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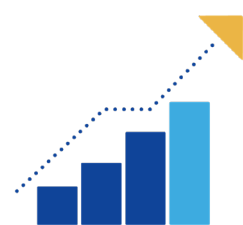
**Financial Aid/FAFSA Completion
Ideal Timeline and Goals**
with Action Plan Template

Financial Aid/FAFSA Completion

Ideal Timeline and Goals for the 2023-2024 School Year

▶ with Fillable School Action Plan Template on pages 5-7

▶ For students ineligible to complete the FAFSA, refer to page 10 for additional resources. Note that the below suggested events should also cater to supporting these students to pursue other Financial Aid options.



Ideal milestone goals

- By January 15, 2024: reach 20% of 12th graders
- By March 15, 2024: reach 43% of 12th graders
- By June 30, 2024: reach 60% of 12th graders

August 2023

- Send messaging to all 12th graders and their families about the importance of Financial Aid and FAFSA completion for students declaring one of the three E's "Enroll (in education beyond high school), Enlist (joining the military), or Employment (going straight into the workforce)".
 - Include within messaging what 12th graders and families will need to provide to complete the FAFSA; this could be included in other 12th-grade messaging, like senior pictures, fees, or other postsecondary tasks like college apps and RDS completion.

September 2023

- Host at least one information session about Financial Aid/FAFSA for students and families, focusing on the "why" Financial Aid is important to be completed, and the "how," including the need for FSA ID creation for the parent/adoptive guardian and student. Consider when planning, if your 12th grader class is larger than 150:
 - Host at least two information sessions.
 - Encourage FSA ID creation at the information session for parent/adoptive guardian and student.

▶ NOTE

Consider branding your information session and future events in line with "Declaring your 'E'" to capture students interested in learning to pay for college or certification programs that financial aid/FAFSA could help with.

October - November 2023

- Host two Financial Aid/FSA ID Creation Drive events during the school day for all 12th graders to create their FSA IDs. Be sure to track attendance!
 - As a part of College Application Week (CAW), they could set up their FSA ID, and make sure to notate their username and password
 - Then, the next event could target students that didn't create their FSA ID
- Host at least two Financial Aid/FSA ID Creation Family Nights. Be sure to track attendance! Invite students and their parents/guardians, so they can create their FSA IDs, learn what they'll need to complete the FAFSA, and learn other Financial Aid options, like scholarship opportunities, for students ineligible for FAFSA completion.

▶ NOTE

It's important for the student to know how their parent/adoptive guardian sets up their FSA ID.

▶ NOTE

Late November, request English (or Math 4/ Social Studies) teachers for all 12th-grade students to share a FAFSA checklist for students to take home to share with their parents/guardians.

December 2023

- When the opening FAFSA date is solidified, share the FAFSA opening date in messaging with all 12th graders and their parents/guardians, reminding them of the things to have ready.

January 2024

- Schools should have reached their first milestone goal for FAFSA completion they set at the beginning of the year.

February 2024 - Financial Aid Awareness Month

- This is the time to really push hosting Financial Aid/FAFSA information sessions, inviting students and families (**remember to track attendance**); repeating the same information shared in the September information session, including the messaging of what 12th graders and families will need to provide to complete the FAFSA or pursue other Financial Aid options.
- Host at least two Financial Aid/FAFSA Family events at night, where students and their parents/guardians can support completion of the FAFSA or pursue other Financial Aid options.

▶ NOTE

Consider marketing the event as "How to Pay for College/Certification Program Night"

