

BEYOND FINANCIAL AID | A GUIDE FOR FACILITATORS

PURPOSE

This guide is designed to assist facilitators in leading a day-long workshop for individual (or groups of) higher education institutions that are interested in exploring and incorporating *Beyond Financial Aid (BFA)* into their student support efforts. This guide provides a sample agenda, suggested activities and discussion questions for a 6.5-hour introductory session.

As a result of this workshop, attendees will:

- (1) receive an introduction to the *BFA* guidebook and the institutional self-assessment;
- (2) identify the specific “value-add” that supporting low-income students holds for their college;
- (3) engage with peer practitioners in structured exploratory discussions around student financial stability needs;
- (4) be equipped to return to their colleges with the information needed to play a lead role in completing the full *BFA* self-assessment; and
- (5) develop next steps that can support policy and practice changes that expand access to and use of financial supports for low-income students.

The *BFA Action Planning Guide* is a companion resource that helps organize a team’s discussion and provides an action planning template. It can be introduced as a tool that college teams can use once they return to their campuses after the workshop.

PARTICIPANTS

The workshop agenda assumes participation by teams from 3-5 colleges, each with 6-10 members. If there are more than 5 college teams or more than 10 members per team, feel free to adjust the times allotted for introductions and report-outs accordingly. For example, if you have six or more college teams, instead of having each college report out on their conversation, invite discussion highlights from the entire group. It’s less likely that you will need to adjust more for the size of the team; if you have 15+ members per college, you might consider adding slightly more discussion time for each section to let all the members weigh in. A second option would be to break the college team into two groups of 8-10 members each. Note that groups with more than 10 members often can be less interactive and conversational than groups of less than 10 members.

AGENDA

9:00 a.m. – 9:05 a.m.	Welcome Host
9:05 a.m. – 9:10 a.m.	Workshop Overview Facilitator

9:05 a.m. – 9:15 a.m. Introductions | Facilitator

- Goal: Provide a sense of the range of perspectives and experience the room as well as how each person relates to this work.
- Ask each attendee to share the following:
 - Name, Title/Capacity, Institution
 - What motivated you to join the discussion today? In other words, what is professionally or personally important to you about changing structures and conditions so low-income students can succeed at higher rates?
 - Note: This valuable question can set the foundation for a deep discussion, but requires an additional time on the agenda (assume 2-3 minutes per attendee).

9:15 a.m. - 9:30 a.m. Where Does *BFA* Fit in Your College's Efforts? | Facilitator

- Goal: Identify the broad value and role of this work in the institutional context.
- Discussion Questions (full group):
 - Why does this work matter for your college?
 - How would you assess the current level of support your college provides for its low-income students?
 - Where at the college do you see this discussion and work being relevant?
 - What are you hoping to learn from today's workshop?

9:30 a.m. - 11:00 a.m. Overview of *BFA* | Facilitator

- Goal: Gain a basic understanding of *BFA*, with an introduction to the self-assessment.
- Discussion Elements:
 - Present the [BFA Master PowerPoint](#).
- Discussion Questions
 - (During the overview) Already embedded in the PowerPoint presentation
 - (After the overview)
 - What are your immediate reactions? What questions do you have?
 - Do you believe that these issues reflect the needs of your students at your institution? Why or why not?

11:00 a.m. - 11:15 a.m. Break

11:15 a.m. - 11:45 a.m. Translating *BFA* to Your College | Team Discussion

- Goal: Begin the process of weaving *BFA*'s strategies into your college's policies and practices by further clarifying the value, role, and fit of this work into the institutional context.
- Guidelines:
 - If all attendees are from one college, divide into groups of 4 to 6. If multiple colleges are present, keep full college teams intact. Project these questions on a PowerPoint slide.
 - Allocate 15-20 minutes for team time and 10 minutes for report-out.

- Discussion Questions:
 - Which of the *BFA* strategies resonate most with you?
 - What, if anything, has your institution already done to act on or explore expanded / comprehensive financial supports?
 - What current campus-wide efforts would this conversation support/advance?
 - Where can you see the *BFA* and/or the *BFA* self-assessment being used on campus?
 - What additional questions does *BFA* raise for you as you consider strengthening your college's approach to the financial stability of your students?
 - Based on this preliminary discussion, which strategies do you want to explore more deeply today?
- Report Out:
 - Share an effective practice, approach, policy, or strategies that your institution is currently implementing related to *BFA*.
 - Of *BFA*'s six strategies, identify the top three *BFA* strategies you want to explore today.

