MONEY MATTERS: USING TECHNOLOGY TO SUPPORT STUDENTS WITH FINANCING EDUCATION ABROAD

Friday, November 10, 2017 – 8:45-10:00 AM – Salon 4
WELCOME
Presenters

- **Lynn Aguado**
  - Education Abroad Coordinator, Michigan State University, aguado@msu.edu

- **Katrina Brown**
  - Manager for Programs and Operations, University of Utah, katrina.brown@utah.edu

- **Lindsay Calvert**
  - Lead, Generation Study Abroad, Institute of International Education (IIE), lcalvert@iie.org

- **Amanda Zamzes**
  - Business and Data Manager, Elon University, azamzes@elon.edu
Session Agenda

- Session overview
- Discuss technological tools for
  - Advising and outreach on financing education abroad
  - Managing financial aid information exchange
  - Processing scholarships
- Compare and contrast packaged software and homegrown database management systems
- Present integrative approaches to promoting and advising for national study abroad scholarships
- Round table discussions among participants on financing education abroad
SESSION OVERVIEW
Financing Education Abroad

- Education abroad participation continues to grow in the US
- More institutions, students and parents are seeing the value of education abroad for education and careers
- Diversity of participants is expanding thanks to national and institutional outreach and funding efforts
- However, financial issues still a top reason students withdraw or do not participate
- Using technology can enhance students’ ability to finance education abroad through:
  - Promotion and advising
  - Information sharing
  - Financial aid and scholarship processing

Source: Open Doors 2016
Financial Aid Terms

- Financial Aid Office
- Financial Aid Package
- Federal Pell Grant
- Free Application for Federal Student Aid (FAFSA)
- Cost of Attendance (COA)
- Expected Family Contribution (EFC)
- Satisfactory Academic Progress (SAP)
USING TECHNOLOGY FOR FINANCING EDUCATION ABROAD
University of Utah - Salt Lake City

- ~32,000 enrolled students
- 700+ students study abroad annually
- Unique challenges for communication
  - 15% of students live on campus
  - 48% of first-year students live on campus
  - Many commuters
  - Upper and lower campus
  - Many non-traditional students

Source: University of Utah Office of Budget & Institutional Analysis
University of Utah Learning Abroad - Advising Tools

- Scholarship webinars in Canvas
University of Utah Learning Abroad - Advising Tools

- Online group advising - Learning Abroad 101 in Canvas
▪ Budget worksheet provided during **Learning Abroad 101**
University of Utah Learning Abroad - Outreach Tools

- E-newsletter in Myemma (previously used Mailchimp)
Elon University profile

▪ Mid-sized liberal arts institution in Elon, NC
▪ Total enrollment: 6,739
  (fall 2016 undergraduates/graduates)

Global Education at Elon

▪ Students abroad (Open Doors 2016): 1,634
▪ 79% of the Class of 2017 studied abroad

Funding for Study Abroad

▪ Students receiving some type of financial assistance (merit and/or need): 75%
▪ GEC manages approximately $700,000 in scholarships support
Elon University - Scholarship Advising

- Direct bill institution
- 6 internal scholarship awarding cycles
- Annual sessions on “How to Finance Your Global Education”
- Direct link to Financial Planning info

Quick Links

- MyElonGlobal
- Course Planning
- Orientations

- Events & Deadlines
- Financial Planning
- FAQ

Planning Ahead for the Costs of Global Study
Financial Aid
Isabella Cannon Global Education Center (GEC) Scholarships
Elon Scholarships
Elon Program Affiliate Scholarships
Outside Scholarships
Research Other Funding Sources
Education Abroad at Michigan State University (MSU)

Michigan State University Profile

▪ Public, Doctoral Granting Research Intensive University in East Lansing, MI
▪ Student Population (Fall 2016): 50,344

Education Abroad at MSU

▪ Students Abroad (Open Doors 2016): 2,391
▪ Study Abroad Participation Rate: 22 % (Average % of Graduates Studying Abroad)
▪ 275 programs, primarily faculty-directed

Financial Aid for Education Abroad

▪ OFA and EA systems linked for sharing program cost information
▪ Students Receiving Some Form of Financial Aid (Grants, Scholarships and/or Loans): 66%

Scholarships for Education Abroad

▪ EA manages $410,000 in scholarship funding annually
▪ Scholarship applications processed with home-grown system
MSU Challenges

- Volume
  - Outreach and advising
  - 275 MSU programs, 2,600 participants
  - Mostly faculty-directed but also exchange and direct enroll
- Creating and sharing budgets
  - Notifying financial aid of program costs
  - Processing aid
- Processing Office for Education Abroad scholarships
  - Data collection and entry
  - Processing and notifying students
MSU Financing Education Abroad Outreach

- Peer Advisors and Education Abroad 101
  - Presentations and email responses
- Program cost sheet
  - Cost tab on each program listing
- Revamped financing education abroad website
  - More concise information
  - Expandable text
- Promote events and scholarship deadlines
  - Wufoo mailing lists
  - Social media
- Annotated PowerPoint presentations
  - To expand audience to those who cannot attend in person
PACKAGED SOFTWARE OR HOME GROWN SYSTEMS
University of Utah - Terra Dotta

