# Chicago Public Schools Office of School Counseling and Postsecondary Advising

# **Financial Aid Completion Strategies**

September 29, 2020 Virtual

**Presenters: MARÍA BUCIO & GLORIA PURIFOY** 



# **Opportunities and Challenges**

- 1. What **opportunities**does the new IL
  financial aid
  graduation
  requirement
  present to your
  school's completion
  strategy?
- What challenges does it bring for you and your team?



# Fortunately for Chicago Public Schools...

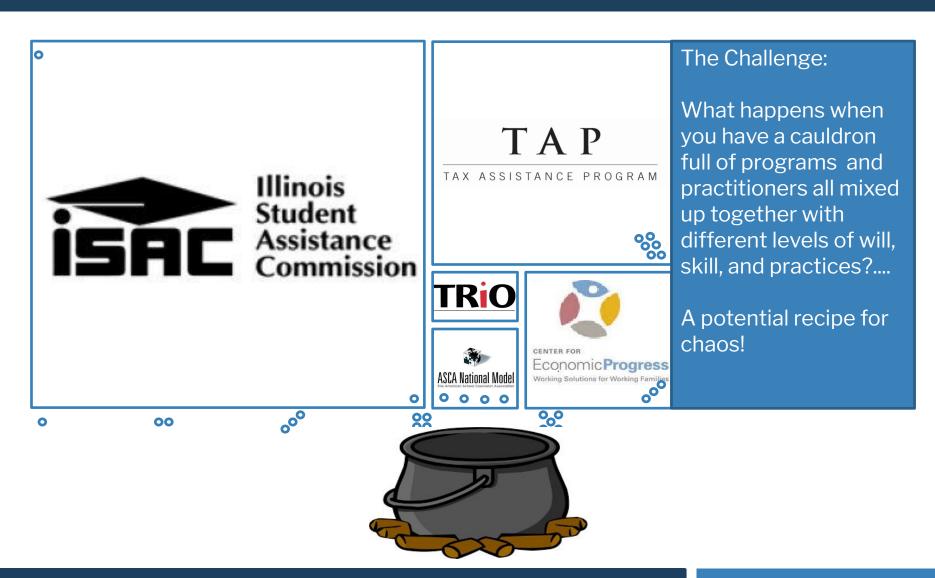
"We're not new to this! We're true to this!"

