



*Traveling Through*



# Uncharted Territory

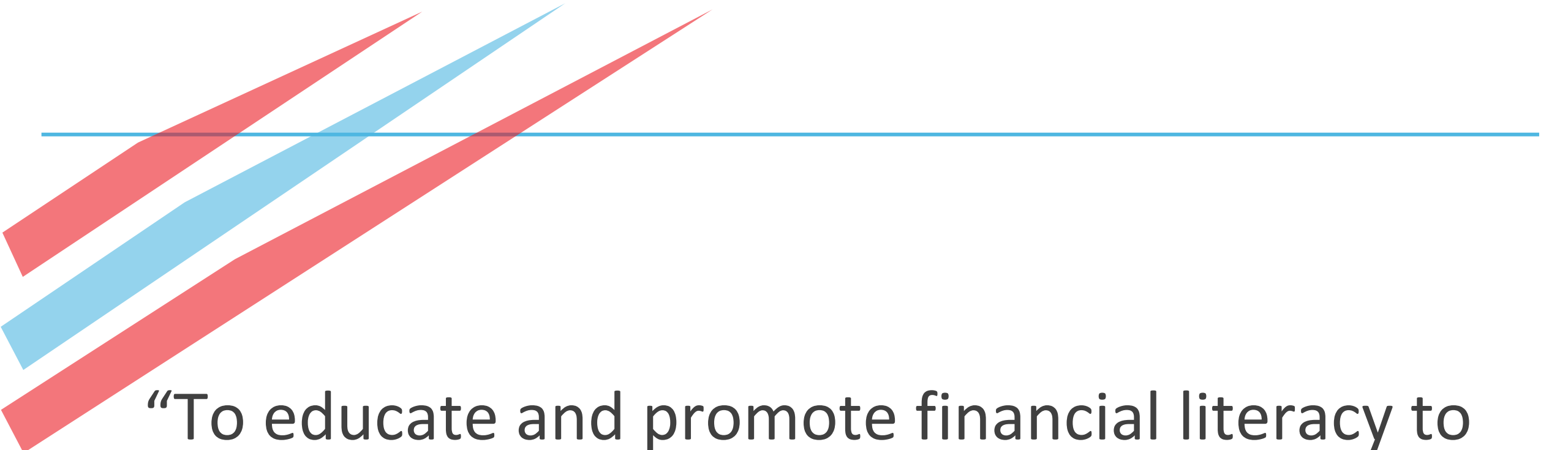
**SWASFAA | TASFAA**  
Conference 2023



# Adventure is out there!

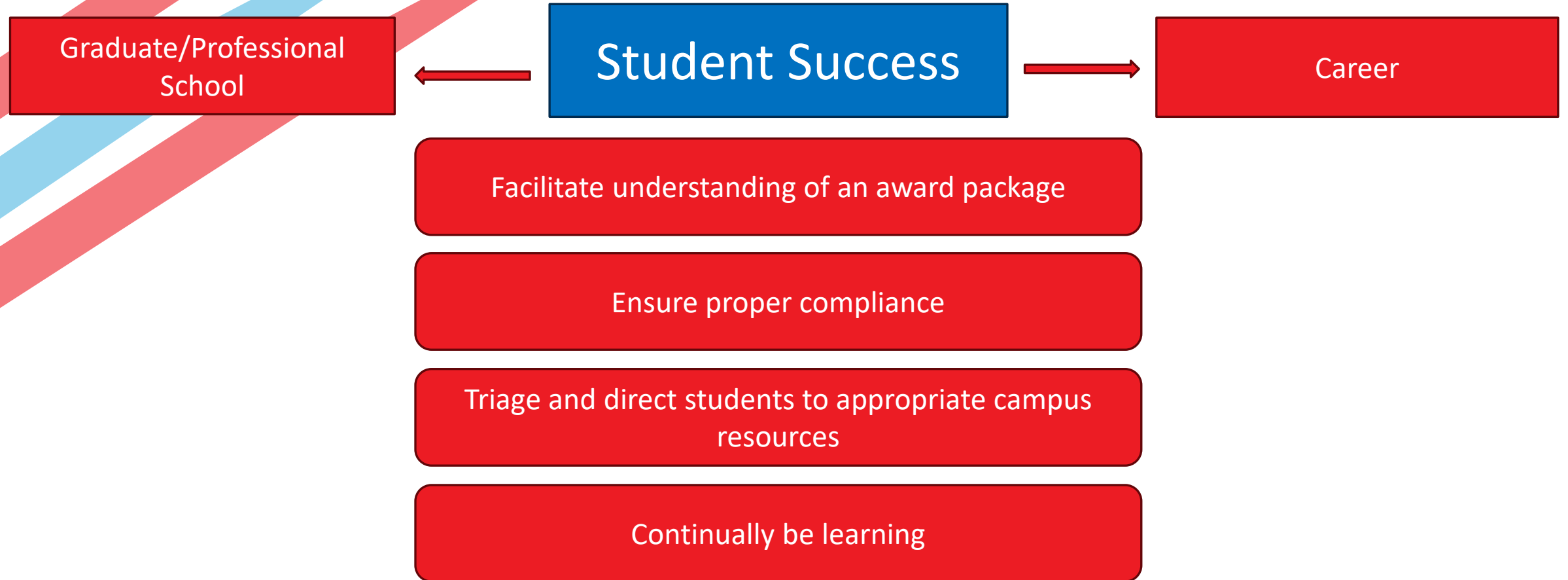
Presenter: Zachary Solano – Outreach Advisor  
Texas A&M University-Corpus Christi

