Stockton University Compass Fund
Proposal Form

1. Please complete this form and email a copy to: CompassFund@stockton.edu.
2. Compass Fund proposals must demonstrate a direct link to one or more of the six areas of focus in the University's *Strategic Plan 2025 – Choosing Our Path*
3. Proposals must provide specific budget details, identify realistic outcomes, and specify assessment measures.
4. Proposals must include an endorsement from your Divisional Executive. Please include an email or memo from your Divisional Executive with this application.
5. All student project leaders must identify at least one faculty or staff mentor.
6. Particular attention will be paid to proposals which include one or more of the following:
   - A clear demonstration of University-wide impact.
   - Involvement of students as project leaders/mentees.
   - Identification of co-funding opportunities in addition to anticipated Compass Fund support.
   - Inter-departmental or inter-divisional collaboration within the project planning or implementation process.

General Application Information

Project Leader Name(s)	**Marielena Dottoli & Angelica Velez**					
Project Leader Email(s)	**Marielena.Dottoli@stockton.edu; Angelica.Velez@stockton.edu**					
Project Partner(s)						
Title of Project	**Free Assistance for Financial Success & Awareness**					
I am a:		Student		Faculty Member	*	Staff Member
Project start date: 9/1/2023			Project end date: 9/1/2025			
If you are a student, who is your faculty/staff mentor?						

Proposal Category (choose one)

One-Time Project/Event		One-Year Pilot Project		Two-Year Pilot Project	
	$5,000 or less		$5,000 or less		$5,000 or less
	More than $5,000		More than $5,000	*	More than $5,000

Strategic Area of Focus (choose one)

*	*Inclusive Student Success*
*	*Diversity and Inclusion*
	Teaching and Learning
*	*Strategic Enrollment Management*
	Financial Sustainability
	Campus Community, Communication, and Shared Governance

Please provide a narrative summary of your project.

The Office of Financial Aid (OFA) seeks to establish a series of free financial aid assistance workshops to help both prospective and returning students and their families secure federal and state funding by filing their Free Application for Federal Student Aid (FAFSA) or their NJ Alternative Financial Aid Application for NJ Dreamers. Significant changes to the FAFSA are to be implemented in the 2024-25 academic year due to the FAFSA Simplification Act. These workshops will offer hands-on assistance with financial aid professionals who are trained to navigate these changes. Additional workshops will assist students in completing outstanding financial aid requirements and enhance their financial literacy skills.

With financial support from the Compass Fund, OFA seeks to provide folders and pens to each student in attendance at one of the workshops. These folders list a student's financial aid checklist from start to finish, as well as other information to help them through the process. These folders also give students a place to store their important financial information and the pens would give them something to use to make notes and check off their to do list. The funding would also assist us in purchasing food for our events to draw students to attend as well as giveaway incentives to drive student participation in the financial aid process, including completing the FAFSA and outstanding requirements before deadlines.

As there are two main FAFSA filing deadlines, we plan to give away one (1) $25 gift card to a student who files their FAFSA by Stockton's March 1 Priority Deadline and one (1) $25 gift card to a student who files their FAFSA by the State of New Jersey's April 15 Filing Deadline. Prospective and returning students will be considered in the random drawing. In addition, to incentivize students and families who attend our events and to fill out our post-event survey, we will offer the chance to win a $25 gift card. We will do this for each of our six (6) events.

The events will be held on the following dates for the following groups:

- Oct. 18, 2023: FAFSA/Requirement Completion Event for EOF/First Generation/Dependency Override Students (identified within the Office of Financial Aid) from 5:30pm-7:30pm on the Galloway Campus
- November 16, 2023: FAFSA/Requirement Completion Event for EOF/First Generation/Dependency Override Students (identified within the Office of Financial Aid) from 5:30pm-7:30pm on the AC Campus
- December 2, 2023: FAFSA/Requirement Completion Event for Prospective Students from 10am-12pm on the AC Campus
- February 3, 2024 (February 10, 2024, back-up inclement weather date): FAFSA/Requirement Completion Event for Prospective Students from 10am-12pm on the Galloway Campus
- March 5, 2024: FAFSA/Requirement Completion Event for Continuing Students from 5:30pm-7:30pm on the Galloway Campus
- April 4, 2024: Financial Literacy Event for all Continuing/Graduating Students from 4:30pm-6:30pm on the Galloway Campus

For the FAFSA/Requirement Completion events, there will be financial aid student workers in the Campus Center Grand Hall/Main Entrance to the Scarpa Academic Center at the Atlantic City Campus to check-in those who registered. They will escort the students and their families to our meeting space, where food and beverages will be served. After everyone is checked-in, (someone will wait in the Grand Hall/at the Main Entrance of the Scarpa Academic Center in case we have anyone come late), we will make our way over to a computer lab and begin assisting the students and their families.

