



Building a Legacy...
One Student at a Time!

SASFAA Annual Conference

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This presentation is for discussion purposes only.

The ABCs of Student Finance

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Meet Today's Presenters



Susan Smith

Assoc. Director of Financial Aid

University of North Georgia



Rick Dwyer

National Director

CampusLogic

University of North Georgia

- + Member: The University System of Georgia
- + Regional multi-campus institution
- + 18,000+ students
- + Financial Aid offices on 4 of 5 campuses (includes Veterans Services)
- + 26 Full-time, 1 Part-time, 10 Student Workers (8 in call center)



CampusLogic

We Help Schools Change Lives.

- Easy, mobile, personalized financial aid
- Cloud-based technology
- Improve the student experience
- Boost FA completion rates
- Streamline efficiencies



Financial Aid Challenges



Paper-intensive procedures



High rate of student errors



Poor student experience



Data security concerns



Early FAFSA process changes

Today's Objectives

- **Recognize** how personalizing the student financial aid experience can increase student engagement
- **Understand** the importance of streamlining every student financial aid interaction
- **Evaluate** the return on investment of making financial aid easy, mobile, and highly personalized



**IT'S TIME FOR A
TRANSFORMATION.**

Problem #1: Accessibility

40%

**of low-income students
who are accepted to
college never go because
they are overwhelmed by
tuition and paperwork.**

SOURCE: The Hechinger Report, August 14, 2015

#1 Improve Accessibility

Student financial aid needs to be about **process-driven, personalized pathways.**



University of North Georgia

1873 – 2012: North Georgia College & State University

- Public senior military college, also civilian, strict admissions criteria
- One residential campus

1964 – 2012: Gainesville State College

- College w associate degrees, 6 Bachelors, open access admissions
- Two commuter campuses

2013: The University of North Georgia

ISSUES	SOLUTIONS
Military status	Retained senior military college status
Admissions Criteria	Created 2 levels of criteria
Staffing	Kept all FA employees
Policies & Procedures	Revised P&P
How to merge databases?	The Big Bang

Accessibility Solutions Improve The Student Experience

- UNG App
- UNG Connect
- StudentForms

Accessibility Solutions Improve The Student Experience

2015-2016 Verification Worksheet Version 1

Your 2015-2016 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. You and one parent (if dependent) must complete and sign this worksheet, attach any required documents, and submit the form along with any other additional information required by the Financial Aid & Scholarships Office. See: www.unlv.edu/financialaid/verification for more information.

A. Student's Information

Last Name: _____ First Name: _____ MI: _____
 NSHE ID: _____

B. Family Information - Please check the box that indicates your current status

Dependent- A student is considered dependent if he/she was required to provide parental data on the FAFSA. Please include in the table below:

- You and your parents/stepparents (who provide more than half of your financial support)
- Your parent/stepparents' dependent children, if your parent/stepparents' will provide more than half of their support, or if the children would be required to provide parent information applying for financial aid
- List other people as part of your household only if they now live with your parents AND they provide more than half of their support AND will continue to provide more than half of their support from July 1, 2015 through June 30, 2016.
- Provide the name of the college for any household member who will be attending at least half time between July 1, 2015 through June 30, 2016

Independent- A student is considered independent if he/she was not required to provide parental data on the FAFSA. Please include in the table below:

- You and your spouse, if married
- Your dependent children, if you will provide more than half of their support
- List other people as part of your household only if they now live with you AND you provide more than half of their support AND will continue to provide more than half of their support from July 1, 2015 through June 30, 2016.
- Provide the name of the college for any household member who will be attending at least half time between July 1, 2015 through June 30, 2016

Full Name	Age	Relationship	Full College Name (do not include parent email)
		Self (student)	University of Nevada, Las Vegas

C. Income Information- check STUDENT (if INDEPENDENT) or BOTH (if DEPENDENT)

Student/ (include spouse, if married)

I/we have used the IRS Data Retrieval Tool at www.fafsa.gov. Skip to section E

I/we DID NOT use the IRS Data Retrieval Tool. Attach a signed copy of the 2014 IRS Tax Return Transcript (www.irs.gov). Skip to section E

