Partnering with Post-Secondary Educational Institutions

AFI Virtual Coffee Webinar Series

July 11, 2016

Office of Community Services
Administration for Children and Families
U.S. Department of Health and Human Services

ADMINISTRATION FOR
CHILDREN & FAMILIES

Introduction of Speakers

- Megan Bolado, CFED

- Rodolfo Acosta-Pérez, Community Action Agency of Southern New Mexico

- Maggie Sanborn, Earn to Learn

- Brent Wilder, Oregon Alliance of Independent Colleges & Universities

Connecting to Audio

- Having trouble dialing in?
  - Listen on your computer by clicking the option on the Control Panel.

  - Connect your speakers or a headset to your computer for best quality
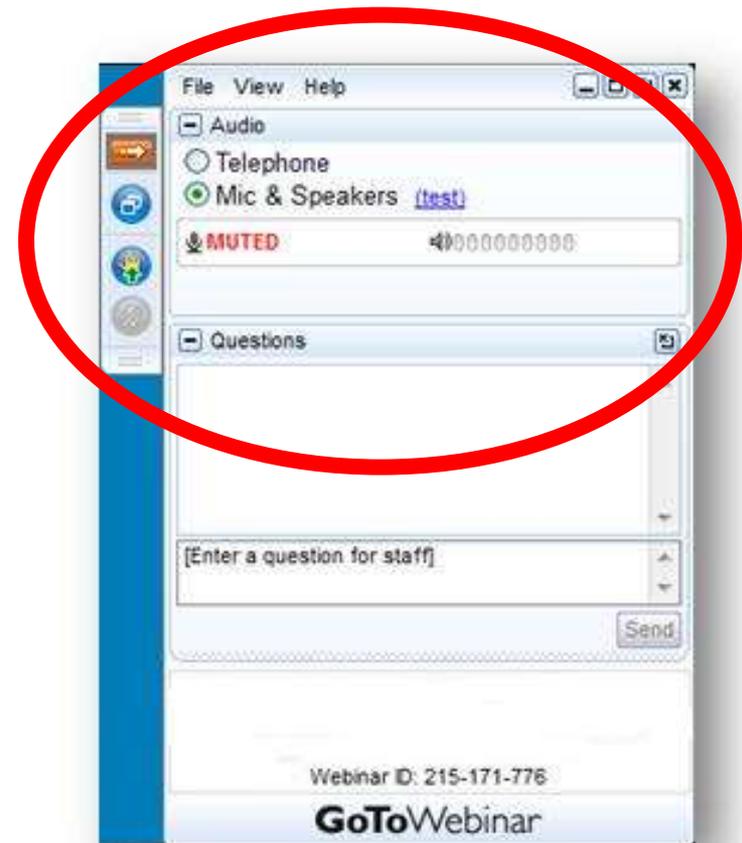
Technical Issues & Questions

- Having technical difficulties?

  – Use the questions box

  – Email

  slandry@cfed.org

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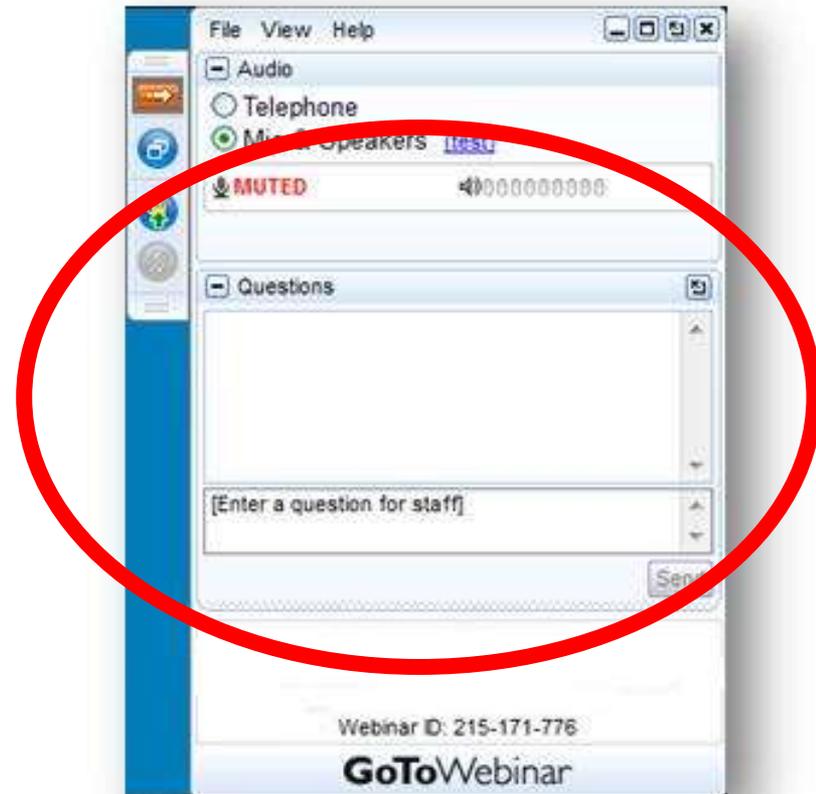
Housekeeping