- Budget sheets for U of U faculty-led and exchange programs
  - **Wilderness Medicine in the Alps** example

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**SUMMER BUDGET SHEET FOR **WILDERNESS MEDICINE IN THE ALPS**

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Undergraduate Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>U of U Learning Abroad Initial Payment *</td>
<td>$500.00</td>
</tr>
<tr>
<td>Final U of U Learning Abroad Program Balance (2017) *</td>
<td>$3,665.75</td>
</tr>
<tr>
<td>Estimated U of U Tuition (2017); 3 CREDITS *</td>
<td>$335.00</td>
</tr>
<tr>
<td>Estimated Program Cost (Billable) subtotal:</td>
<td>$4,320.75</td>
</tr>
<tr>
<td>Estimated Round-Trip Airfare</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Estimated In-Country Transportation (2016)</td>
<td>$50.00</td>
</tr>
<tr>
<td>Estimated U.S. Passport &amp; Related Fees (2016)</td>
<td>$175.00</td>
</tr>
<tr>
<td>Estimated Personal Expenses (2016)</td>
<td>$200.00</td>
</tr>
<tr>
<td>Estimated Emergency Funds (2016)</td>
<td>$200.00</td>
</tr>
<tr>
<td>Estimated Immunizations &amp; Medical Visit (2016)</td>
<td>$50.00</td>
</tr>
<tr>
<td>Estimated Additional Costs (Non-Billable) subtotal:</td>
<td>$2,675.00</td>
</tr>
<tr>
<td>Total</td>
<td>$6,995.75</td>
</tr>
</tbody>
</table>

Notes:

BILLABLE ITEMS*

The pricing above reflects the previous year's program cost and is only an ESTIMATE until the final costs are posted. Although not anticipated, program costs may change due to fluctuation in currency exchange rates, tuition increases, contracted agencies, or number of participants. Billable items (noted with an *) will be paid directly to the University of Utah through both your Learning Abroad Application AND your University of Utah student tuition account.
University of Utah - Terra Dotta for Managing Scholarships

- Evolution of scholarship application technology
- Scholarship applications
  - Separate
  - Integrated
- Processing
### Winter Budget Sheet for WT France: Eat, Pray, Love: Sacred Space & the Place of Religion

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winter Term Global Program Fee (inc. insurance) *</td>
<td>$7,550.00</td>
</tr>
<tr>
<td>Estimated Domestic Airfare</td>
<td>$450.00</td>
</tr>
<tr>
<td>Estimated Passport Cost</td>
<td>$135.00</td>
</tr>
<tr>
<td>Estimated Meals</td>
<td>$400.00</td>
</tr>
<tr>
<td>Estimated Spending Money</td>
<td>$500.00</td>
</tr>
<tr>
<td>Estimated Immunizations, Medications, and Medical Exams</td>
<td>$367.00</td>
</tr>
</tbody>
</table>

**Billable subtotal:** $7,550.00

**Non-billable subtotal:** $1,852.00

**Total:** $9,402.00

### Fall Budget Sheet for Argentina, Buenos Aires: Liberal Arts (CIEE)

<table>
<thead>
<tr>
<th>Budget Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elon semester tuition 2017-2018 *</td>
<td>$16,914.50</td>
</tr>
<tr>
<td>Affiliate Program Fee (click for details) *</td>
<td>($64.50)</td>
</tr>
<tr>
<td>Elon Semester Study Abroad Fee (click for details) *</td>
<td>$4,600.00</td>
</tr>
<tr>
<td>International Health Insurance (five months) *</td>
<td>$322.50</td>
</tr>
</tbody>
</table>

**Billable subtotal:** $21,772.50

| Estimated International Airfare                          | $1,300.00 |
| Estimated Passport Cost                                   | $135.00 |
| Estimated Entry Visa Fees                                 | $160.00 |
| Estimated Residence Permit Fees                          | $100.00 |
| Estimated Ground Transportation                          | $280.00 |
| Estimated Books and Supplies                              | $320.00 |
| Estimated Meals                                          | $1,500.00 |
| Estimated Spending Money                                 | $1,200.00 |

**Non-billable subtotal:** $4,995.00

**Total:** $26,767.50
Embedded scholarship application within the program application

Integrated financial aid information

<table>
<thead>
<tr>
<th>Questionnaire Name</th>
<th>Submitted Date</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply for a GEC Access Scholarship</td>
<td>11/17/2016</td>
<td>#20</td>
</tr>
<tr>
<td>GEC Essay Questions</td>
<td>11/17/2016</td>
<td>#12</td>
</tr>
<tr>
<td>GEC Family Contact Permission</td>
<td></td>
<td>#2</td>
</tr>
<tr>
<td>GEC Student Conduct</td>
<td></td>
<td>#25</td>
</tr>
</tbody>
</table>

| FAFSA filed:       | Y               |
| View Change History|

| Pell Eligible:     | Y               |
| View Change History|

| Need:             | 49642           |
| View Change History|

| Awarded_Total_Tuition | 1000.00         |
| View Change History   |
MSU - Home-grown system

