



**Pell Initiative for Virginia
Annual Report**

October 1, 2024



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EXECUTIVE SUMMARY

This report is mandated by the Virginia Legislature's 2024 Act of Assembly, Chapter 2, Item 130 I. The item requires a yearly report on the Pell Initiative for Virginia (PIV) each October 1 during the duration of the program. A comprehensive bullet-list of the PIV description follows this portion of the report. PIV is a natural experiment to alter both institutional and student behavior, not a controlled experiment, to increase Pell-eligible student enrollment. The enabling legislation requires the report to contain data on recruitment, retention and graduation of Pell-eligible students. This data represents activity in the first three of the five stages of the higher education student life cycle: recruitment, enrollment, retention, attainment and alumni.

The data and observations in this report are incomplete because not all institutions conduct their official enrollment census early enough in September to permit the data to be adequately compiled, analyzed and published by an October 1 deadline. However, this report does include the actual census data from institutions with earlier census dates and estimated data, when available and reported, from those with later census dates. The analysis and observations are tentative. Additionally, there has not been a treatment cycle in sufficient length to report and analyze attainment information. A second edition of this report will be published in November/December 2024 with final data and a complete set of observations including a discussion on attainment.

This first year of PIV implementation comes at a turbulent time in the world of higher education and Pell Grants. Pell Grant eligibility is determined by the U. S. Department of Education (USDOE)-developed form called the Free Application for Federal Student Aid (FAFSA) as completed by new and continuing college students. USDOE contractors compute student Pell eligibility based on a series of family situational and financial conditions. Pell Grant eligibility is reserved for generally low-income, often first-generation, rural and underrepresented students. This past year, the news reports have been replete with the coverage of FAFSA delays, miscalculations and missteps due to a long overdue massive overhaul of the FAFSA. This flawed implementation of the restructured FAFSA has made it difficult to draw solid observations on the impact of PIV. PIV is funding a variety of activities to increase the presence and success of Pell-eligible students in this first year of implementation. Section IV of this report contains a brief summary of each institution's PIV activities.

The data SCHEV has received from the PIV institutions demonstrates a diminished FAFSA completion rate following national trends. Tentatively, it appears, proportionally, more students are Pell eligible under the new FAFSA at most PIV institutions. While SCHEV eagerly anticipates conclusive data observations, this report discusses the challenges of first-year implementation. The data appears mixed by institution. Most institutions seem to show modest

gains in Pell-eligible enrollments for first-year students. There was more time for institutions to initiate recruitment and enrollment PIV activities than retention and graduation activities. Tentative observations of first-year activities are included, although it is difficult to determine solid observations at this stage of implementation. It is important to remember, especially in this, the first year of implementation, PIV is a longitudinal natural experiment where we can draw correlations, not causation, as the initiative operates across a minimum of four-years duration. For this cohort of students entering in the Fall, 2024, six-year graduation rates will not be available until the second half of 2030.

THE PELL INITIATIVE FOR VIRGINIA (PIV)

- *Funded by the Legislature of the Commonwealth of Virginia, the Pell Initiative for Virginia (PIV) encourages and supports state-supported post-secondary colleges and universities to expand the enrollment, retention and degree attainment of Pell Grant-eligible students.*
- *The State Council of Higher Education for Virginia is responsible for awarding, monitoring and reporting PIV activities. SCHEV has established a schedule of reports soliciting data and narrative information. The first of a series of formal reports will be issued for the FY2024 set of proposals October 1, 2024.*
- *The predominant institution-participation requirement in the enabling legislation directs that participating institutions conduct a thorough institution-wide review of institution rules, policies, procedures, practices and traditions that may act as barriers to Pell-eligible students. Such barriers should be mitigated to the extent possible without diminishing the mission, values and accreditation standards of each institution.*
- *The PIV is a unique and innovative state-supported effort focused on state-supported institutions and Pell Grant-eligible students, most often first generation, low-income, underrepresented and rural students geared toward individual institutional needs and flexibility.*
- *State-supported institutions have been invited to submit competitive proposals designed to encourage, attract and nurture Pell-eligible students to enroll in and complete associate and/or bachelor's degree in fiscal years 2024 and 2025.*
- *As of September 2024, \$73.4 million in 50 grants has been awarded to 16 state-supported colleges and universities and the Virginia Community College System. These grants support over 251 activities geared toward Pell-eligible students. Activities represent strategies and interventions to achieve increased Pell-eligible levels of student enrollment and attainment. (A taxonomy is included at the end of this document.)*
- *The activities funded by these grants support a statewide data-based assessment to assist state-supported institutions to adopt and conduct activities/interventions that can increase*

participation and attainment by Pell Grant-eligible students. Such students represent low-income, first generation and underrepresented populations in higher education. This assessment will help to gauge the efficacy of the various treatments/interventions utilized in the various funded activities using evidence-based techniques.

- *The results of this assessment, designed as a natural experiment, will help indicate possible associations between the activities of the experiment and particular outcomes unlike controlled experiments that often seek causation. The nature, ethics and goals of the Pell Initiative for Virginia do not lend themselves to the controlled experimental design.*
- *SCHEV will analyze and share outcomes of the various PIV activities and offer assistance to institutions in determining appropriate activities identified in PIV that show promise of replication.*
- *The FY2024 allocation of \$37.5 million was awarded in two rounds of proposals totaling \$36.8 million for 31 proposals planning 137 activities. SCHEV has reserved a modest amount for institution contingencies and central administration.*
- *The FY2025 allocation of \$37.5 million was awarded in one round of proposals totaling \$36.6 million for 19 proposals with 114 activities. SCHEV has reserved a modest amount for institutional contingencies and central administration.*
- *Each fiscal year grant can range from one to four years.*
- *A call for additional FY2026 proposals from state-supported institutions will be issued during the fall of 2024 for an additional \$37.5 million in funding. The change in timing of the process addresses past difficulties that will be discussed in the next section.*
- *Examples of funded activities are in Section IV.*

The original 2022 legislation authorizing and funding this program at \$25 million for FY2024 prompted SCHEV to issue a call for Round 1 proposals during the spring of 2023. All 15 senior state-supported institutions submitted at least one proposal each. Awards were announced in July 2023 for approximately \$24 million, providing funding for each of the 15 submitting institutions. Subsequently, in Special Session, the legislature added another \$12.5 million in October 2023. At this time, SCHEV assigned part-time staffing to the Pell Initiative for Virginia program. Proposal submission was opened for a Round 2 of funding for the additional FY2024 amount in November 2023. The pool of public institutions was expanded to 17 to include the Richard Bland College of William and Mary (RBC) and the Virginia Community College System (VCCS). Thirteen of the senior institutions and both RBC and the VCCS submitted at least one proposal. At least one proposal for each

institution was funded for approximately \$12 million in grants announced in December 2023. (Note: up to one percent of each total allocation may be used for administration.)