- This webinar is being recorded!

  - All attendees are muted to ensure sound quality

  - A video recording and transcript will be available on idaresources.acf.hhs.gov at a later date.

- The webinar will last approximately 90 minutes.

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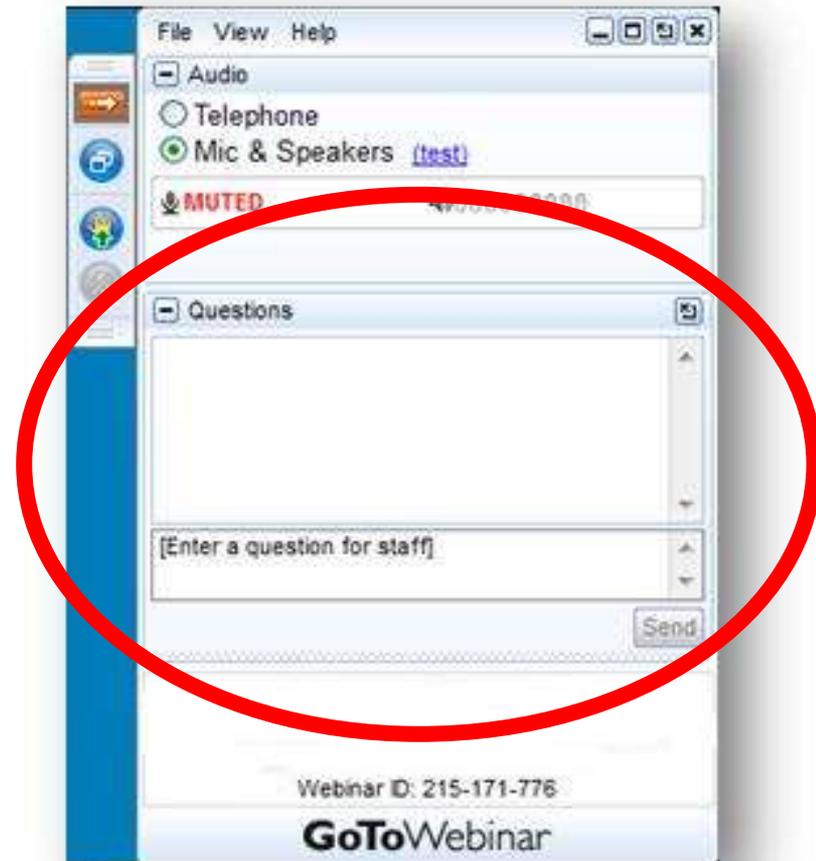
Webinar Objectives

Participants will:

- ✓ Hear about tips and tools for developing strong partnerships with post-secondary educational institutions to support your AFI program

- ✓ Hear from fellow AFI Grantees about their partnership stories

- ✓ Ask questions and share ideas for developing partnerships with post-secondary educational institutions

A Few Questions For You

![AFI logo]