I/we certify that I/we did not file, will not, and am/are not required to file a 2014 U.S. Income Tax Return. GO to Section D

Parent(s) – If Dependent Student

I/we have used the IRS Data Retrieval Tool at www.fafsa.gov. Skip to section E

I/we DID NOT use the IRS Data Retrieval Tool. Attach a signed copy of the 2014 IRS Tax Return Transcript (www.irs.gov). Skip to section E

I/we certify that I/we did not file, will not, and am/are not required to file a 2014 U.S. Income Tax Return. GO to Section D

- + Easy
- + Mobile
- + Personalized
- + Pre-filled
- + Guided
- + E-Signature

Help Jessie Spano

2016/2017 Independent V1 Form

Demographics

Please correct the following information if needed.

*First name

*Last name

*Phone number

[Continue](#)

2016/2017 Independent

Demographics
 Household
 Student Taxes
 Review & Sign

[Return to Student Tasks](#)

degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2016, and June 30, 2017, include the name of the college.

First Na...	Last Na...	Relatio...	Age	College...	At Least...	50% Sup...
JESSIE	SPANO	self	40	Campus...	<input checked="" type="checkbox"/>	

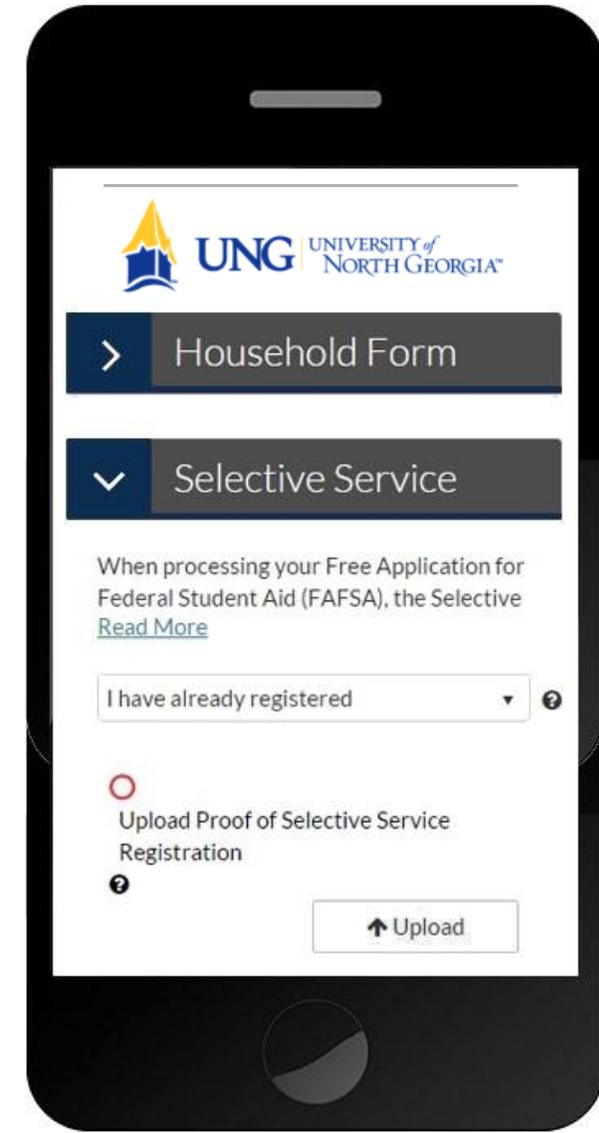
[Add](#) If you have no other household members to add, select Continue.

