

Financial Aid Working Group Meeting Notes

October 17, 2016

61 Woodland St, Hartford

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

Steve McDowell, CSCU

Joe Bertolino, SCSU

Lynn Roller, GCC (FAC)

Greg DeSantis, HCC (FAC)

Jason Ebbeling, CSCU

Margaret Malaspina, CCC

Mary Ellen Jukoski, TRCC

Rich Bishop, CCSU

Alfred Williams, QVCC

Guests Present:

Joe McAuliffe, CSCU

Meeting began at 1:05 PM

Action alerts

Initiative	Action	Champion	Due Date	Status
Working Group Initiative: NA Policy	Discuss policy and practice implications at the institutions (who to drop, what about non-aid students, etc.)	All working group members (as assigned)	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
Working Group Initiative: NA Policy	Work with Mike Kozlowski and Maribel La Luz on campaign for rollout; campaign will inform system constituents regarding NA policy and help to ensure uniform institutional implementation	Ebbeling	Fall 2016	Open
Working Group Initiative: NA policy	Review Harrisburg Area Community College (HACC) procedures as Banner institution – contact is being sought at HACC	McDowell	N/A	Closed
Working Group Initiative: NA policy	Discuss initial details of possible system implementation of the NA policy with system office IT Banner team staff.	McDowell	N/A	Closed
Working Group Initiative: NA policy	Meet with various councils/committees to vet the NA policy	All working group members (as assigned)	November	Open
Working Group Initiative: NA policy	Develop recommendation for good practices in institutional workflow for the NA policy	All working group members	November	Open
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: CSCU “Your Money”	Discuss a system webpage for the CSCU “Your Money” resource with system office IT	All working group members	November	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”	All working group members	Fall 2016	Open

Initiative	Action	Champion	Due Date	Status
	resource incorporates all of the good ideas existing system-wide			
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
Working Group Initiatives: NA policy & CSCU "Your Money"	What current practices exist at CSCU institutions for: Participation and enrollment; financial literacy? Create survey and distribute to institutions for feedback.	Broadie, McDowell, DeSantis	November	Open
Working Group Initiative: Communication with students (app)	Invite Joe McAuliffe to the working group meeting to discuss student communication opportunities (via an app, text message, Everbridge, and/or other methods)	McDowell	N/A	Closed
Working Group Initiative: Email Policy	Can college emails, by default, go to multiple email accounts (student email, personal email from admissions app, FAFSA email)? Review existing CSCU policy.	All working group members (as assigned)	Next Meeting (October 31)	Open
Explore impact of internal audits with financial aid offices	Review current practices and provide information to the working group via responses from Connecticut Community College Directors	Malaspina	N/A	Closed

Initiative	Action	Champion	Due Date	Status
Explore impact of internal audits with financial aid offices	Meet with Erika Steiner and Karen Stone to discuss support to financial aid offices	Broadie, Jukoski, McDowell	November	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 CTDLC 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
Support the development and utilization of an app for communication system-wide, as well as automatically using multiple methods for communication, including all email addresses, text, app, etc., including the need for gatekeepers					

Meeting concluded at 2:30 PM