

Master Planning Checklist 2015-16

This calendar is created for Financial Aid workshop events occurring in February.

Long-term Goal: By September 1, 2018 increase the percentage of Dallas County seniors enrolling in college by five percent to a level of 66 percent across nine partner districts and increase the percentage of seniors who complete the FAFSA to 50 percent by June 30, 2018.

Short-term Goal: By June 30, 2016 increase the percentage of Dallas County seniors who complete the FAFSA to 46 percent.

Event-specific: 250 students/families attend each site; 80% of attendees submit materials day of

August				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Include the workshop locations and dates in senior checklists/calendars	Marketing	Site Lead
<input type="radio"/>		Scout out a location for event. Criteria to consider: <ul style="list-style-type: none"> • Adequate computer facilities • Adequate Parking • Additional spaces for volunteer hospitality room, at least one financial aid and scholarship large group presentation room, and an optional room for students to pick up scholarship applications 	Facilities	Site Lead
<input type="radio"/>		Set up a team at your school to discuss the timeline of events and activities. <ul style="list-style-type: none"> • Consider including school counselors, teachers, students, admins, parents, higher ed representatives, etc. 	General	Site Lead
<input type="radio"/>		Finalize date and make necessary reservations (staffing and IT) <ul style="list-style-type: none"> • iPads/Netbooks for check-in and survey completion (25-30 iPads) • Computer labs—reserve at least 25 computers and 1 printer for every 100 students expected. • Let Commit! know how many computer labs you will have. • If there will be any presentations in lab or scholarship room, reserve a projector • Reserve rooms and equipment from the afternoon/evening the Fri before the event through 3pm Sat 	Facilities/IT/General	Site Lead
<input type="radio"/>		<i>If UWMD is unavailable.</i> Sites will designate someone to be the Volunteer Coordinator to help with volunteer recruitment and day-of logistics.	Volunteer Management	Site Lead/UWMD

September

Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>	1 st week of September	Marketing: 43 target high schools deploy the “There’s a Way to Pay” messages.	Marketing	Commit!/Site Lead
<input type="radio"/>		Update the pitches for sponsorship/volunteers	Volunteer Management/Donations	Commit!
<input type="radio"/>		Create a timeline for securing additional donations beyond budget provided	Donations	Site Lead

October

Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>	Wednesday, October 1 st	Website: Complete site launches	Website	Commit!
<input type="radio"/>		Reach out to higher-ed and corporate partners to recruit volunteers/donations	Volunteer Management/Donations	Commit!
<input type="radio"/>		Identify what languages your volunteers should know how to speak and relay that information to Commit!	Volunteer Management	Site Lead/Commit!
<input type="radio"/>		Determine if additional transportation options are necessary for students and make arrangements	Transportation	Site Lead
<input type="radio"/>		Prep for a December info session with your district/campus’ parents on financial aid. If you need assistance securing a speaker, please reach out to Commit!	Training	Site Lead

November				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Continue to reach out higher-ed and corporate partners for volunteers/donations	Volunteer Management/Donations	Commit!
	Nov 4 @ 8:30a	Participate in the November action network meeting	Check-In	Commit!/ Site Lead/ Action Network
<input type="radio"/>		Edit participant materials as needed (See "Student Packet" on Site Lead section of website) <ul style="list-style-type: none"> • "School Map" • "Station Checklist" • "Student FAFSA Process"/"Student TASFA Process" • "Financial Aid Application Checklist" • "FAFSA Next Steps"/ "TASFA Next Steps" • "Scholarship Info" 	General	Site Lead

December				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Marketing and media relations materials finalized by mid-December.	Marketing	Commit!
<input type="radio"/>	Dec 2 @ 8:30a; Dec 16 @ 8:30a	Participate in December bi-weekly meetings	Check-In	Commit!/Site Lead/Action Network
<input type="radio"/>	1 st week of December	Marketing: Begin rolling out Phase 3 (File your taxes early!) of the "There's A Way to Pay" messages	Marketing	Site Lead/Commit!
<input type="radio"/>		Marketing: <ul style="list-style-type: none"> • Send postcards/emails to parents for all target high schools • Morning announcements • Marquee messages • Talk about taxes over break, send in tax returns early 	Marketing	Site Lead
<input type="radio"/>		Host an info session for parents/students on what to expect with regards to the fin aid process before winter break	General	Site Lead
<input type="radio"/>		Continue to recruit volunteers and registering them through the form on the financial aid website	Volunteer Management	Site Lead/Volunteer Coordinator
<input type="radio"/>		Finalize student/volunteer packet information	Materials	Commit!

