



CASI Learning Community

October 10, 2018

Innovative Scholarship Workgroup 2018 Goals

1. Create and execute a learning agenda which addresses workgroup members' needs
 - A. Explore financial aid processes for post-secondary institutions
 - B. Learn about scholarship displacement and how to address its challenges to meet needs of scholarship providing organizations.
 - C. Develop and share best practices in scholarship administration (e.g. on-line platforms)
2. Obtain and share legal and other expertise to resolve members' issues
 - A. Legal guidance on working within and/or changing scholarship restrictions for donor advised funds, endowments, etc.
 - B. Legal guidance on donor involvement in scholarship selection process
3. Communicate best practices on how to interact with donors (in executing current scholarship programs and/or revising program restrictions based on what learned in goals 1 & 2).
4. Provide strategic input into the development of FPN's CASI Learning Community; share learnings developed from ISWG activities.

Input from CASI Learning Community



What are your biggest challenges?

What would you like to get out of the Learning Community?

Preferred learning methods?

CASI Learning Community Guiding Statement

DRAFT

The CASI Learning Community exists to support and inform philanthropy's role in the use of its investments to increase the college-going and post-secondary completion rates of students traditionally underrepresented in higher education. It will focus on strategies and best practices to support local collaborative efforts, data collection and analysis, and non-traditional scholarship programs and products.

PANEL: Post-secondary Institution Financial Administration Practices and Scholarships



Daniel Barkowitz
Valencia College
Ass't. VP, Financial Aid,
Veterans' Affairs



Jackie LaTorella
University of Tampa
Director of Financial Aid



Damieon Lovett
Univ. of South Florida
Campus Director of
Financial Aid



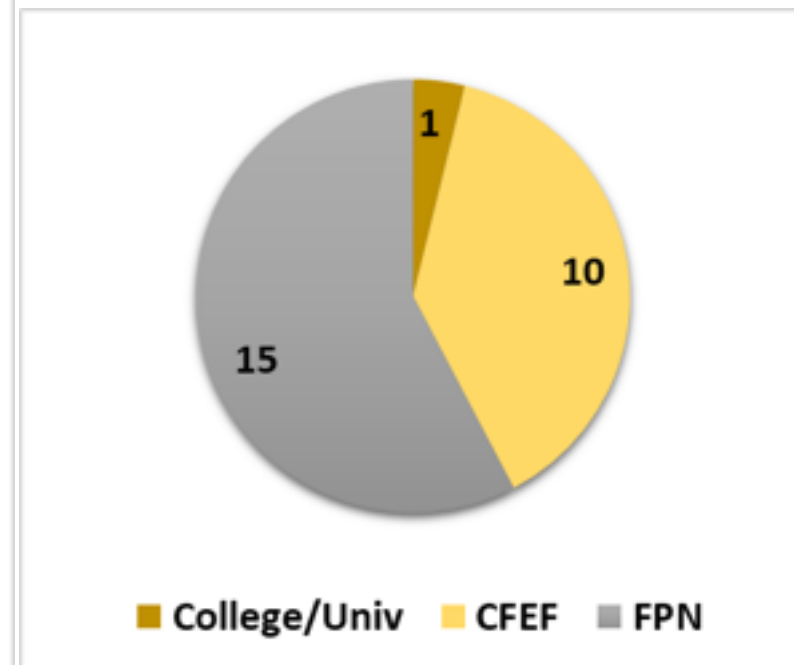
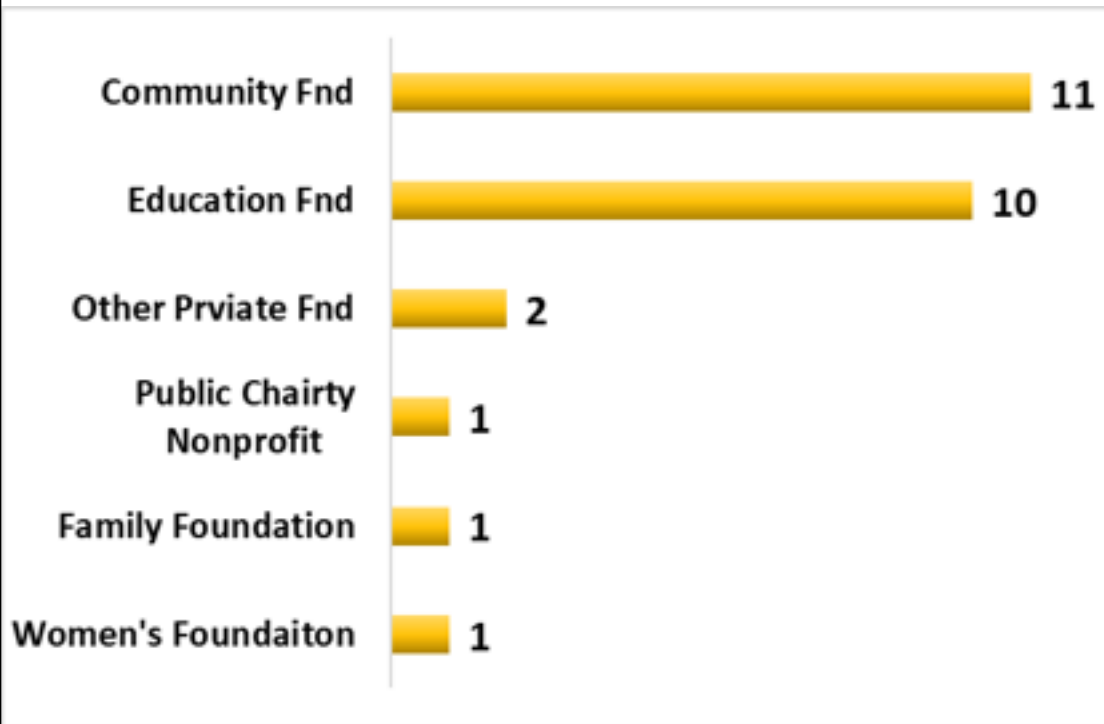
Wayne Kruger
St. Petersburg College
Director, Financial
Assistance Operations



