

# College Action Project Worksheet for CAP Projects – August 7, 2015 Update

## CAP: 1.2.4 Reduction of Financial Barriers for Students

**Champion:** Ann Isackson

1. CAP Team Members: Ann Isackson (Financial Aid), Anna Maria Clark (TRiO), Brune Garcia (Enrollment Center), Brynne Roberts (Financial Aid/Foundation), Chris Allen (Student Employment), David Selmon (Lakeshore Campus), Ennis Young (Faculty), Jane Mohr (Cashiers), TBD (Student Employee – Financial Aid/Enrollment Center), Lori Cook (Admissions/Enrollment Center), Paul Doane (Financial Aid),

2. Describe the **purpose** of this project including a description of the associated activities. (100 words or fewer)

To assist students in achieving their educational and career goals by helping to eliminate financial barriers to student success. This will be accomplished through the development and implementation of new scholarship and student employment opportunities; expanded financial literacy education; and the identification and reevaluation of institutional policies that inadvertently create additional financial obstacles.

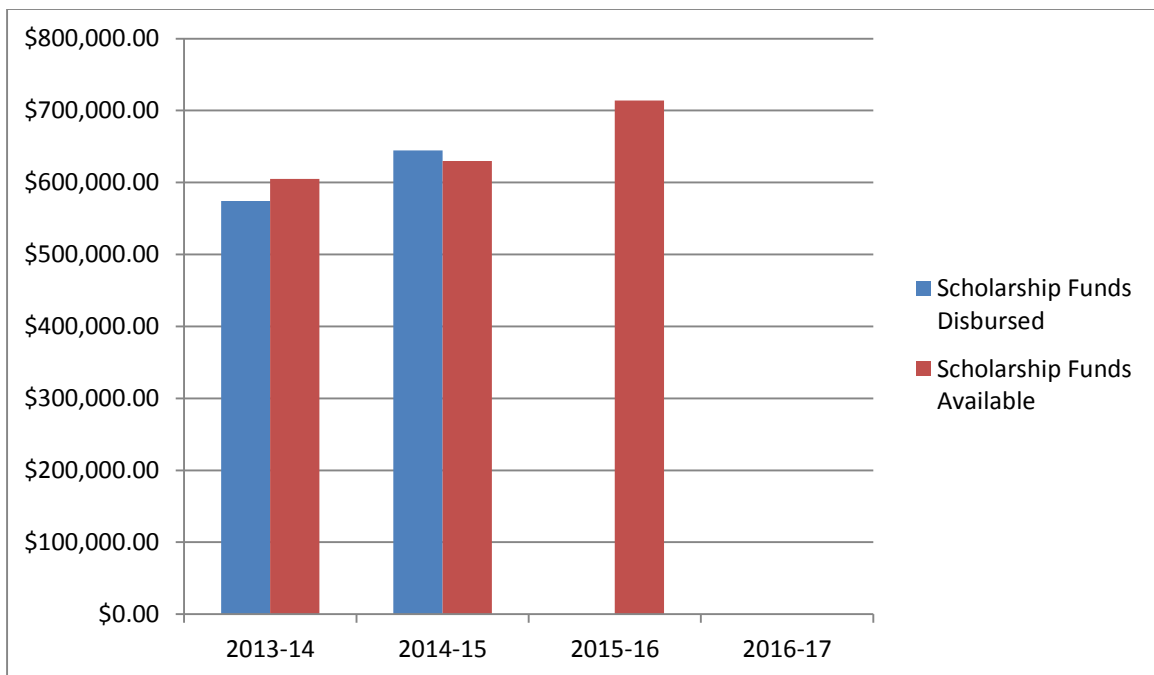
3. Describe the **goals** of this Action Project (in 100 words or fewer) (**Wildly important goals**)
    - Reduce Barriers to Completion
      - Increase available need-based scholarship funding/financial incentives for persistence
