



## CASI Learning Community Convening

Wednesday; October 10, 2018 | 8:30am – 3:30pm ET

Hilton Tampa Downtown

211 N. Tampa St.; Tampa, FL 33602 | 813-204-3000

### Convening Objectives

- ✓ Introduce the FPN CASI Learning Community and identify member needs
- ✓ Learn how financial aid is administered in order to avoid scholarship displacement
- ✓ Increase understanding of current scholarship landscape, alternative designs, and the latitude allowed in administering restricted scholarships.

### Approved Guiding Statement:

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.

### Agenda

#### Facilitated Input from CASI Learning Community Members

*Bill Hoffman, FPN Education Consultant*

Attendees worked to identify areas of work for the LC.

#### Challenges:

- Engaging leadership in the importance of the work
- Staying ahead/current of the changes in workforce needs
- LCAN Financial stability
- Fundraising Plans/Dedicated Fundraisers
- Displacement

#### Learning Methods:

- Zoom Virtual meetings, but partnered with at least 2-3 in person meetings per year (including Summit)
- Possible site tours
- Continuing to update online resources

#### Outcomes:

- Best Practices/Strategies for Success
- Sharing of reports and documents
- Subcommittees in interest areas
- Standardization (statewide)
- Advocacy and policy work

**PANEL: Post-secondary Institution Financial Administration Practices & Scholarships**

*Daniel Barkowitz (Moderator), Valencia College, Assistant VP, Financial Aid & Veterans' Affairs*

*Jackie LaTorella, Director of Financial Aid, University of Tampa*

*Damieon Lovett, Campus Director of Financial Aid, University of South Florida*

*Wayne Kruger, Exec. Director, Financial Assistance Operations, St. Petersburg College*

**Most are targeted to low-income students and may also be “specific geographic area” – i.e. education foundations award in their district.**

**Adjusting cost of attendance to assist in unexpected expenses-laptop needs, transportation issues (car repairs, flight, but not a new car) How long the student travels will impact amount.**

### **Innovative Scholarship Workgroup – Survey Results and Goals**

*Bill Hoffman, FPN Education Consultant*

Refer to attached slide deck.

### **Public Perceptions of Higher Education, Financial Aid and Educational Supports**

*Paul Perrault, Vice Pres., Dir. of Research & Evaluation, Helios Education Foundation*

**Poll was conducted to see how Floridians perceived of these issues.**

**What is Florida's most pressing education issue? Tuition-Dollars, Equity, Access, readiness, Support, complete, persistence 2 degree, early-childhood.**

**Scientific poll- partnered with outside agency. Wanted to capture rural/urban areas, across political affiliations. Gave people not usually heard from a voice. Samples are +/- 2-3%, smaller than most political polls.**

**Tuition in AZ is about \$7,000 more than in FL. What should happen with Bright Futures was a question asked.**

**Public perception is that almost 62% of people ranked higher ed as important to be successful in today's workforce, across all demographics. Biggest difference was between rural/urban.**

**It jumps to 72% when we look at perceptions of the importance 10-15 years into the future.**

**Barriers, what is the biggest barrier? FPN group selected Completion as the largest barrier with readiness ranking 2nd. Student debt & access tied for last.**

**Public picked student debt by 46.33%, readiness came in at 19.95%, completion came in at 12.84%.**

Challenge of “Life issues” was raised as to why students don’t complete and the importance of how that impacts students. Paul mentioned that we do need to focus more on issues outside of debt and readiness. This does show that most people don’t think it’s an access issue.

Paul- there is no silver bullet, we need to find where things overlap and work to help students succeed. And not letting the students give up. Most issues tend to get lumped into student debt, but that’s not necessarily tied to tuition issues. It can encompass life issues as well.

Nearly 50% think college is unaffordable.

It is the state’s role to help with tuition needs. 60% believe that it is. Only about 20% thought it’s not. Bright Futures did impact that thinking.

Bright Futures- 55% knew and 45% did not. People that had children and higher incomes were more aware. Floridians are in favor of expanding BF.

Support a goal to increase post-secondary ed levels to align with workforce needs: majority did agree.

#### **Equity-Minded Leadership and Decision-Making**

*Alicia C. Dowd, Ph.D.; Prof. of Education; Dir., Center for the Study of Higher Education; Dir., CSHE Academic Leadership Academy; Pennsylvania State University*

The idea of equity in practice. Three notions of justice; fairness, care & transformation.