**BUILDING COMMUNITY-DRIVEN OUTREACH TO ENHANCE  
FINANCIAL LITERACY**

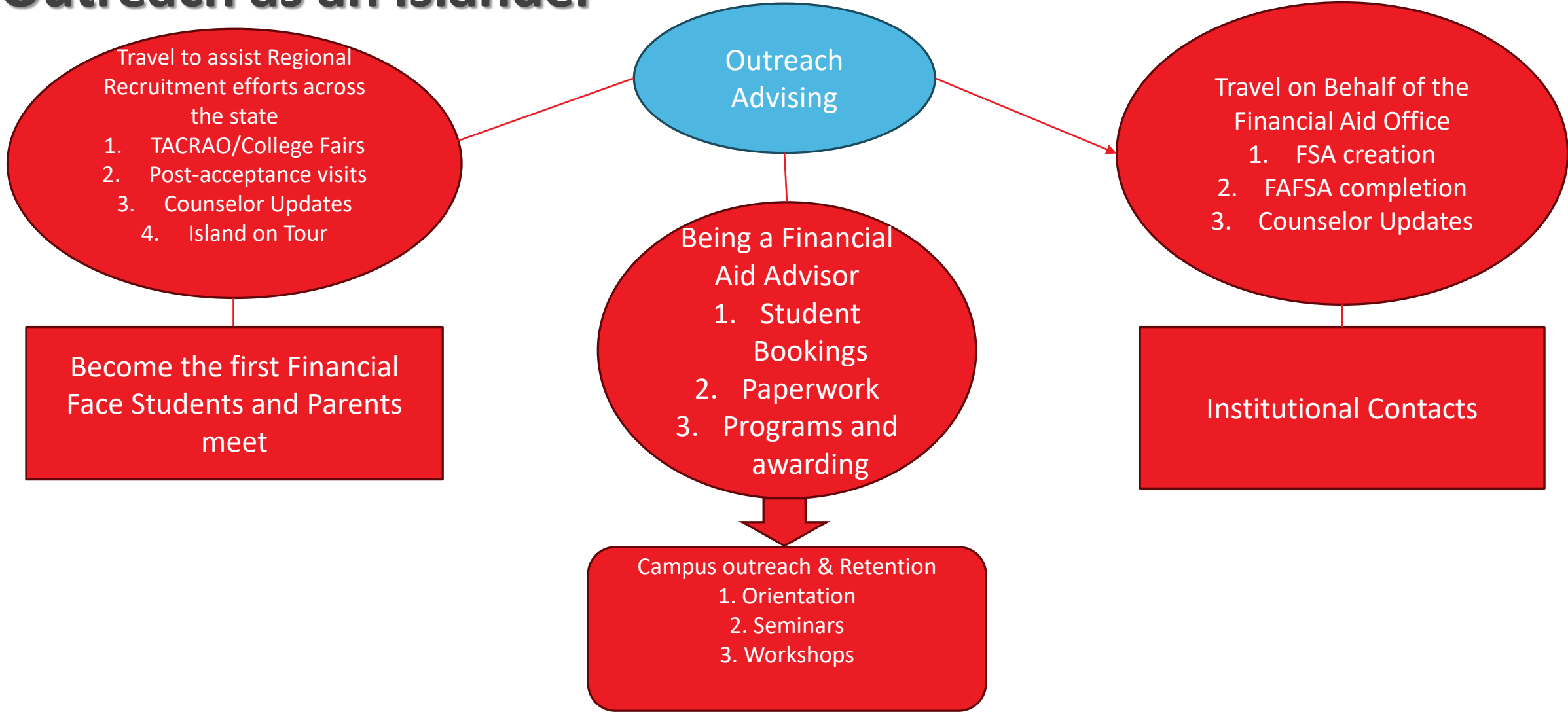


“To educate and promote financial literacy to secondary students as it pertains to the pursuit of Higher Education”

# As Financial Aid Administrators...



# Outreach as an Islander



# When it comes to defining Community-Driven Outreach...

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“Be where the Students are”

Keeping a  
“pulse”



Being out in the  
high schools



Being available  
on campus



Being in a stream  
of constant  
information

## Being out in the high schools

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	School 1A	School 2A	School 3A	School 4A	Admin
Week 2	School 1B	School 2B	School 3B	School 4B	Admin

Targeted events at schools  
Setting up in the CCMR  
Senior Class

## Keeping a pulse on parents

Looking for merit negotiation guidance (whatever worked for you)! i have read that calling financial aid 3 times is the magic number, is that true? thanks in advance!!

We aren't going to qualify for financial aid but we do want our student to be considered for merit aid. Is the FAFSA required for merit aid?

Two reasons for not wanting to complete the FAFSA are 1. hassle, and 2. don't want to disclose financial information.

We understand some colleges want FAFSA for merit aid and some don't. Why would merit aid depend on parental income?

If someone knows about this issue and is able to share the "whys" of why FAFSA must be completed in these circumstances, sure would appreciate your time. Thank you!

Zero merit aid awarded from 1 of 4 oos schools; Requested review/comparison to other offers; Merit aid added to award!

ASK, cuz you won't get what you don't ask for 😊.

EDITED (for those asking): best for student to make the call/email.

Good Afternoon,  
I was offered admittance for Fall 2023 and am trying to find out if there is merit-based aid I qualify for that isn't listed in the attached Financial Aid Offer. I am an out of state student, from [Xxxx, XX].

I was surprised to not see any merit based aid from [UofX], which is not in line with the merit scholarships awarded (for my [X.X] GPA, [XXXX] SAT score), from every other school to which I was accepted (attached).

I am excited about the possibility of attending [UofX] if I can determine it fits in my family's budget. Any information on the possibility of merit-based aid would be greatly appreciated, as I make my school decision in the next few weeks.



# When working with Admissions...

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For students it offers to the opportunity to

Connect with a campus resource

Get beyond the admissions message

Have a better understanding of their aid

Offers Parent Interactions

As administrators it allows us a glimpse into

Offers exposure to the challenges of recruiting

Hard questions parents ask

# Student Line of Responsibility

“How to hand hold without holding hands?”