CASI Learning Community

October 10, 2018

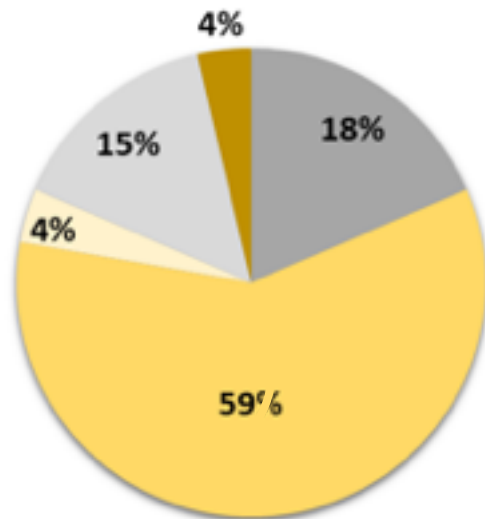
Scholarship Survey



27 Respondents; 14 are members of LCANs

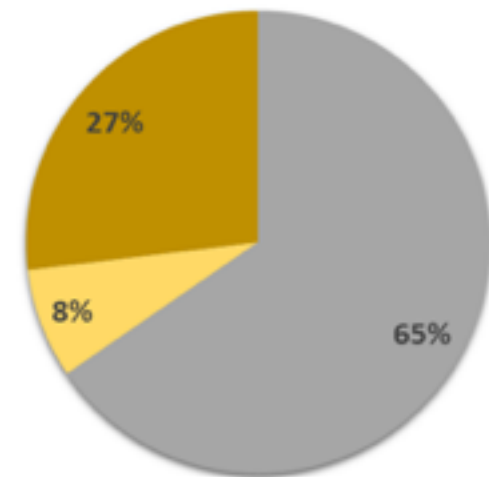
Scholarship Survey

Total Scholarships Amount



■ \$1M & Over ■ \$100,000 - \$1M ■ \$50,000 - \$99,999
■ \$1,000 - \$49,999 ■ Under \$1,000