**“State of affairs that is just” Equity does not equal equality or charity**

**Horizontal vs vertical equity:**

**Horizontal= 3 triplets have the same breakfast and they all like cookies and you have an unlimited amount of milk. You have 6 cookies. All of the children have equal opportunity to benefit from the cookies. 2 cookies per child.**

**Vertical equity- society is marked by inequality. Class, race, religion, etc. Think of equity in social terms. Investments should be guided for the benefit of society.**

**Social, moral, equitable capital. Capital letters, cities, capital one. Capital punishment. Financial capital. Capital good fund. Wasted capital, human capital.**

**No gain without capital pain.**

**Capital is anything that makes time, labor and natural resources more productive. Human capital concept came about after WW2. How can we rebuild war ravaged countries.**

**Bowling alone is the opposite of crowd sourcing- you lose community. The book inspired some of the social media crowd sourcing sites. Social capital in terms of community. Norms, trust reciprocity and relationships- all of those things reduce the time and intensity of transaction costs. Tension between closed and open groups.**

**Cultural capital- schools are reproducing some inequalities by valuing some forms of communications over others. We need to give more cultural capital to groups that may not have enough.**

**The equity scorecard- is a process for learning, an action research process. Laying the groundwork by bringing people together to define an issue or problem. Assessing interventions- looking into strategies and seeing what is effective. Implementing solutions and then evaluating results. American Council for Education “Bringing Accountability to Life” Link to it from FPN website. Using data that’s close to practice. Looking at history of systems and how they operate to exclude some while elevating others.**

**White women are the primary beneficiaries of the civil rights movement. Authentic care vs care as pity, when the caregiver places themselves above those they are caring for. Not using a lens of privilege to try to “help” communities.**

**It’s our responsibility to level the playing field. Tyrannical compassion- forcing our need to help on communities. Using co-creation to involve those we serve as active participants in the solutions we develop.**

**Taking an asset based approach as opposed to a deficit one. Questions about what power you hold and how you use it can be helpful in guiding decisions.**

**We need to look at our language- disadvantaged, at risk, etc.**

**Institutional change agent looks at how to change systems as opposed to just allowing more people into systems that exist.**

**Shared participation and conversation. Deep listening. We can’t guess at other’s issues. Moving alongside people. Being thoughtful about word choices but not to the point that we trip over trying to be too careful that you can’t even have a conversation.**

**Scholarship Legal Considerations and Approaches**

*Jim Hasson, Hasson Law Group*

**Discrimination cannot be used in scholarships even if you are trying to promote diversity within a student body. UT Austin Case which resulted in a narrow decision that upheld the utilization of race as an admission criteria by the school. The university was able to demonstrate that race was only one criteria out of many that was used for admission and that the school had developed a robust process that would ensure diversity. Was from 2 years ago.**

**Case pending against Harvard- trial starting that came from a group applying to Harvard and were denied, they are Asian American. They were denied and claim that Harvard instituted a policy of 22% limit on Asian admissions and because there are no other criteria (geography, gpa, etc.) it’s illegal. Other institutions have**

weighed in and said as a private institution Harvard has the right to do so. Fed government on side of students. Both have tried to get case dismissed but court won't allow. Going to SC eventually. Is there a legitimate basis that the law provides that would allow Harvard to do this. Harvard asserts that if they only use academics, their entire student body would be Asian. Probably 6-8 years before resolution.

Tax law has 2 important elements when it pertains to scholarships; does recipient pay income tax? Rules that address whether org providing scholarships is entitled to tax exempt status. Schools can utilize tax exempt bonds. At state level it can lead to property tax exemptions. Portions of scholarship used for room and board can be taxed. Only funds used for the direct pursuit of a degree are tax exempt (books, fees, tuition).

Donor advised funds are largest component of charitable giving today. You cannot run a scholarship fund out of a DAF. Restrictions of non-discriminatory selections same as they are for private foundations with even deeper restrictions. United Way and schools themselves face similar issues- decision about Bob Jones university that claimed it didn't have to adhere to restrictions. The SC said you can't limit recipients on the basis of race.

#### **Group Debrief, Next Steps & Closing**

*Bob McFalls, President & CEO, Florida Philanthropic Network*

*Bill Hoffman, FPN Education Consultant*

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