- Maintaining *student* accountability through their process
  - Keeping students informed/current in their progression
- Verification
- Financial Aid Suspension
- Impact on the Lifecycle

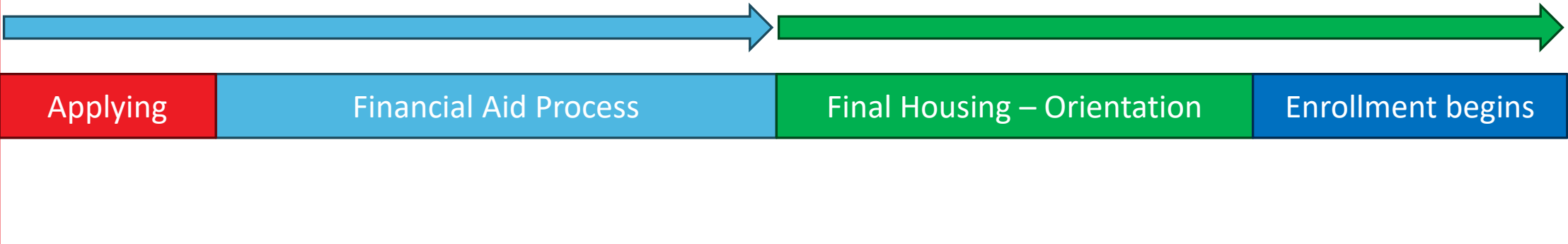
Within Corpus Christi...

First Gen

Trade versus degree-seeking  
“College back in the day” versus  
“Don’t borrow”

Prospect

Institution



In DFW?

In Houston?

In the RGV?