Scholarship Dollars Restricted



■ 75-100% ■ 50-74% ■ 0-49%

Scholarship Survey

	Merit Based	Needs Based	Emergency Financial Assistance	Performance Based	"Micro" Scholarships	Other
All	2	7	0	1	0	0
Most	5	9	0	3	0	0
Some	12	8	5	11	1	3
None	5	1	18	9	23	14
Don't know	3	2	4	3	3	10

Scholarship Survey

	First-generation college students	Low-income students	Students belonging to specific racial/ethnic groups	Veteran students	Students of a specific gender identity	Students pursuing a specific major, program or degree
All	1	7	0	0	0	0
Most	3	11	1	0	0	2
Some	13	4	12	4	8	17
None	8	3	11	20	17	6
Don't know	2	2	3	3	2	2

Scholarship Survey

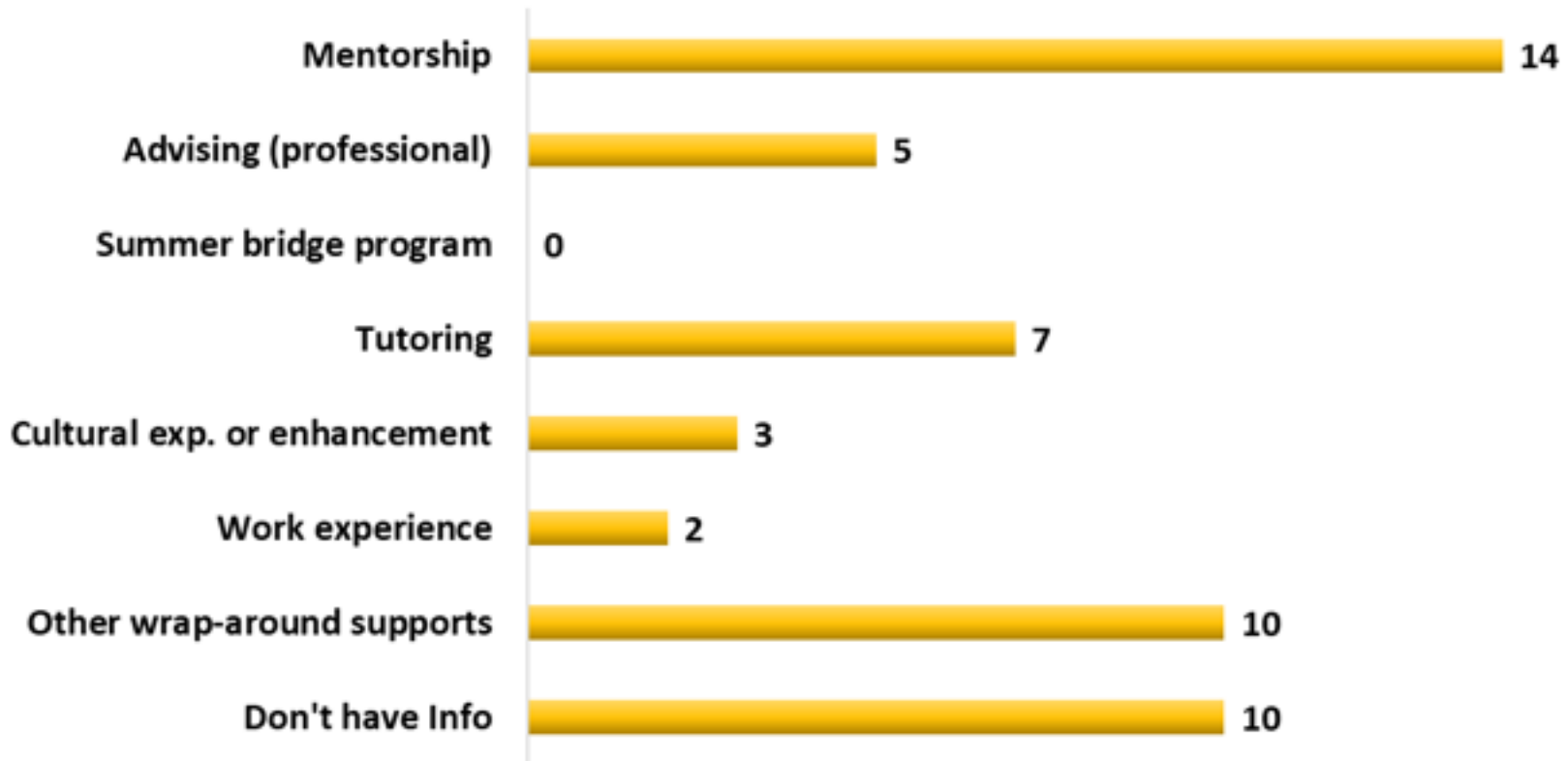
	Homeless students	Foster care students	Undocumented or "DREAMer" students	Migrant or farmworker students	Florida resident students	Students living in specific geographic region
All	0	0	0	0	10	9
Most	0	0	0	0	4	3
Some	5	6	5	4	8	8
None	20	20	20	21	4	6
Don't know	2	1	2	2	1	1