The General Assembly included an additional \$37.5 million for FY2025 and \$37.5 million FY2026 for PIV during the 2024 legislative session. Proposals for the FY2025 allocation were solicited during the spring of 2024 for the 17 institutions. All 17 submitted at least one proposal. Funded proposals were announced in June 2024.

A call for FY2026 proposals will be announced in late October 2024 at a required meeting of institution representatives at Central Virginia Community College in Lynchburg, Virginia. Institutional primary contacts were notified of this meeting in August 2024. Proposals are due to SCHEV by January 6, 2025. This process will have a similar format to the FY2026 proposal process but with a less aggressive timeline. SCHEV utilizes an external reader panel of experts to perform an initial ranking. The FY2026 evaluation process will include increased attention to detail, rigor of activities proposed and history of institution performance in their conduct of PIV grant activities. Current plans call for SCHEV to release proposal action notices and Memorandums Of Understanding documents by April 7, 2025.

YEAR ONE IMPLEMENTATION CHALLENGES

It is important to note this report is written from the vantage of 2023-24 as the first year of a new, institution-based grant program of a highly unique nature. The 'uniqueness' of the PIV centers on the level of institution flexibility allowing institutions to determine and propose interventions and activities they feel best suited to fit their particular student demographics and the mission of the institution. SCHEV has identified a robust listing of activities which may lead to increased Pell-eligible student enrollment and attainment. Institutions may choose to add to these activities or propose additions. No two of the funded proposals are alike. The funded institutions identify the activities then build the infrastructure themselves.

Programs like the Pell Initiative for Virginia face many challenges. PIV attempts to influence student behavior during a critical stage in development toward adulthood. Life after high school can be unpredictable and the factors which act to influence behavior extend to elementary school enrollment. To seek a post-secondary educational opportunity is a major life-changing decision. This choice has multiple influences of varying degrees depending on parental/family situations, socio-economic status, social capital and available support mechanisms for both traditional and non-traditional students. Unfortunately, many of the variables are greater for the non-traditional student and the first-generation and low-income students, particularly the Pell-eligible population.

A major challenge to the Pell Initiative for Virginia from the outset has been the calendar and timing of the grant awards to the institutions, especially during this first year of the FY2024 grant cycle. This calendar left minimal lead time to arrange for the needed infrastructure to begin the funded activities. In this first year, institution proposals were solicited in April 2023, grants were announced in July 2023 and funds became available in August 2023. There was little time for institutions to implement the infrastructure and have it operational in time for the beginning of the 2023-24 academic year. More problematic is the fact that several of the proposals included summer programs commencing before funds were available to the institutions.

Another element in this timing issue is the higher education recruitment cycle which can begin during the student's high school sophomore year, if not sooner, depending on the student and the institution. For instance, if students make their college decision during their high school junior year, the outcome occurs approximately two years later. Given these circumstances, it is almost impossible to determine any meaningful student enrollment outcomes at the end of the first year of PIV. Additionally, retention efforts are equally difficult to judge given such short lead time from the institutions receiving funds and then implementing intervention activities. Attainment takes at least two years at the two-year postsecondary level and four years at the four-year institution level. Determining PIV outcomes for attainment are not possible at this time. This report will present first-year outcome data that, at best, represent inconclusive outcomes.

The FAFSA dilemma further confounds the ability of researchers to gauge the representative nature of student FAFSA-related data in terms of eligibility levels. Additionally, this FAFSA dilemma hampers the degree of confidence researchers can claim using trend data indications for changes in the numbers of Pell-eligible enrolling as new students, as well as retained students. For this report, the data collected from institutions on the 2023-24 recruiting cycle for fall 2024 enrollments are as of September 16 or census data, whichever is earlier. Pell Grant eligibility is determined by the FAFSA, the Free Application for Federal Student Aid. There is no other official method other than the FAFSA. Since the PIV program targets Pell-eligible students, we need to know that eligibility to measure outcomes.

Select details of the FAFSA dilemma follow. There was a three-month delay in publishing the FAFSA which is used to apply for a Pell Grant along with determining eligibility for other types of federal, state, institutional and foundation/private organization financial aid and scholarships. This 2024-25 FAFSA delay was the result of flawed implementation of the Congressional mandate that certain elements of the FAFSA be simplified by adopting a more user-friendly online application process. College access and success researchers and

proponents have long contended that the FAFSA's complexity often hinders students and their families from even considering educational opportunities beyond high school. FAFSA simplification is a legitimate goal, and the spirit should be applauded; however, planning and execution of that simplification was defective.

Normally, for students entering fall 2024, the FAFSA would be available for students to complete October 1, 2023. However, it wasn't available until December 30, 2023. Even at that time, the online site severely limited users, crashed much of the time, was flawed operationally and was computationally inaccurate. The flaw/fix/flaw cycle continued until April when some, but not all, FAFSAs were successfully processed and the eligibility factors furnished to the colleges and universities. But colleges and universities were unable to make corrections. Even though the form was 'simplified' for many concerned populations, it became more complicated for other populations prompting the need for corrections by the colleges.

The planning and implementation process for simplification was further confused by an additional Congressional mandate; that certain aspects of the Pell-eligibility formula be revised. More implementation complexity was caused by another Congressional requirement to have an enhanced conduit direct from the Internal Revenue Service to access financial data for the FAFSA. Another flaw was the unintentional omission of a normal periodic inflation update to the eligibility formula.

A further blow came July 30, 2024, when the U. S. Department of Education notified colleges and universities that they could only submit FAFSA corrections one-at-a-time, rather than by large automated batches as has been the case in prior years. This notice comes less than 30 days prior to the beginning of most institutions' start of the fall term. Making one-by-one corrections is a labor-intensive endeavor.

In the past, FAFSAs were processed in the fall and student financial aid award notices from institutions would be sent to prospective students in February-March. This timeline was necessary in order to give students an appropriate amount of time to make an informed decision on what college to attend considering the financial aid offered to mediate the cost. Due to these delays, many students were unable to make an informed timely decision. Nationwide, high school seniors completing the FAFSA are down 9.3% in late August 2024 according to the National College Attainment Network. In Virginia, the same source notes FAFSA completions are down 8.4%.

This FAFSA dilemma was expected to adversely affect college enrollment in Virginia and especially our Pell-eligible students for both incoming new students and retention of upper class students. Because of this, SCHEV staff is currently debating what academic year to use as the base data. Preliminary data on FAFSA volume indicates wide variability between the choices of 2022-23 or 2023-24 as base data. PIV institutions have pointed out that the institutional PIV proposals used the 2022-23 year as the base data. This first edition report uses

2023-24 as the base year data. The second edition will contain a section discussing the base year choices and make any necessary updates if the 2022-23 year is selected as the base.

