BEYOND FINANCIAL AID | ACTION PLANNING GUIDE

Now that you are familiar with *Beyond Financial Aid (BFA)*, this action planning guide can support practitioners like you in exploring opportunities to strengthen financial supports to support student success on your campus. Specifically, this guide can support your college in:

- Introducing BFA to influencers and implementers on your campus;
- creating a core institutional team to guide this effort;
- conducting a self-assessment of your college's current policies and practices;
- reflecting on the results from the self-assessment to inform next steps, and
- developing a plan of action to expand financial supports to strengthen student success.

The work is divided into four phases:

Phase 1: Prepare.
Goal: Familiarize key individuals at the college and build a core team that can shepherd the self-assessment and action planning process.
Phase 2: Conduct.
Goal: Complete the *BFA* self-assessment, either together as a group or individually.
Phase 3: Discuss.
Goal: Reflect on the self-assessment results and generate a collective understanding of the current state of financial support along with suggested areas of focus for action.
Phase 4: Act.
Goal: Prioritize areas of focus and develop a plan of action.

Phase 1: Prepare.
Goal: Familiarize key individuals at the college and build a core team that can shepherd the inquiry and action planning process.
Core activities:

1. *Introduce BFA at the college.* This step is critical in bringing key players at your campus "up to speed" on what *BFA* is, why it can be a valuable tool for the college and eventually its students, and how to use it to enhance supports for students. We would suggest sharing the *BFA Executive Summary* as an introductory document to both those who will be on your cross-functional core team (Step #2) and hopefully, as a wide range of practitioners as possible so that the work of the core team is made easier by familiarity with *BFA*, its strategies, and its approach. Also, consider the venues where *BFA* can be introduced, including a college Flex Day, student success committee meetings, etc. Engaging your college in this preliminary stage will not only build awareness about expanded financial support for students, but enable some practitioners to play a larger role developing and implementing the policies and practices associated with this work. (All *BFA* resources, including a introductory 75-minute *BFA* webinar and the 2-page Info Sheet are available here.)
2. *Build a core cross-functional campus team who can guide this inquiry and action planning process.* The team can be an existing group of colleagues already working on

student success issues on your campus or a new committee focused on this effort. Include voices who represent various aspects of the student experience and have direct knowledge, data and/or oversight in the campus activities covered by the *BFA*'s Six Strategies.

   a. Members might include senior leadership (Student Affairs, Academic Affairs, Chief Financial Officer, Chief Business Officer), faculty and/or faculty leadership (e.g., Academic Senate, Faculty Association), student services (e.g., financial aid, counseling, career services), program directors (e.g. TRIO, veterans), institutional research/planning/effectiveness, and/or leadership from the Foundation.
   b. It is up to your campus' core team to determine when to engage external partners as well as students in this process. Students can be included at any phase of the process. For the most part, we suggest adding external partners once the internal campus team has had initial meetings, where there has been a conversation of how the external partners might best be engaged.

3. *Develop a plan and schedule to conduct the BFA self-assessment.* The self-assessment can help facilitate conversations around the current environment of support at your college, potential areas to expand and/or innovate, and opportunities to connect this work to other campus efforts.
   - Walk through the *BFA* self-assessment as a team and establish any common definitions among your team members so there is consistency in the responses (e.g., Defining "low-income students" as Pell grant recipients; deciding the criteria for providing a "B" rating on an item, etc.).
   - Determine whether the self-assessment will be completed as a team or individually.
     - Completing the self-assessment as a team:
       - <u>Pros</u>: allows team to come a collective consensus on each item; also provides the opportunity for real-time exchanges that enable team members to learn about current services or activities that may not be known campus-wide
       - <u>Cons</u>: can lead to "groupthink" when coming to consensus; also more challenging logistically as key players may not be able to attend a meeting
       - If the team decides to complete the self-assessment as a team, it should identify who will facilitate the self-assessment process and the subsequent discussion of results. Use the *BFA College Meeting Facilitation Guide* as a resource to help guide the post-assessment discussion.
     - Completing the self-assessment individually:
       - <u>Pros</u>: better serves individuals with varying schedules; get a better sense of the variance between individual responses which can be a sign of the need to market existing services; may provide more candid and honest responses from each respondent

        - <u>Cons</u>: adds a step of building consensus for responses to items; also can lead to potentially inaccurate/incomplete results if few people know about a given service the campus offers
        - If completed individually, the team lead(s) can provide clear instructions on what to prepare for discussing the results as a team (e.g., answer all items for the six strategies, jot down college examples for any items you rate as an "A") and schedule a follow-up team meeting. If possible, identify a team member who can agree to collect all the responses a couple of days before the team meeting and aggregate the individual responses into a single spreadsheet; this can facilitate the discussion.
  - Create a timeline for completing the self-assessment and discussing the group/individual results.
    - If taken as a group, it may take a couple of meetings to complete the entire self-assessment, depending on the length of your meetings.
    - If taken individually, allow time for collection and initial tabulation of the responses before the in-person follow-up meeting.

Phase 2: Conduct.
Goal: Complete the *BFA* self-assessment, either as a group or individually.

- Respond to each item for each of the six strategies.
- Record the total number of As, Bs, and Cs for each strategy.

