

## SAMPLE SELF-ASSESSMENT ITEMS

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### Strategy 1: Know Your Low-Income Students

The items in this section are designed to help you assess how well your institution understands the experiences of its low-income (and other) students — including the rates at which they achieve success, where they fall short of their goals, what their needs may be and where there is opportunity for targeted improvement.

Knowing the reality of your institutional data and what these data suggest is a critical first step in determining how you act to improve success and completion rates, especially for your most needy students.

You may not currently collect, analyze, or use many of the types of data identified in the questions below. Few institutions collect all of them regularly. The point of this section is to identify critical data sources that can be used to understand and serve all of your students — particularly low-income students.

**INSTRUCTIONS: Please respond “Yes” or “No” to the questions below for your institution.**

1. Our institution has defined “low-income student” (e.g., Pell-eligible/Pell recipient, amount of expected family contribution, amount of unmet financial need, income-to-household size ratio, state or federal definition of low-income)?
2. Our institution uses multiple sources of data and information (e.g., FAFSA, admissions application) to identify students who have economic needs?
3. We measure the number and proportion of low-income students by:
  - a. Part time/ full time enrollment status
  - b. Program of study
  - c. Academic major
  - d. Year of classification (e.g., freshman, sophomore, junior, senior)
  - e. Other category \_\_\_\_\_
4. We measure trends in academic performance of low-income students by the following segments:
  - a. first generation
  - b. race/ethnicity
  - c. veterans
  - d. age
  - e. undocumented students
  - f. gender
5. Our institution understands average levels of students’ unmet financial need - difference between the cost of attendance (e.g., tuition, fees, books, living expenses) and available aid (e.g., grants, loans, scholarships, family contribution)?

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### Strategy 2: Review Internal Processes and Organize Student Supports

The items in this section are designed to help you assess which services and supports you already provide to low-income students, and in turn, how well you create a support system for low income students in particular. There are many and varied programs, approaches and initiatives to serve low-income students, as identified below. This section is designed to help you identify where your institution can expand and/or strengthen your assistance to low-income students. It should also be noted that these items are rooted in the conviction that, while student loans can be a piece of a financial stability package, they should not be the only or primary method of providing resources to support low-income students.

**INSTRUCTIONS: Please respond “Yes” or “No” to the questions below for your institution.**

1. Our institution directly engages cross-functional stakeholder groups, including high level administrators/leaders, faculty, student financial assistance professionals, student services professionals, academic advisors, institutional researchers, business officers, and information/technology professionals, staff, in improving and expanding services for low-income students?
2. Our institution reviews and aligns academic and business processes and policies to support low-income students?
3. Our institution uses continuous improvement processes to evaluate whether practices, processes, and policies (e.g., financial aid process, book vouchers, drop policy, course scheduling, online education) support success of low-income students?
4. Our institution regularly engages the voices of students to assess and improve low-income students’ educational experiences?

Our institution provides the following service to address the needs of our students:

5. Grant/scholarship searches and application assistance?
6. Federal work study program?
7. Emergency grant program?
8. Textbooks / supplies assistance?
9. Food security (e.g., vouchers for dining hall, food pantry)
10. Housing stability (e.g., access to temporary shelters, temporary housing in residence halls, housing placement assistance, housing subsidies)?
11. Dependent care services (child and adult)?
12. Healthcare?
13. Transportation support (e.g., discounted, or free bus passes, shuttle services, subway/train cards, auto repair, etc.)?
14. Legal assistance?
15. Assistance with utilities (water, energy)?
16. Financial literacy coaching?