Scholarship Survey

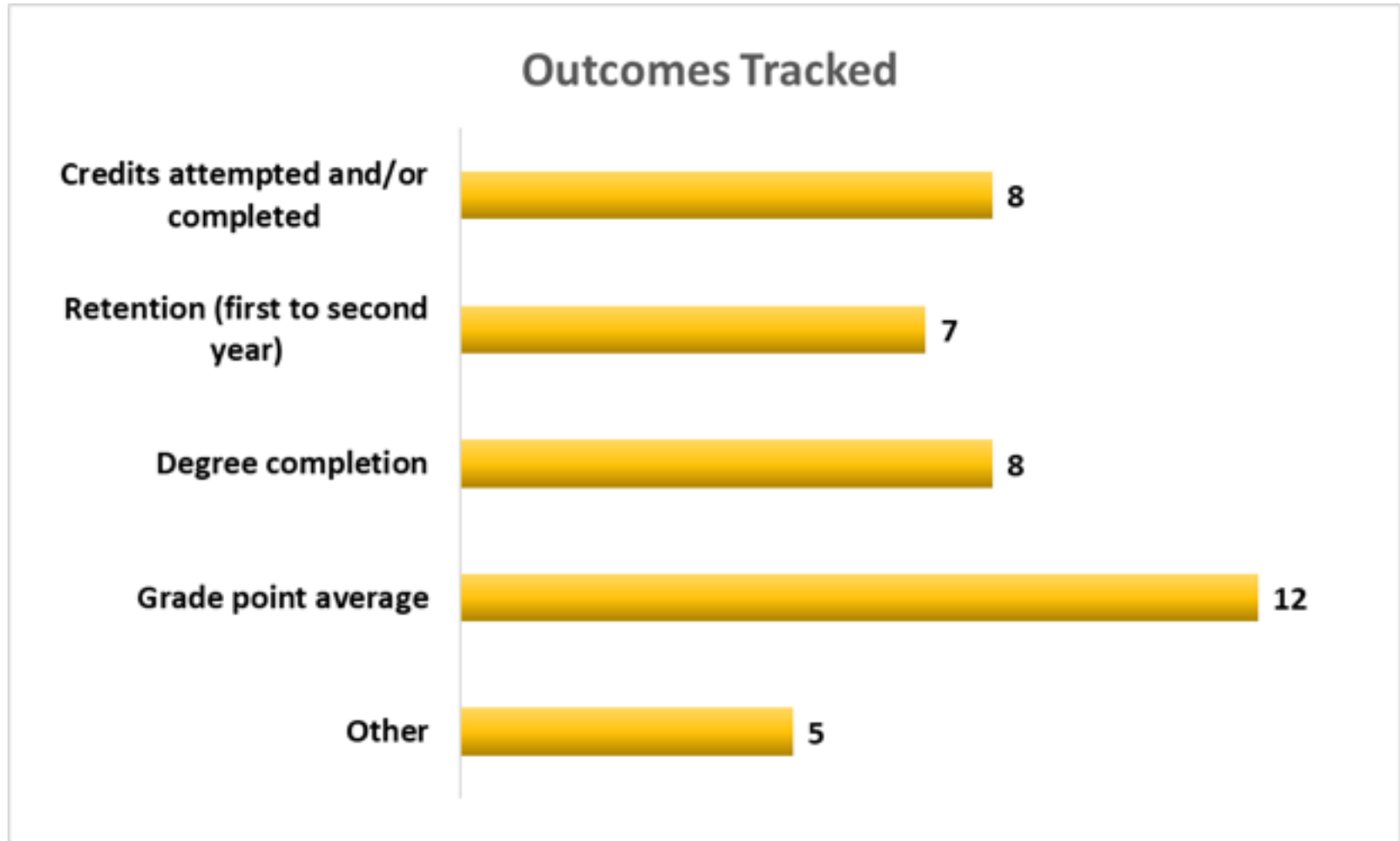
	Students attending specific postsecondary instituton(s)	Students graduating from specific school	Gifted or talented (e.g. high IQ) students	Students with intellectual disabilities (i.e. students special needs or unique abilities)	Other student populations not included in other categories
All	1	3	0	0	0
Most	4	1	0	0	0
Some	11	17	9	6	3
None	8	5	15	19	15
Don't know	3	1	3	2	9

