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.
What are your biggest challenges?

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

Preferred learning methods?
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

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27 Respondents; 14 are members of LCANs
Scholarship Survey

Total Scholarships Amount

- $1M & Over: 4%
- $100,000 - $1M: 15%
- $50,000 - $99,999: 18%
- $1,000 - $49,999: 4%
- Under $1,000: 59%

Scholarship Dollars Restricted

- 75-100%: 27%
- 50-74%: 8%
- 0 - 49%: 65%
## Scholarship Survey

<table>
<thead>
<tr>
<th>Type</th>
<th>Merit Based</th>
<th>Needs Based</th>
<th>Emergency Financial Assistance</th>
<th>Performance Based</th>
<th>&quot;Micro&quot; Scholarships</th>
<th>Other</th>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th></th>
<th>First-generation college students</th>
<th>Low-income students</th>
<th>Students belonging to specific racial/ethnic groups</th>
<th>Veteran students</th>
<th>Students of a specific gender identity</th>
<th>Students pursuing a specific major, program or degree</th>
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<tbody>
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</table>
## Scholarship Survey

<table>
<thead>
<tr>
<th></th>
<th>Homeless students</th>
<th>Foster care students</th>
<th>Undocumented or &quot;DREAMer&quot; students</th>
<th>Migrant or farmworker students</th>
<th>Florida resident students</th>
<th>Students living in specific geographic region</th>
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<tbody>
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</tbody>
</table>

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## Scholarship Survey

<table>
<thead>
<tr>
<th></th>
<th>Students attending specific postsecondary institution(s)</th>
<th>Students graduating from specific school</th>
<th>Gifted or talented (e.g. high IQ) students</th>
<th>Students with intellectual disabilities (i.e. students special needs or unique abilities)</th>
<th>Other student populations not included in other categories</th>
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<tbody>
<tr>
<td>All</td>
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</tbody>
</table>

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Scholarship Survey

Scholarships Tied to Other Student Supports

- Mentorship: 14
- Advising (professional): 5
- Summer bridge program: 0
- Tutoring: 7
- Cultural exp. or enhancement: 3
- Work experience: 2
- Other wrap-around supports: 10
- Don't have info: 10
Scholarship Survey

Outcomes Tracked

- Credits attempted and/or completed: 8
- Retention (first to second year): 7
- Degree completion: 8
- Grade point average: 12
- Other: 5
## Scholarship Survey

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Outreach to schools / districts</th>
<th>Local media</th>
<th>Foundation website</th>
<th>Foundation Facebook page</th>
<th>Foundation Twitter account</th>
<th>Other foundation social account (Instagram, Snapchat, YouTube, etc.)</th>
<th>Official college / Univ. financial aid search portal</th>
<th>Other financial aid search portals (ex. FastWeb, Zinch, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
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<tr>
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</tbody>
</table>
## Administrative & Program Challenges

<table>
<thead>
<tr>
<th>✔️ Time &amp; Application process</th>
<th>✔️ Donor demands &amp; exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Affordable Admin. Platform</td>
<td>Inconsistent # of applications</td>
</tr>
<tr>
<td>✔️ Tracking students</td>
<td>Getting enough applications</td>
</tr>
<tr>
<td>Staying current with students</td>
<td>Incomplete applications</td>
</tr>
<tr>
<td>Sorting multiple criteria</td>
<td>Lack of student follow up on attachments</td>
</tr>
<tr>
<td>Dual scholarship application</td>
<td>Raising funds for scholarships</td>
</tr>
<tr>
<td>✔️ Donor restrictions</td>
<td></td>
</tr>
</tbody>
</table>
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
Reflections?
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 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 care 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

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