COLLEGE ACCESS CHALLENGE GRANT PROGRAM

PART 1 -- PERFORMANCE REPORT

SECTION I: EXECUTIVE SUMMARY
1. Please provide a brief description of the current status of your project. Describe the extent to which you have implemented all program activities and components. Highlight your major outcomes, successes, and challenges.

The University of Montana Western has made progress in all activity and service areas supporting our financial literacy project. Highlights of our progress in meeting the goals and objectives of the grant are detailed below:

- Barbara Julian was hired as the new Financial Literacy Program Coordinator in October.
- Flyers were distributed to all staff and faculty defining the purpose and services of the Financial Literacy Office along with information for referrals.
- Academic Advising sessions included a presentation from the Financial Literacy Coordinator addressing student debt, budgeting, scholarship opportunities, and to provide additional resources to students. Over 300 students had direct contact through these sessions.
- The Financial Literacy Advisory Council met three times this semester. We have discussed the Financial Literacy Symposium and Ever-Fi/TRANSIT implementation. The development of a logo, one of our goals for the year, has been an ongoing discussion, and is now approved. Various methods of reaching our target audience have been proposed and implemented.
- A targeted group has been identified that will be receiving debt letters soon.
- Broad campus contact has been developed in table events at different venues on campus, i.e. wellness fair, welcome fair, scholarship tables.
- Contact was made with all campus clubs and with the Student Senate.
- Our online services have been revised and updated to reflect current information and resources for students and faculty.
- “Know What You Owe” cards are being included with student refund checks this year. To date, over 1100 cards have been handed out via this avenue.
- Since August, over 600 direct student contacts have been made to discuss finances, student loan debt, and scholarship opportunities.
- Mandatory exit counseling sessions have delivered student loan information to graduates along with offering the services of the Financial Literacy Coordinator for follow up.

We are encouraged that our program’s existence is being recognized on campus. We are developing a reputation as a place where students can receive confidential counseling about debt and financial issues. As we move forward in the program we are looking for additional opportunities for direct intervention with students. The targeted debt letters planned for dissemination in the near future will aid in achieving this goal. Plans for the coming year will involve the rollout of the TRANSIT financial education training, our presence at on- and off-campus events to target new students, and class and club presentations across campus. We are scheduling visits to our off-site locations to target at-risk students in our Early Childhood Education program for early intervention.
SECTION II: GOALS AND OBJECTIVES

1. Describe the progress that your project has made towards accomplishing the objectives for this reporting period. Please list your objectives in the table below, and indicate what activities have taken place, the quantitative results of those activities, and actions required (what, if any, changes do you intend to make in response to the results that you have seen). You may extend this table to additional pages as needed.

<table>
<thead>
<tr>
<th>Objectives: List the approved objectives from your grant application or work plan. Where applicable, provide baseline data.</th>
<th>Activities: List the activities that have been conducted to meet the objective.</th>
<th>Results: Has the objective been met? If not, what progress have you made in reaching the objective?</th>
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<tbody>
<tr>
<td>1. Hire a full time program coordinator to oversee the daily management and coordination of the financial literacy project. This person will be part of the Student Success team and reports to the Director of Student Success.</td>
<td>Hired Barbara Julian (see Exhibit A) in October 2014 as a full time Coordinator to oversee the program.</td>
<td>This objective has been met. Barbara Julian started with the University on October 15, 2014.</td>
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| 2. Integrate financial literacy into all aspects of the student retention practices. | • During Ready2Rock Orientation days, students received Dollars & Sense workbooks. Financial literacy information was presented to all incoming students either in person or through the online R2R sessions.  
• Financial Literacy hosted a table at the Montana Western Welcome Fair in September for new and returning students.  
• Financial Literacy hosted a table at the UMW Wellness Fair in October.  
• Contact was made with all campus clubs offering presentations at scheduled meetings.  
• The Financial Literacy Program Coordinator took part in a scholarship workshop on campus to help advise students of the availability of UMW scholarships and helped provide instruction in searching for external scholarships. Scholarships as a means to reduce debt was emphasized | The objective is ongoing. Plans are underway for:  
• Targeted letters to students with high debt ratio to credits completed.  
• Meetings with Residence Life Advisors in the spring, followed by dorm meetings with students living on campus.  
• Rollout of the Ever-Fi TRANSITI financial literacy training  
• College Goal MT scheduled for beginning of next year to target students needing to complete FAFSA.  
• Ready2Rock financial literacy training for new spring semester students.  
• Ongoing presentations to campus clubs and classes to present financial education and develop an awareness of |


