

Financial Aid Working Group Meeting Notes

September 22, 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:

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

Guests Present:

None

Meeting began at 1:05 PM

Action alerts

Initiative	Action	Champion	Due Date	Status
GANTT Chart Review: System Office Financial Aid Team Staff	Create and review 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	September 22	Closed

Initiative	Action	Champion	Due Date	Status
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	Closed
Financial Aid/Mandated Reporting	Ensure that training exists for financial aid offices regarding information that might be received that would necessitate mandated reporting	Ebbeling	N/A	Closed
Working Group Initiative: NA policy	Generate sample questions for October 6 meeting with CUNY representatives: All group members will submit ideas to DeSantis	All working group members	September 23	Open
Working Group Initiative: NA policy	Meet with representatives from the CUNY system at NCC to review methods of promoting institutional compliance with a policy similar to the NA policy, including campaign materials used in CUNY	DeSantis	Next Meeting (October 6)	Open
Working Group Initiative: NA policy	Review Harrisburg Area Community College (HACC) procedures as Banner institution – contact is being sought at HACC	McDowell	October	Open
Working Group Initiative: NA policy	Discuss details of possible system implementation of the NA policy with system office IT Banner team staff – discussion is ongoing	McDowell	October	Open
Working Group Initiative: NA policy	Meet with various councils/committees to vet the NA policy	All working group members (as assigned)	October	Open
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	All working group members	October	Open

Initiative	Action	Champion	Due Date	Status
	regarding NA policy and help to ensure institutional compliance			
Working Group Initiatives: NA policy & SAP success policy	Align NA policy with student success policies being developed for the new SAP policy	Ebbeling	Fall 2016	Open
Working Group Initiative: Folderwave	Folderwave will present to the working group at the next meeting	McDowell	Next Meeting (October 6)	Open
Working Group Initiative: Communication with students (app)	Invite Joe Tolisano to the working group meeting to discuss student communication opportunities (via an app or similar method)	McDowell	October 17	Open
Explore impact of internal audits with financial aid offices	Review current practices and provide information to the working group	Malaspina	October 17	Open
Working Group Initiative: CSCU "Your Money"	WCSU has approved expansion of the "Your Money" resource to the system	Gates	N/A	Closed
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, potentially, during orientation, first year experience, academic and student service departments, etc.), and utilized via outreach to Connecticut high schools	All working group members	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
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: 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 existing FAFSA completion resources	Consider for future meeting	All working group members	Fall 2016	Open

Working Group Recommendations

Working Group Recommendation	Rationale and Benefits	Implementation Strategy and Timeline	Resources Needed for Implementation	Stakeholder discussion and feedback plan	Potential funding sources as applicable
System-wide at all 17 institutions, adopt the "NA" policy as it is currently employed at some of the CSCU Universities	TBD	Recommended implementation date of Spring 2017	TBD	TBD	TBD
System-wide at all 17 institutions, adopt the "Your Money" financial literacy online resource currently in use at WCSU	TBD	TBD	TBD	TBD	TBD

Meeting concluded at 2:09 PM