[Back](#) [Continue](#)

Version 14.62.1202

Mobile Financial Aid at UNG

- Students receive messages and complete tasks where they live: on their phones.
- Student can see what is required for financial aid and how to complete the process — personalized to them.
- Students can take a picture of a required document and upload it to the portal in real-time (and keep their document)



Problem #2: Borrowing

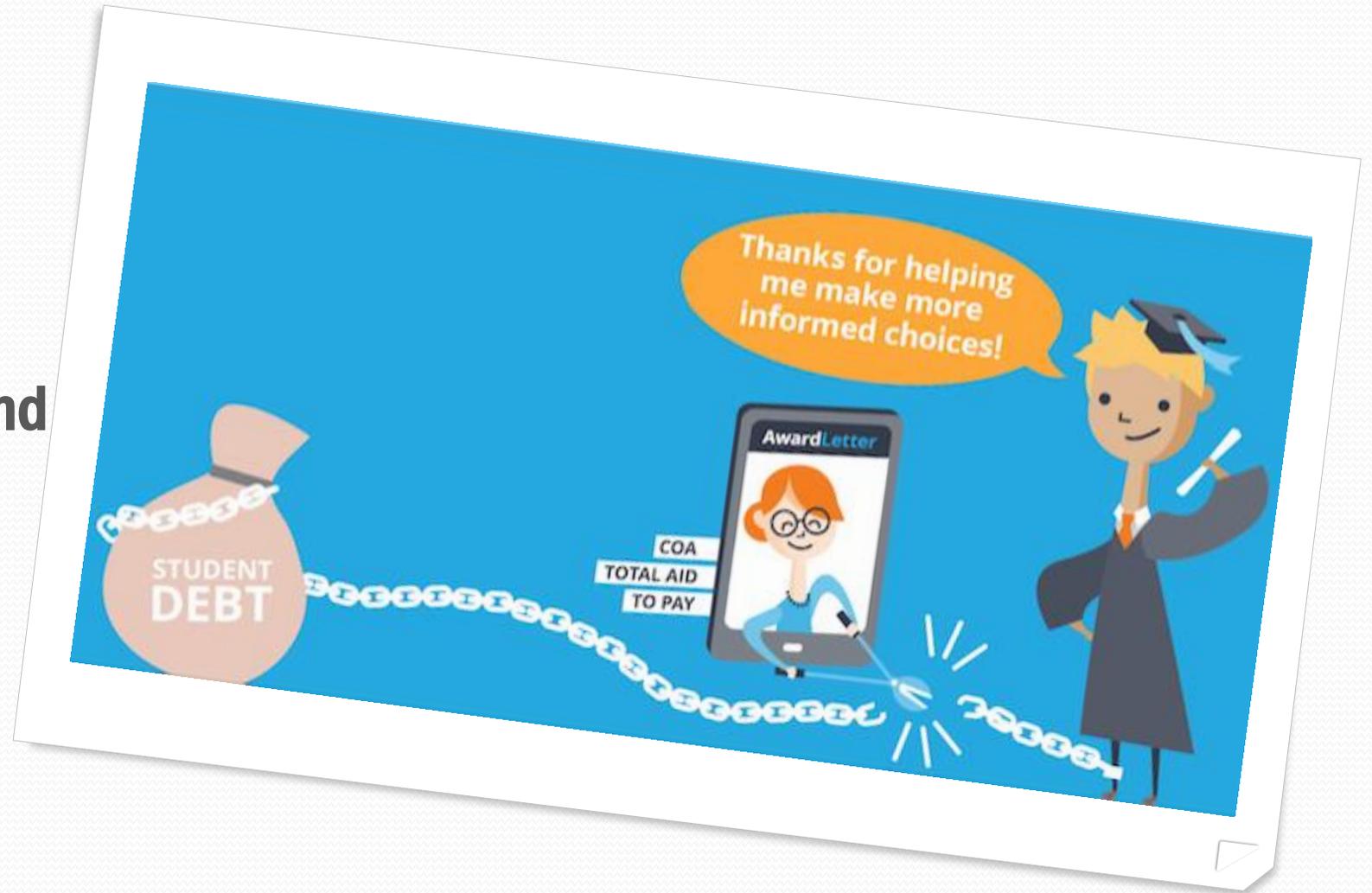
65%

**of high-debt student-borrowers
misunderstood or
were surprised by
some aspect of their
loans.**

SOURCE: NERA Economic Consulting, March 2012

#2 Reduce Borrowing

Student financial aid needs to be about tools and highly personalized road maps that show students how to borrow less.



