

## North Carolina Student Aid Study Group Kickoff Call

Thursday, August 2, 2018 | 3:30 p.m. – 4:30 p.m.

Join the online meeting: <https://join.startmeeting.com/ereilley>

Dial-in number (US): (701) 801-1230 | Access code: 310792#

Online meeting ID: ereilley

### Agenda

- **Welcome** - *Margaret Spellings, President, UNC System & Peter Hans, President, North Carolina Community College System | Co-Chairs of North Carolina Student Aid Study Group*
- **Quick Introductions** – *All*
- **Overview and Background** - *Andrew Kelly, Senior Vice President for Strategy & Policy, UNC System Office*
  - Origins and funding
  - Key questions
  - Draft charge
  - Goals
- **Project Deliverables**– *Martha Snyder, Senior Director, HCM Strategists*
- **Project Management Process and Timeline** – *Annika Many, Principal, edBridge Partners*
- **North Carolina State Financial Aid** – *Sarah Pingel, Ed.D., Senior Policy Analyst, Education Commission of the States*
- **Q&A** – *All*
- **Next Steps**– *Annika Many, Principal, edBridge Partners*
  - Basecamp Site: <https://3.basecamp.com/4066770/projects/8555617>
  - Next meeting: Monday, September 10, 1-4 PM. Center for School Leadership Development, 140 Friday Center Drive, Chapel Hill
  - Meeting Preparation

# DRAFT Charge

## Preamble

The state of North Carolina invests hundreds of millions of dollars in student aid each year in service of its constitutional mandate to provide higher education “as free as practicable.” These investments help ensure that the price of attendance will not be a barrier to college enrollment and completion for qualified North Carolinians of all ages.

As the UNC System and North Carolina Community College System work to build from this strong foundation, both institutions are intensely focused on increasing postsecondary access *and* success. The centrality of those priorities is reflected in both systems’ strategic plans which emphasize increases in completion rates, improved access for key groups, and smoother transitions from K-12 to college.

Student aid is an essential tool in our pursuit of these goals. But to meet the challenge, our state aid programs must adapt. A growing body of research has provided many lessons on how student aid design and delivery can influence college aspirations, enrollment decisions, and student success once enrolled in college. We also know that particular design features--like complicated application processes, poor timing, and insufficient flexibility--can weaken and ultimately undermine the goals of financial aid programs.

As such, it is an opportune time to assess the strengths and weaknesses of our current approach to state-based aid, and to identify evidence-based changes that can increase the productivity of those investments and their transformative impact for students.

The North Carolina Student Aid Study Group will bring together higher education leaders, financial aid experts, and state policymakers to take a close look at the aid programs that serve UNC and NCCCS students (the UNC Need-based Grant, Community College Grant, and Education Lottery Scholarship), identify lessons from research and other states about the optimal design of student aid, and develop evidence-based reforms to enhance the effectiveness of state aid investments.

## Key Questions

- Are our grant programs designed to maximize access *and* success for all UNC and community college students?
- How do students and families learn about these opportunities, and can the state do more to reach back into the K-12 pipeline to inform students about their options?
- Do the programs create incentives for timely degree completion?
- Are our student aid programs designed to meet the needs of nontraditional students?

## Principles

1. Student aid programs should be as simple, predictable, and transparent as possible to the end users.
2. The state should work to ensure that prospective students and their families have opportunities to learn about student aid opportunities and postsecondary options early in their school careers.

3. State aid should be targeted at those on whom it will have the largest effect on enrollment and success.
4. State aid rules and procedures should encourage student progress and timely degree completion without compromising access.
5. State aid rules and procedures should provide sufficient flexibility to serve the needs of different types of students.
6. Potential reforms should focus primarily on making the most productive use of existing state investments.

## **Goals**

1. Conduct a detailed assessment of the strengths, weaknesses, and opportunities for improvement in existing state student aid programs and outreach efforts in the context of new goals and economic conditions.
2. Examine lessons from rigorous research and from other states about the effective design and targeting of student aid programs and associated outreach efforts.
3. Use the findings from 1 and 2 to develop a set of evidence-based reforms that can increase the efficiency and effectiveness of the state financial aid programs and outreach efforts that serve UNC System and NCCCS students.