Assets for Independence
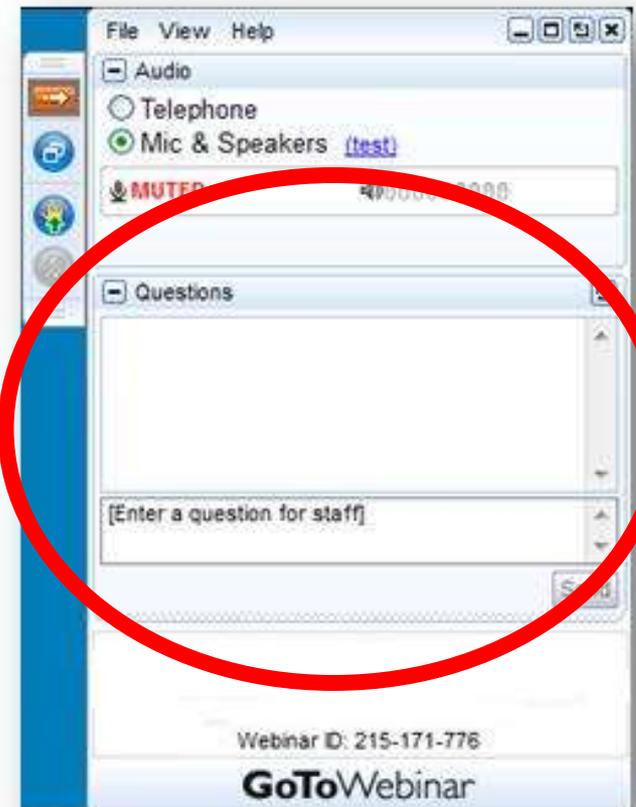
Do you currently partner with post-secondary educational institutions?

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What types of partnerships with post-secondary educational institutions have been most effective in supporting the delivery of your grant?

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In what ways do partnerships with post-secondary educational institutions help?

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Rodolfo Acosta-Pérez, Community Action Agency of Southern New Mexico

Individual Development Accounts (IDA) Partnerships with Post-Secondary Institutions

Rodolfo Acosta-Pérez
July 11th, 2016

Community Action:
Breaking the Cycle of Poverty

17,000 clients served in FY 2015
Family Empowerment-Family Wellness-
Bridging Resources-Community Connections

Strengthen

- Total Benefits Screening

Learn

- Computer Training
- Financial Literacy
- Childcare Provider Training

Grow

- IDAs /CSAs
- Child and Adult Care Food Program
- Free Tax Prep
- Small Business Development