      - Improve utilization of scholarships and work-study
        - Evaluate/modify application/awarding/management processes related to work-study and scholarships
      - Develop/implement solutions that reduce obstacles to completion that arise from our institutional policies and practices
    - Reduce Loan Indebtedness
      - Increase scholarship funding, student employment opportunities, financial literacy awareness
      - Educate students regarding loan repayment and default
  4. What **measureable criteria** will be used to determine this project's success? (**Lead measures**)
    - Scholarships
      - Scholarship dollars available/disbursed to students each year
      - Number of students who apply/are awarded scholarships each year
      - Merit vs. need based scholarships available
      - Completion rates for recipients
      - Student loans awarded
    - Work-Study
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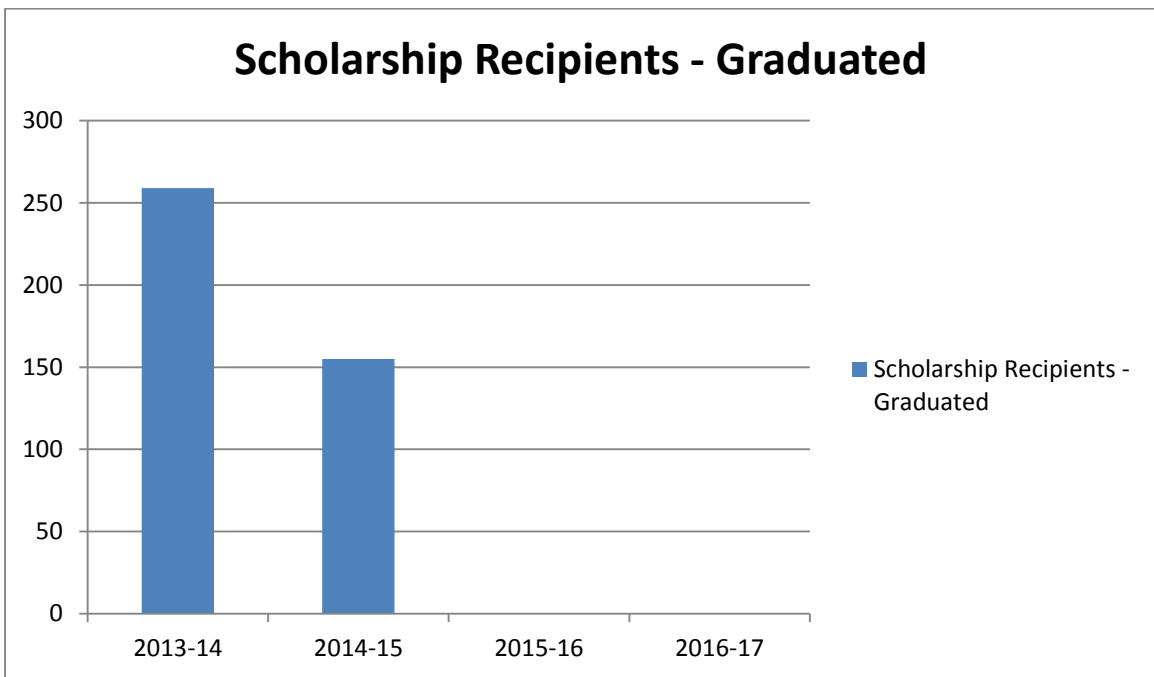
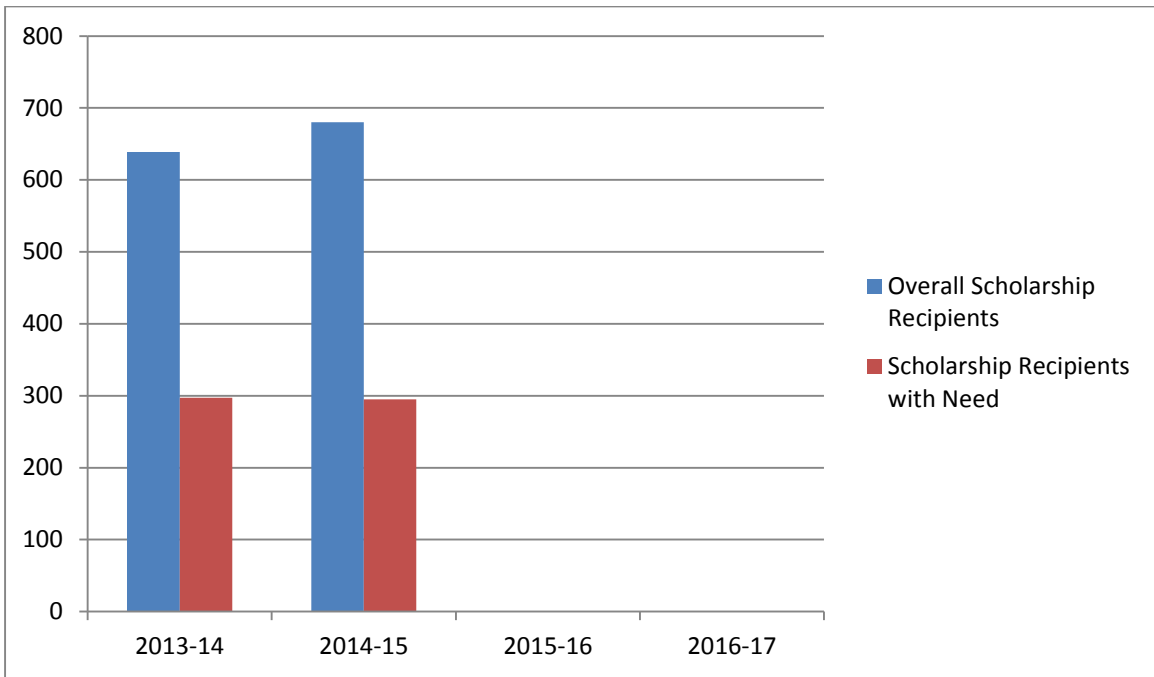
- Work-study awarded/utilized
- Completion rates for recipients
- Student loans awarded
- Institutional Barriers
  - Return of funds calculations performed
  - Financial holds preventing registration
  - Students dropped from classes through enrollment cancelation
- Financial Literacy
  - Student touch points
  - Student loans awarded
  - 3-year institutional cohort default rate