## Meeting Schedule and Topics (DRAFT)

Meeting	Topic	Action
August 2	Kick-off Phone Conference (brief orientation to the study group: discuss the overarching goals and deliverables of the group; outline process; answer questions)	
September 10	Face-to-Face Meeting 1: Level-Setting <ul style="list-style-type: none"> <li>• Summarize key issues driving financial aid reform and current state of reform efforts at the state level;</li> <li>• Assess strengths and weaknesses of current programs;</li> <li>• Identify high-level issues to be addressed by the Study Group</li> </ul>	Adopt charge and goals for the Study Group
October 10	Face-to-Face Meeting 2: Outreach, Access, and Eligibility <ul style="list-style-type: none"> <li>• How do we compare to other states on these fronts;</li> <li>• What do we know, if anything, about how our programs affect student behavior?</li> <li>• What are some potential reforms, based on research and experience in other states, that can promote the group's goals?</li> </ul>	
October 31	Face-to-Face Meeting 3: Optimizing Aid for Student Success <ul style="list-style-type: none"> <li>• How can state aid programs encourage/incentivize credit accumulation and timely completion?</li> <li>• How should reforms balance incentives for student success and maintaining access?</li> <li>• What does encouraging "success" look like for nontraditional students? Is there sufficient flexibility?</li> </ul>	Adopt draft changes to outreach, eligibility, and simplification.
November 28	Face-to-Face Meeting 4: Final Recommendations <ul style="list-style-type: none"> <li>• Assess the distributional and budgetary consequences of proposed changes; and</li> <li>• Prioritize recommendations for final report based on technical analysis.</li> </ul>	Adopt draft changes related to student success;
December TBD	Review the final draft of the report	Ratify final report

## NC Student Aid Study Group

*Co-chairs:*

**Margaret Spellings**  
President, University of North Carolina System

**Peter Hans, President, North Carolina Community College System**

### **UNC System Representatives**

---

**Mr. Darrell Allison**  
UNC Board of Governors  
[Darrell.allison@msn.com](mailto:Darrell.allison@msn.com)

**Dr. Robert Rucho**  
UNC Board of Governors  
[bob@bobrucho.com](mailto:bob@bobrucho.com)

**Ms. Sandy Baum**  
Urban Institute  
[sbaum@urban.org](mailto:sbaum@urban.org)

**Mr. Kennon Briggs, Chair**  
UNC Asheville Board of Trustees  
[kennondb@gmail.com](mailto:kennondb@gmail.com)

**Ms. Imani Burwell, Advisor**  
Warren County High School, Carolina  
College Advising Corps  
University of North Carolina at Chapel Hill  
[imanib@live.unc.edu](mailto:imanib@live.unc.edu)

**Chancellor Philip Dubois**  
University of North Carolina at Charlotte  
[pdubois@uncc.edu](mailto:pdubois@uncc.edu)

**Ms. Rachelle Feldman,**  
**Associate Provost**  
University of North Carolina at Chapel Hill  
[rachelle\\_feldman@unc.edu](mailto:rachelle_feldman@unc.edu)

**Dr. Louis Hunt, Senior Vice Provost**  
NC State University  
[louis\\_hunt@ncsu.edu](mailto:louis_hunt@ncsu.edu)

**Ms. Sharon Oliver,**  
**Director of Financial Aid**  
North Carolina Central University  
[soliver@ncsu.edu](mailto:soliver@ncsu.edu)

**Ms. Deborah Tollefson,**  
**Director of Financial Aid**  
University of North Carolina at Greensboro  
[ddtollef@uncg.edu](mailto:ddtollef@uncg.edu)

### **NCCCS Representatives**

---

**Kali Brown, Director of Financial Aid**  
Vance-Granville Community College  
[brownk@vgcc.edu](mailto:brownk@vgcc.edu)

**Pamela Harrell, VP for Student Services**  
Johnston Community College  
[pjharrell@johnstoncc.edu](mailto:pjharrell@johnstoncc.edu)

**Rosemary Kelly, AVP for Student Services**  
Fayetteville Technical Community College  
[kellyr@faytechcc.edu](mailto:kellyr@faytechcc.edu)

**Lisa Koretoff, Director of Financial Aid**  
Guilford Technical Community College  
[lakorettoff@gtcc.edu](mailto:lakorettoff@gtcc.edu)

**Dennis King, President**  
Asheville-Buncombe Technical Community  
College  
[dennisfking@abtech.edu](mailto:dennisfking@abtech.edu)

**Laura Leatherwood, President**  
Blue Ridge Community College  
[leatherwood@blueridge.edu](mailto:leatherwood@blueridge.edu)

**Mitch Martin, Veterans Service Director\***  
Craven Community College  
[martinmi@cravencc.edu](mailto:martinmi@cravencc.edu)

**Daniel “JJ” McEachern,**  
**Dean of Enrollment Management\***  
Central Piedmont Community College  
[jj.mceachern@cpcc.edu](mailto:jj.mceachern@cpcc.edu)

**Christopher Sabin,**  
**Director of Veterans Programs**  
Coastal Carolina Community College  
[sabinc@coastalcarolina.edu](mailto:sabinc@coastalcarolina.edu)

**Chad Williams, VP for Student Services**  
Randolph Community College  
[gcwilliams@randolph.edu](mailto:gcwilliams@randolph.edu)

## **NCSEAA Representative**

---

**Elizabeth McDuffie, Executive Director**  
North Carolina State Educational Assistance  
Authority (NCSEAA)  
[mcduffie@ncseaa.edu](mailto:mcduffie@ncseaa.edu)

**\*INVITED**