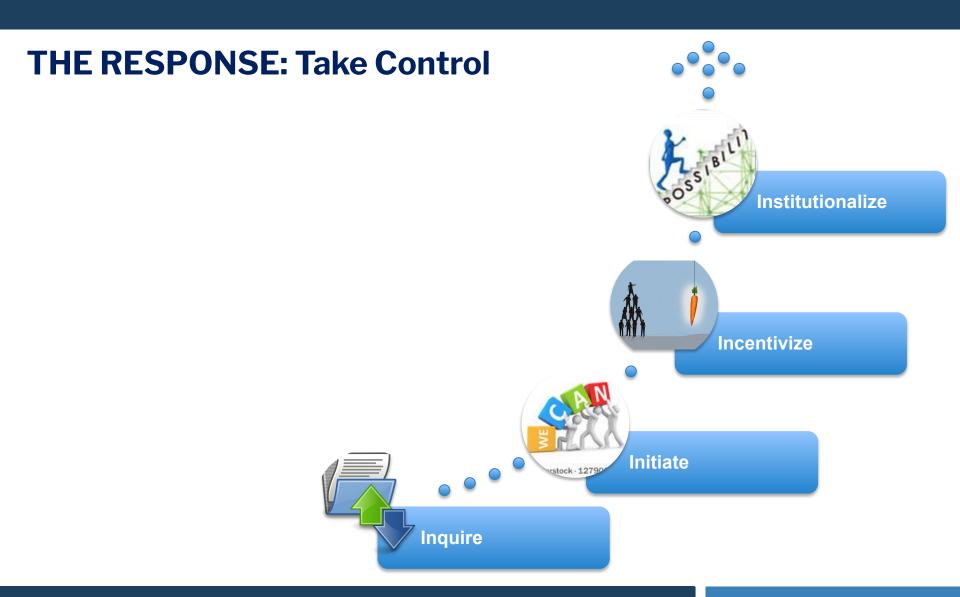
@CPS



#### Birth of CPS/External Partner Financial Aid Committee

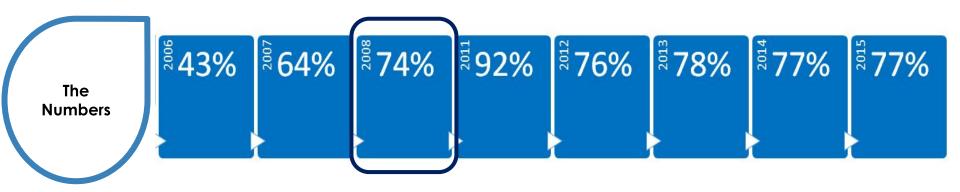
- FAFSA completion rates were low
- Families avoided completing the FAFSA
- CPS completion rates disproportionately impacted the state's overall rate
- School Counselors ill-equipped to support families
- ISAC's outreach was not reaching everyone
- New funding opened doors for emerging tax assistance programs (e.g., Ladder Up & CFEP) to incorporate FAFSA preparation into services supporting low-income and working class families
- No verified tracking system existed to report actual completion rates





#### **INQUIRE:** Data is the Foundation

In 2007 Specialists, Eric Williams and Bernard McCune initiate meeting with Al Hogan which leads to CPS partnership with the Illinois Student Assistance Commission (ISAC's) Outreach and Research divisions to establish the first data-sharing program.



<sup>\*</sup> CPS data averages between 74% - 76% completion rate for all seniors and 80% for seniors with valid SSN.

### **INITIATE:** Take the Lead and Change the Game

In 2004, Shawn Warden, a CC Specialist with a financial aid background establishes a *Financial Aid Consortium* comprised of representatives from ISAC, university partners, community-based organizations, the U.S. Department of Education.

**Standards** 

Systems

**Strategies** 

#### **INCENTIVIZE:** Invest Resources in our Schools

#### **COACHES AND CORPS MEMBERS**

CPS placed College/Career Coaches in high need schools, and partnered with organizations like ISAC and College Advising Corps to deliver direct support alongside and as cost-neutral added-value resources to fill in the gap.

#### **COLLEGE AND CAREER CENTERS**

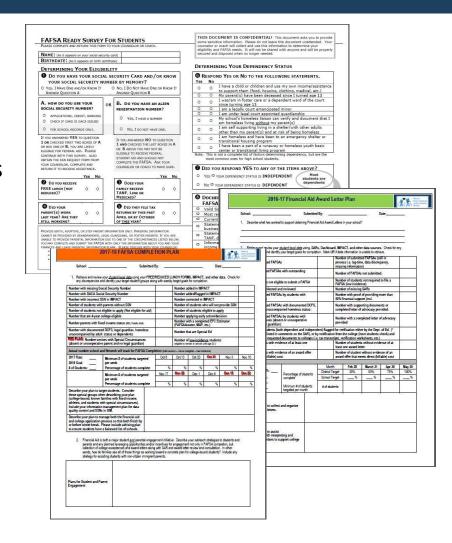
CPS outfitted schools with additional computers initially, evolving to fully operational college and career centers with up to 25 computers, T-1 lines, and furniture to create a space where students and families could come for assistance with college, financial aid and scholarship applications before, during and after school. The Online College and Financial Aid Center Initiative opened up school-based college and career centers to the community.

#### **OPERATION FAFSA PUSH**

Provided customizable marketing materials and templates to publicize FAFSA events. Earmarked funding for Specialists to provide food, giveaways, materials and other resources in addition to incentive funds for schools with the highest FAFSA completion rates.

