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Coordinated Financial Aid Outreach: A Working Model

by Betty Burt, Jean Calvert and Lee Peterson

The concept and development of a coordinated financial aid outreach model has evolved over a period of five years from a relatively small undertaking to an annual series of integrated training sessions and workshops involving college financial aid and admissions personnel, high school guidance counselors and the State Department of Education. In a period of budget restriction at both the state and local level, it was becoming increasingly difficult to meet the growing number of requests for financial aid information sessions in the demographic area served by Jackson Community College. The tri-county area of Jackson, Hillsdale and Lenawee counties in southern Michigan borders on the Ohio state line. Each county has an urban population centered around the county towns of Jackson, Hillsdale and Adrian, with Jackson being the largest, and the rest of the population spread through small rural communities. The geographical area has four baccalaureate-level private liberal arts colleges and one public community college in addition to 35 high schools, 3 of which are private. The size of the graduating senior high school class varies from 425 students to 30 or less, with the majority of the smaller high schools being located in the outlying rural districts.

Figure 1. Tri-County Demographics

	Hillsdale	Jackson	Lenawee	Total
High Schools	8	15	12	35
Public Colleges	0	1	0	1
Private Colleges	1	1	2	4

Prior to the consortium concept local high schools were running financial aid information sessions in a variety of ways. They may or may not have been consistent in meeting the needs of their area.

In a period of budget restriction involving staff cutbacks at the State, college and high school level, in addition to limited travel budgets, it was becoming impossible to meet the requests of all the high schools for financial aid presentations. Some of the high school counselors were contacting local college representatives; some made requests of the State Department of Education staff; and some were requesting four or five financial aid presenters to cover information which could easily be handled by one or two people.

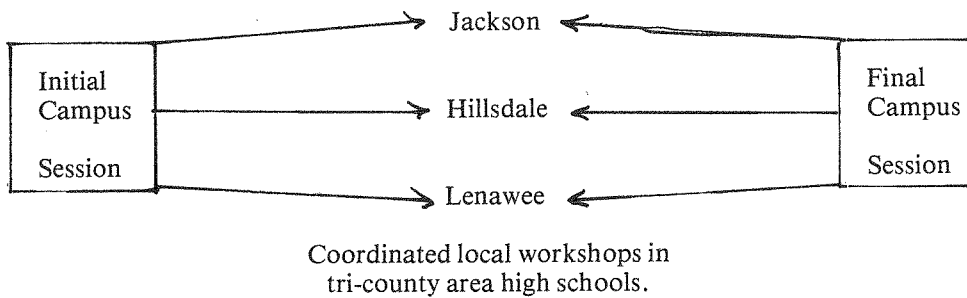
In order to attempt to address the problem, the concept of coordinated sessions, with enhanced publicity stemming from a central planning committee, came into being. The success of the concept relies heavily on the participation and commitment of each group. The steering committee for the consortium model is made up of members from the community college financial aid and admissions offices, counselors from high schools in the tri-county area who are actively involved in financial aid, and the State Department of Education Student Financial Assistance Services program staff.

Betty Burt is Counselor, Hillsdale High School, Hillsdale, Michigan. Jean Calvert is Dean of Students, Jackson Community College, Jackson, Michigan. Lee Peterson is Supervisor, Information Services Unit, Student Financial Assistance Services, State of Michigan Department of Education, Lansing.