11:45 a.m. - 12:00 p.m. Overview of the *BFA* Self-Assessment | Facilitator

- Goal: Gain a basic understanding of the elements, design, and process of the *BFA* self-assessment within the timeframe of today's meeting.
- Discussion Elements:
 - The *BFA* self-assessment mirrors the six strategies of the *BFA* framework.
 - Each strategy has a set of relevant items.
 - For each item, use the rating scale (A/B/C) to assess your college's progress on that item. Answer each item and then count up the numbers of As, Bs, and Cs.
 - The college team(s) will work through three of the six strategies (Strategy 1, Strategy 2, and a strategy of the college's choice).
 - Strategy 1 reviews quantitative and qualitative data and sets the baseline for the size, scope, and experiences of low-income students at your college. We suggest addressing this strategy first, as it serves as a point of departure for and informs the work of the other five strategies.
 - Strategy 2 is also critically important as it explores the actual services the college does and could provide to more broadly and intentionally support low-income students.
 - Strategies 3 to 6 dive deeper into internal/external partnerships, empowering students to use existing services, reviewing institutional practices, and connecting this work to the broader student experience. Colleges should select which of these strategies is of greatest interest and importance to discuss during this workshop, acknowledging that all four will be useful to explore at a later time.
- Reminders for the teams:
 - This self-assessment is not designed to highlight deficiencies. Instead, it is a companion tool that can help organize your institution's conversations and help identify areas of priority and opportunity.

- It's okay to have Bs and Cs.
- If you do not know how to answer an item, identify which department(s)/individual(s) on your campus would be able to answer it.
- Of the Bs and Cs that you may have, identify the priority items that you would like your college to pursue first.
- Establish any common definitions among your team members so there is consistency in the responses (e.g., Let's define "low-income students" as Pell grant recipients, Rating a "B" on an item it means that our college...)

12:00 p.m. - 12:30 p.m. Lunch

12:30 p.m. - 1:15 p.m. Strategy 1 | Team Discussion

- Goal: Use the *BFA* self-assessment to reflect on the current student experience and related data.
- Guidelines:
 - In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
 - During the team time each team will work through the items in Strategy 1 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Report Out:
 - Share a source of quantitative or qualitative data you currently collect about financial challenges faced by your students and if possible, the impact of these challenges on their progress or completion and how the data are used.
 - Share a challenge you face in accessing or using data related to better understanding students' financial challenges or needs.
- Additional Discussion Questions (Consider weaving in any of these questions based on team responses and remaining time):
 - What quantitative and/or qualitative data do you currently collect about financial challenges faced by your students?
 - What data can do you currently collect about the impact of these financial challenges on student progress and completion?
 - How are these data used? In which institutional conversations are they currently presented/discussed?
 - Of the self-assessment items, which items did you identify as priority activities for your college? Why?
 - For self-assessment items that you were not able to answer, who on your campus might be better positioned to address them?

1:15 p.m. - 2:00 p.m. Strategy 2 | Team Discussion

- Goal: Goal: Use the *BFA* self-assessment to reflect on the college's current services and supports.
- Guidelines:

- In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
- During the team time each team will work through the items in Strategy 2 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Report Out:
 - If possible, share an example of bundled/integrated services for students on your campus, where two or more services are connected or provided together. Otherwise, share an example of a campus service (beyond traditional forms – grants, loans, scholarships, work study) that addresses students’ financial stability concerns.
- Additional Discussion Questions (Consider weaving any of these questions in based on team responses and remaining time):
 - What types of services do you think your students most need? How do you know?
 - What services and supports do you already provide to your students?
 - Do students who need them know where to find / access these services? How do you know?
 - Where can your institution expand and/or strengthen assistance? How do you know?
 - Of the self-assessment items, which items did you identify as priority activities for your college? Why?
 - For self-assessment items that you were not able to answer, who on your campus might be better positioned to address them?
 - As you completed the self-assessment, did you or your team members learn something new about existing services on your campus?

2:00 p.m. - 2:15 p.m. Break

2:15 p.m. - 3:00 p.m. Strategy 3/4/5/6 | Team Discussion

- Guidelines:
 - Each college team can select the strategy (3, 4, 5, or 6) for this discussion section. See *Appendix A: Activity Guides for BFA Strategies 3-6* to find the corresponding activity guide.
- Report Out:
 - Share which strategy you selected.
 - Identify a one-sentence headline that best captures your discussion.
 - Identify a question your college team has about making progress in this strategy.