There is wide variability between institutions demonstrating the differences in student populations at different institutions. The higher education environment was extremely fluid during the 2023-24 academic year. This myriad of confounding circumstances renders SCHEV hesitant to draw any firm conclusions on PIV outcomes for the first year.

Another challenge, resting with many of the participating Virginia public colleges, has been the inadequacy of many institutional initial responses to a major requirement of PIV. This requirement is a legislative mandate that participating institutions *must demonstrate efforts to restructure outreach, recruitment, admission, and retention procedures*. Such a review could examine the policies, procedures, practices, rules and practices across all phases of the student life cycle of a postsecondary educational enterprise that might inhibit the recruitment, enrollment, retention of Pell-eligible students. SCHEV has distributed a short paper of what such a review might entail. It is included in this report as an appendix.

While a limited number of institutions have embraced this effort in varying degrees, not all have demonstrated an adequate level of commitment to such a cross-departmental, all-embracing, institution-wide review in the reporting requirements prior to the most recent September 20, 2024, report. Many had committed to only one or two stages of the undergraduate student life cycle. SCHEV has intensified efforts to sensitize institutions to immediately engage in efforts to conduct an institution-wide review of policies, procedures and practices that occur throughout the student life cycle that may present barriers to Pell-eligible students. Institutions are required to report the structure and calendar for such a review in their September 20, 2024, report. SCHEV has carefully examined the reported structures and calendars and has consulted and will continue to consult individually with institutions as needed. A sample of these structures and calendars will be shared in the data section of this report. The September institutional reports do show significant improvements.

INSTITUTIONAL STRATEGIES AND ACTIVITIES FOR FY2024, FY2025 AND FY2026 PIV GRANTS

SCHEV staff created summaries of each institution's PIV activities and shared them with each institution to assure accuracy. Several institutions submitted their own summary replacing the SCHEV summary. SCHEV staff has edited the institutionally authored summaries for brevity.

Christopher Newport University (CNU) uses PIV funding to target 17 Hampton area high schools with on-site admission review, partnerships with local Upward Bound, Talent Search, and Special Services (referred to as TRIO) programs and access organizations for campus visits and is instituting a direct admission program with Virginia Peninsula Community College including scholarships for enrollment at Virginia Peninsula and CNU. PIV funds transportation to the CNU campus for on-campus programming, application fee waivers, acceptance deposit scholarships and summer school scholarships.

George Mason University (GMU) has implemented PIV funding to expand its Access to Excellence Initiative that provides college access programming for targeted high schools with large proportions of students who qualify for free lunch. GMU provides the partner schools with college planning presentations, application completion workshops, and campus tours that include transportation and meals. Students and parents from partner schools receive an invitation to the Access to Excellence Seminar, which provides a financial aid presentation and FAFSA/VASA completion workshops in both English and Spanish. PIV funds support financial literacy programming for the Early Identification Program (EIP) by expanding the Financial Well-Being Peer Mentor Program and featuring college-going seminars including financial aid information, essay-writing seminars, a session on career exploration and choosing a college major. PIV funds also supplement scholarships for Pell-eligible students at GMU with outstanding balances. Upcoming activities include Access to Excellence seminars in the fall and spring semesters, expansion of the Summer Academy for EIP students, and establishing a One-Stop Service Center with trained social workers and a laptop loaner program.

James Madison University (JMU) is expanding its successful Centennial Scholars Program (CSP) with 16 additional undergraduate participants and two additional graduate mentors funded by PIV. The CSP entails the recruitment and attainment of talented low-income and underrepresented students utilizing extensive scholarly activities, financial literacy and general support activities. JMU also is providing assistance to 40 other Pell Grant eligible non-CSP undergraduate students. In total, 58 students are receiving support they otherwise would not receive without the support of PIV.

Longwood University (LU) has added a dedicated admissions counselor with responsibility for targeted high schools in rural areas through PIV support. Along with peer admission coaches, that counselor also will assist and support prospective students through the admissions process. Funding has been made available for recruitment scholarships, geo-targeted marketing campaigns, and scholarships to level-out state aid for an increasing population of Pell-eligible students. Upcoming activities include adding retention counselors, utilizing peer retention support, and increased early engagement to address common transition barriers in support of

the welcoming atmosphere of the Longwood campus. PIV will fund an innovative approach to engage students with academic support services (e.g., tutoring and individualized sessions on study techniques, time management techniques, etc.) using a financial incentive to encourage participation in established activities that promote academic achievement.

Norfolk State University (NSU) is using PIV funding to streamline the student experience by leveraging existing signature programs to minimize summer melt and learning loss. This approach involves coordinating various successful existing projects to create a more streamlined and cohesive student experience, ensuring that all students receive comprehensive supports and resources tailored to their unique needs. Throughout the students' college careers, they are engaged in high-impact summer programs designed to enhance career development and readiness while minimizing duplication of efforts and celebrating current successful initiatives. This PIV focus extends beyond traditional Pell-eligible students to include similar vulnerable populations who are often highly motivated but require intentional resources to persist. Students-as parents, transfer students and parents of Pell-eligible students are often considered with the Pell-eligible variable. The Commonwealth of Virginia's PIV funding provides holistic support through mentoring, coaching, academic assistance, professional development, and emergency aid to address insecurities and financial challenges. Additionally, there are opportunities that pave the way for post-graduation success, such as participation in conferences and visits to graduate schools, which help students build valuable networks and prepare for future career or academic pursuits. Efforts also are included to identify an engaged cohort to support continuous improvement activities to identify promising practices.

Research at **Old Dominion University** (ODU) has identified a gap in retention for Pell-eligible students between male and female students. As a result, ODU PIV activities focus on narrowing that gap with staffing a success coach, [peer](#) mentors and [educational](#) programming including topics such as self-advocacy, academic and planning skills, resources and systems, [financial](#) literacy, civic engagement and career professionalism. PIV funding also enables the purchase of CampusESP, software to involve students' families as part of an effort to enhance family multi-channel engagement, providing virtual touchpoints and retention support. Additional activities will foster and increase community building/connections with the university resulting in a more welcoming atmosphere on campus and the creation of professionally designed orientation modules [for new students](#). Other planned activities include [emergency](#) retention grants for Pell-eligible students and incentive grants for incoming [and continuing](#) Pell-eligible students.

Radford University (RU) PIV activities consist of peer enrollment coaches to follow and guide applicants through the admissions progression process to assure consistent engagement from offer of admission, the confirmation of deposit to matriculation on the enrollment spectrum.

PIV funds replacement scholarships when students do not maintain eligibility for VGAP and need a monetary supplement to make up the deficit created by the substitution of the Commonwealth Award. Upcoming PIV activities include the addition of four full-time Student Success Advocates and an intentional expansion of the undergraduate research program with other administrative support and continued use of peer mentoring.

