

Loan Counseling School and Student Survey 30D Clearance

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ICR Data Collection Item- School Survey- Loan Counseling	
1	What is the institution's six-digit OPEID number?
2	What is the name of the institution?
3	Describe any challenges to the institution in administering the experiment.
4	Describe any unintended benefits or consequences associated with the experiment.
5	In the most recently completed award year, when was your institution actively participating in the experiment? Select all that apply. <input type="checkbox"/> Summer <input type="checkbox"/> Fall <input type="checkbox"/> Spring <input type="checkbox"/> None of the above <input type="checkbox"/> Other: _____
6	What changes took place at your institution during the last school year in response to COVID-19? Instruction. How was the teaching in the majority of classes changed? (Select all that apply): <input type="checkbox"/> Moved in-person classes to online classes <input type="checkbox"/> Moved in-person classes to a hybrid format combining online and in-person instruction <input type="checkbox"/> Moved in-person classes to correspondence instruction <input type="checkbox"/> Suspended instruction (no in-person, online, or correspondence classes) <input type="checkbox"/> Reduced class sizes for in-person instruction <input type="checkbox"/> Modified classrooms to facilitate social distancing for in-person classes <input type="checkbox"/> Added more sections of in-person classes to compensate for smaller class sizes <input type="checkbox"/> Created shorter instructional or course modules (For example, three 5-week modules instead of one 15-week semester)

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	<ul style="list-style-type: none"> <input type="checkbox"/> Modified the schedule or timing of the academic calendar <input type="checkbox"/> Offered in-person classes for more hours per session to compensate for fewer in-person sessions <input type="checkbox"/> Used new online learning resources or other new technology <input type="checkbox"/> Changed from using a letter grading system (i.e., A, B, C, D, I) to some other grading system (e.g., credit/non-credit, pass/fail, etc.) <input type="checkbox"/> No changes <input type="checkbox"/> Other, please specify: _____ <p>Source: Inside Higher Ed Survey: Responding to the COVID-19 Crisis: A New Survey of College and University Presidents, adapted question (Which of the following actions have you taken at your institution in response to COVID-19?).</p>
7	<p>Financial conditions at the institution. What were the financial implications of COVID-19 for your institution? Select all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reduced tuition, fees, room and board for students <input type="checkbox"/> Furloughed or laid off financial aid staff <input type="checkbox"/> Furloughed or laid off academic advising staff <input type="checkbox"/> Furloughed or laid off career services staff <input type="checkbox"/> Furloughed or laid off faculty <input type="checkbox"/> Furloughed or laid off other staff <input type="checkbox"/> Reduced number of programs of study that are offered <input type="checkbox"/> Lower overall student enrollment <input type="checkbox"/> Lower international student enrollment <input type="checkbox"/> No changes <input type="checkbox"/> Other, please specify: _____ <p>Source: Inside Higher Ed Survey: Responding to the COVID-19 Crisis: A New Survey of College and University Presidents, adapted questions (Which of the following actions have you taken at your institution in response to COVID-19? and How likely is your institution to take the following actions in the future?).</p>
8	<p>Did you use funds from the CARES Act for any of the following? Select all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reimbursed institution for refunds to students for room and board, tuition, and other fees <input type="checkbox"/> Purchased technology to enable students to transition to distance learning <input type="checkbox"/> Paid per-student fees to a third-party service provider for distance learning technology. <input type="checkbox"/> Provided additional emergency financial aid grants to students (beyond those provided from the student portion of the Higher Education Emergency Relief Fund) <input type="checkbox"/> Other, please specify

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	<p><input type="checkbox"/> Not applicable, my institution did not receive any funding from the CARES Act.</p> <p>Source: Categories are based on U.S. Department of Education guidance to colleges for how to use the institution portion of the Higher Education Emergency Financial Relief Fund https://www2.ed.gov/about/offices/list/ope/heerfinstitutionalfaq.pdf</p>
9	<p>How was the administration of additional loan counseling affected by COVID-19? Check all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Modified how students were informed of the additional required loan counseling. <input type="checkbox"/> Changed the loan counseling approach from one developed by the institution to the F.A.C.T. or a commercial vendor. <input type="checkbox"/> Changed the loan counseling approach from the F.A.C.T. or a commercial vendor to one developed by the institution. <input type="checkbox"/> Stopped delivering loan counseling in-person or peer-to-peer <input type="checkbox"/> Modified the content or curriculum of the required additional loan counseling <input type="checkbox"/> Increased the amount of staff time devoted to providing the required additional loan counseling <input type="checkbox"/> Decreased the amount of staff time devoted to providing the required additional loan counseling <input type="checkbox"/> Increased the amount of time on average that individual students took to complete the required additional loan counseling <input type="checkbox"/> Decreased the amount of time on average that individual students took to complete the required additional loan counseling <input type="checkbox"/> Some students were not able to complete additional loan counseling <input type="checkbox"/> No changes <input type="checkbox"/> Other, please specify:
10	Approximately how many students received additional loan counseling before these changes were made? _____
11	Approximately how many students received additional loan counseling after these changes were made? _____
12	<p>Which of the challenges below, if any, has your institution encountered while administering the Additional Loan Counseling experiment? (Add "note to survey programmer: add option to select whether or not each challenge selected was a result of COVID-19")</p> <p>A. Please check all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Choosing the type of additional loan counseling to require (e.g., approach and delivery method) <input type="checkbox"/> (b) Cost/procedures to obtain license for the additional counseling chosen (if third-party) <input type="checkbox"/> (c) Finding time/staff to develop the counseling curriculum/materials (if institutionally developed) <input type="checkbox"/> (d) Integrating counseling into existing school technology (if utilizing online delivery) <input type="checkbox"/> (e) Staffing (e.g., assigning or hiring appropriate school personnel to provide or assist students in completing the additional loan counseling) <input type="checkbox"/> (f) Identifying borrowers eligible for the additional loan counseling requirement (e.g., flagging the appropriate students in your data system)