University of North Georgia

NGCSU - Residential

- 2010 2-yr CDR 5.5%
- 2010 3-yr CDR 6.7%

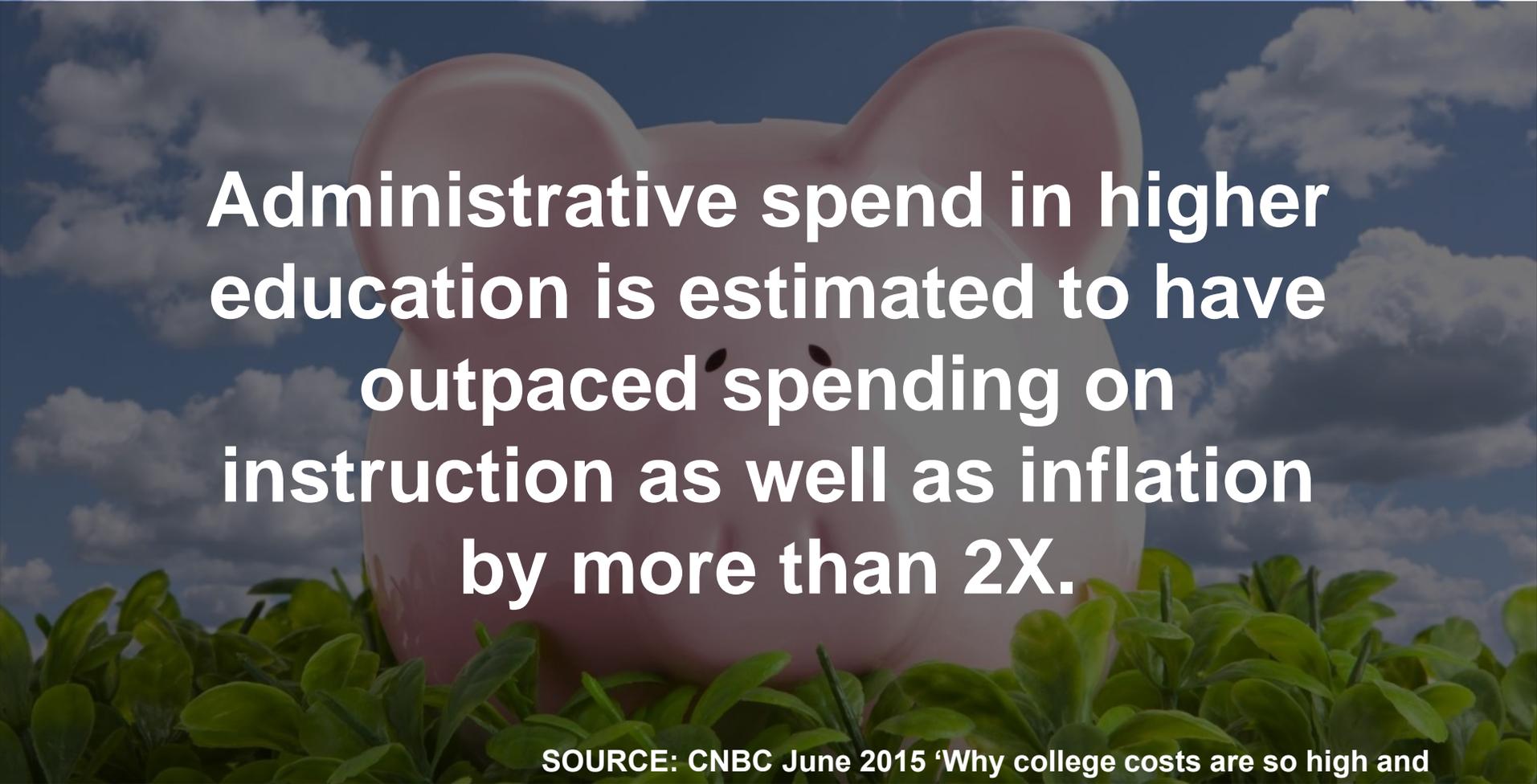
GSC - Commuter

- 2010 2-yr CDR 12%
- 2010 3-yr CDR 16.9%

UNG – 1 Res, 4 Commuter

- 2013 3-yr CDR 10%

Problem #3: Cost



Administrative spend in higher education is estimated to have outpaced spending on instruction as well as inflation by more than 2X.