The **University of Mary Washington's** (UMW) approach is one that focuses on recruiting and retaining Pell-eligible students. UMW first embarked on a digital marketing effort through PIV funding championing their Tuition Promise (TP) program for the recruitment end of the higher education life cycle. PIV funding also has supported the purchase of Mongoose, a digital platform for two-way texting. Next came the launch of the Center for Student Transition, Access and Retention Services (STARS) with the hiring of the inaugural staff and operation of a summer transition program. The next PIV activity was to hire a Retention Specialist and a Financial Aid Counselor to focus on Pell-eligible students. These efforts are supplemented by completion replacement grants and micro grants. During the 2024-25 year the PIV grant is providing four-years of support to establish a "Call Me Mister Program" to recruit, enroll and retain males for the teaching profession at UMW.

The **University of Virginia** (UVA) houses the Virginia College Advising Corps (VCAC) in addition to the university's traditional administrative structure. VCAC provides dedicated college admission/financial aid counselors in 63 Virginia high schools to assist over 14,000 primarily low-income, first-generation, and underrepresented students in the college-going process. PIV grant funds have been awarded to expand VCAC advisers to additional Virginia high schools, and to staff an outreach position focused on enhancing connections between students and other low-Pell-eligible-enrollment institutions. Additional PIV funding supports expanded adviser training and professional development and increasing Pell-eligible student visits to college campuses. During the summer of 2024, VCAC also conducted virtual FAFSA completion sessions. Upcoming VCAC activities include PIV support of continued expansion of VCAC advisers. The traditional UVA structure received PIV funds to support selection of 40 pilot partner high schools and hire a director and support staff for the All-Virginia pilot, a program designed to increase enrollment from communities across Virginia that are historically underrepresented at UVA. In the summer of 2024, UVA began consolidating the customer service centers for Student Financial Services, the Office of Undergraduate Admission, and the University Registrar into a central "one-stop" shop designed to support inquiries from current and prospective students and their families. PIV funds also support the expansion of community college partnerships. To improve the 'sense of belonging' of students and their families on campus, PIV will fund the addition of dedicated staff to arrange and implement

specialized campus tours designed for All Virginia, VCAC and VCCS partnerships students and their families. PIV funding will support travel grants for student families.

The **University of Virginia at Wise** (UVAW) has established a Mentorship and Adaptability Program (MAP) to operate within the Student Success Center using PIV funds. This effort has included the hiring of a MAP Coordinator, hiring and training of MAP mentors sufficient to maintain a 1:10 mentor-student ratio and securing the necessary physical space for operations. Peer activity programming has been developed and implemented to include topics including social integration and building connects, effective time management, study strategies and test prep, communication and social interaction, navigating academic challenges, personal development, emotional well-being and enhancing study strategies, preparing for the sophomore year and year-end reflection and celebration. Subsequent activities include developing and implementing a faculty-led first year seminar.

Virginia Commonwealth University's (VCU) PIV effort began in the summer of 2024 with an expansion of the Summer Scholars Program exclusively for Pell-eligible students. This residential five-week program provides a head start consisting of two summer courses along with activities supporting personal, social and academic success. These activities are designed to help form a peer-support group before the beginning of fall semester. Additional activities such as visits to the Virginia Museum of Fine Arts, community engagement activities, one-on-one meetings with advisors, career path discussion, academic workshops and meetings with academic coaches. Upcoming activities include a pilot to expand financial support and transition services for Pell-eligible community college transfer students and a four-year program to expand the existing Richmond Talent Pathway Program (RTP), currently with a STEM-H focus, to all majors. Two additional RTP coaching staff, peer mentors, operating expenses and scholarships are funded.

The **Virginia Military Institute** (VMI) is using PIV funds to establish a Division of Strategic Enrollment Management consisting of an assistant superintendent, an administrative assistant, two academic support coordinators and a college access coach. Additionally, PIV funds regular scholarships and grants to cover outstanding accounts and application fee waivers. PIV funds also support the purchase of assessment software, marketing materials, College Board targeted name purchases, the development of virtual Cadet orientation and campus tour, and the purchase of retention software. VMI is shifting portions of its recruitment efforts to population areas of Asset Limited, Income Constrained and Employed...households with income above the federal poverty level, but below the basic cost of living, referred to as "ALICE" areas, where significant numbers of Pell-eligible student may reside.

For PIV, **Virginia State University** (VSU) has created ‘Trojan Traditions,’ based on Sandra McGuire’s “Teach Yourself How To Learn,” an online course for freshmen focusing on preparation and encounter, building persistence and coping skills. VSU also offers a summer bridge program to Pell-eligible students where participants are assigned a faculty mentor and student mentor, enroll in two college-level courses and participate in two to three seminars a week covering financial aid, test-taking time management, emotional intelligence, study skills and similar topics. Another intervention is supplemental instruction, where a small group of students convene and discuss strategies for success and understanding of course material led by a student mentor. Offering a recovery course, such as one at VSU, offers struggling students a facilitated program to approach learning from a self-reflection, self-responsibility vantage. VSU will offer Trojan Academies, cohorts of approximately 100 students focused on either university core values or service-learning activities guided by an academic coach who also will perform recruitment responsibilities at local high schools with a high population of free and reduced lunch students. New activities will include a special summer program for dual enrollment students and a special mentoring program reserved for freshmen.

Virginia Tech (VT) received PIV grants to support three projects with implementation dates of 2023-2028. VT GPS, (“Go to College, Pathways to SEM Success, Summer Start) includes a state-wide college access tour; a summer jumpstart program with two academic credit-bearing courses, mentoring, tutoring and seminars on study skills, social activities, exposure to in-demand skillsets, and PIV scholarships for 50 first-year and transfer students. Another PIV-funded initiative, the Hokie Summer Scholars Program, covers attendance costs for up to 20 students and offers paid summer research opportunities. Finally, the College of Engineering program, eleVaTed Scholars, will establish relationships with local high schools, organize STEM boot camps, provide a mentored summer transition program, tuition, fees, room, board, and books, for four years 40 first-year students. Second-year participants will become mentors.

VT will monitor Pell-eligible students for warning signs like course withdrawals or major changes that could delay graduation. Program administrators can negotiate with academic departments to offer needed courses and examine prerequisite hierarchies. Virginia Tech continues to review its policies and practices to identify and minimize/eliminate those that impede access, success and degree progress for students from low-income families. The reviews have resulted in:

- Broader outreach and engagement to underrepresented minority and underserved student communities.
- Transformed, holistic and more inclusive admissions process.
- Enhanced financial aid for students from lower- and middle-income families.
- Academic enrichment for first-year students prior to the fall semester.

- Review and simplification of curricula to remove course and other requirements that, based on data, are not integral for students' academic achievement and degree progress.
- Revised scholarship retention policy to allow students to retain select scholarships if they maintain a 2.00 cumulative grade point average. This policy will especially benefit first-year, first-generation and low-income students, as the high school-to-college transition has proven difficult for these populations.
- An undergraduate policies review to examine policies and propose modifications as needed to ensure that policy is not creating barriers for student success. The guiding principles for the academic policy review process indicate that academic policies should be structured to promote timely progression to degree completion, be proactive and focus on early identification and intervention, should promote student learning and success, and be data informed.

