

## Financial Aid Working Group Meeting Notes

September 8, 2016

CSCU System Office

Financial Aid Working Group Charge: To ensure system-wide opportunities to capitalize on existing resources, streamline processes, demonstrate compliance, and provide avenues for student outreach and financial education.

### Group Members Present:

Paul Broadie, HCC, Chair  
Jane Gates, CSCU  
Jason Ebbeling, CSCU  
Steve McDowell, CSCU  
Margaret Malaspina, CCC  
Rich Bishop, CCSU  
Lynn Roller, GCC (FAC)  
Greg DeSantis, HCC (FAC)  
Alfred Williams, QVCC  
Joe Bertolino, SCSU  
Mary Ellen Jukoski, TRCC

### Guests Present:

None

Meeting began at 1:10 PM

### Action alerts

Initiative	Action	Champion	Due Date	Status
Review responses to the question sent to gather the major priorities of the Financial Aid Council and	Responses to the following question delivered to all 17 CSCU Financial Aid Directors will be reviewed in an ongoing basis at meetings of the working group:	Broadie	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
the University Financial Aid Officers	"The charge of the CSCU Financial Aid Working Group is to ensure system-wide opportunities to capitalize on existing resources, streamline processes, demonstrate compliance, and provide avenues for student outreach and financial education. As a Financial Aid Director, what policies, practices, and processes could be enhanced to assist you in carrying out the important work you do with students?"			
Meet with the Financial Aid Council	Discuss the goals of the working group at the September 9 Financial Aid Council Meeting	Broadie, Malaspina, Williams, McDowell	September 9 Financial Aid Council Meeting	Open
Working Group Initiative: NA policy	Working Group Recommendation: System-wide at all 17 colleges, adopt the "NA" policy as it is currently employed at some of the CSCU Universities, with a recommended implementation date of Spring 2017	All working group members	(Recommended Spring 2017 implementation)	Closed
Working Group Initiative: NA policy	Review Harrisburg Area Community College (HACC) procedures as Banner institution	McDowell	<b>September 22 (next meeting)</b>	Open
Working Group Initiative: NA policy	Discuss details of possible system implementation of the NA policy with system office IT Banner team staff, and create GANTT chart regarding how the NA policy, other working group initiatives, and the SAP success initiatives may fit into upcoming project schedules for the system office Financial Aid team staff	McDowell	<b>September 22 (next meeting)</b>	Open
Working Group Initiative: NA policy	Meet with various councils/committees to vet the NA policy	All working group members (as assigned)	October	Open

Initiative	Action	Champion	Due Date	Status
Working Group Initiative: NA policy	Develop recommendation for good practices in institutional workflow for the NA policy	All working group members	October	Open
Working Group Initiative: NA policy	Develop recommendation for a campaign that will inform the system constituents regarding NA policy and help to ensure institutional compliance	All working group members	October	Open
Working Group Initiative: NA policy	Schedule meeting with representatives from the CUNY system, possibly at NCC, to review methods of promoting institutional compliance with a policy similar to the NA policy, including campaign materials used in CUNY	DeSantis	Upcoming meeting (depending on CUNY representative schedules)	Open
Working Group Initiatives: NA policy & SAP success policy	Align NA policy with student success policies being developed for the new SAP policy	Ebbling	Fall 2016	Open
Working Group Initiative: CSCU "Your Money"	Working Group Recommendation: System-wide at all 17 colleges, adopt the "Your Money" financial literacy online resource currently in use at WCSU	All working group members	Fall 2016	Open
Working Group Initiative: CSCU "Your Money"	Discuss expansion of the "Your Money" resource with administration at WCSU	Gates	<b>September 22 (next meeting)</b>	Open
Working Group Initiative: CSCU "Your Money"	Discuss a system webpage for the CSCU "Your Money" resource with system office IT	All working group members	October	Open
Working Group Initiative: CSCU "Your Money"	Explore existing financial literacy initiatives and resources at the CSCU institutions to ensure that the CSCU "Your Money" resource incorporates all of the good ideas existing system-wide	All working group members	Fall 2016	Open
Working Group Initiative: CSCU "Your Money"	Determine recommendations for how the CSCU "Your Money" resource might be utilized at institutions (including,	All working group members	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
	potentially, during orientation, first year experience, academic and student service departments, etc.), and utilized via outreach to Connecticut high schools			
Working Group Initiative: Communication with students	Explore new and upcoming methods for communicating financial aid information and related topics to students, for example via text, apps, etc.	All working group members	Fall 2016	Open
Working Group Initiative: Communication with students	Discuss possibilities and upcoming software with Joe Tolisano	McDowell	<b>September 22 (next meeting)</b>	Open
Working Group Initiative: SAP policy implementation (currently in testing phase)	Consider for future meeting	All working group members	Fall 2016	Open
Working Group Initiative: TD Client	Consider for future meeting	All working group members	Fall 2016	Open
Working Group Initiative: Automatic batch packaging	Consider for future meeting	All working group members	Fall 2016	Open
Working Group Initiative: Grant award calculation and recalculation	Consider for future meeting	All working group members	Fall 2016	Open
Working Group Initiative: Strategic use of CTDL system-wide	Consider for future meeting	All working group members	Fall 2016	Open
Working Group Initiative: Partnership with State Department of Education to work with K-12 on FAFSA completion and other financial literacy, as well as exploration of	Consider for future meeting	All working group members	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
existing FAFSA completion resources				

Meeting concluded at 2:45 PM