# INSTITUTIONALIZE: Create Powerful and Sustainable Practices

- FAFSA Completion with target groups (AVID, AP/IB, Athletes, TRIO, GEAR UP, etc.)
- FAFSA Toolkit
  - FAFSA Ready Surveys and Worksheets
  - Financial Aid and Award Plan Templates
- Early College Credentials, College Enrollment and Persistence became part of School Quality Rating Performance (SQRP)



# Financial Aid Completion Plan Sample

#### **Identify the Prospect or Problem**

Completion push before MAP Suspension

Special circumstance cases resistant students/parents

#### Assess the Level of Reach or The Problem/Challenge

How many are accepted and college-bound, low/fixed income, independent students?

How many are technically dependent, but have parent issues or refuse to complete?

#### **Set Goals and Objectives**

% of eligible students completing applying by December 18 (let goal match enrollment rate)

% of problem/challenge students/families targeted by December 18

#### Identify Best Overall Strategies and/or Targeted Intervention

Plan FA sessions at different hours. Address tax-filing issues, waive fees or offer incentives

Assign special cases to adult by clientele, specialty, relationship, etc.

#### Office of School Counseling & Postsecondary Advising

# Looking Ahead

So Where Are We Now?

## **Current Successes & Needs**

#### **Successes**

- Dedicated infrastructure: college/career spaces and postsecondary leaderships teams
- FAFSAs completed before MAP suspension date
- Families less resistant to FAFSA
- Postsecondary teams are CCCAC trained; expert briefs provided
- Trusted partners integrated in schools and campaigns
- Data sharing agreements and tools to track FAFSA completion & concrete postsecondary plans

#### **Needs**

- After FAFSA efforts must be improved to ensure that students get financial aid award letters before HS graduation.
  - SAR Review
  - Updates & Corrections
  - Verification
  - Documentation
- Consumer Ed of Higher Education
  - Affordability Trends
  - Comparison of Award Letters
  - Debt Management
- Renewals / Persistence

# **Current Approach**

#### Data Informed (Inquire)

- Naviance / Dashboard
- Data Sharing Agreements
  - Application Completion
  - MAP Indicator
  - Verification Indicator
  - Other

#### Allocate Dedicated Supports (Incentivize)

- Team of College/Career Specialists in each HS Network
- Team of College/Career Coaches at high need schools
- Team of CCC Postsecondary Navigators and Postsecondary Champions
- Collective Impact Visits
- Lense on Priority Groups
- Directed Resources

#### Sustainable Practices (Institutionalize)

- LPS | ILP, Concrete Plans, Pathways
- Postsecondary Leadership Teams
- School Leaders as Champions
- Focus on School-based Approach
  - FAFSA Plan
  - Financial Aid Award Letter Plan
  - Affordability / Financial Literacy
- Build Knowledge & Enhance Skills
  - Briefs for Financial Aid Facilitators
  - ISAC Financial Aid Certification
- Proxy System

#### COMPACT - Finance Committee \*

- Address Issues that Emerge as Patterns
- Shared Ownership & Approach
- Protocol for Collaboration

# Postsecondary Leadership Teams

# Postsecondary Leadership Teams (PLT)

A **team of stakeholders in schools** guided by the belief that all students must have viable college and career options and a concrete postsecondary plan through the Learn.Plan.Succeed initiative before they graduate. Chaired by school principals and counselors, PLTs lead efforts in their schools and communities to ensure that students participate fully in college and career awareness, readiness, access and success initiatives to access a variety of opportunities that meet their needs, aspirations, and postsecondary success.