The Model

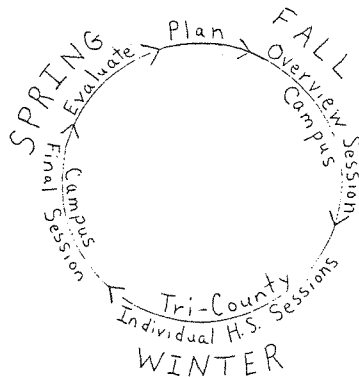
The components of the model involve two major presentations at the beginning and end of the sessions, with a series of smaller workshops in between. The two major presentations are held on the college campus with a representative from the college financial aid office, a high school counselor knowledgeable in financial aid and the State Office of Education representative as presenters. In the first session an overview of the aid process is given followed by specific aid sources and options. The intervening workshops are held at some 15 high schools throughout the tri-county area. The presenters for these local workshops are knowledgeable high school counselors who review in detail the application process and forms with participants. The final session, given by the same presenters as the initial one, and held after the local workshop series, briefly covers sources and options again and explains the application process with ACT and CSS forms for families who either could not attend the local workshop in their area or wished to review the process a second time.

Figure 2. Consortium Training Sessions



The series is held from November through January with anywhere from 10 to 15 individual workshops being held between the beginning and ending sessions. Each spring the steering committee plans for the upcoming academic year. A fall planning meeting is held to confirm dates and locations and to enable high school counselors to coordinate with each other in the planning process. An evaluation meeting is held in the spring following the final session.

Figure 3. Financial Aid Consortium Model



Publicity is coordinated by the college through the media, and high school counselors ensure that information on all sessions is publicized through their individual high schools. This ensures that parents and students have a number of different options for information and are not limited to one session at their home high school.

Results

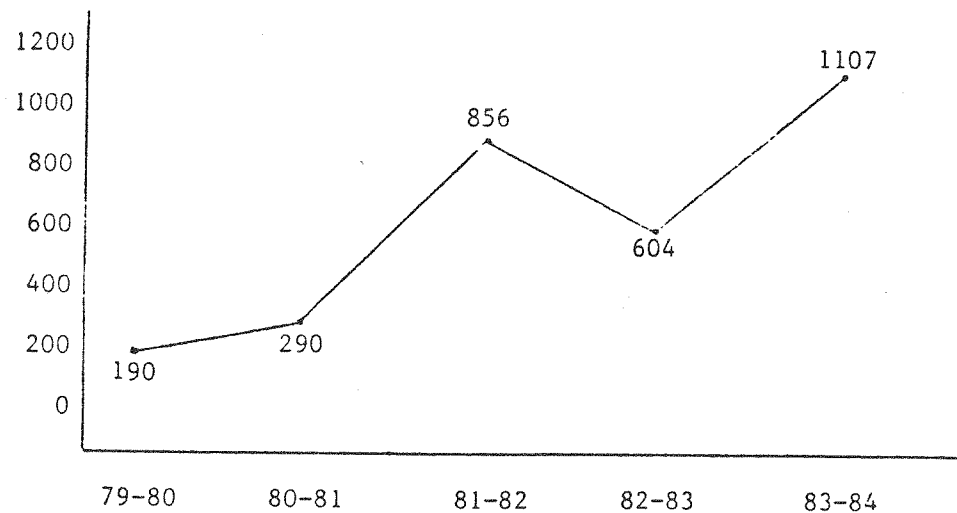
The development of a coordinated financial aid outreach model has had a very positive impact in a number of different ways. It has enabled a far larger number of parents and students to be given more consistent information than before.

Figure 4. Participants Served Through Consortium Model

Academic Year	College Review Session	Coordinated High School Workshop*	College Final Session	Total
1979-80	190	----	None held	190
1980-81	290	----	None held	290
1981-82	150	653	53	856
1982-83	250	253	101	604
1983-84	300	627	180	1107

*Numbers served by individual high schools unknown prior to consortium.

Figure 5. Number of Participants Served Through Consortium Model*



*Not unduplicated count. Authors feel there is no significant overlap.

