The JCESOM Medical Student        |
| Medical Student  | Director of       | students will have   | July 1              | indicating satisfied or very | Financial Aid Guide revision will |
| Financial Aid    | JCESOM Office of  | received an          |                     | satisfied with financial aid | be completed and posted to        |
| Guide            | Student Financial | electronic copy of   |                     | administrative services and  | the JCESOM Office of Student      |
|                  | Assistance        | the detailed         |                     | overall debt management      | Financial Assistance website by   |
|                  |                   | financial aid guide  |                     | counseling in the Student    | October 1, 2012.                  |
|                  |                   | that includes        |                     | Services Annual Survey.      |                                   |
|                  |                   | financial aid steps, |                     |                              |                                   |
|                  |                   | related deadlines,   |                     | At least a 15% increase      |                                   |
|                  |                   | resources related    |                     | each year in students        |                                   |
|                  |                   | to federal, state,   |                     | indicating satisfied or very |                                   |
|                  |                   | and institutional    |                     | satisfied with financial aid |                                   |
|                  |                   | loan and             |                     | administrative services and  |                                   |
|                  |                   | scholarship          |                     | overall debt management      |                                   |
|                  |                   | programs.            |                     | counseling in the Graduate   |                                   |
|                  |                   | Guide will be        |                     | Questionnaire beginning      |                                   |
|                  |                   | available online at  |                     | with 2012 with the goal of   |                                   |
|                  |                   | JCESOM Financial     |                     | exceeding the "all schools"  |                                   |
|                  |                   | Assistance website   |                     | average results by 2015.     |                                   |