SOURCE: CNBC June 2015 'Why college costs are so high and

#3 Lower Cost

Student financial aid needs to be about high value, highly personalized, lower cost interactions with students.



Challenges

- ⚠ Little time to counsel students, as verification took most of the work time
- ⚠ Completion of file variable depending on speed of counselor
- ⚠ Difficult to hold all staff to same verification steps
- ⚠ Hard to schedule staff vacations due to assigning structure with students
- ⚠ Missing documents due to 4 campuses performing imaging
- ⚠ Minimal time for Professional Training

Cost Reduction Solutions: Automated, Scalable Staff Experience



Cost Reduction Solutions: Automated, Scalable Staff Experience

- + Digital
- + Workflow driven
- + Automatic student communications
- + Auto-indexing
- + Dashboard reporting

The screenshot displays the UNG University of North Georgia dashboard. At the top, there is a navigation bar with 'Workflow', 'Reports', and 'Admin' menus, and a search bar for 'Students'. Below the navigation, there are several workflow management cards:

- File Review:** Files Available: 2, Files Pending: 0. Button: Get Next File.
- Document Review:** Documents Available: 6, Documents Pending: 0. Button: Get Next Document.
- Document Retrieval:** Downloads Available: 1, Appeals Available: 0. Button: View All.
- Appeal Review:** Category: All, Appeals Available: 1, Appeals Pending: 0. Button: Get Next Appeal.
- Other Documents Review:** Documents Available: 0, Documents Pending: 0. Button: Get Next Document.

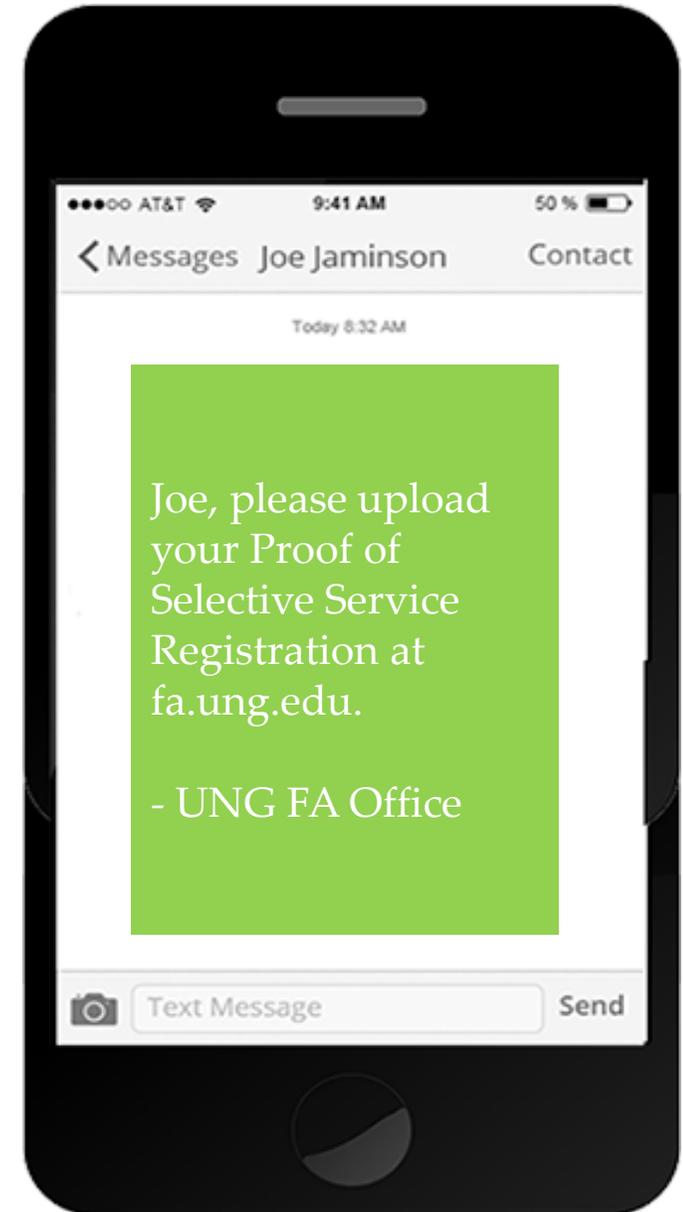
Below these cards, there is a section for 'Smart File Review' with a pull-down menu for 'All Comment Codes'. A table displays the following data:

ISIR Fields	ISIR Value	Document Value	Document Type	Status
Student's Last Name	POWERS	POWERS	2016-2017 Independent V1 Household Web Form	Match
Student's First Name	SCREECH	SCREECH	2016-2017 Independent V1 Household Web Form	Match
Student's Date of Birth	08/21/1972	08/21/1972	2016-2017 Independent V1 Household Web Form	Match
Student's Child Support Paid			No Documentation Provided	Match
Student's Pension Payments			No Documentation Provided	Match
Student's Number of Family Members	5	2	2016-2017 Independent V1 Household Web Form	ISIR Correction
Student's Number in College	2	1	2016-2017 Independent V1 Household Web Form	ISIR Correction
Student Supplemental Nutrition Assistan	No	No	2016-2017 Independent V1 Household Web Form	Match

At the bottom right, there are buttons for 'Pend' and 'Complete Review'.

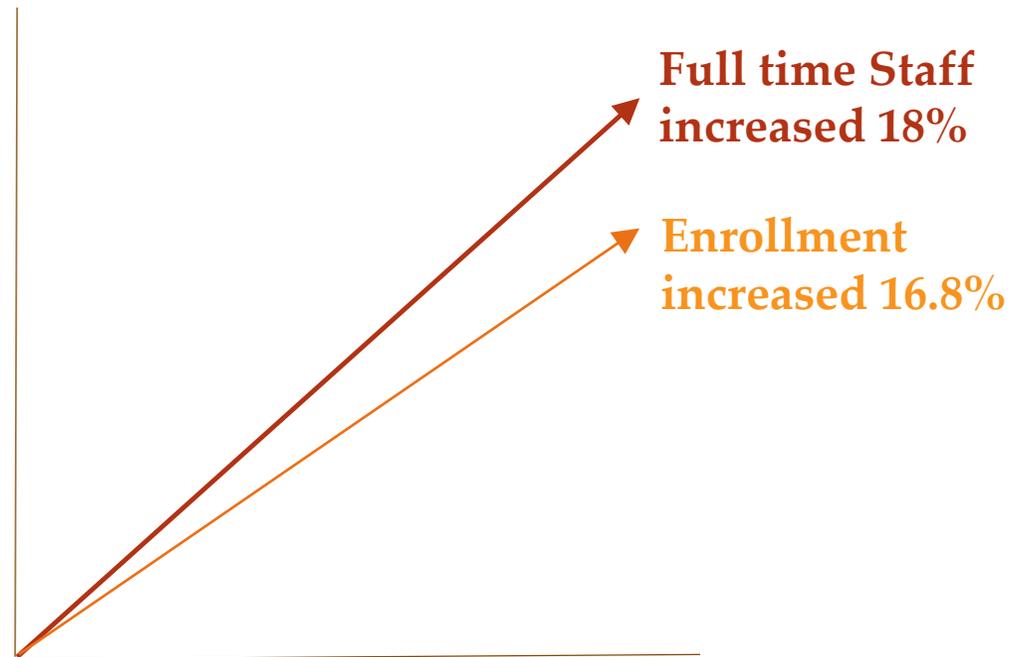
How it works

- Staff manage financial aid documents online with CampusLogic's workflow driven file review process.
- Final documents are pre-indexed, saving staff indexing time and labor.
- To ensure completion, CampusLogic provides automated student communications and follow up so staff don't spend precious time tracking down missing information.