We will market the events through several different channels. For prospective students, we will work collaboratively with the Office of Admissions to send post cards to students as well as email invitations

to them. We will also promote on financial aid social media and work with University Relations and Marketing to do the same. Each prospective student event will have 30 spots to fill. Others who would like assistance can make an appointment with our office. We could also look into hosting another event if there is interest. Once someone registers for the event, they will receive an email letting them know that their registration was successful. Then, they will receive reminders one week and two days before the event. Post-event, they will receive a survey asking them about their experience, so that we can help gauge the success of the event. We will provide breakfast at each of these events.

For continuing students, we will promote these events through several channels. We will work collaboratively with the Educational Opportunity Fund (EOF) Program as well as First Ospreys to promote the events (especially those in Oct. and Nov. as these will be designated for these students specifically) and encourage attendance. We will utilize email to send information to all students on the events. We will also create flyers and posters to hang on both campuses as well as graphics to have displayed on the campus TV's, LED's, Computer Monitors and on the web. We will work with University Relations and Marketing to have the events promoted on social media as well as within the Stockton News. We will also promote the events on our financial aid social media platforms. Similar to the process with prospective students, once someone registers for the event, they will receive an email letting them know that their registration was successful. Then, they will receive reminders one week and two days before the event. Post-event, they will receive a survey asking them about their experience, so that we can help gauge the success of the event. We will provide a hot chocolate bar and cookies at each of the FAFSA/Requirement Completion events and an ice cream bar at the Financial Literacy event.

In addition to these events, we are hoping to incentivize students to complete the FAFSA/requirements prior to deadlines with merchandise purchased from the bookstore. Items include, clothing, hats, water bottles, book bags, blankets, lanyards, magnets, phone accessories, an iPad and a diploma frame. By giving students the opportunity to win something tangible that is of value to them, we are hoping to incentivize them to complete all of the steps to the financial aid process earlier, before deadlines. Then, they will see that completing the process earlier makes it easier for them, hopefully changing their behavior for the future.

With this proactive approach, we aim to increase FAFSA and incomplete requirement completions, as well as increase financial literacy and raise awareness of college affordability, which should result in increased retention rates among our returning student population. Through our collaboration with the Office of Admissions, the project will also actively engage with prospective students demonstrating our excellent "Students First" customer service to leave a lasting positive impression which may increase admissions applications, FAFSA completions and enrollment deposits. This project would also affirm Stockton's commitment to inclusivity and diversity by working with the First Ospreys initiative and the Educational Opportunity Fund (EOF) to target and bridge the equity gaps within our most vulnerable student populations, including first generation students. Hands-on assistance with financial aid experts reduces errors in the application process thereby giving students more confidence in the accuracy of their financial aid eligibility. Learning how to complete their financial aid application and the next steps in the financial aid process will give these students the confidence and awareness necessary to be successful going forward. The workshops would take place on the Galloway and Atlantic City campuses in computer labs. Night and weekend events would be scheduled to accommodate the schedules of students and their families. Staff from the Office of Financial Aid as well as student workers and admissions ambassadors would assist during the events.

Strategic Impact

- How will this project clearly address the strategic area/s of focus and the goal/s chosen above?

- What will be the institution-wide impact of this project?

This project supports the themes selected as it provides equitable educational access to diverse populations. This project clearly supports the themes of Strategic Enrollment Management, Inclusive Student Success and Diversity and Inclusion by affording all continuing and prospective students, including those from diverse populations access to one-on-one financial aid assistance. It is widely known that finances are a major barrier students face when looking to pursue a college degree. Some of these are caused by a lack of knowledge or understanding of the financial aid process and the resources available to students. By assisting these students in not only applying for aid, but also completing requirements and giving them an understanding of the entire financial aid process, students will have the tools and resources at their disposal to knock some of those financial barriers down. The programs and incentives presented in this proposal can be especially supportive of students from diverse populations as they may lack the access to the resources to complete and stay informed and involved in the financial aid process. By offering these resources and incentives to students who are considering attending Stockton University, we may be able to reach them on a personal level and leave a lasting impression on them, hopefully giving them an incentive to choose or remain at Stockton.