- Developed by MSU tech team
- All online:
  - Program promotion, cost information, application and admission
  - Budget sharing with OFA
  - Scholarship applications and processing
- Pros:
  - Features available
  - Integration with central information and financial aid systems
- Cons:
  - Tech staff for maintenance and improvements
  - Slow to innovate
Budget created in spreadsheet template, sent for approval

Costs are added to program in database, sent to Financial Aid database for student aid packaging

Students view program cost sheet online for estimate of total cost of attendance
MSU Financial Aid Collaboration

- Dedicated staff liaisons
  - Hybrid of tech and in person interactions
- Streamlined processing
  - Integrated databases
  - Budgeting timeline
- Messaging and marketing
  - Collaborate on web and flier text to ensure accuracy
  - Co-sponsor workshops on financing EA and Gilman
  - Email to promote Gilman sent by OFA to all Pell eligible students
Financial Aid Policies, Procedures and Processing

- Interfacing with the Office of Financial Aid (OFA)
Office for Education Abroad Scholarships

- Scholarship processing
  - Students apply online
  - System pulls information from program application record
  - System ranks students based on need score and GPA, assigns funding
  - Sends award and regret emails
- Many improvements over the years to improve efficiency
  - Auto enter eligibility requirements
  - Financial Aid data request
- Still requires some manual processing so additional features needed
  - Essay review process
  - Financial aid information data entry
PROMOTING AND ADVISING FOR NATIONAL STUDY ABROAD SCHOLARSHIPS
IIE Resources for Study Abroad

Guide to Study Abroad Books

- E-books for A Student Guide
  - Visual/other print disabilities can access free on Bookshare.org.
  - Chapter 4 - Figuring Out the Financials
- PDF download for A Parent Guide (English & Spanish)
  - Chapter 3 - Figuring Out the Financials: Cost Models, Financial Aid, and Scholarships

iie.org/publications
IIE Resources for Study Abroad

StudyAbroadFunding.org

- Searchable online database of scholarships & grants to study abroad
- Narrow down with criteria searches
- Free to register information
Funding for Students/Faculty/Institutions

- IIE Generation Study Abroad Travel Grants (students apply)
- Supporting Commitment Partner Network
  - Country Partners
    - Ex: French Embassy Matching Grants (institutions apply & if selected, nominate students)
    - Ex: Education New Zealand Generation Study Abroad Excellence & Travel Awards
  - Program Providers
    - Ex: CIEE’s $20,000 Generation Study Abroad Access Grant (faculty)
    - Ex: Olesay Spain’s Generation Study Abroad Stem2Spain Scholarship (scholarships for STEM internships)
  - Universities/Colleges
    - Ex: WINS Flies Five Scholarship (round-trip ticket to 5 students)
    - Ex: Alamo Colleges $1 student fee/semester creates study abroad scholarship
National Scholarships & Grants for U.S. Students - Advising Tools

- NSEP’s Boren Scholarships & Fellowships - Resources page
- U.S. Department of State’s Gilman International Scholarship Program - Outreach tools, videos, & webinars + advisor portal
- U.S. Department of State’s Fulbright Program - FPA webinars & events
Campaigns - Diversifying Study Abroad

“It’s free money...that’s money that instead of you paying when you graduate, they are paying you to go abroad.”

“I received the Gilman Scholarship...that’s through the U.S. government. They gave me $3,000....”

SUNY Oswego’s

I, Too, Am Study Abroad

- Alumni ambassadors
- Demonstrates diversity
- Voices financial need & scholarship attainment
Promotion and Outreach

- What technology and tools do you use for promotion and advising for students on financing education abroad?
- What are the pros and cons of the tools you use?
- If you could add any additional tools to your toolbox what would they be?
- What resources would you need to add those tools?
Financial Aid Processing

- What technology do you use for processing financial aid?
- What are the pros and cons of the system?
- If you could fix any part of the system or change to a new one, what would that be?
- What resources would you need to make the updates/changes?
Scholarship Processing

▪ What technology do you use for processing scholarships?
▪ What are the pros and cons of the system?
▪ If you could fix any part of the system or change to a new one, what would that be?
▪ What resources would you need to make the updates/changes?
Brainstorming

- Imagine you could have a technological tool that could:
  - Help students identify scholarships
  - Determine if they are eligible
  - Manage deadlines and requirements
  - Submit applications
- What would that look like? What resources would you need to develop it?
Resources

- Terra Dotta – http://www.terradotta.com/study-abroad.html
- Generation Study Abroad – GenerationStudyAbroad.org
  ○ Join the 2017 briefing on Facebook Live, November 13th, 9:30 – 11:00 a.m. EST
THANK YOU