3:00 p.m. - 3:30 p.m. Identification of 3-5 Next Steps & Wrap-up | Facilitator

- Goal: Identify the next steps to continue this discussion at the institution.
- Guidelines:

- In the same teams, allocate 10 minutes for team time and the remaining 20 minutes for report-out.
- Each college team can use the template in *Appendix B: Action Planning Template* to chart out the next steps.
- Discussion Questions:
 - Brainstorm three to five specific areas to explore further at your college that can strengthen your students' financial stability. Record these areas on the implementation worksheet.
 - Given this workshop, what are the next steps to sustain this momentum when you return to campus? Record your actions on the implementation worksheet.
- Report Out:
 - Share your college team's next steps.
 - Share a practice, policy, or approach that you hope to implement or redesign.

APPENDIX A: Activity Guides for *BFA* Strategies 3-6

2:15 p.m. - 3:00 p.m. Strategy 3 | Team Discussion

- Goal: Use the *BFA* self-assessment to reflect on the college's existing internal and external partnerships.
- Guidelines:
 - In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
 - During the team time each team will work through the items in Strategy 3 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Discussion Questions:
 - Which financial needs (e.g., food, housing, childcare) are addressed through current partnerships? Which needs are not currently being addressed?
 - Which current relevant partnerships can be leveraged or expanded?
 - How can critical connectors (e.g., President, Board of Trustees, Foundation, senior leadership) help strengthen these partnerships?
- Depending on time, you can ask the college team to share a current service provided by a partner organization that supports the financial stability of students. Follow-up questions could include: How does the partnership work? How is the service delivered? Who receives this service? Who on campus work with the partner organization? What is the greatest challenge in expanding this service?

2:15 p.m. - 3:00 p.m. Strategy 4 | Team Discussion

- Goal: Use the *BFA* self-assessment to reflect on the college's current efforts to enable students to use existing services and supports.
- Guidelines:
 - In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
 - During the team time each team will work through the items in Strategy 4 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Discussion Questions:
 - Which services (that could greatly benefit low-income students) are currently underused?
 - What is critical information for low-income students to access? How is that information currently delivered? How would students prefer to access that information? What would increase the ability/desire of students to access that information?
 - Which services could be revised to be "opt-out" instead of "opt-in"?
 - What opportunities exist to reduce stigma associated with certain services?
- Depending on time, you ask the college team to share a current approach in practice that enables more students to use an existing service. What contributes to its success?

What types of resources were/are being invested? What role, if any, did students play in this process?

2:15 p.m. - 3:00 p.m. Strategy 5 | Team Discussion

- Goal: Use the *BFA* self-assessment to reflect on the college's internal processes.
- Guidelines:
 - In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
 - During the team time each team will work through the items in Strategy 5 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Discussion Questions:
 - How can we better learn the unintended impacts our processes may have on our low-income students?
 - Which institutional processes may currently have unintended consequences for low-income students?
 - Which institutional processes offer opportunities to better understand and/or support our students?
 - How much do faculty, staff, and administrators know about the variety of campus services that current exist to support low-income students?
 - Are there any current professional development opportunities that support faculty, staff, and administrators in better understanding the circumstances and challenges faced by low-income students or services to support them? If so, which ones?
- Depending on time, you can ask the college team to identify a current practice, process, or policy that hampers the progress of students. How does this action create unintended consequences for students?

2:15 p.m. - 3:00 p.m. Strategy 6 | Team Discussion

- Goal: Use the *BFA* self-assessment to reflect on the college's additional efforts to support student success.
- Guidelines:
 - In the same teams as before, allocate 25 minutes for team time and 20 minutes for report-out.
 - During the team time each team will work through the items in Strategy 6 of the *BFA* self-assessment. The team can also use the interpretation guide to interpret the results for that strategy.
- Discussion Questions:
 - What are the major current efforts (e.g. guided pathways, orientation, advising, First Year Experience) at your college that support student progress and success?
 - What is the impact of these current efforts on low-income students? How do you know?

- Which current efforts already address financial stability in some way? How is that done?
 - Where could the knowledge and/or provision of financial supports be integrated in these efforts?
- Depending on time, you can ask the college team to discuss early thoughts on weaving broader financial supports into a current institutional effort and what that could look like.

APPENDIX B: Action Planning Template

Guidelines: Identify 3-5 next steps for your college in terms of using *Beyond Financial Aid* and/or addressing financial stability issues for your low-income students. These can be process steps such as identifying how a fuller range of practitioners at the college can engage with *BFA* or they can be discrete steps such as creating a food pantry or reaching out to partners to offer workshops on campus. For each item, indicate the intended audience/outcomes, the expected challenges, lead person(s) (suggest 1-2 people), timeline, and any necessary resources/supports.

Step	Intended Outcomes	Expected Challenges	Lead Person(s)	Completion Date	Resources/Supports Needed
1.					
2.					
3.					
4.					
5.					