5. Please provide the **results of your lead measures** to date (either tables or charts) (**Compelling scoreboard**)

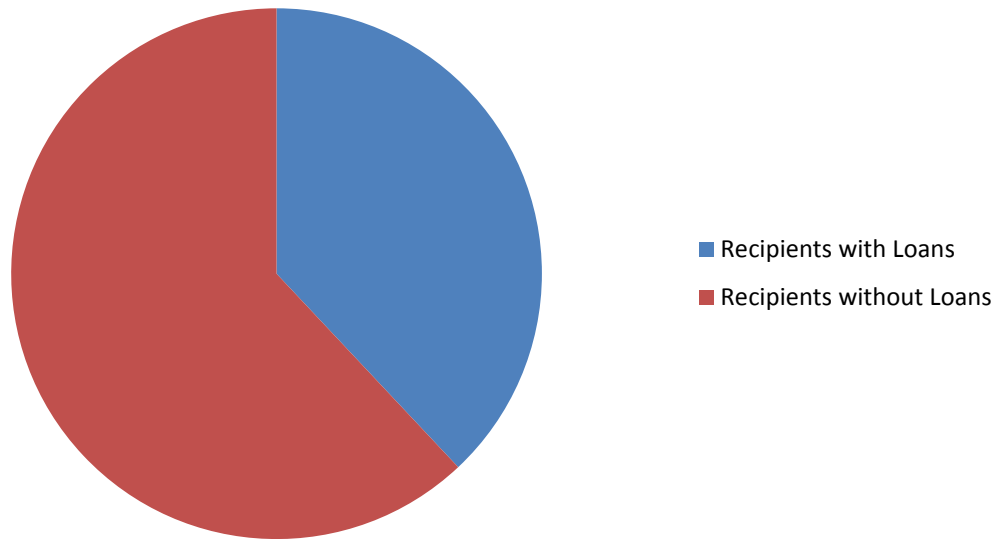
*Note: Preliminary scoreboards have been developed for several Scholarship Lead Measures. Scoreboards for other subteams will be developed during initial CAP meetings this Fall.*