University of North Georgia

Enrollment vs Staff (2013-2016)



University of North Georgia

Cost & FA Staffing

'15-16 (pre-automation)



- 11 Staff members
- Split by campus/alphabet
- Counseling & Verification

'16-17 (with **campuslogic**)



2 for Verification



9 split by campus/alphabet for Counseling

Impact On UNG

- Verification now completed in the order received
- Better service = better student experience
- Consistency in reviewing verification documents
- Reduced processing time
- Allows more time for counseling & training



Impact On UNG

“On any day I can ask about the status of verifications. I am given the exact number of verifications in the queue. Many times the response is that staff were caught up on verifications when they left the day before.”

New UNG FA Workgroups

New Student /
Transfer Student
Orientation

Open House
events

Class
presentations,
such as First Year
Experience

FA monthly
events, including
social media

Veterans events

Impact On UNG

“We’ve begun a new training of all staff called Tuesday Tutoring @ 2. Finally we are taking time for some of the most important needs.”



**THE RIGHT SOLUTION PAYS FOR
ITSELF—SEVERAL TIMES OVER.**

Return on Investment

↑ 82%

Verification Review
Improvement

↓ 9 FTE

Verification Staff Reduction

↑ \$405k

Value Created Through
Improved Productivity

	15-16	16-17	Savings
Number of Verification Staff	11	2	9
Annual Verification Staff Cost	\$495,000	\$90,000	405,000

Together, we all can:

1. Offer tools that personalize the student financial aid experience to increase both enrollment and student engagement
2. Make every student financial aid interaction mobile
3. Evaluate the return on investment of making financial aid easy, mobile, and highly personalized



Questions & Answers





campuslogic

Thank you to Susan
and to the SASFAA committee!



APPENDIX

What Makes Us Unique



1

**One platform to
solve your biggest
FA problems.**

2

**The best financial
aid student
experience.**

3

**The industry's
fastest & easiest
implementation.**

How We Help

Appendix

Easy, Mobile, Personalized Financial Aid



StudentForms

Simplify FinAid forms.

From verification and PJs to SAP appeals and c codes, make all of your FA forms easy, mobile, and personalized.



CampusMetrics

Act on FinAid data.

Get financial aid insights instantly about your student population—from any device, no IT required.



AwardLetter

Modernize award letters.

Deliver digital, mobile award letters that communicate your value and affordability to prospective students.