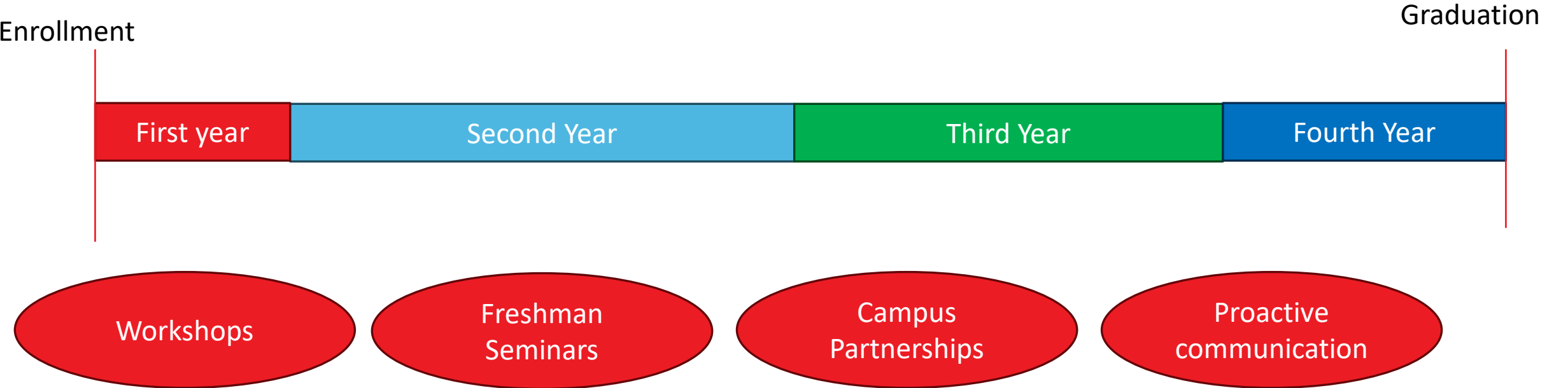
Everywhere and  
anywhere

# And for Current Students?

Keep them off SAP  
Or  
Get them off SAP

Help them find funds

Prepare them for repayment  
or educate on graduate school  
resources

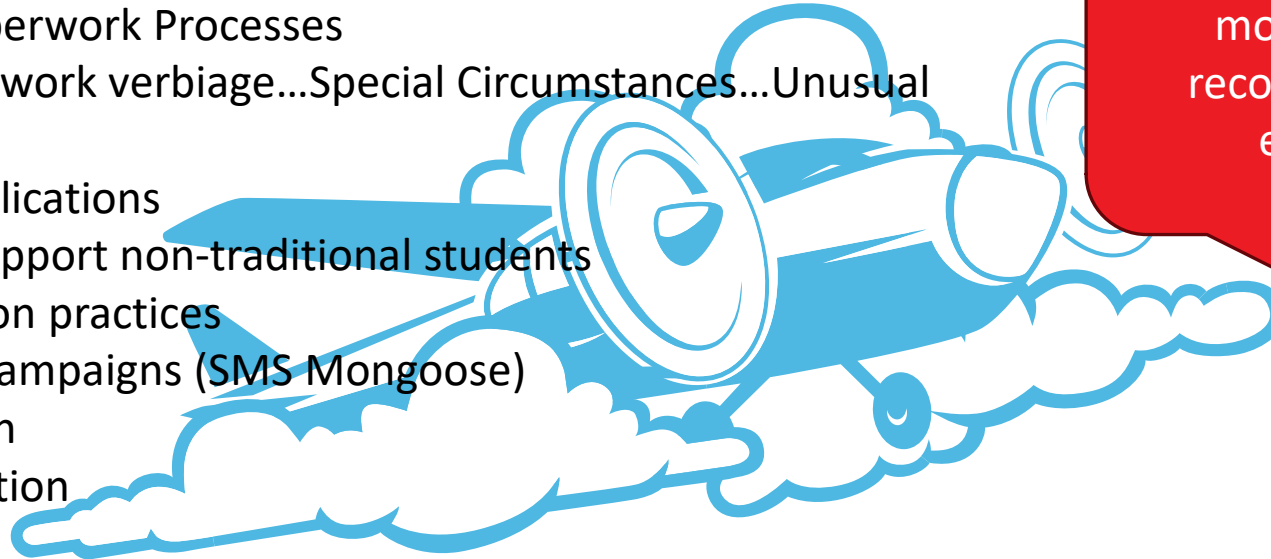


# Kaizen and the Toyota Production System

Kaizen = “Change for better” “Continuous improvement”

- Marked by smaller continuous improvements
  - Developing New Paperwork Processes
    - Updating Paperwork verbiage...Special Circumstances...Unusual Circumstances
    - New FAFSA implications
    - New ways to support non-traditional students
  - Better communication practices