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	<p><input type="checkbox"/> (g) Using the last digit of students' SSN to determine which of them are subject to the additional loan counseling requirement (the treatment group)</p> <p><input type="checkbox"/> (h) Notifying treatment group students about their additional counseling requirement</p> <p><input type="checkbox"/> (i) Negative student response or negative reaction to the additional loan counseling requirement</p> <p><input type="checkbox"/> (j) Other (Please specify: _____)</p> <p>B. Please identify the top three challenges by entering the letter of the challenge descriptions listed above in the appropriate place below:</p> <p>1. My institution's most significant challenge was _____</p> <p>2. My institution's second most significant challenge was _____</p> <p>3. My institution's third most significant challenge was _____</p>
13	How did the institution inform borrowers in the treatment group of the additional required loan counseling and that information about them would be reported to the U.S. Department of Education?
14	How did the institution inform borrowers in the control group that they are part of an experiment and that information about them would be reported to the U.S. Department of Education?
15	Does the institution offer voluntary loan counseling to students? If so, describe the types of voluntary loan counseling provided to students outside of the experiment. Include what kind of counseling is provided, the core curriculum, and the students targeted to receive this additional voluntary counseling.
16	What was the mode(s) of delivery used for the additional counseling required under the experiment (e.g. online, in-person, hybrid)?
17	Which counseling approach was used for the additional counseling required under the experiment (e.g. FACT, third-party servicer, third-party counseling product, institutionally developed, or other)?
18	Please describe the main components of your institution's additional loan counseling curriculum, the expected amount of time required to complete the counseling, and any personalized information presented to students (e.g., showing students their NSLDS portal to look at their current loan amounts).
19	How much staff time was dedicated to conducting the experimental additional loan counseling for all students in the treatment group?
20	How much time did students typically take to complete the experimental additional loan counseling?
21	How did your institution inform students in the experiment's treatment group (borrowers with an even number in the last digit of their SSN) of the additional required loan counseling and that information about them would be reported to the U.S. Department of Education? Please check all that apply. <p><input type="checkbox"/> Through communication (letters, emails, etc.) to students in the treatment group accompanying their financial aid</p>

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	<p>award</p> <ul style="list-style-type: none"> <input type="checkbox"/> Through communication (letters, emails, etc.) to students in the treatment group that was separate from their financial aid award <input type="checkbox"/> Communication efforts that targeted all students or groups of students <input type="checkbox"/> Other (Please specify: _____)
22	<p>Who developed the additional counseling approach your institution uses for the experiment? Please check all that apply and provide the name of the counseling product or curriculum, if applicable.</p> <ul style="list-style-type: none"> <input type="checkbox"/> U.S. Department of Education (Office of Federal Student Aid, Financial Awareness Counseling Tool or F.A.C.T) <input type="checkbox"/> Third-party loan servicer (Please specify: _____) <input type="checkbox"/> Some other vendor from whom your school purchased or leased a commercial product (Please specify: _____) <input type="checkbox"/> A non-profit organization from whom your school obtained curriculum or other materials for free or minimal cost (Please specify: _____) <input type="checkbox"/> Our institution (Please specify: _____) <input type="checkbox"/> Other (Please specify: _____)
23	<p>How is the additional counseling required under the experiment delivered? Please check all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Online <input type="checkbox"/> In-person <input type="checkbox"/> Peer-to-peer <input type="checkbox"/> Hard copy, written materials <input type="checkbox"/> Other (Please specify: _____)
24	<p>Does the content or curriculum of the required additional loan counseling include any of these features? Please check all that apply.</p> <ul style="list-style-type: none"> <input type="checkbox"/> An activity where students go to their NSLDS/loan servicer portal to look at their loan amount or outstanding balance <input type="checkbox"/> Other material tailored to individual students' loan amount or balance <input type="checkbox"/> Development of a budget for students' remaining years of education <input type="checkbox"/> A way for students to see expected starting salaries in their occupation of interest <input type="checkbox"/> General financial literacy education (e.g., explaining interest compounding or present value discounting) <input type="checkbox"/> An assessment to determine if students understood the material <input type="checkbox"/> A survey to identify students' expected loan repayment methods
25	<p>What amount of staff time, expressed in the Full-time Equivalent (FTE) metric, would you estimate is devoted to providing the required additional loan counseling to students over the entire award year?</p> <p>____.____ FTE</p>