January				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Expert volunteers confirmed	Volunteer Management	Commit!
<input type="radio"/>	Jan 4 or 5	Participate in FAFSA/TASFA training provided by Commit! Site leads recruit counselors to attend and commit to volunteer shift	Professional Development	Site Lead/ Commit!
<input type="radio"/>	2nd week of January	Marketing: <ul style="list-style-type: none"> • Priority schools will receive mktg materials during Jan 4/5 training • Continue rolling out Phase 3 (File your taxes early!) and begin rolling out Phase 4 (Financial Aid February) of the “There’s A Way to Pay” messages • Send out Spring parent letter notifying parents about workshops (See “(Spring) Financial Aid Parent Letter” in toolkit) • Push to register students for workshop 	Marketing	Site Lead/ Volunteer Coordinator/Commit!
<input type="radio"/>	Jan 13 @ 8:30a	Participate in January meeting	Check-In	Commit!/Site Lead/Working group
<input type="radio"/>		Schedule on-site walk through with Volunteer Coordinators, IT personnel, and facilities	Facilities/IT/General	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Continue inviting students to the workshop	Marketing	Site Lead

February				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		FAFSA/TASFA Asst Volunteer Training	Volunteer Management	Commit!
<input type="radio"/>		Media relations efforts launch	Marketing	Commit!
<input type="radio"/>	Feb 3 @ 8:30a	Participate in February meeting	Check-In	Commit!/Site Lead/Working group

2 weeks before

Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Volunteer and Participant packets printed and delivered	Materials	Commit!
<input type="radio"/>		Webinar orientation for expert volunteers and site leads on Financial Aid event agenda	Volunteer Management/Donations	Commit!
<input type="radio"/>		Marketing: Continue rolling out Phase 4 (Financial Aid February) of the "There's A Way to Pay" messages	Marketing	Site Lead/ Volunteer Coordinator/Commit!
<input type="radio"/>		Pull DOE FAFSA completion report two weeks before event	Evaluation	Site Lead/Commit!
<input type="radio"/>		Create signage for directions around campus and parking	General	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Confirm iPad/Netbook reservations for sign-in and exit survey	Facilities	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Confirm an IT staff person will be available the day of the event	Technology	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Ensure district/site does not wipe computers each night	IT	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Schedule text messages to go out re workshops on SignalVine/Remind	Marketing	Site Lead/Campus Contact

1 week before

Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Send reminder email to volunteers with event details	Volunteer Management	Commit!
<input type="radio"/>		Ensure sites have everything they need for the event <ul style="list-style-type: none"> • Adequate number of volunteer sign-ups • Printed materials • Day-Before/Day-Of Plan 	General	Commit!
<input type="radio"/>		Marketing: <ul style="list-style-type: none"> • Continue rolling out Phase 4 (Financial Aid February) of the "There's A Way to Pay" messages • Last push to get students to pre-register for the event 	Marketing	Site Lead/Commit!
<input type="radio"/>		Do a walk through including a trial run in the computer lab of a student filling out a live FAFSA	Technology	Site Lead/ Volunteer Coordinator
<input type="radio"/>		Organize all donated materials	Donations	Site Lead
<input type="radio"/>		Coordinate on final volunteer assignments	Volunteer Management	Site Lead/ Volunteer Coordinator/Commit!

Day before				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
<input type="radio"/>		Send out reminder to site-leads to conduct day-before tasks	General	Commit!
<input type="radio"/>		Volunteer Sign-In <ul style="list-style-type: none"> Designate registration area Set up tables/signage 	Facilities	Site Lead/Volunteer Coordinator
<input type="radio"/>		Student/Family Sign-In <ul style="list-style-type: none"> Designate registration area Set up tables/signage Prep and place student packets and qualifications for TASFA v. FAFSA information sheet on the registration table (See "Student Packet" folder and "FAFSA_TASFA Qualifications EXAMPLE" in Toolkit_ 	Facilities	Site Lead/Volunteer Coordinator
<input type="radio"/>		Financial Aid and Scholarship Presentation <ul style="list-style-type: none"> Place projector in the room for presentation/video Ensure adequate seating for attendees 	Facilities/IT	Site Lead/Volunteer Coordinator
<input type="radio"/>		FAFSA/TASFA Computer Labs <ul style="list-style-type: none"> Confirm guest logins Bookmark FAFSA site, registration link, and student exit survey Confirm adequate ink & paper and number of printers Print and prep sign-out sheets to keep track of completions and those who need further follow-up (See "FAFSA/TASFA Sign-Out sheet EXAMPLE in Toolkit) 	Facilities/IT	Site Lead/Volunteer Coordinator
<input type="radio"/>		Scholarship Room <ul style="list-style-type: none"> Lay out paper scholarship applications and any other materials 		Site Lead/Volunteer Coordinator
<input type="radio"/>		Post directional signage in building and directions from parking lot to student/volunteer entrance	Facilities	Site Lead/Volunteer Coordinator
<input type="radio"/>		Designate and label area for bus drop off (optional)	Transportation	Site Lead/Volunteer Coordinator