    - Text Message Campaigns (SMS Mongoose)
      - Orientation
      - Deregistration

“Kaizen starts with a problem or more precisely, with the recognition that a problem exists.” (Imai, 1986)



## The Five Principles of Kaizen

Know your  
Customer

Let it flow

Follow the  
Action/Gemba

Empower  
People

Be  
Transparent

# Toyota Production System

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## The 4 P's

### Philosophy

- What are your Priorities as an Aid administrator?

### Process

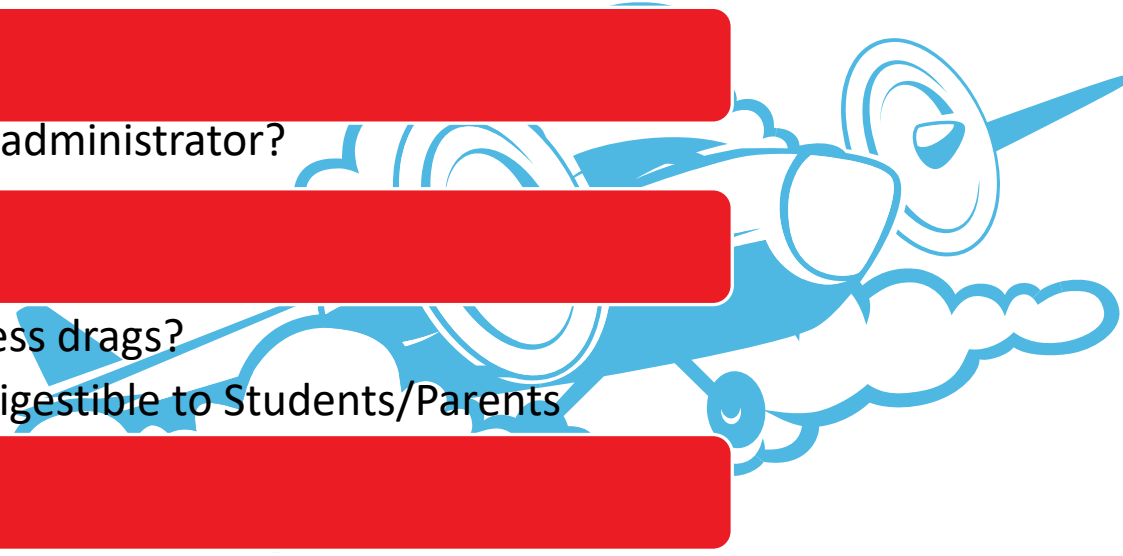
- Are there places where your process drags?
- How do you make your program digestible to Students/Parents

