

SECTION II: GOALS AND OBJECTIVES

1. Describe the progress that your project has made towards accomplishing the objectives for this reporting period. Please list your objectives in the table below, and indicate what activities have taken place, the quantitative results of those activities, and actions required (what, if any, changes do you intend to make in response to the results that you have seen). You may extend this table to additional pages as needed.

Objectives: List the approved objectives from your grant application or work plan. Where applicable, provide baseline data.	Activities: List the activities that have been conducted to meet the objective.	Results: Has the objective been met? If not, what progress have you made in reaching the objective?
<p>1. Establish a Financial Education Success Specialist Position that will continue, regardless of funding source.</p>	<p>The position was established and a staff member was hired in January.</p>	<p>Objective to secure permanent funding for the position is in progress.</p>
<p>2. Continue to educate campus community as a whole.</p>	<p>Marketing and promotional materials created for MSUB – Be Money Smart Financial Education program to raise awareness across campus of financial education resources.</p> <p>Participation in Grad Fairs on both campuses to provide information on loan repayment and budgeting after college. Bi-weekly information tables held in April for Financial Literacy Month. Participation in the Alumni Foundation’s “Free Day at the Zoo” event.</p> <p>Lunchtime and evening campus table outreach activities conducted by Student Health Services’ student group HEROES (Peer Health Educators) on “Healthy Spending Habits.”</p> <p>Financial education included in staff meetings (internal and external to Financial Aid office), small group presentations, FAFSA nights, and one-on-one meetings.</p>	<p>Education and outreach to campus is ongoing.</p> <p>The Be Money Smart name and logo was finalized and is being used to promote the financial education program on campus monitor message boards, website, and print materials. The dedicated BeMoneySmart email account is being utilized to run targeted email campaigns and send information and resources to students.</p> <p>New financial education graphics, videos, and text-based resources are being created for the University website and social media platforms, with the intent to be completed and launched this summer.</p> <p>We continue to partner with MSUB Alumni Foundation and Campus Store to provide small branded items such as t-shirts and book discounts for program promotion and incentives.</p>

<p>3. Focus financial education program for all incoming freshman and transfer students</p>	<p>College Success Specialists provide Financial Education resources to first-year students and refer them to the Financial Education Success Specialist for one-on-one counseling. Financial education included in the Spring 2014 section of the A&SC 111 (First Year Seminar) course for freshmen as well as in Academic Recovery programming.</p> <p>The BuzzFeed online newsletter - sent to all first-year students on both the University and City College campuses - now includes an ongoing "Be Money Smart Tips" column.</p> <p>Participation in outreach events such as FAFSA nights, College Prep night, and College Goal Montana. Presentation at Senior High School on financial success.</p>	<p>Objective is in progress and ongoing.</p> <p>Collaboration with the College Success Specialists is underway to improve and enhance the financial education component of the A&SC 111 (First Year Seminar) course for the Fall 2014 semester.</p> <p>Financial education is embedded in all of our summer new student orientation sessions, financial aid sessions and FAFSA nights.</p>
<p>4. Target high risk students: SAP warning, Transfer students, Veteran students and Minority students</p>	<p>Students placed on Satisfactory Academic Progress <i>Warning</i> status after fall semester were first sent an email and then called on the telephone, to tell them about the Be Money Smart program and invite them to a financial counseling appointment with the Financial Education Success Specialist.</p> <p>Weekly "Financial Literacy at Lunch" meetings held at the American Indian Outreach Office in April. Office bulletin board displayed information on budgets and Get Money Smarts.</p> <p>Diversity Center and Veteran's Services coordinators provided Dollars & Sense, Get Money Smarts, and Be Money Smart materials to their students. A targeted email campaign was sent to 250 minority students.</p>	<p>Objective met. Students who came to a financial counseling appointment were awarded a 10% off coupon for course supplies at the Campus Store. Follow-up emails on loan repayment and Career Services counseling sent to financial aid students not returning in the Fall.</p> <p>Targeted outreach is ongoing. We continue to foster strategic partnerships with other campus constituencies serving at-risk students: SOS / TRIO, Office of American Indian Outreach, Veterans, Upward Bound, Disability Support Services, and the Diversity Center.</p>

<p>5. Engage in training activities</p>	<p>All MSUB staff invited to participate in SolidFinances lunchtime webinars presented by the MSU Extension Office.</p> <p>Provided lunchtime workshops at American Indian Outreach Office. Evening training provided to the Student Health Educator and HEROES group (Health Peer Educators).</p> <p>Met individually with students for financial education counseling.</p>	<p>Objective is ongoing.</p>
<p>6. Identify ways to track and assess training.</p>	<p>Currently utilize pre and post tests for assessment. If training effective, goal is to decrease default rate over time. May also witness numbers of loans declined or request to reduce loan awards.</p>	<p>Objective is ongoing.</p>