THE ROAD
LIFE SKILLS

CAA
COMMUNITY
ACTION AGENCY
OF SOUTHERN NEW MEXICO
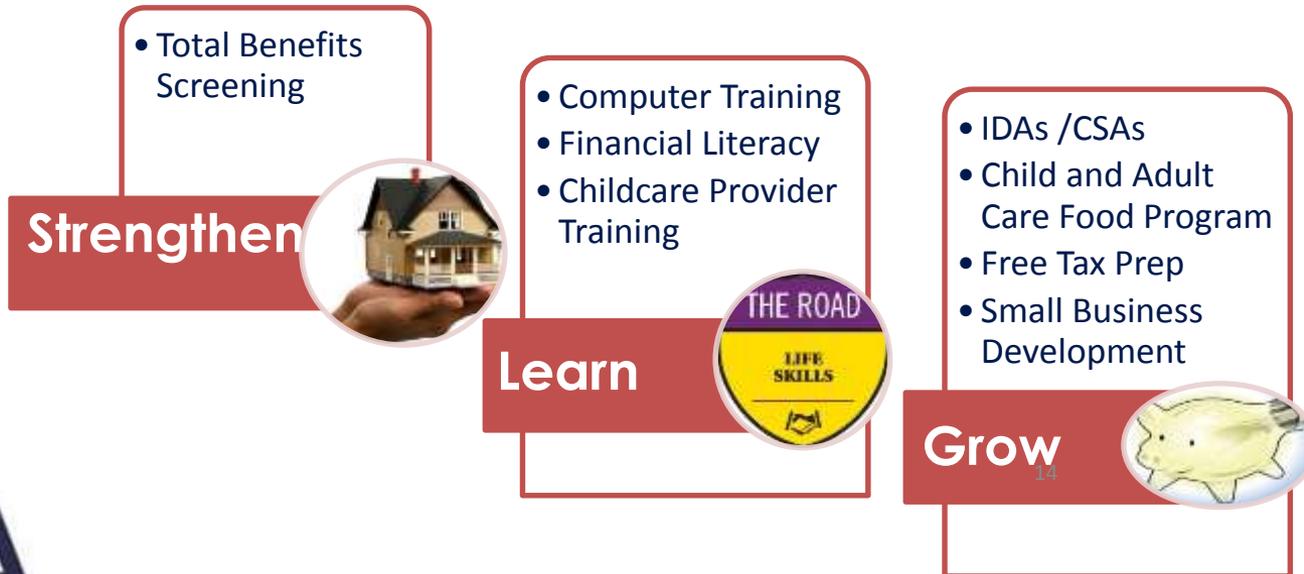
CAASNM's IDA Program
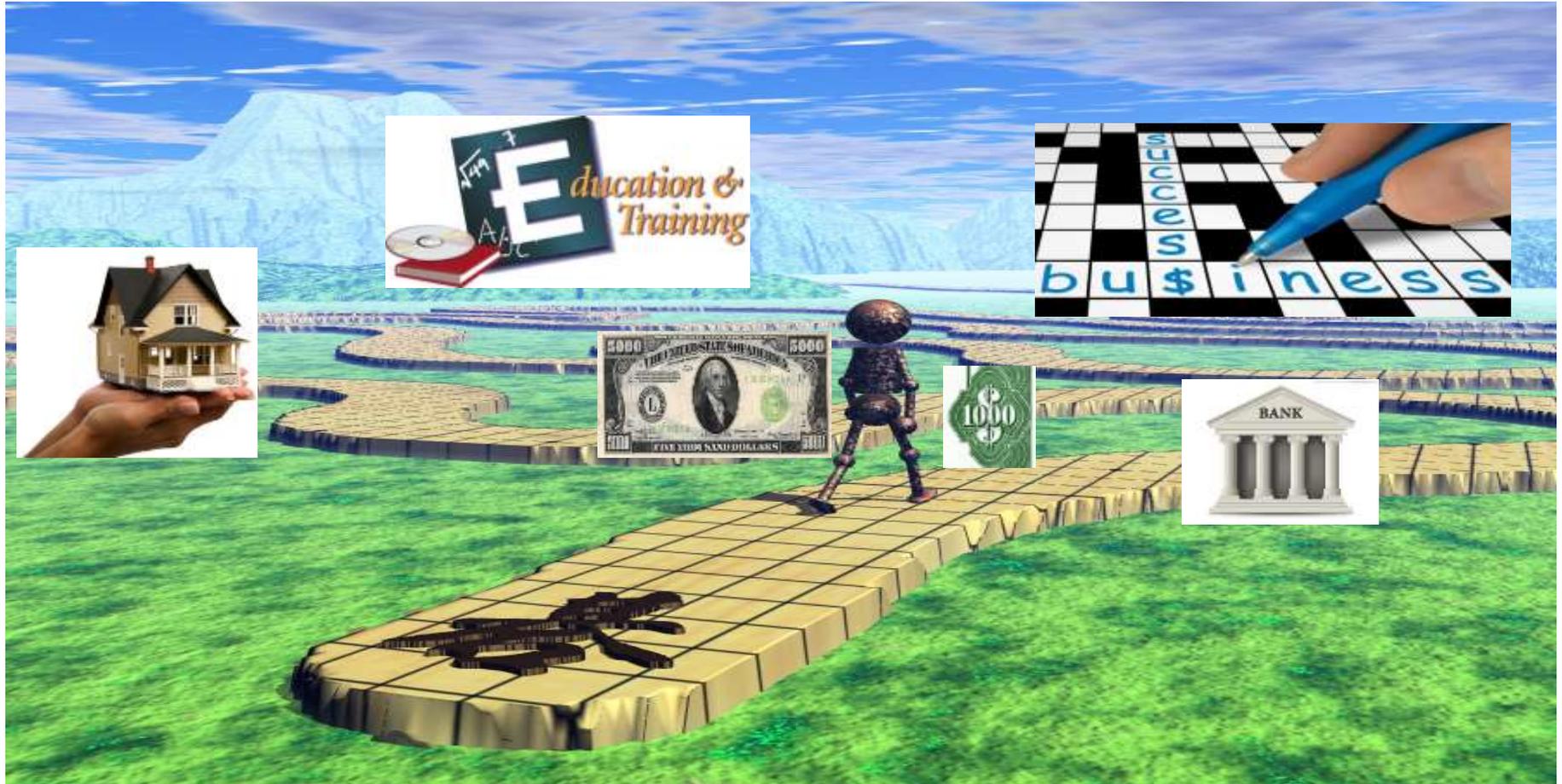
THE ROAD TO A SUCCESSFUL PARTNERSHIP WITH POST-SECONDARY INSTITUTIONS

1st — Research
Research the institutions you want to work with

2nd — Programs available
Are they a good fit with your IDA program?