### People & Partners

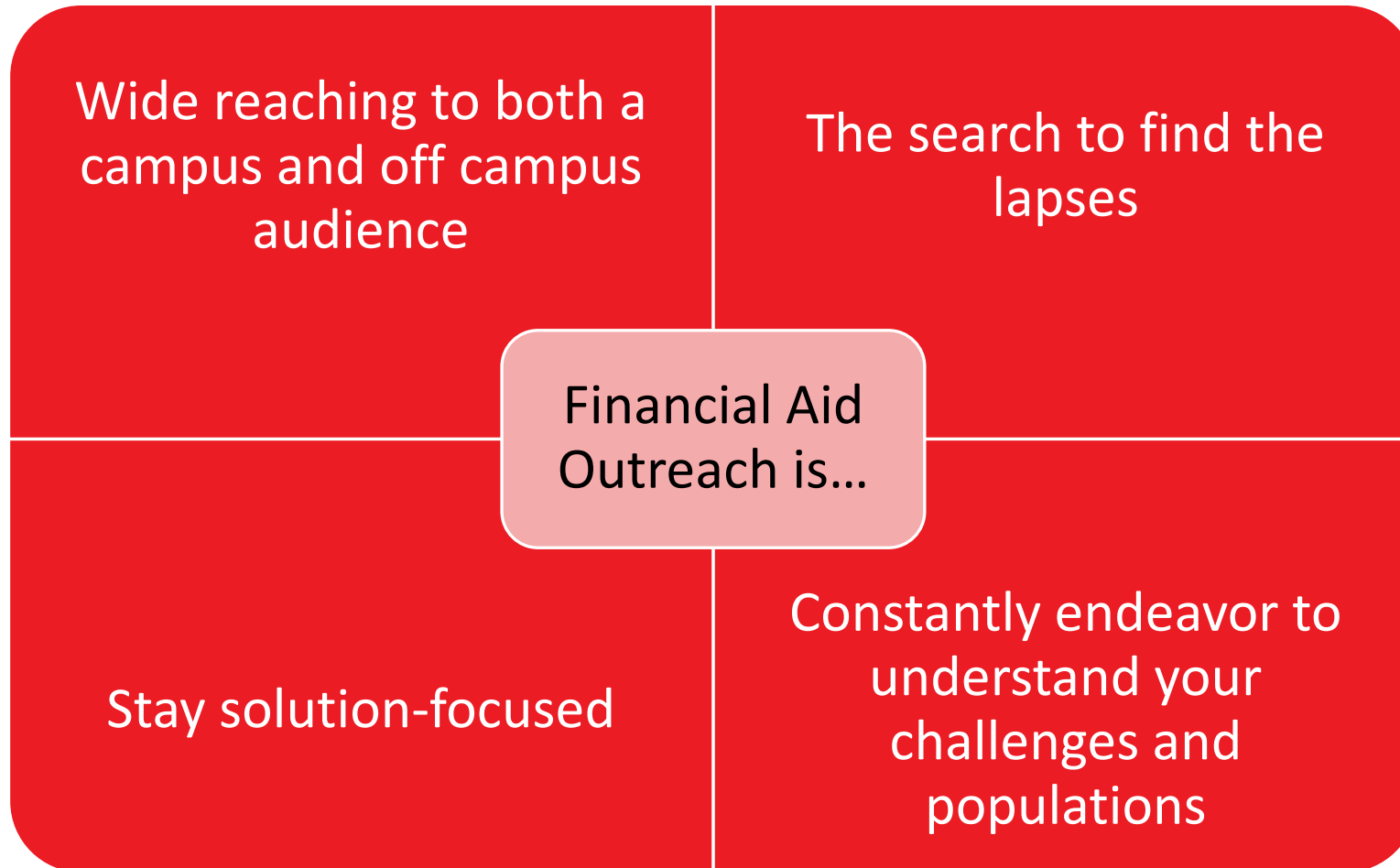
- Who would you say are your top 3 campus partners?
- Are you a student facing position?