The institution-wide impact of this project will be showcased in rising recruitment and retention rates as well as graduate outcomes including lower loan default rates. Through these programs, our students will be given the tools to become responsible, financially literate individuals who are proactive and complete the financial aid process early each year to avoid missing deadlines, which determine their eligibility for certain aid programs. They will understand the sources and types of financial aid, how to apply for financial aid and the importance of applying early, how and where to search for and apply for scholarships and the impact of borrowing. As students are more conscious of the financial aid process, they may be more equipped to make smarter decisions when it comes to funding their education, including going into loan debt.

Assessment Plan

- How will you know if your project is a success?
- What are your anticipated outcomes and specific measurements for success?
- What is your project's "finish line?"

We plan to measure the success of this project by comparing FAFSA completion rates collected from previous years with data for the 24-25 and 25-26 academic years.

We will run monthly reports on FAFSA completion rates as they relate to Stockton's March 1 Priority Deadline and the State of NJ's April 15 deadline. Data will come from prior years as well as the 24-25 and 25-26 academic years. More students filing the FAFSA earlier would indicate a success, while fewer students missing the deadlines would also point to a successful project.

We will also compare FAFSA completion data for admitted students from the 24-25 and 25-26 academic years to previous years. An increase in admitted students completing the FAFSA would indicate a success.

We will also look at historic data for students missing HESAA's requirement completion deadlines and compare the number of students who miss the deadline to that data. A decrease in students who miss this deadline would also help determine the success of the project.

In addition to analyzing FAFSA/requirement completion rates, we also plan to give post-event surveys to event participants. These will ask participants about their experience to determine if the event was helpful and effective.

To gauge the success of the financial literacy event, we will analyze Exit Counseling completion rates for continuing students as compared to prior years (an upward trend would indicate a success).

Budget Summary – Compass Fund Requested Funding Only

	Item	FY2023 July 1, 2022 – June 30, 2023	FY2024 July 1, 2023 – June 30, 2024	FY2025 July 1, 2024 – June 30, 2025	Notes/Comments (stipends, supplies, hospitality, etc.)
1.	Supplies		$1,454 ~~$2,693.60~~	$1,454 ~~$2,693.60~~	(Folders/Pens/Flyers/Posters/ Post Cards)
2.	Incentives		~~$1,379.78~~	~~$1,379.78~~	(Gift Cards/Stockton Apparel- merchandise from the bookstore/iPad/Diploma Frame)
3.	Food		$1,000 ~~$2,399.36~~	$1,000 ~~$2,399.36~~	Various food items for events (hot chocolate and cookie bar, breakfast items/ice cream bar/beverages)
	Total		$2,454 ~~$6,472.74~~	$2,454 ~~$6,472.74~~	See below for a breakdown of expenses. Quotes attached separately.

Please note: A proposal can only receive support from the Compass Fund for two fiscal years. Compass Funding cannot be used to fund full-time/part-time salaried positions, office computer equipment, or summer institutes. Compass Funding cannot be transferred to other budgets.

Supplies:

For Events & Open House for FAFSA Promotion:

- Folders
  - 1000 folders for $1,960

- Pens
    - 1000 Pens for $520
        - From Quality Concepts
- Flyers
    - 100 flyers for $84 ($0.84 per flyer)
        - From Stockton's Print Shop
- Posters
    - $39.60 for 30 posters ($1.32 per poster)
        - From Stockton's Print Shop
- Post Cards (to send to prospective students)
    - $90 for 300 post cards ($0.30 per post card)
        - From Stockton's Print Shop

Supplies Total = $2,693.60 (for 1000 folders and pens, 100 flyers, 30 posters and 300 Post Cards)

Incentives:

- Gift Cards (for students who file by March 1 and April 15 as well as for one person who completes the post-event surveys (1 for March 1 and 1 for April 15))-(1 for each event (6))- for new and returning students
    - Wawa (1 at $25); Target (1 at $25); Wal Mart (1 at $25); Bookstore (1 at $25); Amazon (4 at $25 each- $100 total)
        - Total = $200
- Stockton "Swag" for students who file through the end of the spring semester (once a week someone will be selected)- ISIR's that come in each week - for new and returning students
    - T-Shirts (3 at $22 each); Sweatshirts (2 at $52 each); Water bottles (2 at $32.95 each); Blankets (2 at $25 each); Socks (4 pairs at $18 each); Baseball Hats (2 at $20 each); Beanie Hat (1 at $15); Bookbags (2 at $69 each); Phone Wallet Card Holders (2 at $6.95 each); Lanyards (2 at $5.95 each); Magnets (2 at $8.95 each)
        - Total = $594.60 + 41.62 (tax) = $636.22
- iPad- for new and returning students
    - $309 from Stockton's Bookstore
        - Total: $330.63 (with tax)
- Diploma Frame for a student who attends the Financial Literacy event and completes their Exit Counseling before April 30- for graduates only
    - Fame is $199.00 in the Stockton Bookstore
        - Total = $212.93 (including tax)