#### **Guiding Beliefs**

- Relationships with school staff, administration and partners are central to students' success
- College and career expectations must be held for all students
- Students must have viable college and career **options** once they graduate; a transition plan is key
- Creating a school-wide college and career culture is every stakeholder's job and responsibility
- Understand who is in our school building and use data to guide decisions

# **PLT: Five Guiding Questions**

Five guiding questions to regularly drive the purpose, work and discussion of the Postsecondary Leadership Team are:



# What are we doing and why?

- Solve a problem
- · Fulfill a need
- Build a culture



# Who are we targeting?

- Tier 1 whole school
- Tier 2 target group
- Tier 3 High need intense support



# What are our action steps?

- Strategies
- Interventions
- Collaboration
- Best Practices



# When and where is it happening?

- Logistics
- Resources
- Roles



# How are we tracking what we do?

- Students
- Parents
- Activities
- Monthly
- Quarterly
- Annually

# Higher Ed Compact

**Finance Committee** 

## **Finance Committee**

## Office of School Counseling & Postsec Advising (OSCPA)

Maria Bucio Gloria Purifoy Lysandra Barnett Michele Howard Eric Williams

### **Collegiate Partners**

VPs and Directors of Office of Student Financial Aid 19 IHE represented

#### **University Co-Leaders**

Richard Hayes, City Colleges of Chicago Dr. Christopher Rone, DePaul University Maureen "Mo" Amos, Northeastern IL Univ

### **Agency Partners**

IL Student Assistance Commission IL Association of Student Financial Aid Administrators Ladder Up

## **Priorities**

#### **SY20 Priorities**

- **Cohesion of Work:** How will we leverage our relationships to jointly work towards cross-organizational outcomes? Can we really align systems to meet common goals?
- Knowledge and Skills: How will we build the capacity of postsecondary teams and partners supporting CPS students with affordability issues and financial aid processes?
- **Student & Family Engagement:** How will we jointly build knowledge and financial literacy to effectively manage college costs and navigate financial aid processes?
- Advocacy: How might we voice recommendations, debate for supports that produce greater access, affordability, and choice for students?
- **Funding:** How will we collaborate to earmark grants and scholarships, establish emergency funds, and create paid work and internship options?

#### **Subcommittees**

- Group 1: Knowledge & Skills + Student & Family Engagement
- Group 2: Funding & Advocacy

# Two Initiatives

#### **ISAC FinAid Certificate** SY21

September 21-25, 2020

#### **SY20**

- SPR '19 54 participants; 48 certified
- SUM '19 211 participants; 152 certified
- SPR '20 330 participants; TBD certified (still compiling)

# FinAid Symposium SY21

- September 30, 2020
  - 150 registered

#### **SY20**

- 90% of Network Schools had at least 1 representative in attendance
- 197 Counselors, Coaches, and Postsecondary Service Providers



## Calendar of Events

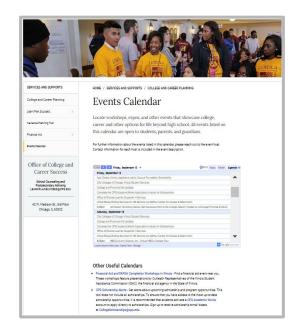
CPS CONNECTION is an event registration tool that informs and populates calendars, newsletters, social media, other communication tools of OCCS and Office of School Counseling and Postsecondary Advising (OSCPA).

#### How to submit an event?

- <u>CLICK HERE</u> to register an event
- cps.edu/LPSCaledar to view public calendar
- For greater effectiveness of this tool, please include "<u>publication ready</u>" text.
- All events registered here must be provided at NO COST to participants.