March 2024

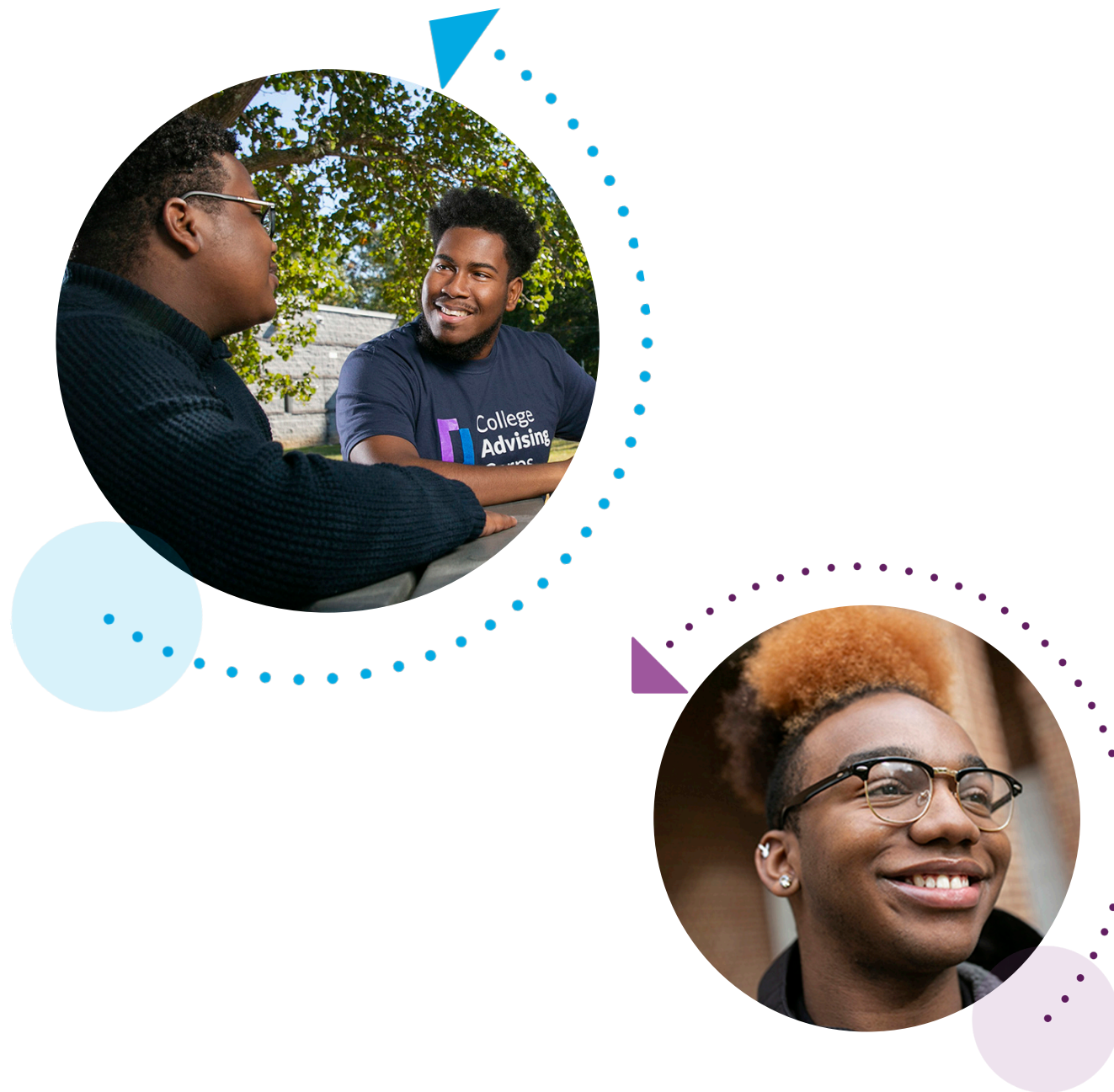
- Schools should have reached their second milestone goal for FAFSA completion they set at the beginning of the year.
- Send messaging specifically to any 12th graders and families who have either not submitted FAFSA and/or attended any of the previously hosted Financial Aid events.

April - May 2024

- Host Financial Aid/FAFSA information session, inviting only students and families who have not attended any of the prior events; repeat the same information shared in the September information session, include in messaging what 12th graders and families will need to provide to complete the FAFSA or pursue other Financial Aid options.
- Host at least two Financial Aid/FAFSA family nights, where students and their parents/guardians can support completion of the FAFSA or support students pursuing other Financial Aid options.

June 2024

- Schools should have reached their third and final milestone goal for FAFSA completion they set at the beginning of the year.



Financial Aid/FAFSA Completion 2023-2024 School Year Timeline and Action Plan Template for High School

2022-2023 FAFSA Completion Rates for your school, reference resource provided at Summit:

- By January 2023: _____ % of 12th graders completed FAFSA
- By March 2023: _____ % of 12th graders completed FAFSA
- By June 2023: _____ % of 12th graders completed FAFSA

How many students are in your School Year 2023-2024 12th grade class? _____

Set your school's milestone goals for School Year 2023-2024:

- By January _____, 2024: reach _____ students, _____ % of 12th graders
- By March _____, 2024: reach _____ students, _____ % of 12th graders
- By June _____, 2024: reach _____ students, _____ % of 12th graders