### Scholarship Scoreboards

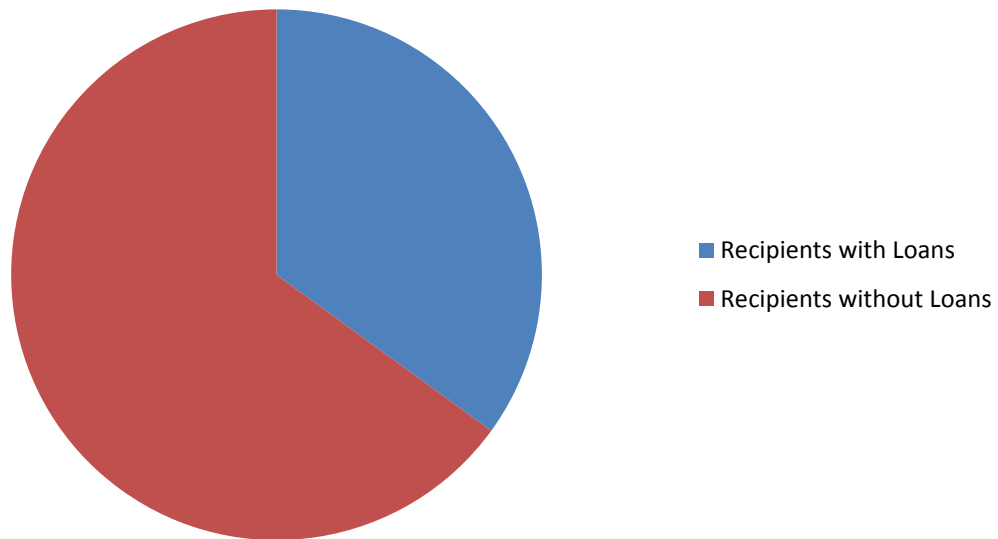




## 2013-14 Scholarship Recipients



## 2014-15 Scholarship Recipients



6. What **Indicators of Success** will this project most likely impact? Please indicate whether the project will directly or indirectly impact the measure.

Yes, the project will directly impact the measures.

- Increase in number of students who apply for GRCC Foundation scholarships
  - Increase in number/percentage of scholarships awarded to students with economic need
  - Increase in number of fully utilized scholarship accounts
  - Increase in loan default awareness within the campus community
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- Increase in work-study funds utilized by students
- Increase in student employment opportunities offered
- Reduction in student loan funds awarded annually to GRCC students
- Reduction in GRCC's 3-year cohort default rate (CDR)
- Decrease in students dropped from classes through enrollment cancellation process
- Decrease in financial holds preventing future registration

7. What **personnel resources** will be required to deliver the project successfully?

Personnel from the following GRCC offices: Foundation, Financial Aid, Admissions, Enrollment Center, Records, Counseling, Student Employment, TRiO, Communications, IT, IR, and Cashier's. Potentially contingency employees to assist with default aversion/financial literacy outreach/orientation.

8. What **additional resources** will be required to develop and/or sustain the project?

Category	Cost	Explanation (one time or recurring)	Which budget will cover these costs?
Supplies	\$750 (estimated)	2014-15 Request: Print materials/social media for financial literacy/default aversion outreach and promotion of scholarship opportunities.	Not required
Training	\$8867 (actual)	2014-15 Request: PeopleSoft Training for Financial Aid Processing Staff – January 20-23, 2015. 7 people. (one time)	Was covered by IT budget
	\$1141.57 (actual)	2014-15 Request: Annual Conference on Financial Education – April 1-3, 2015. 1 person – conference fee, travel expenses. (one time)	Was covered through Financial Aid budget
	\$829.74 (actual)	2014-15 Request: Department of Education Strategies for Reducing Cohort Default Rates Conference – April 28, 2015. 2 people - travel expenses. (one time)	Was covered through Financial Aid budget
Equipment/ Software	\$6000 – implementation fee (actual)	2014-15 Request: Potential scholarship management software (one-time implementation fee, as well as annual fee). Software would make application process simpler for students and speed	Received one-time implementation fee through SLT

	\$9,500 – annual fee (actual)	application processing time. Software would also aid in improved utilization of scholarship funds.	Annual fee covered through Foundation/Financial Aid budgets
Other	\$170.80 (actual)	2014-15 Request: Scholarship Management Software Review/Best Practices Meeting with Delta College Foundation – October 22, 2014. 3 people – travel expenses. (one time)	Financial Aid
	\$125.72 (actual)	2014-15 Request: Hosting Directors' Financial Aid Best Practices/Reduction of Student Barriers Meeting at GRCC. Representation from Lansing Community College, Muskegon Community College and Kalamazoo Valley Community College – April 17, 2015. (one time)	Financial Aid
	\$9068.28 (actual)	2014-15 Request: FA Operations Evaluation consultation and travel expenses – week of April 27, 2015 (one time)	SLT – Request previously approved
TOTAL Cost Estimate	\$36,453.11 (requested) \$35,703.11 (used)		