#### **More Information**

LearnPlanSucceed@cps.edu



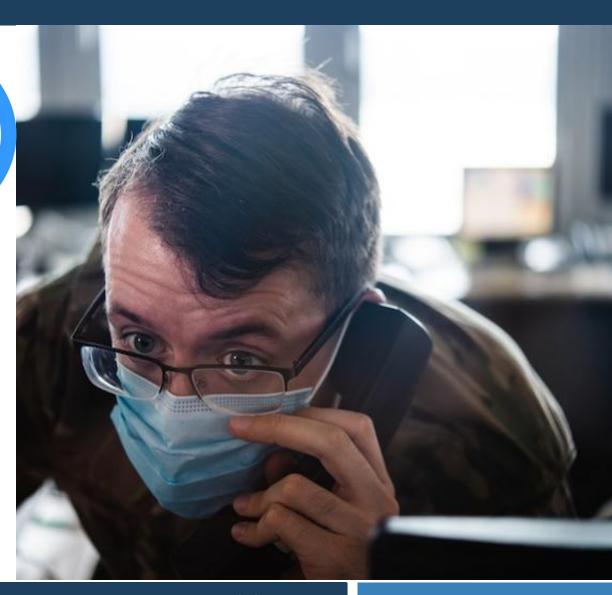
# Virtual World

Tackling Financial Aid Completion in Remote Learning

# Completion in COVID...Hits Different....

"We ain't never scared! Well....sorta?

@CPS



<sup>\*</sup> CPS data averages between

# Collective Impact Visits

College & Career Specialists convene experts and trusted partner organizations and colleges and universities to support school-level efforts to ensure that every student at CPS graduates with a concrete postsecondary plan.

#### **SY19 Impact** (Spring Only)

- 24 Events
- 286 Experts
- 2303 Class of 2019 students engaged

### **Types of Events** (Start Where They Are)

- Applications, FSA ID & FAFSA (October December)
- Applications, Verification / Review of FinAid Award Letters (January March)
- Evidence of Concrete Postsecondary Plans (April May)

# Acceptable Use Policy

https://www.cps.edu/about/policies/acceptable-use-policy/

This site addresses and sets standards of behavior for the use of the CPS network, devices, digital platforms and communications, and interactions among CPS staff and students.

**★** Exceptions to Policy



# Safety

- Volunteer Form for Postsecondary Service Providers
   Only for partners who function within CPS schools.
  - o <u>Tier Info / Vendor Policy</u>
  - How to Become a Vendor

			TO CPS STUDENTS		
	TO CPS STAFF	TO CPS FAMILIES	EMAIL	LIVE VIDEOCONFERENCE VIA Google Meets ONLY	PHONE
TIER O	1	x	x	x	x
TIER 1 REMOTE LEARNING PARTNER	<b>√</b>	With written permission from principal	With:  -Written permission from principal -CC to approver or designee	Google Meets only  Multiple students only CPS staff must initiate and participate	x
TIER 2	<b>√</b>	✓ Via vendor's cps.edu email	Only via vendor's cps.edu email to student's cps.edu email	Google Meets only     1:1 or multiple students     Only via vendor's cps.edu email to student's cps.edu email	x

Postsecondary Screening Form for Recruiters

All postsecondary representatives will be required to complete this form.

# This is Unchartered Territory

"Like you we're looking for answers and ideas" @CPS



<sup>\*</sup> CPS data averages between

#### **Recommendation 1:**

Use multiple channels and methods to continue outreach to students and provide support for completion of applications.

- Avoid group sessions and do not record when completing applications or discussing personal information.
  - Provide virtual advisement and 1:1 coaching online and over the phone with students and their families.
  - Convert in-person workshops and events to online events and recordings for on-demand access.
  - DO NOT send, upload, or use Google suite to collect or swap documents.
- Seek collaboration with trusted sources of information:
  - Partner with universities and community-based groups to expand reach.
  - Coordinate efforts with ISAC, Ladder Up, and other state and local agencies.