<table>
<thead>
<tr>
<th>The Financial Literacy Coordinator participated in Academic Advising sessions to counsel students and explain the services of the Financial Literacy Office.</th>
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<tr>
<td>The Financial Literacy Office has participated in and led exit counseling sessions for graduating students.</td>
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<td>The Moodle course has been updated and offers online financial literacy training as well as contact information.</td>
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<td>To inform students of the services of the Financial Literacy Office, a tab was added to the Campus Life section of the UMW website.</td>
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<tr>
<td>Business services is delivering Know What You Owe cards with refund checks. To date, approximately 1100 cards have been delivered via this program.</td>
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<tr>
<td>A withdrawal packet detailing the cost of withdrawal, how to reapply for classes, student loan repayment and contact information for the offices on campus has been developed this term, and is scheduled for completion and introduction in the spring semester.</td>
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<tr>
<td>Tables have been set up at various locations on campus to develop increased awareness of the Financial Literacy program. This one on one contact has resulted in increased appointments with both student and staff/faculty segments of the University population.</td>
</tr>
<tr>
<td>Flyers were distributed to all staff and faculty defining the purpose and services of the Financial Literacy Office along with information for referrals. Approximately 290 staff and faculty received the flyer.</td>
</tr>
<tr>
<td>A flyer is being prepared to define and advertise the services of the Financial Literacy Office. Pending final approval of the logo and branding, this flyer will be posted and distributed in early spring.</td>
</tr>
<tr>
<td>Planned visits to off-site Early Childhood Education programs next semester to meet and develop relationships with high-risk students and counsel about student loan debt.</td>
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</tbody>
</table>
• Contact was made with the campus mental health counselors. Students that present with needs that are related to financial stress will be directed to the Financial Literacy Office for a one on one appointment.

• The Financial Literacy Office was added to the campus tour for all potential students and parents. The purpose of this addition is to develop an awareness among incoming students of the availability of our services.

• The Financial Literacy Office staffs the Veteran’s Military Exchange twice weekly to facilitate meetings with military veteran students to discuss student loan debt, repayment options, scholarship opportunities, and budgeting.

• Targeted debt letters are being sent to students with high debt ratio vs. course credits completed.

• Presentations have been made to a number of clubs and classes for financial education.

• Presentations have been made to staff in different areas (i.e. Residence Life) to ensure an understanding of the need for and services of the Financial Literacy Office.

• Individual appointments with students are ongoing. Through referral and self-identification, students are visiting the Financial Literacy Office for personalized attention and counseling regarding student loan debt, scholarships, FAFSA issues and future financial planning.

• At the December meeting of the FLAC, we finalized the wording and graphic for the logo. The goal is to
make the program readily recognizable on campus and to empower students to take responsibility for their finances. We reviewed the progress made by the program to date, and discussed plans for the spring semester.

3. Coordination and implementation of the Ever-Fi’s TRANSIT Online Financial Literacy program.

- TRANSIT was required and implemented for students who had Satisfactory Academic Progress issues this past fall.
- In meetings with Carie Kelly we have been informed that the TRANSIT Financial Literacy program will become mandatory for all students beginning in fall 2015.
- The Financial Literacy Office is continuing training with the TRANSIT course to ensure that we are knowledgeable and ready to assist students when the program becomes required.
- Our targeted mailing will introduce a second (high risk) group to TRANSIT.
- We are waiting for information from OCHE as to whether or not we can track data from TRANSIT into and through spring. Success in meeting this goal would be better measured by being able to track this data.
- This objective is still in progress with the understanding that for the school year 2015-16 students will be required to complete the Ever-Fi TRANSIT Online Financial Literacy program.
- Plans are underway for a spring rollout of the program at Montana Western.

4. The advisory council and coordinator will work with the marketing department at Montana Western to develop a brand as a strategy to increase visibility of the program and resources offered.

- At the FLAC meeting in October, we assessed the desired emphasis of our branding. Meetings have been taking place with our marketing director to work through the process of developing a brand. We have sent potential logos and branding concepts to Carie and Andrea for initial approval.
- A meeting was held with the Advisory Committee in December to approve logo and branding design.
- This objective is still in progress. Meetings have been ongoing with the Marketing department and the Financial Literacy Advisory Council to develop an approved logo, which has now been submitted to Carie and Andrea for final approval. This objective should be met within the next month.
<p>| | |</p>
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<tbody>
<tr>
<td>• The finalized logo and graphic was approved by our FLAC in mid-December.</td>
<td>• After the semester break, we will move forward on developing materials utilizing the new logo and branding, to include flyers, slip cards, academic advising folder inserts, and admissions tour folder inserts.</td>
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</table>
SECTION V: SERVICES/ACTIVITIES

1. Please enter the number of students who participated in CACG activities or received services.

   Number of Students: 357 unduplicated student contacts

2. Services Provided to Students: In the following table, place an “X” in the first column next to the types of services or activities provided by your project with Federal or matching funds. For each type of service provided, indicate the number of students who received the service during the reporting period.