The advantages are evident in that the number of parents and students has more than doubled with the concept of combined financial aid workshops. By reaching more students and parents, there are more families applying for aid who should be applying without fearing the forms, rejection or their ignorance of the process. The number of errors on completed forms are far fewer, enabling the student to receive

his/her award in a timely manner and cutting down on processing time in the financial aid office. By attending workshops in familiar surroundings, given by a counselor they know, parents and students feel more comfortable in asking questions. The multiple workshops give families a variety of options and encourage attendance. In addition, area high schools and counselors work together becoming more familiar and comfortable with the financial aid forms, counselor reinforcing counselor. The concept allows for trading and sharing the responsibilities and sites for the local "hands-on" workshops between schools in the area. Students and parents are much more aware of deadlines, the reasons for deadlines, and are more responsive to meeting those deadlines thus avoiding too-early or too-late filing.

The involvement and commitment of high school guidance counselors has enhanced immeasurably the success of the outreach into the schools. In addition, it has added a greater dimension of understanding and communication between the high school and aid office. It has also provided an opportunity to evaluate the impact of the material presented in a consistent manner and provided a method of modifying presentations to meet stated needs. A cohesive series of information sessions and workshops for participating high schools ensures their students maximum opportunity to get needed information.

The involvement of the college admissions office has greatly facilitated the process. The admissions office has personal contact with area high school counselors, up to date mailing lists and other resources not always readily available to the financial aid office. The sessions are geared towards all students regardless of their college type preference, and no overt recruitment occurs. (Appendix I provides a sample mailing to all parties describing the sequence.)

Further Action

That coordinated financial aid outreach can be successful is not in question.

Figure 6. High School Financial Aid Sessions Conducted by College Financial Aid & State Financial Aid Program Staff

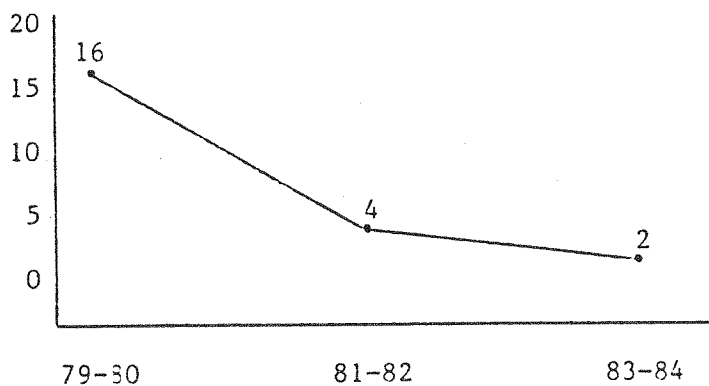
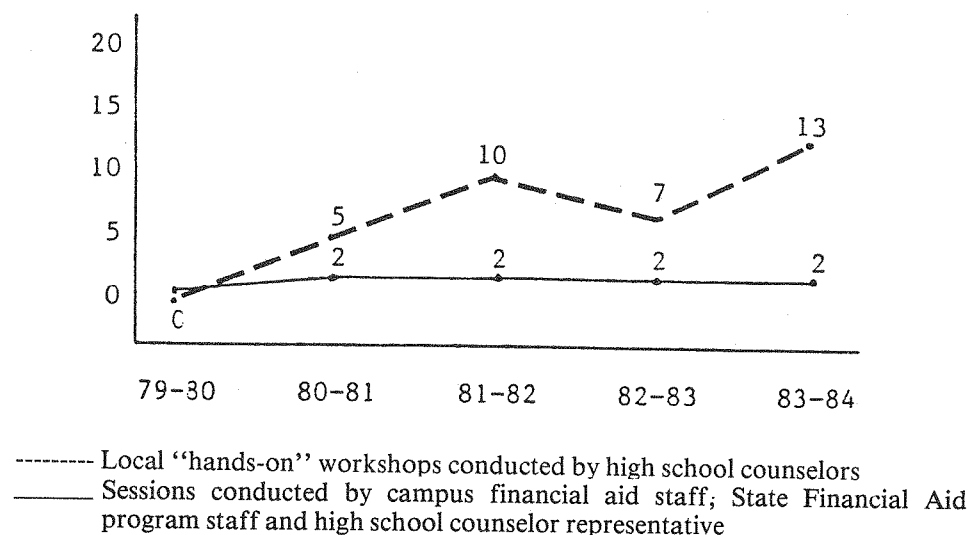