- Use multiple channels to send reminders and alert families of changing deadlines, including more traditional methods like postcards and print ads to reach students and families who may not have access to internet.
- Maximize the availability of Naviance the college and career portal used at CPS.
- Maximize your school's Google Suite, Website and and other Social Media spaces:
  - Create one-stop-shops for online resources, and playlist tutorials that students, families, and other stakeholders can easily access at any time.
  - Use social media to share information, but promote chats and videos using other channels to bring in students and families who are not already following accounts.
- Leverage ready-to-use resources and tools provided by:
  - ISAC, US Dept of Education Federal Student Aid, National Association of Student Financial Aid Administrators, Illinois Association for College Admission Counseling and Others

# **Recommendation 2:** Ensure that staff and volunteers that assist students with completion of applications are trained experts.

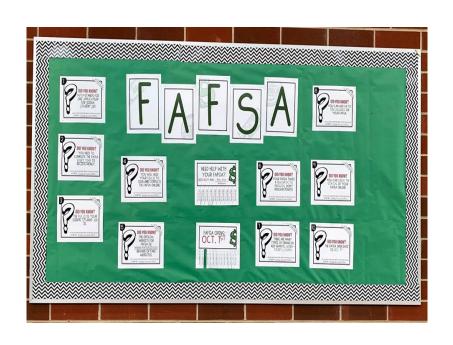
- Financial Aid Certification Training is possible through our relationship with Illinois Student Assistance Commission (ISAC), a key partner that builds financial aid knowledge among front-line resource people who help students in their local communities.
- ISAC Corps Can assist with the ins and outs of virtual completion, workshops, award review and more!
- Ladder Up Carly Oishi, the Director of Financial Capability at Ladder Up, will be hosting five FAFSA Ask Me Anything sessions to answer your questions about the application process and college financial aid.

Financial Aid and Admission Officers at Colleges and Universities across the Nation



# **Recommendation 3:** Collect and monitor data and adapt outreach practices as needed.

- Track completion of applications to target engagement of students and their families.
- The <u>CPS Dashboard</u> captures completion and submission of FAFSA and Alternative Application for IL Financial Aid.
- Progress monitor in your Postsecondary Leadership Team (PLT) meetings:
  - Who is being missed? Why?
  - What can you do to re-engage each student/parent?



**Recommendation 4:** Provide *verification support* to help students and families navigate the process and ensure they can access financial aid.



- Help students navigate the verification process, including:
  - Explanation of <u>the process</u>
  - Review <u>Student Aid Report</u> (SAR)
- Direct students and families to appropriate <u>campus portals</u> to submit documents.
- Strategically take advantage of limited on-site support.
  - Who is less successful in the virtual world?
  - Who needs more intense support on campus?

# Learn.Plan.Succeed.















**Notice** 

**MILITARY Enlistment Letter** 

**EMPLOYMENT** Offer Letter

APPRENTICESHIP **PROGRAM** Acceptance Letter

JOB TRAINING **PROGRAM** Admission Letter

**GAP YEAR PROGRAM** Admission Letter

OTHER\*\* Counselor or Coach **Verified Option** 

**Former Definition** 

**Expanded Definition** 

\*\* Acceptable evidence varies based on the postsecondary pathway a student chooses to pursue after high school graduation.

# What is Learn.Plan.Succeed?

Learn.Plan.Succeed. is a high school requirement that starts with the Class of 2020. Every 12th grade student must have evidence of next institution for life beyond high school in the form of a concrete postsecondary plan.

To provide a high quality public education for every child, in every neighborhood, that prepares each for success in college, career, and civic life.



# LPS Implementation

The Naviance college and career planning platform is integral to LPS implementation as it is the primary way of tracking, progress monitoring, and evaluating strategies.

#### INDIVIDUALIZED LEARNING PLANS

ILPs are at the core of Learn.Plan.Succeed. Success. By starting conversations and exploration as early as possible, students will be prepared to make postsecondary decisions during their senior year.

Elementary and high school counselors play a vital role in ensuring ILPs are developed for each student from  $6^{th}$ — $12^{th}$  grade.



Naviance will collect seniors concrete postsecondary plan.