William & Mary (W&M) already conducts institution-funded recruitment activities. Through PIV William & Mary is adding a dedicated admissions counselor for enhanced identification and support of high-achieving, low-income prospective students. Initiative funding also supports recruitment events, printed materials and summer scholarships. Research shows campus visits often positively influence a prospective student's decision to attend an institution. Unfortunately, many Pell-eligible students and their families cannot afford travel and overnight expenses. To mitigate this barrier, W&M has chosen to use PIV funds to underwrite campus-visit expenses for low-income, high-achieving students. PIV will fund the expansion of the existing W&M Undergraduate Research Experience (WMSURE) from 50 to 100 participants as a retention/attainment focus. To support this expansion, PIV is funding full-time staffing to coordinate the assignment of faculty mentors to students, further develop and conduct various workshops and to develop a peer mentor effort. PIV funds will also support a summer transition pre-calculus program. PIV is also supporting this part of the expansion along with increased workshop expenses.

Richard Bland College (RBC) began PIV participation on July 1, 2024. Their plan focuses on first-generation, underrepresented and underserved rural student success primarily in STEM-H. To mediate transportation and lack of information, PIV funds will be used to create a mobile recruitment unit with equipment and staff. This unit will act as an innovative mobile marketing and communication pathway to reach both first-generation and non-traditional adult learners. An RV or bus-type vehicle will anchor the initiative on wheels offering virtual campus tours, academic info, student services info, mental and behavioral health resources along with application completion assistance and drone demonstrations. Students will be closely followed through their two years at RBC to analyze real-time instructional and support data for trends in both recruitment and retention. A one-year pilot project will reach rural, underrepresented middle, high school and junior college students by exposing them to artificial intelligence

concepts and applications. Building on the mobile unit, an added initiative will fund grants/scholarships, paid student internships, work study and experiential learning opportunities in STEM-H areas. PIV funds will support hiring staff in years two to four of the grant. All four years PIV funds will support high school dual enrollment, internships and work study, internships and operations.

The **Virginia Community College Community College System** began participation in PIV on July 1, 2024. Their PIV activities represent a highly targeted effort at recruiting, enrolling, retaining and graduating low-income, first generation and underrepresented students, both traditionally aged and of non-traditional ages. Their principal activity involves staffing a dedicated financial aid liaison at 25 of the VCCS campuses to deal principally with the target population, from recruitment to graduation. PIV funds will finance staffing consisting of a program coordinator and 25 campus financial aid liaisons trained specially to deal with the many challenges faced by the target population. In addition to the dedicated financial aid liaison, front line staff will receive special training similar to the dedicated positions. PIV also funds programming and outreach activities for the community college service areas to encourage residents to seek enrollment at their local campus by coaching prospective students through the admissions process and the financial aid process. Administrative and evaluation staffing fall under PIV funding as does general operating expenses of the initiative

FY24 YEAR ONE GRANT DATA AND ANALYSIS

This section contains both qualitative and quantitative data. As mentioned earlier, the base year will be 2023-24. Institutions also submitted preliminary data in August 2024. SCHEV's analysis of the August data yielded high variability between institutions. The August report was an opportunity for the PIV institutions to test their own data-gathering protocols, as well as to give SCHEV staff a preliminary indication of earlier institutional activity. In reality, most of the data, except for current enrollment and retention data, should be relatively stable within institutions. This early view has also enabled SCHEV to determine the need for a second edition of this report to be published later in 2024.

A. One of the required report elements (H1) is a description and structure of each institution's mechanism for completing the institution-wide review for barriers that impede Pell-eligible students from seeking and/or achieving a post high school educational credential. At a minimum SCHEV required the structure and calendar of this review. Institutional responses ranged from a paragraph to a 32-page paper.

SCHEV staff is pleased with the majority of the responses. As discussed in the ‘Challenge’ section of this report, at first, institutions were slow to embrace the importance of this requirement for an institution-wide review of policies, practices and institutional culture that may act as barriers to Pell-eligible students.

Below each institution is listed with one of three Barrier Study qualitative compliance levels: "exceeds expectations," "meets expectations," and "in progress."

Table 1

September 20, 2024, Virginia Public College & University Pell Barrier Review		
Compliance Classification		
Institution	Compliance Level	Comments
Christopher Newport University	Exceeds Expectations	The Student Success Coordinating Committee has been charged with the review and reports directly to the president.
George Mason University	Exceeds Expectations	GMU appears to have an annual assessment of potential barriers and mitigations built into their <i>2023-28 All Together Different Strategic Plan</i> .
James Madison University	Exceeds Expectations	Entitled The Pell Initiative for Virginia Review Committee which will use a matrix of the student life cycle barriers and support strategies of policy, awareness, process, culture and data.
Longwood University	Meets Expectations	Involving collaboration between administration at the cabinet level providing a formal report to SCHEV in December 2025.
Norfolk State University	Meets Expectations	NSU has implemented a three-prong strategy to help facilitate the success of Pell-eligible students: an attract prong, a support prong and a connect prong. In addition to the three-prong strategy, the institution’s September 2024 report describes a detailed functional calendar. The completion of NSU’s September 20, 2024, report was hampered by several recent deaths in the principal investigator’s family resulting in select data omissions. SCHEV staff continues to work with the PI to clarify required data requirements and certain aspects of the Pell Barrier Review.
Old Dominion University	Meets Expectations	In 2023, ODU reimagined and revived a former committee into the Student Success Innovation Team to conduct the review and report out within 18 months.

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Radford University	Exceeds Expectations	Both established in 2024, the Enrollment Operations Group and the Student Success Council will work to identify barriers and possible solutions.
University of Mary Washington	Exceeds Expectations	A pre-existing, cross-division, cross-disciplinary Recruitment and Retention Committee with senior level leadership will conduct this review. The committee will adopt a more formal reporting process.
University of Virginia	Exceeds Expectations	A working group will be formed with a charge issued by the executive sponsors to review the institutional environment for Pell-eligible students in terms of enrollment, retention and completion. The review also should examine current efforts underway to remediate any such barriers. The senior sponsors require formal periodic reports culminating in a final report June 30, 2025.
UVA-Wise	In Progress	Several reviews and improvements have already occurred in 2020, 2021, 2022 and 2023 to the availability of technology to students, the academic standing policy, the admissions process, availability of an Academic Success Center and the iPass academic rehabilitation program. SCHEV staff is assisting UVA-W in developing a review protocol.
Virginia Commonwealth University	Meets Expectations	The National Institute for Student Success (NISS) submitted a May 2024 report containing multiple recommendations. VCU has chosen to focus on four of the recommendations. First, leverage academic outcome data to study low grade/failure courses, better use of financial data to support students, better student communication and strengthen academic advising. While the NISS assessment was broadly based, the emphasis on data will make it easier to study Pell-eligible students and their barriers in comparison to non-Pell-eligible students. While VCU's priority should be on retention, attention should be paid to the recruitment/enrollment stages of the student life cycle.