August 2023

- By _____ date, your school will send messaging to all 12th graders and their families about the importance of Financial Aid and FAFSA completion for students considering one of the three E's "Enroll (in education beyond high school), Enlist (joining the military), or Employ (going straight into the workforce)." Include in the messaging what 12th graders and families will need to provide to complete the FAFSA (Note: This could be included in other 12th-grade messaging, like senior pictures, fees, or other postsecondary tasks like college apps and RDS completion)
- Who will craft said messaging? _____
- Who will send said message? _____
- Who will answer questions from students and their families? _____

September 2023

- By _____ date, your school will host _____ (number) “How to Pay for College/Certification Programs” information session(s) for students and families, focusing on the “why” it’s important it be completed, along with the mechanics of “how” and the need for FSA ID creation for the parent/adoptive guardian and student. Remember, if your 12th grader class is larger than 150, host at least two information sessions.
- Which staff members will present at the information session? _____
- Who, and by when, will you tell them they’re needed to present? _____

October - November 2023

- By _____ and _____ date host _____ (number) Financial Aid/FSA ID Creation Drives, where students can create their FSA IDs, and learn Financial Aid options, like scholarship opportunities, for students ineligible for FAFSA completion.
- Will your school, as a part of CAW, set up their FSA ID, and make sure to notate their username and password? If yes:
 - Who would be involved in making this happen? _____
 - When will you inform them that they need to help with this? _____
 - Will your school host a second event to target students that didn’t create their FSA ID? _____
- By _____ and _____ date, host _____ Financial Aid/FSA ID Creation Family nights. Invite students and their parents/guardians so they can create their FSA IDs, learn what they’ll need to complete for the FAFSA, and learn Financial Aid options, like scholarship opportunities, for students ineligible for FAFSA completion.
- By _____ (late November), have English (or Math 4/ Social Studies) teachers for all 12th-grade students share a FAFSA checklist for students to take home to share with their parents/guardians. Which specific teachers will share this resource? _____
- Who and by when will these teachers be informed they need to share this resource? _____

December 2023

- By _____ date, after the opening FAFSA date is solidified, share the FAFSA opening date in messaging with all 12th graders and their parents/guardians, reminding them of the things to have ready.
- Who will share the message? _____
- When will they be informed they need to share this messaging? _____

January 2024

- By _____ date, school should have reached their first milestone goal for FAFSA completion they set at the beginning of the year.

February 2024 - Financial Aid Awareness Month

- By _____ date, host Financial Aid/FAFSA information session, inviting students and families (remember to track attendance); repeat the same information shared in the September information session, including the messaging of what 12th graders and families will need to do/provide to complete the FAFSA or pursue other Financial Aid options.
- By _____ and _____ date(s), host _____ (number) of Financial Aid/FAFSA Family events at night, where students and their parents/guardians can support completion of the FAFSA and/or pursue other Financial Aid options. Consider marketing the event as “How to Pay for College/Certification Program Night.”

March 2024

- By _____ date, school should have reached their second milestone goal for FAFSA completion that they set at the beginning of the year.
- By _____ date, _____ is to send messaging specifically to any 12th graders and families who have either not submitted FAFSA and/or attended any of the previously hosted events.

April - May 2024

- By _____ date, host a FAFSA information session, inviting only students and families who have not attended any of the prior events; repeat the same information shared in the September information session, include in messaging what 12th graders and families will need to do/provide to complete the FAFSA or pursue other Financial Aid options.
- By _____ and _____ date, host at least two Financial Aid/FAFSA family nights, where students and their parents/guardians can support completion of the FAFSA or support students pursuing other Financial Aid options.

June 2024

- By _____ date, school should have reached their third and final milestone goal for FAFSA completion they set at the beginning of the year.

Resources

- [“How to Host a Successful Financial Aid Night”](#)
- [Local Financial Aid Offices](#)
- Financial Aid/ FAFSA Information Session Slide Deck - *Coming Soon*
- FAFSA Checklist for the “Better FAFSA” - *Coming Soon*
- Example Financial Aid/FAFSA Messaging for Student/Parent/Adoptive Guardian for August 2023:

Hi [student name] and [parent name]!