Day Of				
Complete?	Due Date	Task	Task Category	Person(s) Responsible
○		Volunteer Sign-In/Orientation <ul style="list-style-type: none"> ○ Check in volunteers on iPads/Netbooks ○ Make sure volunteers are clear on their roles/messages and that they've received their volunteer packets (See "Volunteer Packet" folder in Toolkit) 	Volunteer Management	Volunteer Coordinator
○		Student/Family Sign-In <ul style="list-style-type: none"> ○ Check in students/families on iPads/Netbooks ○ Ensure that there is a one-pager displayed with FAFSA or TASFA eligibility (See "FAFSA_TASFA Qualifications EXAMPLE") ○ Provide students with packets (See "Student Packet" folder in Toolkit) 	Registration	Site Lead/Volunteer Coordinator
○		Financial Aid and Scholarship Presentation <ul style="list-style-type: none"> • Ensure projector is working • Manage flow of students into the presentation room 	IT/Facilities	Site Lead/Volunteer Coordinator
○		FAFSA/TASFA Computer Labs <ul style="list-style-type: none"> ○ Document completed FAFSA/TASFA ○ Document completions and those in need of a follow-up (See "FAFSA_TASFA Sign-Out sheet EXAMPLE" in Toolkit) ○ Ensure volunteers stationed there are clear on messages/materials to deliver for next steps ○ Have paper copies of exit survey on hand as backup 	IT/Facilities	Site Lead/Volunteer Coordinator
○		Scholarship Room <ul style="list-style-type: none"> • Have scholarships applications ready to print in case there are more families than expected 	IT/Facilities	Site Lead/Volunteer Coordinator
○		Hospitality Room <ul style="list-style-type: none"> • Hang signage for room • Set up food • Post site coordinator's phone number 	Facilities	Site Lead/Volunteer Coordinator

After the event/March

Status	Due Date	Task	Task Category	Person(s) Responsible
○		Send thank you note to volunteers including feedback survey link (See "Volunteer Thank You Letter EXAMPLE" in Toolkit)	Volunteer Management	Site Lead/ Volunteer Coordinator Commit!
○		Pull DOE FAFSA report after event	Evaluation	Site Lead/Commit!
○	March 16 @ 11:30am	Meeting: Participate in the final debrief meeting	Debrief	Site Lead/Commit!/ Working group
○		Immediately debrief with partners and key volunteers to capture feedback	Evaluation/General	Volunteer Coordinator/Site Lead
○		Send in FAFSA/TASFA completion numbers to Commit!	Evaluation	Site Lead
○		Follow-up with students who did not complete their FAFSA or TASFA	Follow-Up	Site Lead
○		If possible, plan an additional, smaller event in March for your students who still need help with their application	Follow-Up	Site Lead

Student/Family Event Flow

Station	Room #	Materials Needed	# Volunteers	Task
Student/Family Registration		<ul style="list-style-type: none"> • Google form registration • Paper sign in (backup) • Site map & event flow • Photo release sign posted • Participant packet • iPads/laptops • radio/text message for status 		
FAFSA/TASFA Overview Presentation		<ul style="list-style-type: none"> • Video with Spanish subtitles <insert link> • Projector and internet • radio/text message for status 		
Checklist Station		<ul style="list-style-type: none"> • Checklist with FAFSA/TASFA qualification metrics • Pens • radio/text message for status 		
FAFSA Lab #1		<ul style="list-style-type: none"> • Printer with paper & ink • 2 baskets for complete/incomplete • FAFSA/TASFA volunteer cheat sheet • Evaluation survey • radio/text message for status • FAFSA/TASFA sign-out sheet 		
FAFSA Lab #2				
FAFSA Lab #3				
FAFSA Lab #4				
TASFA Lab #1				
TASFA Lab #2				
Debrief Room				
Scholarship Room		<ul style="list-style-type: none"> • Computers/ 		
Raffle Items				
Other		<ul style="list-style-type: none"> • Directional signs • 		

Volunteer Flow

Station	Room #	Materials Needed	Volunteers	Task
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Volunteer Registration		<ul style="list-style-type: none">• Site map•		
Hospitality Room		<ul style="list-style-type: none">• Space for food and training		