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Virginia Military Institute	Meets Expectations	VMI is a unique institution. The Institute is in the process of re-vamping its entire enrollment management strategy and organization. Activities to mediate barriers for Pell-eligible students, funded through PIV, as well as institutionally funded activities, have been identified and implemented. As the enrollment management infrastructure and culture matures over the next several months, the formal institution-wide review will meet quarterly.
Virginia State University	In Progress	VSU has removed financial barriers, such as admission application fees. Participation in Upward Bound, Talent Search, and Special Services (referred to as TRIO) gives VSU an extra opportunity for partnerships, as well as their efforts with GEAR-UP. SCHEV staff is working with VSU in developing a thorough institution-wide review of barriers.
Virginia Tech	Exceeds Expectations	A newly created Institutional Review Committee will meet periodically to provide feedback on continuous improvement to areas of student success. With membership including the chair of the Commission on Undergraduate Studies and Policies (CUSP), the committee is strategically positioned with the main academic policy-making body on campus. In September 2023, CUSP resolved to “Review at least one academic policy and propose modifications as needed to ensure that policy is not creating barriers for student success.’
William & Mary	Exceeds Expectations	In September of 2023, the college established the First-Generation/Limited-Income (FGLI) Standing Committee with significant institution leadership among the membership. A subcommittee from the standing committee was appointed to specifically research and identify potential barriers. In this effort, national best practices, existing W&M support structures, will be considered when making recommendations for barrier removal. Most importantly, the subcommittee is to recommend an “...on-going governance structure

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		to continue the work of robustly supporting FGLI students.”
Richard Bland College	In Progress	Began PIV participation on July 1, 2024, FY2025, but chose to submit an FY2024 report with data and narrative. An Innovation Implementation Readiness Task Force will be developed. SCHEV staff is working with RBC to develop a charter and calendar for this task force.
Virginia Community College System	NA	Began PIV participation on July 1, 2024, FY2025, and chose not to submit a FY2024 report. They will be required to submit their Barrier Review structure and calendar within the next six months.

B. Table 2: Institution PIV Grant Activity— duration ranges from one to four years.

Institution	FY 2024 Round One, ends June 30, 2027	FY 2024 Round Two, ends June 30, 2027	FY 2025, ends June 30, 2028	Institution Grand Total
CNU	\$161,900	\$496,715	\$923,500	\$1,582,115
GMU	\$536,112	\$691,111	\$3,520,045	\$4,747,268
JMU	\$1,000,000	\$750,000	\$0	\$1,750,000
LU	\$1,155,753	\$352,368	\$1,288,730	\$2,796,851
NSU	\$1,756,891	\$586,500	\$1,457,500	\$3,800,891
ODU	\$773,780	\$595,133	\$5,090,000	\$6,458,913
RU	\$1,411,040	\$114,000	\$1,191,932	\$2,716,972
UMW	\$3,668,668	\$0	\$1,326,446	\$4,995,114
UVA	\$2,431,000	\$600,850	\$3,743,672	\$6,775,522
UVAW	\$354,000	\$250,000	\$0	\$604,000
VCU	\$1,024,300	\$0	\$1,948,556	\$2,972,856
VMI	\$3,832,025	\$0	\$0	\$3,832,025
VSU	\$1,997,000	\$111,000	\$2,095,164	\$4,203,164
VT	\$3,461,560	\$569,980	\$3,467,623	\$7,499,163
W&M	\$840,971	\$665,425	\$258,394	\$1,764,790
RBC	\$0	\$1,029,325	\$3,423,000	\$4,452,325
VCCS	\$0	\$5,651,588	\$6,880,130	\$12,531,718
Grand Totals	\$24,405,000	\$12,463,995	\$36,614,692	\$73,483,687

C. Institution Descriptive Statistics

As SCHEV tracks and measures the PIV institutions’ activities, the reader should note SCHEV will concentrate on proportional changes in the data. For example, SCHEV will monitor the proportional distribution of changes between Pell-eligible and non-Pell-eligible students as compared to the entire population of students. The use of a simple change in participation can be misleading. The purpose of PIV is to encourage institutions to have a greater proportion of their student bodies composed of Pell-eligible students, not just more Pell-eligible students. When an institution recruits more, or fewer, students as a whole, the proportionality of Pell-eligible distribution could remain the same, increase or decrease. So, proportionality of student body will be the principal metric.

In the early recruitment stage of the student life cycle, SCHEV uses a proxy for Pell eligibility. This proxy is 70% or greater of free and reduced school lunch population at high schools. Generally, at the prospect level, students have not completed a FAFSA or submitted an application for admission. But colleges and university begin farming for prospects sometimes as early as their freshman year in high school, a good time for a college to begin exposing prospective students to that college’s brand. At this level, this free and reduced lunch status is

one of the few very broad proxies. But once the student applies for admission, the college should have enough identifying data to match with a student’s FAFSA if they have completed one.

SCHEV staff has noted significant variances throughout the data submitted in the institutions’ September 20, 2024, PIV Report for October 1, 2024, publication. These variances are of a nature where staff considers it prudent to delay publication of the full data until there is appropriate time to consult with the institutions regarding the quality, accuracy and nuances of the data. Between the publication of this report’s first and second editions, SCHEV will further consult with institutions to learn more of the context and nuances of these variations.

Below is a table of PIV institution data on student life cycle data prospect through the retention stage. Data is not yet available on attainment data for the 2023-24 treatment cohort.

Table 3. Initial PIV Change Performance Metrics

Institution	Change in Pell-eligible FAFSAs from 2023-24 to 2024-25	Change in Pell-eligible FAFSAs from First-time Full-time Students enrolled as of September 16, 2024, Fall 2023-24 to 2024-25	Change in Retention Gap of Non-Pell-eligible to Pell-eligible 2022-23 Cohort (fall 2022-fall 2023) to Fall 2023-24 Cohort (fall 2023-fall 2024)
Christopher Newport University	6.60%	2.66%	-1.061%
George Mason University	5.97%	2.58%	0.004%
James Madison University	1.65%	4.09%	-0.457%
Longwood University	3.66%	-0.86%	-0.249%
Norfolk State University	26.10%	Not Reported	Not Reported
Old Dominion University	2.47%	3.15%	-0.373%
Radford University	7.06%	10.92%	-1.038%
University of Mary Washington	9.75%	-2.16%	-1.477%
University of Virginia	5.21%	1.24%	-0.082%
University of Virginia Wise	-7.50%	Not Reported	-4.992%

Virginia Commonwealth University	6.96%	6.21%	-0.530%
Virginia Military Institute	6.00%	4.19%	-1.640%
Virginia State University	-4.58%	0.83%	-1.475%
Virginia Tech	3.16%	-0.11%	2.039%
William & Mary	4.95%	5.67%	-0.245%

The first column denotes name of the particular institution followed by the second column, the proportional volume change Pell-eligible FAFSAs from the fall of 2023 to the fall of 2024 as of September 16, 2024. The range of this recruitment-level volume varies from -7.50% to +26.20%, an extremely broad range. All but two institutions experienced an increase in the number of Pell-eligible FAFSAs.

