

# SFS Strategies – Overcoming Obstacles, Objections, and Obstinance

Charmaine Daniels

Associate Vice President for Student Financial Services



**MOREHOUSE**  
COLLEGE

# The Presenter

- Over 19 years experience in higher education
- Most of my career in large public institutions:
  - University of Illinois System (2001-2010)
  - Georgia State University (2010-2017)
- Higher education technology and operations



# About Morehouse

- Founded in 1867
- Private, non-profit historically black college (HBCU)
- Campus size: 66 acres, 42 buildings
- 27 majors in 3 academic divisions
- Enrollment: About 2,100





# Conflicting Priorities: Our Reality



# Team/Staff Development

- Functional Knowledge
  - Office functions/policies
  - Scenario based training
  - Financial literacy
- Soft Skills
  - Conflict management
  - Difficult conversations
  - Stress management



# Focus on Student Success: Two Approaches

## **Pre-College**

- Career Day
- Junior Achievement
- College Fairs
- Curriculum Nights
- ....and basically any other opportunities to get in front of kids and talk about money.

## **During College**

- College tours
- Admitted student days
- Orientation
- First year experience
- Carrot & the stick....

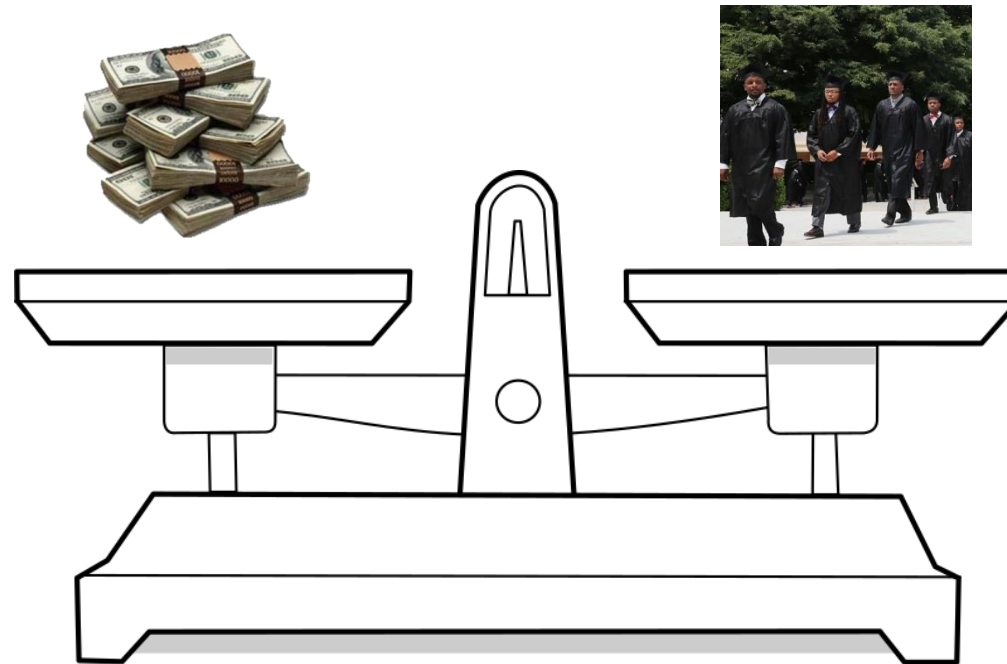


# What Does Student Success Mean?

- Retention
  - Graduation
  - Progression
  - No or low debt
  - Certificate
  - Job Placement
- Defining what this means for your school is an important first step!
  - Each department or division may have a different perspective about this.



# Balance





# How Do We Achieve Balance?

## **Fiscal Practices**

- Cost
- Payment Options
- Operational Efficiency
- Fiscal Policies
- Rehabilitation
- Data Informed
- Collaboration

## **Enrollment Practices**

- Admissions/Orientation
- Managing Expectations
- Operational Efficiency
- Academic Policies
- Data Informed
- Collaboration



# Balance in Action: To Drop or Not?

## Fiscal Priorities

- Cash Flow
- Low/No Receivables
- Financial Health
  - Accreditation
  - TIV Eligibility
  - Paying Bills
  - Bond Ratings
- **Student Success**

## Enrollment Priorities

- Enrollment Targets
- Recruitment
- Progression (closed classes)
- Retention
- US News
- **Student Success**



# Balance in Action: To Drop or Not?

- What does the data say?

1st Drop Enrolment Analysis															
	Fall 2014			Spring 2015			Summer 2015			Fall 2015			Spring 2016		
	N	N w/Bal	Balance	N	N w/Bal	Balance	N	N w/Bal	Balance	N	N w/Bal	Balance	N	N w/Bal	Balance
Total Dropped	3,326	24	\$ 41,264.17	4,272	65	\$ 100,379.58	681	7	\$ 11,676.69	4,658	70	\$ 86,349.07	2,535	72	\$ 98,268.93
Never Re-enrolled	754	0	\$ -	567	8	\$ 14,632.81	137	0	\$ -	922	11	\$ 16,175.00	478	9	\$ 16,487.85
WP	26	7	\$ 20,757.80	24	16	\$ 38,210.20	4	2	\$ 3,325.04	43	17	\$ 29,085.70	41	19	\$ 41,927.50
Other Withdrawal	79	1	\$ 610.18	111	14	\$ 12,885.40	6	1	\$ 81.23	105	6	\$ 2,310.26	44	3	\$ 3,319.14
Re-enrolled	2,467	4	\$ 10,798.22	3,570	27	\$ 34,651.17	531	4	\$ 8,270.42	3,588	36	\$ 38,778.11	1,972	41	\$ 36,534.44

1st Drop Cash Flow Analysis															
	Month	N	Month	N	Month	N	Month	N	Month	N	Month	N	Month	N	Month
Fall 2014	Oct-14	181	Nov-14	137	Dec-14	75	Jan-15	61	2015	96	2016	3			
Spring 2015	Mar-15	280	Apr-15	172	May-15	346	Jun-15	418	Jul-15	40	Aug-15	32	Sep-15	4	Oct-15
Summer 2015	Jul-15	50	Aug-15	17	Sep-15	2	Oct-15	1	Nov-15	1	Dec-15	6	2016	1	



- **Example:** in spring 2016, 81% of the students dropped ended up re-enrolling. 78% of those students stayed enrolled. What does this tell us?



# New TigerPay Online Billing and Payment System

Morehouse College  
Student Financial Services

**TIGER****PAY**

  
MOREHOUSE  
COLLEGE

**UNIVERSITY OF ILLINOIS**  
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

# USFSCO

**University Student Financial Services and Cashier Operations**  
Parent Open House  
September 13, 2008

**USFSCO Parent Open House**



**UIC**



[www.usfsc.uillinois.edu](http://www.usfsc.uillinois.edu)



## SunTrust Student Financial Management Center

- **Financial Alerts based on Predictive Analytics**
- **Proactive Outreach**
- **Financial Literacy Training, starting in high school**
- **Replication of the Model Regionally**

# Open Discussion



Thank you!

Charmaine Daniels

[Charmaine.Daniels@morehouse.edu](mailto:Charmaine.Daniels@morehouse.edu)