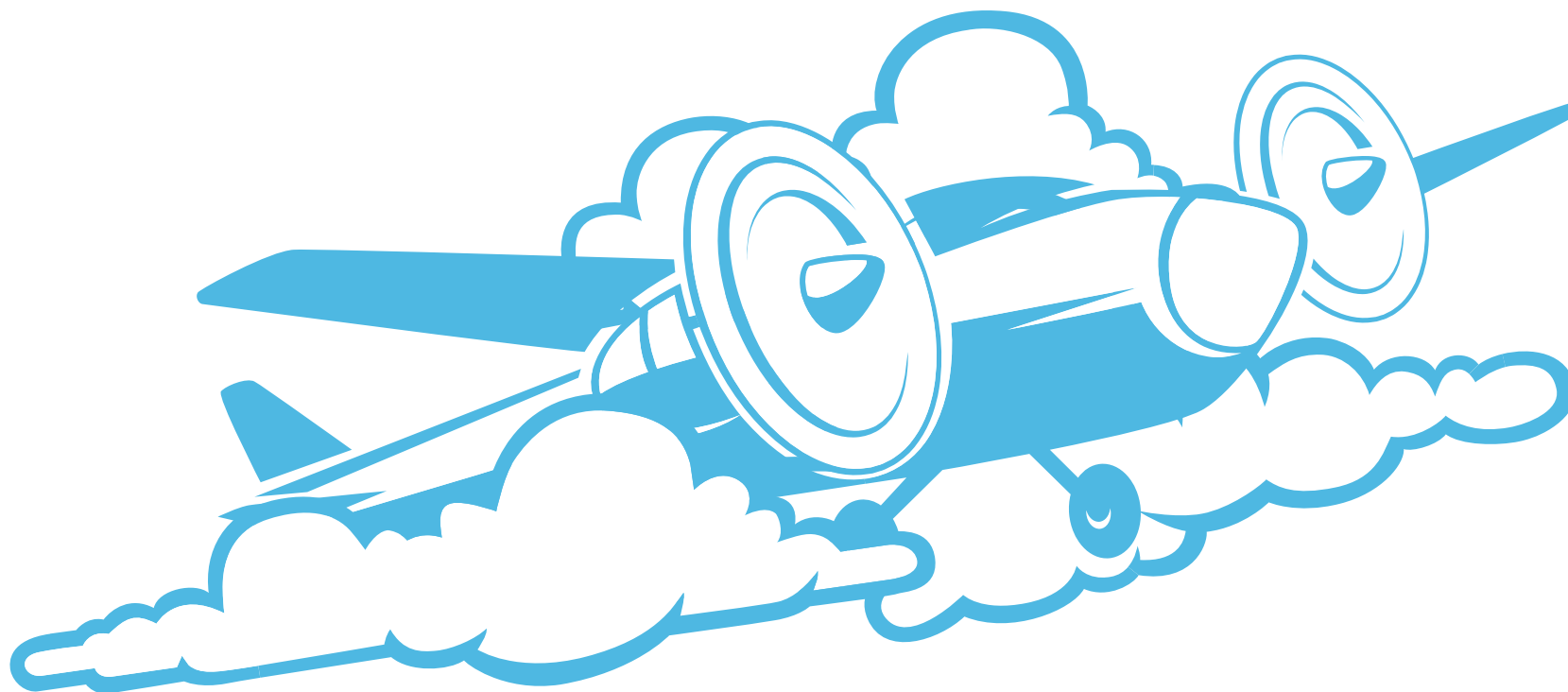
### Problem Solving

- What are your issues your attempting to address?



# My Take-aways for you...





# Questions?

# Traveling Through Uncharted Territory

Feel Free to connect with me!



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# Thank you!



## References

Imai, Masaaki. *Kaizen: The Key to Japan's competitive success*. Tokyo:Mcgraw-Hill, 1986.