

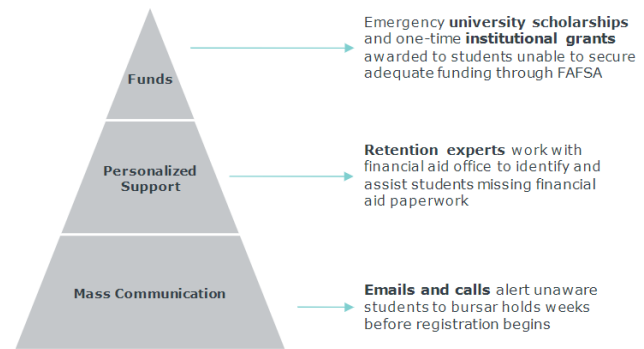
For AY 2022-23, UW-Milwaukee has dedicated approximately \$1.3 million of institutional funding to support retention grants and student persistence. This funding will be allocated as described below – split roughly in half for awards in fall and spring semesters.

- 42% - \$550,000 for Moon Shot for Equity Retention (Completion) Grants (coordinated by OSS)
- 38% - \$500,000 for Pounce (Retention) Grants (coordinated by SSC)
- 20% - \$250,000 for Special Circumstances (coordinated by SFSC/FAO)

## Approach

In Academic Year 2022-23, UWM will use a multi-pronged approach to address financial need with retention grants. Our model is based on the pyramid graphic (below) described in further detail within in the EAB Retention Grant Team Guide. This format leverages a variety of resources to drive retention and graduation rates.

Source: EAB Retention Grant Team Guide



## Phase 1: Mass Communication

Tuition and fees are charged to students' PAWS accounts approximately six weeks prior to the start of the term. Students receive email notification when their bill is available. Tuition and fees are due on the first day of classes for the term.

Students who do not pay their balance by the due date receive the following:

- A one-time late payment fee of \$25 each term.
- A finance charge of 0.5% per month assessed on the past due principal balance.
- A Bursar Hold on their PAWS account that restricts transcript and diploma release, registration for future terms, refunds, and other services.

Students may enroll in an optional Payment Plan that allows them to spread payment of anticipated tuition and mandatory fees, room, and board expenses over two or three installments during the term. Students are notified of the optional payment plan when they receive their initial bill six weeks prior to the start of the term.

- Students who enroll in the Payment Plan prior to the tuition due date do not have a Bursar Hold placed on their PAWS account.
- Students are not assessed monthly late payment fees while enrolled in the Payment Plan.
- A \$25 non-refundable fee is charged at the point of enrollment, in addition to the required \$100 down payment.
- Students on the Payment Plan may view their online Statement of Account at any time by selecting the View Billing Statement link on the PAWS Student Center page.
- Students who neglect to make a monthly payment as required by the Payment Plan are treated the same as students who do not pay their balance by the initial due date (i.e., one-time late payment fee, monthly 0.5% finance charge, Bursar Hold).
- Students who have a past due balance of \$1500 or greater are ineligible for enrollment in the Payment Plan in the next term.

## Phase 2: Identifying Eligible Students

The process for identifying students who may benefit from retention grants occurs three times throughout each cycle, as follows:

1. Following the [deadline](#) for the second installment of the payment plan (March 20 in spring semester, October 20 in fall semester).
  - a. This initial list is used for personalized outreach.
2. Following the [deadline](#) for the third and final installment of the payment plan (April 20 in spring semester, November 20 in fall semester).
  - a. This refined list should eliminate additional students who have applied to graduate, already enrolled for the subsequent fall/spring semester, or paid off their balance.
3. Following the start of open enrollment for the following fall/spring semester.
  - a. This further refined list should eliminate additional students who have applied to graduate, enrolled for the subsequent fall/spring semester, or paid off their balance.

Each time the process runs, the following occurs:

1. OSS requests the Office of Assessment and Institutional Research (OAIR; Vicky D’Anjou-Pomerleau) to generate a list of students\* who satisfy the following criteria and shares it with the Office of Student Scholarships (OSS; Joel Spiess):
  - Enrolled in current term at some point during the first 10 days of classes and not withdrawn from classes
  - Undergraduate/Associate career
  - Cumulative GPA  $\geq 2.0$  (or 0.0 for new freshmen without a GPA)
  - Degree-seeking
  - First degree (include ASOC; exclude those who are second degree or post-baccalaureate)
  - Good Academic Standing
  - Not expecting degree in current term, which includes students who do not meet the criteria below (used to flag students who are expecting a degree):
    - Expected graduation term is current term
    - AND Degree Checkout Status equals any one of the following = “Approved”, “Applied for Graduation”, “Degree Awarded”, “Program in Review”, “Needs to Finish Pending Work”
    - AND they have not been discontinued in their program
    - Not enrolled for next fall/spring term

*\*The report must include the following fields on the list of students:*

- *Stu Empl ID*
  - *Stu Campus ID*
  - *Stu Name*
  - *Cumulative GPA*
  - *Cumulative credits*
  - *Stdav Primary Advisor*
  - *Stdav All Advisors*
  - *Athlete?*
  - *Non-Immigrant Alien/International (NIA)?*
2. OSS asks Student Financials IT (SF-IT; Bobbie Jo Weber) to add the following to the list pulled by OAIR:
    - Unpaid balances (inclusive of current/previous terms and administrative fees; NOT future terms/fees)
    - Bursar holds

OSS then narrows the list to include only those students with an outstanding balance  $\geq$ \$1500 and less than \$6500 with a Bursar hold. (An outstanding balance  $\geq$ \$1500 prevents enrollment in the next term.)