POSTSECONDARY PLAN



#### PROGRESS MONITORING

The Key Performance Indicator, usage, and ILP reports will be used to progress monitor and sent to chiefs, principals, specialists, and counselors to understand the impact of interventions and for planning.



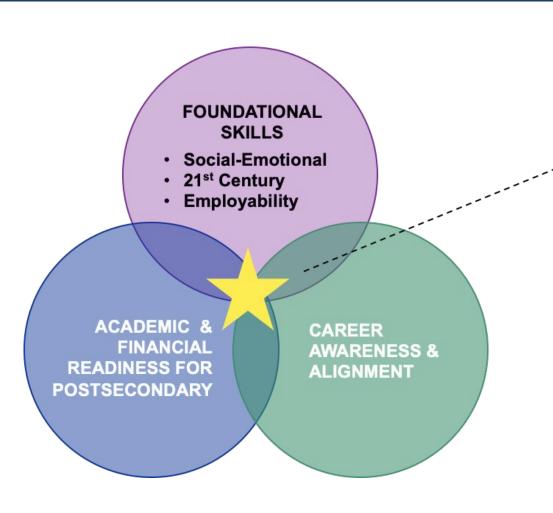


The evidence collected in Naviance will then be used to compute the Learn.Plan.Succeed SQRP metric.

# **SY21 OSCPA Priorities**

Department	Priority Summary	Targeted Student Group(s)
Office of School Counseling and Postsecondary Advising (OSCPA)	College and Career Competency Curriculum (C4)  Outline College & Career Competencies for Grades 6-12 Develop a College & Career Curriculum Phase I (Gr 11 & 12) Align Individual Learning Plan (ILP) Scope and Sequence Provide tools guidance, coaching and resources	Grades 6-12
	Postsecondary Equity & Empathy Professional Learning System (PEEPLS)	Grades 6-12
	<ul> <li>Outline Domains &amp; Competencies for OSCPA Practitioners</li> <li>Develop PD Objectives and Content (Phase I)</li> <li>Systematize Assessments for All PDs (Phase 1)</li> <li>Conduct Outreach &amp; Create Partnerships</li> </ul>	

# **Postsecondary Competencies**



LEARN. PLAN. SUCCEED.

Every CPS graduate has a concrete postsecondary plan and the information, support, and resources necessary to implement it

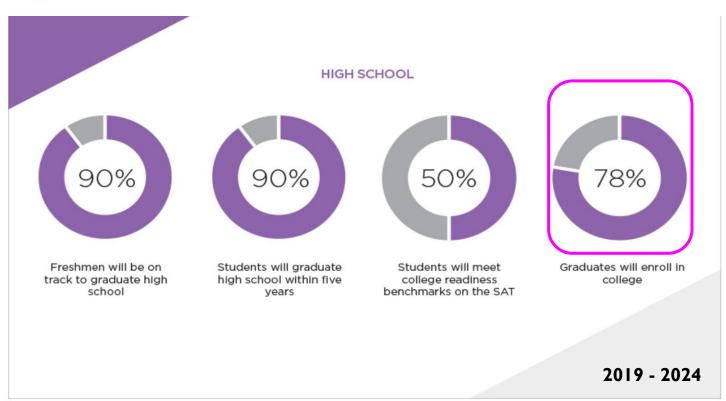
# **CPS 5-Year Goals**

We believe that CPS is just getting starting in our journey to the new heights our school district can achieve. So to prepare our students for success in a global economy, we are elevating instruction in every content area to emphasize deeper reasoning and creative problem-solving.

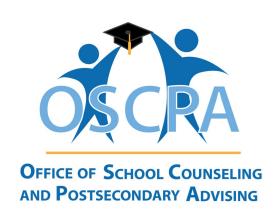
Early Childhood

**Elementary School** 

— High School



# Thank You! QUESTIONS



#### María Bucio

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### **Network College & Career Specialists**

**CLICK HERE** for Directory