3rd — IDAs sound too good to be true
Message of action and optimism

4th — Select your ambassadors
Who are the right persons to champion an IDA program?

5th — Target population
Market the program to eligible individuals (enrollment)

6th — Financial literacy and asset-specific training
Partner with universities and colleges' staff to deliver training

7th — Cash out process
Work with the appropriate department or unit

8th — Communicate successes
Keep partners informed of savers' progress.

REMEMBER
This will not be a linear process! But you now have the guidelines to spark your creativity!

CAA
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OF SOUTHERN NEW MEXICO

The Economic Impact of CAASNM's Individual Development Account (IDA) Program in Doña Ana County, New Mexico.

IDAs are an evidence-based approach to economic development. }

167 savers and their families have increased their assets.
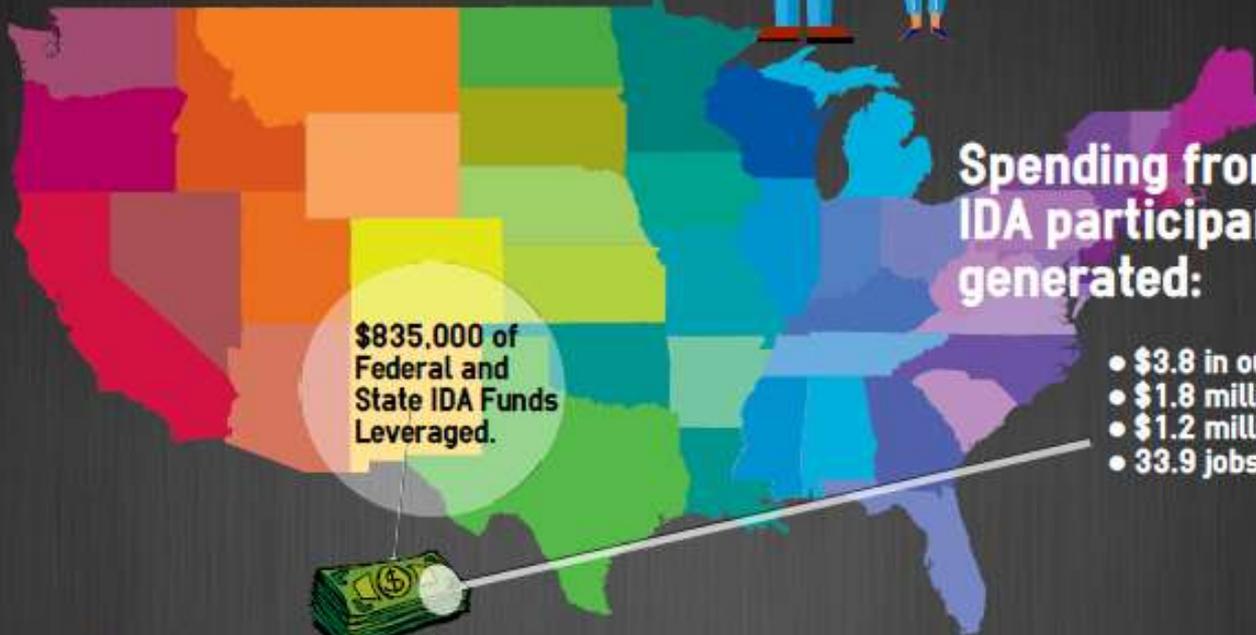
$835,000 of Federal and State IDA Funds Leveraged.

Spending from CAASNM's IDA participants generated:

- $3.8 in output
- $1.8 million in value added
- $1.2 million in labor income
- 33.9 jobs

CAASNM's IDA Program Economic Impact was Generated by:

50 Home Purchases

33 post-secondary educational institution enrollments

43 business start-ups or expansions

OPEN

Meet Jorge Dominguez

- "I would get off work at like 12 pm, drive to Cruces, sleep, go to (financial literacy) class the next day and then drive back to Silverton right after."
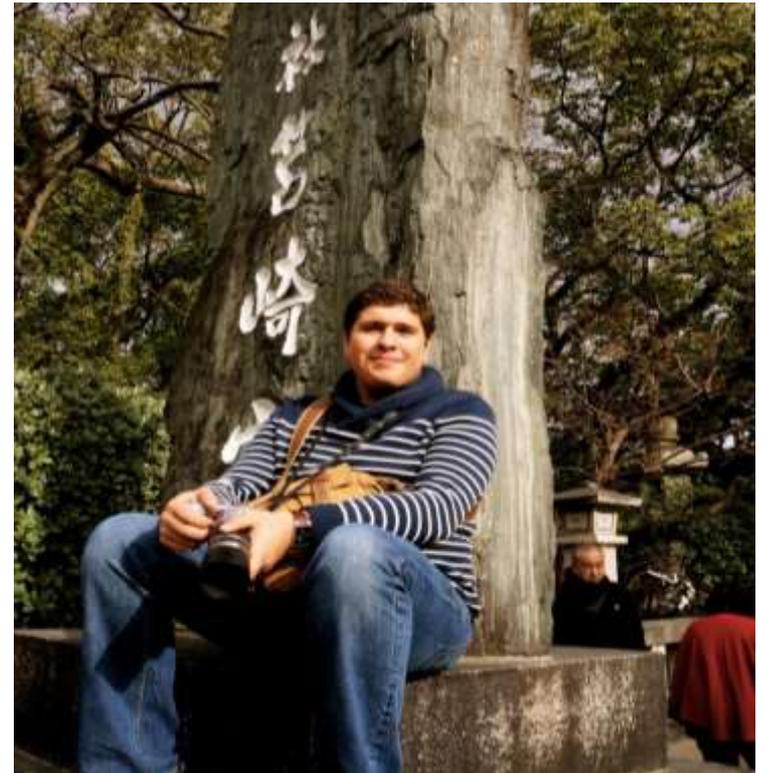
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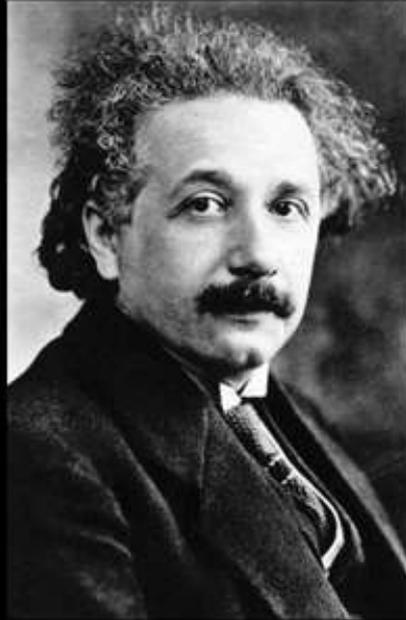
Education is not the learning of facts, but the training of the mind to think.

~ Albert Einstein

www.quotesthoughts.com

Rodolfo Acosta-Pérez
Director of Family Empowerment
Community Action Agency of Southern New Mexico (CAASNM)
575-527-8799, Ext. 136
acostar@caasnm.org

Maggie Sanborn, Earn to Learn

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Earn to Learn

We envision a world without barriers to higher education

History of Earn to Learn

- Earn to Learn was founded in 2008 by Kate Hoffman under the name Live the Solution – with a primary focus on housing

- In January 2013 Live the Solution started the AZ Earn to Learn IDA Program and has focused solely on college education since

- With the focus on college education and the success of the flagship program, in 2015 Live the Solution was officially re-named and branded Earn to Learn

- Earn to Learn now has 10 Full Time Program Coordinators (Success Coaches) a Support Team of 5 Full Time Staff, 4 Part Time Support Staff. Together we are still shaping what Earn to Learn as a program is, developing the core model of our program to benefit each student individually

University Partners

- Earn to Learn is a collaborative effort between the Arizona Board of Regents, Arizona State University, Northern Arizona University, and the University of Arizona.

- Earn To Learn has offices at each university and a team of Success Coaches (Program Coordinators) in each office.

- Arizona State University – Phoenix

- Northern Arizona University – Flagstaff

- University of Arizona – Tucson

Recruitment at Universities

- All 3 State Universities handle Earn to Learn recruitment differently, but are more recently coming together to provide the same services for ETL during recruitment of new students.