The third column moves to the enrollment stage where we see 10 of the 15 institutions have experienced an increase in proportional Pell-eligible first-time full-time enrollment. First-time full-time enrollment fell at three of the institutions while two institutions did not report this item.

We see first-year retention rates in the fourth column. A negative value indicates a diminished gap between non-Pell-eligible students and Pell-eligible students. Gaps diminished at 12 of the 15 institutions while two increased and one did not report the item.

A more robust data and analysis section will be included in the second edition of this report in November/December 2024.

OBSERVATIONS

The 2023-24 Pell Initiative for Virginia has been a fluid, eventful and learning year for students, our post-secondary educational institutions and SCHEV. The important outcome is that everyone learned something. Students have been reminded of ever-present uncertainty and the need to be adaptable. Colleges and universities have been reminded how fragile administrative and support systems can be in today's environment. SCHEV has learned the complexities of overseeing an innovative, flexible and far-reaching institutional access and success program. Government officials have learned the need for more deliberate planning and testing of service technology changes.

The participating institutions have shown varying degrees of participation in PIV from the vantage of discovering and mitigating potential barriers for Pell-eligible students. However, they are learning and adopting a healthy approach to the task at hand. Select institutions should more fully develop the types and quality of their student data protocols and analysis in terms of access and success. In today's changing higher education marketplace, institutional survival and thriving depend on solid enrollment management principles, most of which are based on evidence-based planning.

PIV, a fledging statewide program has tremendous potential for students, institutions and the Commonwealth in terms of supporting higher education access and attainment. The initiative is currently slated to run through FY2029. During that period, and more importantly, long afterward, the Commonwealth and the country will continue to learn and benefit through the 'lessons-learned' from the Commonwealth's foresight in establishing the Pell Initiative for Virginia.

APPENDIX A: TAXONOMY OF PIV ACTIVITIES

1.0 Build relationships with high schools

- 1.11 Include both high school counselors and principals
- 1.12 Develop partnerships with Elementary middle high schools or whole divisions
- 1.13 Create high school/community college pipelines
- 1.14 Encourage dual enrollment at targeted high schools
- 1.15 Provide pre-college mentors coaches during Jr/Sr high school years
- 1.99 Other

2.0 Provide communication strategies for outreach and recruitment activities

- 2.11 Virtual activities for students
- 2.1 Virtual activities for parents/families
- 2.13 Predictability in both admissions and financial aid
- 2.14 Targeted school districts/specific schools
- 2.15 Alumni involvement

- 2.16 Communication with middle school and/or freshmen & sophomore students
- 2.17 Targeted to transfer students in general not in pipelines
- 2.18 Targeted to stop-outs
- 2.19 Targeted to gap year students
- 2.99 Other

3.0 Recognize the reality of basic needs support

- 3.11 Nudging-overcome basic needs insecurity
- 3.12 Emergency financial aid
- 3.13 Transportation support
- 3.14 Food Pantries
- 3.15 Childcare
- 3.16 Treatment of a specific sub-group
- 3.17 Books and supplies
- 3.18 Internships
- 3.99 Other

4.0 Provide enhanced administrative and support services

- 4.11 Dedicated staff assigned to PE students
- 4.12 Summer bridge or 'catch-up' programs

4.13 Tracking/early warning systems, CRM & analysis

4.14 Tutoring

4.15 Financial literacy and financial well-being programs

4.16 Research opportunities

4.17 Professional development for staff

4.18 Adding additional staff

4.19 Software purchases

4.99 Other

5.0 Foster a sense of belonging on campus

5.11 Peer mentors

5.12 Activities to engage students in campus life/culture

5.13 Systemic reorganization study & implementation

5.14 One-on-one interaction with faculty/staff

5.15 College faculty contact with HS juniors/seniors

5.99 Other

6.0 Provide financial aid and scholarships

6.11 Grants/scholarships

6.12 Retention micro-grants

6.13 Completion grants

6.14 Paid internships

6.15 Replacement grants for non-renewable high school/civic scholarships

6.16 Grants for foregone summer savings due to summer enrollment

6.99 Other

* When using *Other** please describe each activity

APPENDIX B: INSTITUTION-WIDE REVIEW OF BARRIERS TO PELL-ELIGIBLE STUDENTS

All Pell Initiative for Virginia (PIV) participating institutions are required to conduct an institution-wide thorough examination of all institution policies, rules, procedures, practices and campus customs that may act as barriers/hindrances, even unintentionally, to the recruitment, enrollment, retention and credential attainment of Pell-eligible students. The review should span the college student lifecycle up to stop out or alumni status. The institution should undertake an effort to mitigate such barriers to the extent possible given the institution's mission, accreditation and institutional standards. The funding legislation directs SCHEV to monitor the program. In order to do so, SCHEV requires various yearly reports including item H1 on all reports. H1 requests progress on the institution-wide review. Institutions were notified of this report and contents of this report in early 2024.

Several institutions have inquired about the structure and nature of this item's requirement. The final outcome of the effort in H1 is a report to SCHEV, the legislative and administrative stakeholders and the institution. This paper deals in detail the structure and content of the information and examples of variables to be reviewed and reported in the final report. However, it should be stressed that institutions are NOT required to include all the variables mentioned in this paper. Different variables will be in play for different institutions.

The year-end report due September 20, 2024, for the FY2024 Rounds 1 and 2 grants. Item H1 on this report should include only the structure and calendar of the timeline of how this review will be conducted. The due date for the final review report will be determined by each institution's review calendar submitted at this time.

Below is the structure and nature of the review and the content of the final report. (This section also describes an ideal membership for the group or body conducting the review.)

Introduction

- Include a brief description of the institution including a short history and the institution's mission.
- Briefly describe the student population and programs offered.
- Include data on Pell-eligible/non-Pell-eligible undergraduate population and retention statistics.
- The review should state and concentrate on the stage/s of the student life cycle in which the institution has weaknesses or is below average for Virginia but examine all stages.