Incentives Total: $1,379.78

Food:

Oct./Nov./March Events: (EOF/DO's and First Gen Students all three) (All students in March)

- Hot Chocolate and Cookie Bar
    - $2.09 per person (order for 330 people- 110 at each event)
        - Total = $689.70

April Event:

- Ice Cream Bar, Cookies, Water and Lemonade (order for 75)
    - Ice Cream Bar = $4.39 per person = $329.25
    - Cookies = $6.49 per dozen (order 7 dozen) = $45.43
    - Water = $1.99 per gallon (order 8 gallons) = $15.92
    - Lemonade = $4.39 per gallon (order 4 gallons) = $17.56
        - Total = $408.16

Dec. and Feb. Events: (order for 100 (30 students per event and two parents at each event)

- Bagels, Muffins, Coffee, Hot Chocolate, Water, Cookies
    - Bagels ($1.59 each) = $159
    - Muffins ($1.29 each) = $129
    - Coffee ($1.39 per person) $139
    - Hot Chocolate and Cookie Bar ($2.09 per person) = $209
    - Water ($1.99 per gallon- order 3 gallons) = $5.97
    - Lemonade ($4.39 per gallon- order 2 gallons) = $8.78
        - Total = $650.75 * 2 (both events) = $1,301.50

Food Total: $2399.36

Total for Year 1: $6,472.74

Compass Funding Budget Questions

What department or academic school will your budget for this project reside?	Enrollment Management- Financial Aid	
Who will be the Budget Unit Manager (BUM)?	~~Rochelle Iannuzzi~~ Chris Connors	
Who will be the budget processor?	Rochelle Iannuzzi	
If you are requesting funding to hire a TES or consultant, is that person a current Stockton employee?	Yes, currently paid as a/an: ___ Adjunct ___ Faculty ___ Staff ___ TES ___ Student	☑ No
Will you need Compass Funds for immediate use to begin your project?	Yes, date needed: _____	☑ No

Additional Funding from Other Sources Questions

Are you receiving any other University funding for this project?	___ Yes	☑ No
If so, from where?		
If so, what is the purpose of this additional funding?		
If so, has this additional funding already been secured or is it just anticipated at this time?		

Budget Summary – Additional Funding from Other Sources Only

	Item	FY2023 July 1, 2022 – June 30, 2023	FY2024 July 1, 2023 – June 30, 2024	FY2025 July 1, 2024 – June 30, 2025	Notes/Comments (stipends, supplies, hospitality, etc.)
1.					
2.					
3.					
4.					

5.					
6.					
7.					
8.					
9.					
10					
	Total				

How will this project sustain itself after Compass Funding concludes (if you are seeking funding beyond a one-time project or event)?
We will use the data we collect from this project to work to secure additional budgetary funding for our office to purchase these items. We will also use this data to encourage collaboration with other offices, showcasing how the initiatives and events can be beneficial to them, to help sponsor these items and events.

Additional Support Questions

Will your project require support from Information Technology Services?	☑ Yes	___ No
If yes, please provide details:	Set up for computer labs, provide temporary logins for prospective students, troubleshooting as needed.	
Will your project require support from Plant/Facilities & Operations?	☑ Yes	___ No

If yes, please provide details:	Unlock doors to computer labs, set up tables and chairs for food set up, etc.	
Will your project require support from any other unit or division?	☑ Yes	___ No
If yes, please provide details	Admissions/Student Affairs for outreach prior to events. Event Services for scheduling of event spaces.	

Divisional Executive Approval/Support

Have you discussed and received endorsement of your Compass Fund proposal from your Divisional Executive? Please include an email or memo from your Divisional Executive with this application or send the documentation to CompassFund@stockton.edu	This project has been reviewed and is approved by the Enrollment Management Divisional Executive. Dr. Robert Heinrich - VP for Enrollment Management Robert Heinrich 11.04.2022