9. Will this project require any **additional budget dollars** for the 2015-2016 academic year that have not already been secured?                    \_\_\_NO                      X   Yes

If yes, please describe briefly:

For:

- 1) Additional Training Needs Based on Consultant Report Recommendations – Estimate - \$4500 (May be a partial SLT Request)
- 2) Contingency Staffing to Assist with Scholarship Management Software Implementation – Estimate - \$1600 (Will likely be accommodated in Financial Aid Office budget)
- 3) Print materials/social media for promotion of scholarship opportunities/work-study – Estimate - \$750 (May be an SLT request).

10. Please provide an update on the activities from your spring report:

Month	Activity	Person Responsible	Current Status
July, 2014	Select CAP participants. Initiate CAP kick-off meeting to discuss and document CAP purpose and goals. Establish monthly meeting	Ann Isackson All CAP Team	Completed

	schedule.		
August, 2014	<p>Assessment of current and planned financial literacy/default aversion touch points and initiatives. Benchmarking of other institutions.</p> <p>Discussion at monthly CAP team meeting and development of next steps.</p>	<p>Paul Doane</p> <p>All CAP Team</p>	Completed
September, 2014	<p>Benchmarking schools that utilize scholarship leveraging, as well as those with scholarship programs targeting:</p> <ul style="list-style-type: none"> <li>• Vulnerable student populations</li> <li>• Students who are not Pell eligible, but still have financial need</li> </ul> <p>Research related to existing incentive aid programs such as <i>Paying It Forward</i>, <i>MICROscholarships</i>, campus-based employment, etc.</p> <p>Discussion at monthly CAP team meeting and development of next steps.</p>	<p>Ann Isackson Paul Doane Brynne Roberts Stacey Bush</p> <p>All CAP Team</p>	Completed
October, 2014	<p>Invitation to new CAP members, Chris Allen and Lori Cook</p> <p>Visit to Delta College to meet with their Foundation Office staff and demo Academic Works scholarship management software. Convey information to team.</p> <p>Review of SLT feedback</p> <p>Presentation and review of additional scholarship benchmarking completed to date</p>	<p>Ann Isackson</p> <p>Ann Isackson/ Brynne Roberts</p> <p>All CAP Team</p> <p>Ann Isackson Paul Doane Brynne Roberts Stacey Bush</p> <p>All CAP Team</p>	Completed

	<p>Creation of Scholarships, Student Employment, Financial Literacy, and Institutional Policies/Procedures subteams.</p> <p>Discussion at monthly CAP team meeting re: potential initiatives for further development and funding needs.</p>		
November, 2014	<p>Development and submission of FA Operations Evaluation SLT request</p> <p>Monthly CAP team meeting discussions. Progress reports from CAP subteams.</p>	<p>Ann Isackson</p> <p>All CAP Team</p>	Completed
December, 2014	<p>Approval of FA Operations Evaluation SLT request</p> <p>Coordination of PS training scheduling and outcomes with IT (Michael Passer) and training vendor.</p>	<p>Michael Passer/Ann Isackson</p>	Completed
January, 2015	<p>Invitation to new CAP Team member, Jane Mohr.</p> <p>Progress reports from CAP subteams.</p> <p>Presentation of ongoing financial literacy and default aversion initiatives</p> <p>PeopleSoft training for FA processing staff. Evaluation of current processing practices and identification of process improvements.</p>	<p>Ann Isackson</p> <p>All CAP Team</p> <p>Becky Powell – Guest</p> <p>FA Processing Team/Michael Passer/Ann Isackson</p> <p>Financial Aid and IR staff (Bev Daily/Bruce</p>	Completed