Structure and Calendar

- Include membership by position of the group conducting the review. Ideally, upper level administration should hold membership including the provost and/or president. An institution-wide body similar to this may already exist and may be utilized. Note such a group should have a charter authorizing them to make recommendations.
- Include faculty, staff and student membership.
- Include Pell-eligible and non-Pell-eligible students.
- If possible, recent Pell-eligible alumni could provide valuable input.
- Institutions fully involved in the principles of enrollment management principles may already be conducting such reviews across the entire student body.
- Some institutions may be doing such a review in a decentralized manner. However, the institution must coordinate such decentralized efforts to produce an institution-wide report on such barriers
- The review calendar should span at least a year but not more than 18 months unless an institution-wide review was in place prior to July 1, 2023, in this case, a report of the review as described in this document must be submitted to SCHEV in a timely manner.

Review Methodology

- Survey
- Focus groups
- Interviews
- Review of data gaps between Pell and non-Pell eligible students (e.g., while some families of traditional students may be too involved with the student's time at the institution Pell-eligible students' families may have just limited if any involvement in providing emotional/financial support).
- Other

Outcomes

- What may not be a barrier to some demographics of students may be a barrier to other demographics of students such as Pell-eligible students.
- Easily-identified barriers and their solutions/elimination.
- Complex institutional barriers that need further study.
- Be aware some barriers may be beyond the institution's control but there may be institutional mitigation or substitution.

Conclusion

- Significant conclusion/s on institutional barriers.
- Institutional strengths in ability to serve Pell-eligible students.
- Institutional areas of improvement needed to better serve Pell-eligible students.
- Institution's assessment of the review's value and usefulness.

Future Pell Initiative for Virginia Grant consideration and disbursement schedules will depend on each participating institution's initiation, progress and completion of this formal review. **The September 20,2024, PIV Report must include the structure and calendar of the group that conducts this study and prepares the report.**

Possible Review Variables

The following are suggested variables, areas of focus and potential strategies to be considered during this review. This list is not exhaustive and there are other areas that may act as barriers and mitigations given the specific institution and its mission.

Recruitment

- Student awareness of the institution
- Social media presence & targeting social media by demographic
- Collateral Materials
- Ensure appropriate visual representation of the student body
- Outreach through high school visits
- Outreach through community/religious organizations
- Partnerships with regional/local access organizations
- Campus visits
- Outreach for transfer students, stop-outs, gap students and students disadvantaged by the 2024-25 FASFA situation
- Financial aid workshops
- College prep workshops/seminars
- Purchasing targeted student names with contact via electronic means or mail
- Dual enrollment opportunities
- Travel vouchers for student/family campus visits
- Summer programs
- Student & family programming to build social capital and support mechanisms
- Other areas particular to the institution
- Appropriate campus climate
- Appropriate campus customs
- Use of peer enrollment counselors
- Faculty involvement
- Welcoming/invitational nature and atmosphere of the campus to all student demographics
- Other areas in general

Enrollment

- Application form requirements (Common Application)
- User-friendly application
- Overly complex application process
- Application fee waivers
- Vouchers to assist student/family campus visits
- Appropriate application review protocol
- Intense follow-up of incomplete applications
- Pre-orientation workshops/seminars for students and families including topics such as paying for college, exploring majors, building social capital
- Unreasonable admission or financial aid application deadlines
- Provisional acceptance status
- Waiver of enrollment deposits
- A welcoming/invitational campus atmosphere to all demographics
- Tuition coverage guarantees

- Meeting full financial need
- Assistance in purchasing a computer
- Strong orientation for both student and family including separate orientation for first-time as well as transfer students
- Book and supplies vouchers
- Careful matching of dorm roommate if living on campus
- Appropriate campus climate
- Continued student & family programming to build social capital and support mechanisms
- Use of peer counselors
- Availability of childcare where students are parents
- Adequate academic advising
- Transportation vouchers where public transportation is available
- Part time work-study
- Appropriate campus customs
- Faculty involvement
- Summer jump-start programs with aid coverage
- Availability of mental health support mechanisms
- Other areas particular to the institution

Retention

- Academic continuance policies appropriate for today's demographics
- Financial aid satisfactory academic progress policies in alignment with the academic continuance policies
- Institutional scholarship renewal GPA/enrollment requirements appropriate
- Summer aid available to remedy sub-par academic year achievement
- Adequate academic advising
- Additional areas particular to the institution
- Appropriate quantity of general education and gateway courses to meet student demand during summer sessions
- Appropriate quantity of general education and gateway courses to meet student demand during the academic year
- Appropriate course scheduling to match student availability
- Appropriate course scheduling to avoid core course competing availability
- Appropriate frequency offering of advanced coursework
- Appropriate pedagogy for today's students
- Sufficient, in number and level, of tutoring services available
- Student & family programming to build social capital and support mechanisms
- Peer mentoring, advising and tutoring
- Availability of childcare where students are parents
- Welcoming nature of the campus to all student demographics
- Faculty involvement
- Emergency financial aid grants
- Emergency loans
- Part time work-study
- Financial literacy
- Appropriate campus customs
- Research opportunities with stipends
- Wellness and mental health opportunities in sufficient quantity

Attainment

- Appropriate non-competing scheduling of advanced courses
- Appropriate frequency and sequencing of advanced coursework and prerequisites offerings
- Appropriate pedagogy for today's students
- Completion grants
- Sufficient, in number and level, tutoring services available
- Adequate academic advising
- Student & family programming to build social capital and support mechanisms
- Availability of childcare where students are parents
- Aid to assist with graduation expenses
- Peer tutoring
- Wellness and mental health opportunities in sufficient quantity
- Welcoming and invitational nature of the campus to all student demographics
- Unnecessary fees and practices surrounding graduation requirements
- Other areas particular to the institution
- Appropriate campus customs

The above discussion is NOT an exhaustive collection of considerations the campus-wide review could address, but only areas and examples of potential impediments and possible mitigations. The PIV September 20, 2024, report should contain the structure and timetable for the review, including when the final report will be presented to the institution's academic community.

The Commonwealth of Virginia and SCHEV appreciate each institution's participation in the Pell Initiative for Virginia and look forward to informative and vital insights to supporting our Pell-eligible students.

Questions should be sent to

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Additional Resources

On the following pages is a short listing of research on educational barriers; the Nguyen article has an excellent reference section in addition to the article's findings.

The Relationship between One-Stop Support and New Student Enrollment

Perry, Lisa

Strategic Enrollment Management Quarterly, v11 n2 p59-68 2023

Low-Income Students in Postsecondary Educational Environments

Nguyen, David J.

Journal of Diversity in Higher Education v16 n4 (Aug 2023): 497-508

Improving College Student Retention: New Developments in Theory, Research and Practice

Reason, Robert

Barriers to Student Active Learning in Higher Education

[Børte, Kristin](#); [Nesje, Katrine](#); [Lillejord, Sølvi](#)

Teaching in Higher Education, v28 n3 p597-615 2023

Real and Perceived Financial Barriers to Higher Education in the United States

Jannie Sharee Eggleston

ProQuest LLC, Ed.D. Dissertation, St. Edward's University