- Universities provide
  - ETL with literature for our Outreach/Tabling Events (pamphlets, flyers, postcards)
  - ETL with access to send emails to all incoming first time students
  - ETL literature (flyers, postcards etc.) during their university outreach events

- Admission Teams (staff and student) receive presentations each year about Earn to Learn from our staff and any updates about the program. This allows both our team and university teams to promote the Earn to Learn Program accurately – this is a fundamental piece of how a good relationship with university offices effects our efforts

Recruitment at Universities Challenges

- Target Population (eligibility of students) differs at each University – balancing these differences can be hard working with students who are not certain on university choice

- ASU – Incoming Freshmen, one campus group called SPARKS, Transfer Students *just recently approved*

- NAU – income Freshmen, Transfer Students, Current Native American NAU Students

- UA – Incoming Freshmen, Transfer Students

Financial Aid and Admissions

- Building Relationship with both offices is important. These offices work together at the university but handle different functions that are important to our students and enrollment at the university.

- Receiving trainings for our Staff to learn about each universities differences is important. Our regional staff attends yearly trainings with the Financial Aid and the Admissions offices at their regional University.

- Having a Point Person at the Universities in each office is key too, having a specific person for ETL to go to and students to go to to help keep track of any questions or concerns

- Notifying both offices of Earn to Learn Program changes (eligibility changes, program updates etc.) is very important so their staff can stay up to date

Financial Aid and Admissions Challenges

- Earn to Learn Scholarship dollars are applied differently through financial aid offices at the universities

- Explaining to Students who are applying to multiple schools (most in state students in AZ are encouraged to apply to all 3 state universities) takes time and staff understanding of the process

- ETL Staff require yearly training from Financial Aid at each University to provide our team with updates on ETL and University Aid
  - each student has individual needs and individual financial aid packages
  - There is no cookie cutter way to treat each student and their financial aid package

Support Services

- Earn to Learn has recently connected with all 3 Universities Student Support Services Offices to meet about serving our clients in the best ways

- Reason: Having a well informed regional staff that understands how to refer students to existing Student Support Services, follow through with check ins, and tracking student involvement can benefit all our students

- Lessons Learn: in the beginning, Earn to Learn would create internal support services and educate our Success Coaches on how to teach and administer these services, we cannot serve as many students when going in this direction. When we connected with the universities about helping Earn to Learn students they were all on board. Each university is developing a system to report out to Earn to Learn on which services students have accessed and which students may need reminders on the services in their reach.

Tracking Student Issues at Universities

- Tracking University Issues – Success Coaches and Program Directors track student issues until fully taken care of
  - email and calls to universities designated staff for individual case by case issues
  - Issues included completed FAFSAs, Full Time Enrollment, Residency, Deposits, Change in start dates, etc.
- Reporting out – Program Directors track issues/concerns student come to ETL about, creating a resource list and possible solutions for future cases
- Again having the point person in Financial Aid and in Admissions is important to handle situations

Tracking Grant and Scholarships

- Earn to Learn has 4 grants each at the 3 different universities (12 grants total)
    - each student can access 4 grants at the university
    - assigning and tracking the number of enrolled students with each grant can be a challenge
- Assigning Roles (university choice) and Cohorts (original start date/semester) helps track and send the correct students scholarships to the correct school
    - Check in to confirm with each student prior to start date

Wire Process to the University

- July and November students have to have their IDAs ready for wiring the money to the universities

- August and December wires go off from the Financial Institution to the University

- Staff preps students a few months before, making sure every student is aware of their balance, the wire date, the process

- ETL sends wire lists to the Financial Institutions and the Universities – for tracking on both ends

Key Take Aways

- Training and Updates with important offices at universities/colleges (training on your program and training of their school)

- Admissions, Financial Aid, Student Support Services are important connections to start with

Questions?

Contact:
Maggie Sanborn
Maggie@EarntoLearn.org
520-269-3757

Brent Wilder, Oregon Alliance of Independent Colleges & Universities

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ALLIANCE MATCHED COLLEGE SAVINGS PROGRAM

Helping income-eligible Oregonians secure the lifetime asset of a college education at one of our member institutions.

- Formed in 2007, modeled after individual development account programs delivered through non-profit networks.
- MCSP was one of the first of its kind in the United States.