	Scholarship recipient profile data collection	Morrison)	
February, 2015	<p>Progress reports from CAP subteam</p> <p>Brainstorming potential institutional policy/process barriers</p> <p>Incorporation of PS process improvement needs into 2015-16 Financial Aid department plans and IT project requests.</p> <p>Obtain additional FA Operations Evaluation quotations/determination of final vendor. Scheduling consultant visit.</p> <p>Obtain feedback from Enrollment Management Team regarding CAP subteam initiative related to reducing negative impact of enrollment cancellation process.</p> <p>Review of SALT default aversion data</p> <p>Department of Education's release of draft 3-year cohort default rates – news to celebrate. GRCC's rate decreased from 26.4% to 24.7%.</p>	<p>All CAP Team</p> <p>All CAP Team</p> <p>Ann Isackson/Bev Daily/Andrew Masters</p> <p>Ann Isackson</p> <p>Jane Mohr/Lori Cook/Ann Isackson</p> <p>Paul Doane</p>	Completed
March, 2015	<p>Completion of FA Operations Evaluation requisition. Collection of data for consultant.</p> <p>Development of scope of work for scholarship management software RFP. Coordination with Purchasing.</p>	<p>Ann Isackson/Paul Doane</p> <p>Ann Isackson/Paul Doane/Brynne Roberts</p> <p>Paul Doane/Ann</p>	<p>Completed</p> <p>Note: Decided not to move forward with SLT funding request for financial education and default training</p>

	<p>Development of SLT funding request for financial education and default training conferences</p> <p>Development of SLT funding request for scholarship management software implementation fees</p> <p>Progress reports from CAP subteams</p> <p>Review of Student Employment data</p> <p>Joint Financial Aid/Student Employment meeting to identify ways to improve communication and coordination between offices and service to students</p>	<p>Isackson</p> <p>Paul Doane/Ann Isackson</p> <p>All CAP Team</p> <p>Chris Allen</p> <p>Financial Aid/Student Employment representatives</p>	<p>conferences. These costs were accommodated in Financial Aid Office budget</p>
April, 2015	<p>Progress reports from CAP subteams</p> <p>Attend Annual Conference on Financial Education</p> <p>FA Directors meeting to evaluate best practices and methods for reducing student barriers</p> <p>Onsite FA Operations Evaluation Consultation</p> <p>Review of proposals, selection of scholarship management software vendor and contracting</p> <p>Attend DOE Strategies for Reducing Cohort Default Rates Conference</p> <p>Presentation of feedback from Student Employment/Financial Aid meeting. Discussion of next steps.</p>	<p>All CAP Team</p> <p>Paul Doane</p> <p>Ann Isackson/ Directors from LCC, KVCC, MCC</p> <p>Financial Aid staff</p> <p>Foundation/Financial Aid/Purchasing</p> <p>Paul Doane/Becky Powell</p> <p>Chris Allen</p> <p>Bev Daily (Guest)</p>	<p>Completed, except for review of dashboard data. Deferred until August 2015 meeting</p>

	Review of dashboard data		
May, 2015	<p>Progress reports from CAP subteams</p> <p>Presentation on conference content. Identification of potential recommendations.</p> <p>Documentation of work to-date on initiatives. Review and refinement of next steps and continuing recommendations.</p>	<p>All CAP Team</p> <p>Paul Doane/Becky Powell (Guest)/ CAP Team</p> <p>CAP Team</p>	Completed except for refinement of next steps. This was deferred as it was determined that consulting report will play major role in this work. Report is unavailable for distribution prior to September 2015.
June, 2015	<p>Present FA Operations consultant recommendations and feedback from Directors Meeting. Identification of potential recommendations/next steps.</p>	Ann Isackson/All CAP Team	Deferred. Will follow after Student Affairs Division conference call with consultant occurs in August 2015.
July, 2015	<p>Progress reports from CAP subteams</p> <p>Identification of CAP funding needs for 2015-16</p> <p>Review of dashboard data</p>	<p>All CAP Team</p> <p>All Cap Team</p> <p>Bev Daily (Guest)</p>	Meeting content deferred until August 2015 meeting due to Financial Aid Office workload.