3. Third and Final Run ONLY: OSS asks Financial Aid IT (FA-IT; Yue Xiong) to add the following to the list returned by SF-IT:
  - Unmet need
  - FAFSA Filing Status for Prior and Next AY
  - Financial Aid Package Status for Prior and Next AY
  - Estimated Family Contribution (EFC)
  - Previous receipt of a retention grant
4. OSS then collaborates with the Student Success Center (SSC; Brennan O’Lena) to divide the eligible students into two groups:
  1. Moon Shot for Equity Retention (Completion) Grants: Cumulative credits  $\geq$ 90 for Main Campus (including ASOC fall bridge students),  $\geq$ 30 for Branch Campuses
  2. Pounce (Retention) Grants: Students not satisfying the credit level criteria in #1.

### **Phase 3: Personalized Support & Insights**

When the list of eligible students is generated for the first time, following the [deadline](#) for the second installment of the payment plan, the SSC (Pachoua Lor), in collaboration with the Bursar’s Office, conducts personalized outreach via texts and phone calls to understand and troubleshoot more complex issues including missing paperwork, etc. This outreach is the most active between the second and third payment plan deadlines.

When the list of eligible students is generated for the second time, following the [deadline](#) for the third and final installment of the payment plan, EMSS shares the list of potential recipients (excluding the amounts) with the Academic Services and Advising Leadership Council (ASALC; advising unit leaders) to solicit feedback regarding any concerns with the students receiving retention grants (e.g., they are graduating at this time but simply haven’t applied yet, they could have already graduated but are purposely delaying, etc.). ASALC members are encouraged to forward the list to their respective staff members for review. Advisors with concerns send them to Brennan O’Lena and Joel Spiess via email.

### **Phase 3: Awarding**

Once the list of eligible students is run for the third and final time (following the start of open enrollment), OSS/SSC manually eliminates any students according to the following:

- Not enrolled in current term
- Previous degree earned
- Estimated Family Contribution (EFC)  $>$ 24,780 (UWM’s Cost of Attendance)
- Unmet Need of 0 if FAFSA was filed
- Currently on Academic Probation
- Academic advisor feedback
- Not returning indicator in Navigate
- Not a new freshman but GPA of 0.0
- Ineligible student athletes per NCAA regulations

The students remaining on the list will be considered for funding of that semester’s allocated funds.

Students will be assessed on the following criteria:

- Balances which can be addressed within the Retention Grants program funding
- Greatest need and/or no other options for funding
- Proximity to graduation

Selected recipients will receive the appropriate funds to bring their balance down to \$1499 – removing the Bursar hold to enable course registration. The goal is to award retention grants at the start of open enrollment for the subsequent term.

The final list of recipients is shared with FA-IT by OSS to have the grants applied to students' accounts. International students will be indicated so that FA-IT can initiate the appropriate checklists.

At the time of the award, students receive an automated email communication from PAWS that indicates the following:

1. The grant was awarded and is visible in their PAWS account.
2. The student should register for courses for the next term as quickly as possible.
3. The student should meet with their academic advisor or other Navigate student success team member to finalize their degree completion plan.
4. Financial aid advising is available, if desired.

Following notification to the recipients, the following occur:

1. SSC will record a note in each student's Navigate record indicating they received a retention grant (but excluding the amount) to enable registration for the coming term (Note Reason: Retention Grant).
2. OSS will share the criteria, process, and list of recipients (excluding the amount) with the Academic Services and Advising Leadership Council (advising unit leaders) to inform units of the work and request follow-up communication to students (as determined by advisor). Advisors who identify new students who may benefit from a retention grant may send the students' names/situations to Brennan O'Lena via email.
3. OSS will share the list of recipients with the Dean of Students Office for comparison with emergency grant recipients.
4. OSS will initiate the GLACIER process for any awards to foreign nationals (international students) whose award cannot be disbursed via PAWS.
5. OSS updates 1) the master list of recipients based on PAWS disbursement report, and 2) the master record of statistics and outcomes.
6. OSS shares relevant data points with the Retention Grants advisory group.

#### **Phase 4: Assessment**

Following the add/drop date in each term, OAIR will prepare a summary report including demographics of the student population, comparisons of test and control groups (if any), and enrollment outcomes.