City/community name:

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Self-Assessment

This document can help your community better understand campus and district needs so that you can create a successful financial aid completion plan.

Financial aid completion goals

1. **Does your state have a financial aid application completion goal?**

□ Yes (please describe the goal):
□ No
□ Not sure

2. **Does your community have a financial aid application completion goal?**

□ Yes (please describe the goal):
□ No
□ Not sure

3. **Does your school district have a financial aid application completion goal?**

□Yes (please describe the goal):
□No
□Not sure

Part I: Partnerships and Collaborations

4. **Does your community have a partnership or collaboration that focuses on increasing access to education after high school for all students?**

□ Yes (if so, please add its name):
□ No
□ Not sure

5. **If you answered yes to question 4 above, is financial aid application completion part of the collaborative's work?**

□ Yes
□ No
□ Not sure

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6. **What sectors are involved in this collaborative? Please check all that apply and add their roles.**

□ Community-based/Nonprofit college access organizations
Roles:

□ Community-based/Nonprofit local foundations/scholarship providers
Roles:

□ Community-based/Nonprofit grassroots, civic, social service, and/or advocacy organizations
Roles:

□ K–12 schools/district
Roles:

□ Postsecondary institutions
Roles:

□ Businesses/Business organizations
Roles:

□ Faith-based organizations
Roles:

□ Local government/social service agencies
Roles:

□ Other (please describe)
Roles:

7. **What are three to five focus areas of this partnership or collaborative? (Leave blank if unsure.)**

Priority area 1:

Priority area 2:

Priority area 3:

Priority area 4:

Priority area 5:

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8. **How are these partners coordinated? Which partner does that coordinating? (Leave blank if unsure.)**

9. **In your opinion, which partners/sectors see themselves as responsible for helping students complete financial aid applications and go on to pursue a degree or credential after high school?**

10. **In your opinion, does your community have a college-going culture?**

11. **How are parents engaged in financial aid application completion?**

Part II: Training and Capacity Building for Financial Aid Application Completion

12. **Who currently helps students complete financial aid applications? (Check all that apply.)**

□ Staff from community-based, nonprofit college access organizations
□ Counselors/K–12 staff
□ Representatives from postsecondary institutions
□ Volunteers from local businesses
□ Peers or near peers
□ Other (please describe):

13. **How are these people trained to help students complete their financial aid application?**

14. **Who conducts that training?**

15. **What training curricula or vehicles are used?**

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16. **Where do students complete their financial aid application? (Check all that apply.)**

□ In school during the school day
□ At an in-school financial aid completion event but after traditional school hours
□ Off-site at a community-hosted event (e.g., library, faith-based organization, or college-fair type event)
□ At an event hosted by a local postsecondary institution
□ On their own or at home
□ Other (please describe):

17. **In your opinion, do people in your community have any misinformation about completing a financial aid application?**

□ Yes
□ No
□ Not sure

18. **If you answered yes to the question above, what misinformation do they have?**

19. **How do you build trust with students and their families in your community about college-going, applying for financial aid, etc.?**

Part III: Reaching Students and Families Through Strategic Communication and Events

20. **Do you use any of these traditional media strategies to disseminate information on applying for financial aid to students, their families, or the broader community? (Check all that apply.)**

□ Ads in newspapers or magazines
□ Radio spots
□ Announcements on cable or network TV
□Other (please describe):

21. **Do you use any of these nontraditional media strategies to disseminate information on financial aid applications to students, their families, or the broader community? (Check all that apply.)**

□Social media (e.g., Facebook, Twitter, Snapchat, and Instagram)
□ Online ads
□ Geofencing
□ Texting
□ Online advertising
□Other (please describe):

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22. **Does your community have a marketing campaign or specific branding aimed at raising awareness about the importance of postsecondary education and/or financial aid application completion?**

□ Yes
□ No
□ Not sure

23. **If you answered yes to the question above, please briefly describe your campaign or branding:**

Part IV: Accessing and Using Data to Increase financial aid application Completion

24. **Does your state make student-level financial aid application completion data available to schools, districts and/or eligible partners? (Check all that apply.)**

□ Yes, to schools and districts
□ Yes, to eligible partners
□ No
□ Not sure

25. **If you answered yes to the question above, do your schools, districts, and/or eligible partners access and use this data? (Check all that apply.)**

□ Yes, schools and districts access and use this data.
□ Yes, eligible partners access and use this data.
□ No
□ Not sure

26. **If you answered yes to the question above, how do your schools, districts and/or eligible partners use this data? (Check all that apply.)**

□ To target students who have not completed a financial aid application to get them to do so
□ To create public-facing dashboards that display our schools' financial aid completion rates
□ To promote and track friendly financial aid application completion competitions within and/or among our schools
□ Not sure
□ Other:

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Implementation Plan

Please fill out one plan template for each goal you hope to accomplish during the upcoming academic year.

Goals:				
Potential barriers:		**Desired outcomes:**		
Objectives	**Actions**	**Timeline**	**Responsible Party**	**Measure of Success/Data Sources**
Objective 1:				
Objective 2:				
Objective 3:				
Objective 4:				

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Objective 5:				
Stakeholder/partners required:				
Resources required:				
What training or technical assistance do you anticipate needing to accomplish this goal?				