11. Provide a 12-month work plan for this project:

Month	Activity	Person Responsible
July, 2015	Confirm CAP team participants and availability. Set up meeting schedule. Complete CAP worksheet.	A. Isackson / P. Doane
August, 2015	<p>Meeting Date: August 27, 2015</p> <ul style="list-style-type: none"> <li>Welcome to new CAP team members</li> <li>Introduction of new meeting format based on 4 Disciplines of Execution</li> <li>Triage Reporting from All Subteams – 5 to 10 minutes each</li> <li>Review and Evaluation of Scoreboard and Dash Board Data</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: P. Doane</p> <p>Guest: B. Daily</p>
September, 2015	<p>Meeting Date: September 10, 2015</p> <ul style="list-style-type: none"> <li>Review of Choice Consulting Report and</li> </ul>	Meeting Facilitator: A. Isackson

	<p>Discussion of Next Steps Involving CAP team</p> <ul style="list-style-type: none"> <li>• Triage Reporting from All Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Budget Evaluation</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	Note Taker: B. Roberts
October, 2015	<p>Meeting Date: October 22, 2015</p> <ul style="list-style-type: none"> <li>• Update from Scholarship subteam on Scholarship Management Software Implementation</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: A. Isackson</p>
November, 2015	<p>Meeting Date: November 12, 2015</p> <ul style="list-style-type: none"> <li>• Update from Financial Literacy Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: D. Selmon</p> <p>Guest: B. Powell</p>
December, 2015	<p>Meeting Date: December 17, 2015</p> <ul style="list-style-type: none"> <li>• Update from Institutional Barriers Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard and Dashboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: L. Cook</p> <p>Guest: B. Daily</p>
January, 2016	<p>Meeting Date: January 28, 2016</p> <ul style="list-style-type: none"> <li>• Update from Work-Study Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Budget Evaluation</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: M. Reed</p>
February, 2016	<p>Meeting Date: February 25, 2016</p> <ul style="list-style-type: none"> <li>• Update from Financial Literacy Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: J. Mohr</p> <p>Guest: B. Powell</p>
March, 2016	<p>Meeting Date: March 24, 2016</p> <ul style="list-style-type: none"> <li>• Update from Scholarship subteam on Scholarship Management Software and</li> </ul>	Meeting Facilitator: A. Isackson

	<p>Application Process</p> <ul style="list-style-type: none"> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	Note Taker: E. Young
April, 2016	<p>Meeting Date: April 28, 2016</p> <ul style="list-style-type: none"> <li>• Update from Institutional Barriers Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Budget Evaluation</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: A. Clark</p>
May, 2016	<p>Meeting Date: May 26, 2016</p> <ul style="list-style-type: none"> <li>• Update from Work-Study Subteam</li> <li>• Triage Reporting from All Other Subteams</li> <li>• Discussion of Key Goals for Each Subteam, Alternatives, Paths that Must be Cleared</li> <li>• Review and Evaluation of Scoreboard</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: B. Garcia</p>
June, 2016	<p>Meeting Date: June 23, 2016</p> <ul style="list-style-type: none"> <li>• Triage Reporting from All Other Subteams</li> <li>• Review and Evaluation of Scoreboard</li> <li>• Documentation of Work To-Date on Initiatives. Review/Refinement of Next Steps/Continuing Recommendations.</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: C. Allen</p>
July, 2016	<p>Meeting Date: July 21, 2016</p> <ul style="list-style-type: none"> <li>• Triage Reporting from All Other Subteams</li> <li>• Review and Evaluation of Scoreboard</li> <li>• Finalization Next Steps and Continuing Recommendations.</li> </ul>	<p>Meeting Facilitator: A. Isackson</p> <p>Note Taker: A. Isackson</p>

12. When will your Team meet? Please provide **Team meeting dates** for August 2015 to June 2016  
*(Create a Cadence of Accountability)*

- August 27, 2015
  - September 10, 2015
  - October 22, 2015
  - November 12, 2015
  - December 17, 2015
  - January 28, 2016
  - February 25, 2016
  - March 24, 2016
  - April 28, 2016
  - May 26, 2016
  - June 23, 2016
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- July 21, 2016

*NOTE 1: We highly recommend that your team meets, at minimum, one time per month. You are encouraged to find ways to communicate within your team between scheduled meetings, perhaps weekly.*

*NOTE 2: If you choose to hold Team meetings on the SLT meeting dates immediately following SLT, lunch and a meeting space will be provided for your team.*

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