Scholarship Survey

Scholarships Tied to Other Student Supports



Scholarship Survey



Scholarship Survey

Marketing								
	Outreach to schools / districts	Local media	Foundation website	Foundation Facebook page	Foundation Twitter account	Other foundation social account (Instagram, Snapchat, YouTube, etc.)	Official college / Univ. financial aid search portal	Other financial aid search portals (ex. FastWeb, Zinch, etc.)
Strongly Agree	15	2	10	10	5	5	3	3
Agree	7	13	9	7	7	4	6	2
Disagree	0	5	2	1	4	5	4	7
Strongly Disagree	1	3	2	5	7	9	10	11

Scholarship Survey

Administrative & Program Challenges	
✓ Time & Application process	✓ Donor demands & exceptions
✓ Affordable Admin. Platform	Inconsistent # of applications
✓ Tracking students	Getting enough applications
Staying current with students	Incomplete applications
Sorting multiple criteria	Lack of student follow up on attachments
Dual scholarship application	Raising funds for scholarships
✓ Donor restrictions	

Public Perceptions of Higher Education, Financial Aid and Educational Supports



Paul Perrault, Ph.D.

Vice President, Director of Research & Evaluation
Helios Education Foundation

Equity-Minded Leadership and Decision-Making



Alicia C. Dowd, Ph.D.

Professor of Education

Director, Center for the Study of Higher Education (CSHE)

Director, CSHE Academic Leadership Academy

Pennsylvania State University

Associate Editor, Review of Educational Research

Scholarship Legal Considerations and Approaches



Jim Hasson

Hasson Law Group

CASI Learning Community



Reflections?

CASI Learning Community Guiding Statement

DRAFT

The CASI Learning Community exists to support and inform philanthropy's role in the use of its investments to increase the college-going and post-secondary completion rates of students traditionally underrepresented in higher education. It will focus on strategies and best practices to support local collaborative efforts, data collection and analysis, and non-traditional scholarship programs and products.

CASI Learning Community



Resources from Convening
Learning Community Goals
Future Programs

CASI Learning Community

[Home](#) » [Programs](#) » [College Access & Success Initiative](#) » CASI Toolkit

CASI Toolkit

FLORIDA PHILANTHROPIC NETWORK PRESENTS

COLLEGE ACCESS & SUCCESS INITIATIVE

Funded by Helios Education Foundation and The Kresge Foundation

Chapter 1: Introduction

Quality of Life

Why Education and Students Can't Wait

Seven Reasons to Lead

Florida's Prosperity

IN THIS CHAPTER

☰ Chapter 1: Introduction

Gain a better understanding of how postsecondary attainment rates can boost your community's quality of life and how community foundations are poised to support local college access networks (LCANs).

- ▶ Quality of Life
- ▶ Why Education and Students Can't Wait
- ▶ Seven Reasons to Lead in College Readiness
- ▶ Postsecondary Attainment is Key to Florida's Prosperity
 - ▶ Attainment Rates
 - ▶ Median Annual Wages



CASI Learning Community

October 10, 2018