18 Schools | 37,000 Students | Working Together to Make a Difference

THE ALLIANCE
intersecting the needs of the

MEMBERS
Concordia University
University of Portland
Pacific University
Warner Pacific College
Reed College
Lewis & Clark College
George Fox University
Marylhurst University
Linfield College
Willamette University
Corban University
Northwest Christian University

AFFILIATES
University of Western States
Multnomah University
Western Seminary
Pacific Northwest College of Art
National College of Natural Medicine
Oregon College of Art & Craft

The Alliance
Oregon Alliance of Independent Colleges & Universities

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MAKING A CASE FOR USE BY POSTSECONDARY EDUCATION

Low-income groups face not only financial barriers, but also cultural barriers. Thus, asset building provides:

- <u>opportunity</u> to encourage college attendance by underrepresented groups

- a <u>solution</u> for many students unable to secure sufficient funding for higher education

- <u>support</u> for students so that they can access and complete higher education

IDENTIFY THE RIGHT POSTSECONDARY PARTNER(S)

Talking to a few institutions and finding out some of the following information is critical:

- How many of their students are Pell eligible?

- Do they have a TRIO program?

- Do they serve first-generation college students?

- Is helping low-income and/or first-generation college students part of their mission?

- Based on their website, do the financial aid and TRIO programs seem accessible?

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DEVELOP A COMPELLING MESSAGE AND EDUCATE YOUR POSTSECONDARY PARTNER

Here are some messages that work:

- Recruiting Low-Income Students & Meeting Institution's Mission of Access.
- Retaining & Graduating Low-Income Students.
- Addressing Difficult to Reach Populations.
- Offering Services Beyond Financial Aid.
- Use IDA Data to Tell Success Stories.
- Meet Regional Talent Development Needs & Goal of Community Engagement.
- Leverage More of Scholarship/Student Aid Dollars.

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START AT THE TOP

- If you are looking for a meaningful partnership, you need to meet with an individual who has authority and decision-making power.
- Partnerships are slow to develop or never take off or become fully implemented because top-level leaders do not understand what is needed to make the partnership successful.
- Leadership needs to meet with the relevant members of financial aid, student support services, advising, and other key offices to make the partnership/program successful.

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QUESTIONS?

Brent Wilder
Vice President
brent@oaicu.org
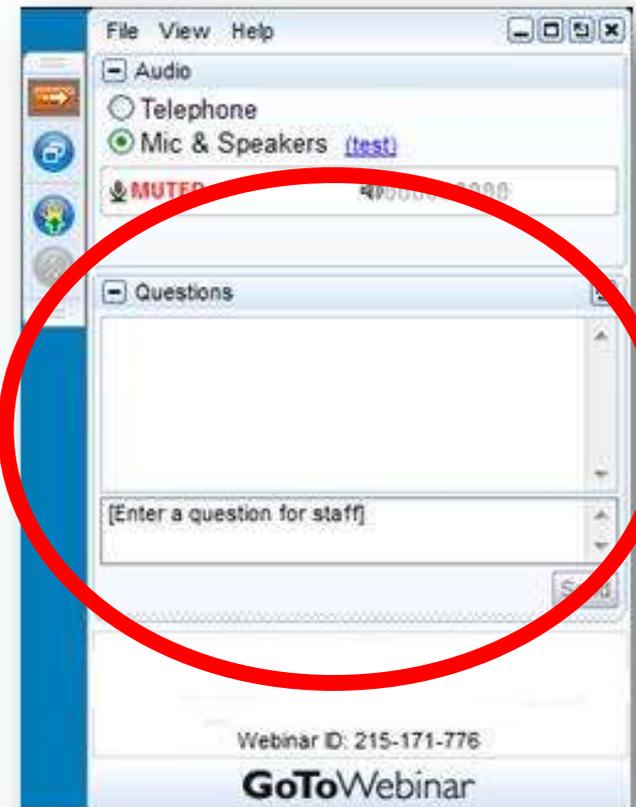
AFI Virtual Coffee Series

- **Webinar 3: Program Development** – Monday, August 8, 2016 2:00-3:30 PM EST
    - Developing and delivering a strong AFI program requires careful planning and thoughtful consideration of the needs and opportunities for the target population. AFI Grantees will hear from each other and AFI TA providers during this third webinar to identify tools for making programs more robust, sustainable, and manageable.

AFI Resource Center

- Home: idaresources.acf.hhs.gov
- Calendar: http://idaresources.acf.hhs.gov/Calendar

- Help Desk:
  - Email: info@idaresources.org
  - Phone: 1-866-778-6037

Assets for Independence

Thank You!

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