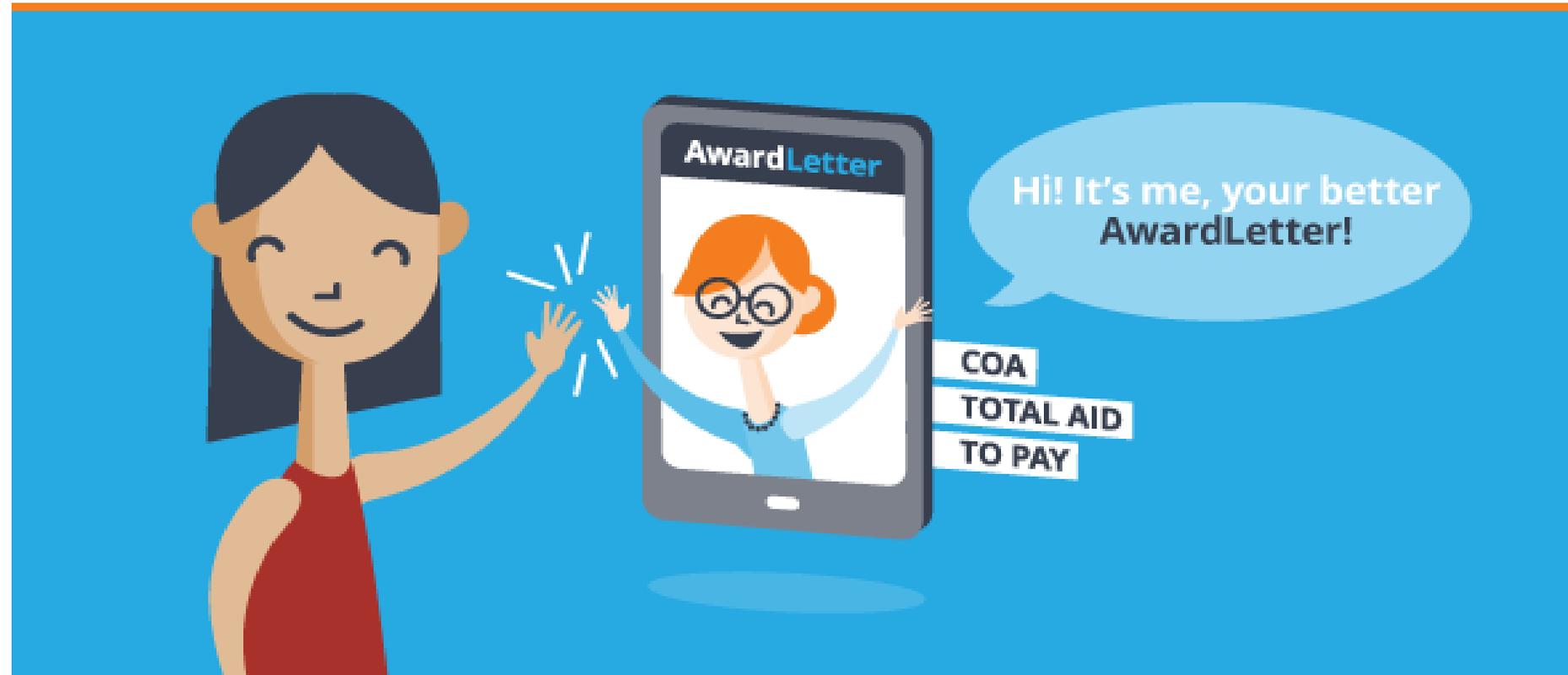
ScholarshipUniverse

Streamline scholarships.

Make it easy for students to discover and apply for scholarships while simplifying scholarship management and awarding.

Coming
2017!

The Solution: A Better AwardLetter



- ✓ Boost enrollment yield
- ✓ Improve the student experience

- ✓ Streamline efficiencies
- ✓ Modernize award letters



5/3/2016
2016 - 2017 Award Letter
McGrivis Mark
1234567

Direct Costs

	Yearly Total
Direct Costs	
Tuition and Fees	\$26,890
Room & Board	\$12,158
<small>New, first year and transfer semester students will be enrolled in the 0 meal plan per semester. All resident room and board costs listed here are estimated at the cost of double rooms and a 100 meal plan per semester. Actual charges will be reflected in your billing statement. Visit 2016 - 2017 Room & Board for more information.</small>	
Total Direct Cost	\$40,038

Financial Aid

	Fall 2016	Spring 2017	Total
Scholarships and Grants			
Presidential Scholarship	\$5,000	\$6,000	\$11,000
Neumann Grant	\$2,520	\$2,520	\$5,040
Federal Pell Grant	\$2,906	\$2,907	\$5,813
Federal Supplemental Education Opportunity Grant (SEOG)	\$175	\$175	\$350
Estimated PA State Grant	\$1,969	\$1,964	\$3,933
Loans			
Subsidized Loan	\$1,750	\$1,750	\$3,500
Unsubsidized Loan	\$1,000	\$1,000	\$2,000
Total Aid	\$15,818	\$15,816	\$31,634

What is my balance?

\$9,204 Estimated Annual Balance Due

Estimated balance if I complete my degree in 4 years: $\$38,818 = \$9,204 \times 4$ yrs

Estimated balance if I complete my degree in 6 years: $\$55,224 = \$9,204 \times 6$ yrs

Other Aid

	Fall 2016	Spring 2017	Total
Federal Work Study	\$1,000	\$1,000	\$2,000

Short Video Answers to Common Questions



Click here for more video answers:
Neumann University
Office of Financial Assistance
Neu@neumann.edu
610-556-5821

WATCH VIDEOS

Compare Financial Aid Offers

Next Steps & Additional Aid Resources

How Do I Create a Budget for College?

To see the digital, full-featured version of this AwardLetter in action, visit campuslogic.com/neumann.

Check Out Neumann's AwardLetter Online Now!

campuslogic.com/neumann