Phase 3: Discuss.
Goal: Reflect on the self-assessment results and generate a collective understanding of the current state of financial support along with suggested areas of focus for action.
Core Activities:

1. *Reflect on the self-assessment results*.
    a. Spend some time summarizing the major findings and insights from each strategy. What is working well? What are the opportunities? What are the challenges? Which types of support/resources are needed? Who else needs to be engaged in this conversation?
    b. Consider these additional strategy-specific questions to help guide the discussion.
        i. Strategy 1: Know the low-income students at your institution.
            1. What quantitative and/or qualitative data do you currently collect about financial challenges faced by your students?
            2. What data can do you currently collect about the impact of these financial challenges on student progress and completion?
            3. How are these data used? In which institutional conversations are they currently presented/discussed?
            4. Of the self-assessment items, which items would you identify as priority activities for your college? Why?

5. For self-assessment items that you were not able to answer, who on your campus might be better positioned to address them?

ii. Strategy 2: Provide supports to help low-income students overcome practical barriers.
   1. What types of services do you think your students most need? How do you know?
   2. What services and supports do you already provide to your students? Do students who need them know where to find / access these services? How do you know?
   3. Where can your institution expand and/or strengthen assistance? How do you know?
   4. Of the self-assessment items, which items would you identify as priority activities for your college? Why?
   5. For self-assessment items that you were not able to answer, who on your campus might be better positioned to address them?
   6. Share an example of bundled/integrated services for students on your campus, where two or more services are connected or provided together. Or, share an example of a campus service (beyond traditional forms – grants, loans, scholarships, work study) that addresses students' financial stability concerns.

iii. Strategy 3: Leverage external partnerships for service delivery on campus.
   1. Which financial needs (e.g., food, housing, childcare) are addressed through current partnerships? Which needs are not currently being addressed?
   2. Which current relevant partnerships can be leveraged or expanded?
   3. How can critical connectors (e.g., President, Board of Trustees, Foundation, senior leadership) help strengthen these partnerships?
   4. Share a current service provided by a partner organization that supports the financial stability of students. How does the partnership work? How is the service delivered? Who receives this service? Who on campus work with the partner organization? What is the greatest challenge in expanding this service?

iv. Strategy 4: Empower low-income students to use available resources.
   1. Which services (that could greatly benefit low-income students) are currently underused?
   2. What is critical information for low-income students to access? How is that information currently delivered? How would students prefer to access that information? What would increase the ability/desire of students to access that information?
   3. Which services could be revised to be "opt-out" instead of "opt-in"?

    4. What opportunities exist to reduce stigma associated with certain services?
    5. Share a current approach in practice that enables more students to use an existing service. What contributes to its success? What types of resources were/are being invested? What role, if any, did students play in this process?
   v. Strategy 5: Review your internal processes.
    1. How can we better learn the unintended impacts our processes may have on our low-income students?
    2. Which institutional processes may currently have unintended consequences for low-income students?
    3. Which institutional processes offer opportunities to better understand and/or support our students?
    4. How much do faculty, staff, and administrators know about the variety of campus services that current exist to support low-income students?
    5. Are there any current professional development opportunities that support faculty, staff, and administrators in better understanding the circumstances and challenges faced by low-income students or services to support them? If so, which ones?
   vi. Strategy 6: Implement effective practices to strengthen the academic progression of all students.
    1. What are the major current policies, practices and/or programs (e.g. guided pathways, orientation, advising, registration, First Year Experience) at your college that support student progress and success?
    2. What is the impact of these current efforts on the success of low-income students? How do you know?
    3. Which current efforts already address financial stability in some way? How is that done?
    4. Where could the knowledge and/or provision of financial supports be integrated in these efforts?

Phase 4: Act.
Goal: Prioritize areas of focus and develop a plan of action.
Core Activities:

1. *Determine the priority areas for action.* While this is more an art than a science, consider the combination of scale, impact, leverage, and ease in your prioritization efforts.
   a. Consider scale. Which strategies/changes would positively affect large numbers of students at your college?
   b. Consider impact. Which strategies/changes would generate the largest student and/or institutional outcomes?

c. Consider leverage. What existing efforts/partnerships could be tapped to move this work forward? This may include key relationships with internal and external partners or identifying effective efforts on campus that could be expanded.
d. Consider ease. Which strategies/changes could be quickly or easily implemented, without a large investment of resources, to provide some "quick wins" and pave the way for implementing more complicated/long-term strategies?

2. *Identify missing information and voices.*
    a. What additional quantitative and qualitative data are necessary to understand the nuances of this issue? Your college researcher can be a valuable asset in supporting the team's efforts to gather, present, and interpret the data.
        i. Do these data exist in your college's student information system or elsewhere on campus? If so, can these be provided by your institutional researcher?
        ii. If the necessary information is external to the college, where are they located and how can they be accessed?
    b. Which other individuals, committees, or areas on your campus should be informed about or involved in this work? Where are opportunities for collaboration inside and outside the institution? Where do external partners fit in? Where can students play a role in this process?
2. *Determine next steps.*
    a. Which actions/changes will help address the priority strategies/focus areas? Use the template on the next page to map out your top three to five actions, or add other rows for more detailed action planning.

Action Planning Template

Guidelines: Identify 3-5 next steps for your college in terms of using *Beyond Financial Aid* and/or addressing financial stability issues for your low-income students. These can be process steps such as identifying how a fuller range of practitioners at the college can engage with *BFA* or they can be discrete steps such as creating a food pantry or reaching out to partners to offer workshops on campus. For each item, indicate the intended audience/outcomes, the expected challenges, lead person(s) (suggest 1-2 people), timeline, and any necessary resources/supports.

Step	Intended Outcomes	Expected Challenges	Lead Person(s)	Completion Date	Resources/Supports Needed
1.					
2.					
3.					
4.					
5.					