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26	<p>How much time on average do you estimate individual students assigned to the treatment group took to complete the additional loan counseling required in the experiment? Please check one category.</p> <p><input type="checkbox"/> 30 minutes or less</p> <p><input type="checkbox"/> 30 - 60 minutes</p> <p><input type="checkbox"/> 61 -120 minutes</p> <p><input type="checkbox"/> More than two hours</p>
27	<p>What kind of voluntary loan counseling does your institution offer to students, if any? Please check all that apply.</p> <p><input type="checkbox"/> My institution does not offer voluntary loan counseling</p> <p><input type="checkbox"/> Students may drop by or schedule time to talk with financial aid counselors</p> <p><input type="checkbox"/> Students are encouraged to access our institution's entry counseling each year or as needed</p> <p><input type="checkbox"/> Our institution offers a separate loan counseling program for those who need and/or are interested in additional counseling (distinct from required entry and exit counseling)</p> <p><input type="checkbox"/> The voluntary counseling students can access is tailored to their borrowing amount and status</p> <p><input type="checkbox"/> The voluntary counseling is targeted to students with certain borrowing amounts</p> <p><input type="checkbox"/> The voluntary counseling is targeted to other type(s) of students (Please specify:___)</p>
28	<p>Were there any unanticipated benefits or positive outcomes, above and beyond improving student knowledge of and appreciation for the consequences of using federal Direct Loans to finance higher education, associated with your institution's implementation of the Additional Loan Counseling experiment?</p> <p><input type="checkbox"/> Yes. (Please briefly describe: _____)</p> <p><input type="checkbox"/> No.</p>

Item Number	ICR Data Collection Item- Student Survey- Loan Counseling
1	What is the student's first name?
2	What is the student's last name?
3	What is the student's date of birth?
4	What is the student's Social Security number?
5	What experiment is the institution reporting on with regard to the student?
6	List any other experiments in which the student is participating.
7	What is the reporting award year?

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8	What was the student's cumulative postsecondary grade point average (or other alternative measure) at the end of the most recently completed award year?
9	What was the student's enrollment status at the beginning of the first award year in which the student was part of the experiment?
10	What was the student's enrollment status at the end of the most recently completed award year?
11	To the best of your knowledge, did the applicant enroll in a program of study at your institution not involved with the experiment or enroll at another postsecondary institution during the most recently completed award year? (Select one: "Yes," "No," "Unknown")
12	What was the student's grade level at the beginning of the most recently completed award year?
13	What was the student's grade level at the end of the most recently completed award year?
14	How many postsecondary credits/hours were attempted by the student in the most recently completed award year?
15	How many postsecondary credits/hours were earned by the student in the most recently completed award year?
16	How much was the student assessed for tuition and other mandatory fees for the most recently completed award year?
17	What was the amount of the student's indirect costs that were included in the student's COA for the most recently completed award year (including books and supplies)?
18	What was the total non-Title IV grant or scholarship aid received by the student for the most recently completed award year?
19	What was the total non-Title IV loan aid received by the student for the most recently completed award year?
20	What was the total amount of PLUS Loans initially awarded to the parent of the student for the most recently completed award year?
21	What was the total amount of PLUS Loans disbursed to the parent of the student for the most recently completed award year?
22	What was the total amount of FSEOG initially awarded to the student for the most recently completed award year?
23	What was the total amount of FSEOG disbursed to the student for the most recently completed award year?
24	What was the total amount of Perkins Loans initially awarded to the student for the most recently completed award year?
25	What was the total amount of Perkins Loans disbursed to the student for the most recently completed award year?
26	What was the amount of Federal Work Study (FWS) funds awarded to the student for the most recently completed award year?
27	What was the amount of Federal Work Study (FWS) funds earned by the student for the most recently completed award year?
28	Did the student complete the academic program associated with the student's participation in the experiment?
29	What was the Department of Education assigned status for each student: treatment or control?
30	Did the student receive voluntary loan counseling during the most recently completed award year?