Figure 7. Coordinated Financial Aid Model Financial Aid Presentations



In order for continued growth and improvement, it is essential that evaluation and feedback take place on a regular basis. Success is very much dependent on the local high school counselors, participation and their commitment to the concept. Unless the counselors are willing to actively participate, the process will not be successful. Inadequate publicity can also have a devastating effect since the concept relies heavily on access to individual students through the high school network. Newspaper and other media advertising is a valuable supplement.

Each year new ways of reaching changing student populations can be explored. Expanding the process to include community programs serving a potential adult student population is a goal we hope to reach. Expansion of the process to include the private institutions in our geographic area is another possibility.

Finally, a variety of outreach models are feasible depending on the demographics of individual locations; however, the commitment of all participating groups is essential. The key to success is capable, concerned high school counselors who are knowledgeable in financial aid, and interested and committed to the concept. If necessary, training sessions either by the aid office personnel and/or their peers may provide the high school counselors the necessary expertise and confidence. In conclusion, coordinated financial aid outreach enables all concerned to plan their calendars in advance and share the burden of time and travel commitments, while reaching more parents and students with consistent information.

Appendix I



Jackson Community College

2111 Emmons Road • Jackson, Michigan 49201
(517) 787-0800

October 17, 1984

TO: All Area High School Seniors and Parents of High School Seniors
FROM: Gordon J. Glair, Director of Admissions
Jean Calvert, Dean of Students
SUBJECT: Financial Aid Nights for Parents, Seniors, and Counselors

A series of Financial Aid Nights has been planned for students who will be entering college in the Fall of 1985. These have been planned by representatives from the Michigan Department of Education, Jackson Community College, and counselors from Jackson, Hillsdale and Lenawee Counties.

1. OVERVIEW FINANCIAL AID NIGHT FOR EVERYONE (Kick-Off Session)

When: Tuesday, November 20, 1984, 7:30 P.M.

Where: Jackson Community College, Potter Center, Federer A, B, C

Who: Dr. Lee Peterson, Supervisor, Support Services, Mich. Dept. of Education
Mrs. Jean Calvert, Dean of Students, Jackson Community College
Mrs. Betty Burt, Counselor, Hillsdale High School

2. REGIONAL "HANDS ON" WORKSHOPS - GOING THROUGH THE APPLICATION PROCESS - 7:00 P.M.*

Hillsdale County

Litchfield H.S. - Dec. 5
Jonesville H.S. - Dec. 5
Pittsford H.S. - Dec. 12
*Hillsdale H.S. - Dec. 19
*Waldron H.S. - Jan. 3

Jackson County

Northwest H.S. - Oct. 30
Jackson H.S. - Dec. 11
Vandercook Lk. H.S. - Jan. 16

Lenawee County

Addison H.S. - Dec. 10
Tecumseh H.S. - Dec. 12
Onsted H.S. - Jan. 9
Adrian H.S. - Jan. 10
Hudson H.S. - Jan. 15

Reading/Camden-Frontier - at Reading H.S. - Jan. 10

*7:00 P.M. for all schools with exception of Hillsdale and Waldron H.S., which is 7:30 P.M.

3. OVERVIEW OF FINANCIAL AID AVAILABLE AND THE APPLICATION PROCESS (Wrap-Up Session)

When: Wednesday, January 23, 1985, 7:30 P.M.

Where: Jackson Community College, Potter Center, Federer A, B, C

Who: Dr. Lee Peterson, Supervisor, Support Services, Mich. Dept. of Education
Mrs. Jean Calvert, Dean of Students, Jackson Community College
Mrs. Betty A. Burt, Counselor, Hillsdale High School