<table>
<thead>
<tr>
<th>Place an “X” in this column if your project provides this type of service</th>
<th>Type of Service/Activities</th>
<th>Number of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>Information for students and families (i.e., postsecondary education benefits, opportunities, planning, financial options, and college preparation)</td>
<td>604</td>
</tr>
<tr>
<td>X</td>
<td>Outreach activities</td>
<td>155</td>
</tr>
<tr>
<td>X</td>
<td>Assistance in completion of FAFSA or other financial reporting forms</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>Need-based grant aid</td>
<td></td>
</tr>
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<td></td>
<td>Academic enrichment</td>
<td>16</td>
</tr>
<tr>
<td>X</td>
<td>Loan cancellation, repayment, or interest rate reduction</td>
<td>38</td>
</tr>
<tr>
<td>X</td>
<td>Other (please specify)</td>
<td>5 (VMX) 9 (Cheer Club) 5 (Residence Life Staff)</td>
</tr>
</tbody>
</table>

3. Professional Development

   a. Please enter the number of financial aid administrators, and/or college admissions counselors at an institution of higher education that participated in professional development activities.

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success Advisors &amp;/or Career Coaches</td>
<td>7</td>
</tr>
<tr>
<td>Financial Aid Administrators</td>
<td>4</td>
</tr>
<tr>
<td>College Admissions Counselors</td>
<td>6</td>
</tr>
</tbody>
</table>

   These numbers represent 100% of our staff involved in ongoing professional development activities in the reporting period.

   b. Please describe briefly the type of professional development activities that were implemented (e.g., workshops and/or materials).

   Financial Aid workshops, FAFSA changes workshop, needs analysis training, Admissions conferences, Admissions Counselor update meetings, professional seminars, online professional development through webinars, on-the-job coaching with specialists, attendance at state and national conferences, grant writing training, student retention workshops, financial literacy workshops, Chair of Leadership Pipeline of RMASFAA
EXHIBIT A

Barbara Julian  
40 Deerfield Ln. Dillon, MT 59725  
barjulian@yahoo.com 406-925—0935

Objective and Background

Individual with strong people skills and computer competency seeking a permanent position. Experience in banking as a teller, teller manager, and banker. Additional experience in public and private schools as a substitute teacher and tutor.

Education

Indiana University South Bend, IN  
B.A. Speech Communication  
- DePauw University Honors Award for written communication.

Relevant Experience

Feb 2010-present  Wells Fargo Bank, Dillon, MT  
Customer Service Representative/Teller

- Customer Service which involves opening accounts, selling new products, ensuring customer satisfaction using bank computer systems.
- Teller responsibilities including processing transactions, computer proficiency, cash handling, and various tasks as needed to maintain branch security and efficiency.
- Administrative functions including filing, maintenance of records, and processing incoming and outgoing mail and faxes.
- Recognition for sales, outstanding customer service and excellence in following proper bank procedures.
- Notary Public

2009-2010  La Cense Beef, Dillon, MT  
Customer Service and Sales


2005-2009  I took time away from work to temporarily care for a disabled relative, providing physical care as well as taking care of all communications with doctors, insurance, employer, and Social Security.

2001-2005  Bank of America, Mesa, AZ/Dallas, TX  
Senior Teller/Merchant Teller

- Customer Service Representative ensuring that customers received accurate and professional service while processing transactions.
- Computer input of customer information and documentation for customer and bank security.
- Responsible for opening and closing of branch and shift supervision of 10-20 employees.
- Ongoing training of current employees and training new employees in procedures and policies.
- Weekly supply ordering, bi-weekly processing of payroll and time cards using a computer system.

Recognition for accuracy in processing of client transactions and for sales of new products.

1995-2001  Goshen Public Schools, Elkhart Christian Academy,  
Valley Christian High School, Indiana and Arizona  
**Substitute Teacher for elementary and secondary schools and special education**

- Responsible for maintaining order and teaching various subjects throughout the school day.
- Testing, assigning and grading homework and using computers to monitor progress as needed.
- Communication with parents and teachers as necessary.
- One-on-one interaction with students to provide tutoring in a classroom environment. Proctoring tests as needed in specialized situations.

**Other Experience**
- Competent at working in stressful situations while maintaining composure as needed.
- Personable and flexible, able to work with others and independently as the position requires. Able to work well with and without supervision.
- Experience organizing and supervising community and volunteer events.
- Routine use of office equipment including FAX, computer and related equipment. Willing to learn new computer programs as required for position. Limited experience with website and blog development tools and templates.
- Experience in leading and organizing work projects, seeing them successfully through to completion.

**References**

Peter Eldridge  
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482 Expedition Dr  
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406-925-3281  

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406-925-2127