Even though we’re just starting the school year, graduation will be here before you know it. Whether you’re interested in pursuing college, military, or going straight into the workforce after high school, we strongly encourage you to consider completing the FAFSA/Financial Aid applications, so you have plenty of options for your next steps. As you may know, the Free Application for Federal Student Aid (FAFSA) opens in December. There are several federal and state student aid programs that have limited funds that are “first-come, first-served.” Look out for future messaging and school-hosted events supporting Financial Aid/FAFSA completion! We look forward to sharing more soon :)

Here is an overview of the process:

<https://studentaid.gov/h/understand-aid/how-aid-works>



Partners in North Carolina who you can request to assist in Financial Aid/ FAFSA Information/ Workshop Sessions:

CFNC Regional Reps:

- Amy Denton, 252 area CFNC Regional Rep, amy.denton@cfi.org
- Takeila Hall, 336 area CFNC Regional Rep, takeila.hall@cfi.org
- Timeka Ruffin, 704/980 area CFNC Regional Rep, timeka.ruffin@cfi.org
- Devon McCarthy-James, 828 West area CFNC Regional Rep, devon.mccarthy-james@cfi.org
- Skip Watts, 828 East area CFNC Regional Rep, skip.watts@cfi.org
- Brittany Privott, 910 area CFNC Regional Rep, brittany.privott@cfi.org
- Sarita Broadway, 919 area CFNC Regional Rep, sarita.broadway@cfi.org
- Juana Hernandez-Lira, CFNC en Español Rep, juana.hernandez-lira@cfi.org
- JuanEs Ramirez, CFNC en Español Rep, juanes.ramirez@cfi.org

Partners in North Carolina, specific to prosperity zone regions, who can assist with linking and leveraging community and regional resources:

myFutureNC Regional Reps:

- Toni Blount, South Eastern Regional Impact Manager, toni@myfuturenc.org
- Brett Brenton, North Central Regional Impact Manager, brett@myfuturenc.org
- Kim Case, Northwest Regional Impact Manager, kim@myfuturenc.org
- Angie Jenkins, Northeast Regional Impact Manager, angie@myfuturenc.org
- Robert Locklear, Southeast Regional Impact Manager, robert@myfuturenc.org
- Tracie Metz, Western Regional Impact Manager, tracie@myfuturenc.org
- Senemeht Olatunji, Southwest Regional Impact Manager, senemeht@myfuturenc.org
- Preston Roseboro, Piedmont-Triad Regional Impact Manager, preston@myfuturenc.org



Created by the CFNC En Español Team:
How to Support Students Who Are Ineligible to Complete FAFSA

What to share with students/families of students who are ineligible to complete FAFSA:

- There are many ways to pay for college that are not necessarily attached to federal or state financial aid:
 - Unrestricted aid through institutions or foundations
 - Scholarships are geared toward students that are not eligible to receive state or federal aid. A diverse strategy of local, regional, state, and national scholarships is recommended
 - Utilize tools such as [CSS profile](#) or schools' own forms to determine financial necessity of the family. Some schools have a goal to meet 100% financial need of the student
- Encourage students to maximize opportunities while still in high school & minimize college costs:
 - AP, IB, Dual Enrollment, or Cambridge courses
 - Career and Technical Education, students can earn certification for free
 - [Transfer and guaranteed admission programs](#)
- Encourage students to assess their prior knowledge by taking College Board's CLEP examination:
 - There are free resources to help you prepare for these exams, such as [Khan Academy](#) and [Modern States Education Alliance™](#)
- Explore promise programs at the local community college that may help reduce costs or provide financial aid for students.
- Explore the NC Promise Universities that cap their tuition at \$500 for in-state and 2,500 for out-of-state students:
 - <https://www.northcarolina.edu/future-students/nc-promise/>
- Get Informed about special rules and exceptions to reduce tuition at North Carolina Colleges and Universities. Some common exceptions include: Business-Sponsored Students, Public School Graduates, Students Sponsored by a Non-Profit Entity, and Full Scholarship at UNC System Schools. Learn more [here](#).

How to share the above with students/families of students who are ineligible to complete FAFSA:

- In messaging all 12th graders about their Financial Aid options
- During Financial Aid events/information sessions
 - Utilize trusted organizations already in your communities to increase participation
 - Increase target populations in the planning of the event
- Make scholarship information easily available or visible to students
 - Helpful to include eligibility requirements and deadlines
- Invite families to be part of the process of paying for college
 - Seek information in other languages to assist students and families.
Example: CFNC en Español [publications](#)
 - Information sessions in a language other than English or interpretation services
- Encourage students to discuss costs related to postsecondary education opportunities
 - Utilize tools such as [Reality Check](#) and [financial basics](#)

- Use opportunities to connect and build trust with other communities through your language access programs, trusted community organizers, and other personnel that connects already with targeted populations in your districts
- Utilize social media, school websites, and other platforms to share special opportunities.

NOTES

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