

# The University of California

## IMPROVING FINANCIAL AID COMMUNICATION

The University of California (UC) has 10 campuses, nine of which offer undergraduate degrees and were the focus of this engagement. Approximately 232,000 undergraduate students attend each year and 65 percent receive some form of financial aid, totaling almost \$3 billion in disbursements annually.



### Shawn Brick

Exec. Dir., Student  
Financial Support

When the University of California (UC) Board of Regents raised a concern in 2020 about the lack of consistency in UC campus financial aid offers, Shawn Brick seized the opportunity to not only review the offers, but also to examine and improve communication overall for prospective students.

“We frequently hear that students don’t understand our offer letters,” says Shawn, executive director of student financial support at UC, “but we really don’t know what students don’t understand. Are our net cost calculations unclear? Is our explanation of aid confusing? Do they need to understand out-of-pocket costs? We struggle to convey our offers clearly, as do many institutions.”

The UC Office of the President had an existing relationship with uAspire, so Shawn reached out to engage its consulting team in a project to improve communication of college costs and financial aid. “uAspire was a trusted partner and we had been using their materials for years. We have always viewed them as the gold standard, so it was logical to ask them to help with this challenge.”

uAspire led an introductory webinar for the financial aid offices, executed a survey of financial aid practices and language across institutions, and conducted focus groups with financial aid staff and students. uAspire then delivered a broad set of recommendations for the UC system as a whole and a set for each of the nine schools.

## Creating Consistency

**“The most enlightening aspect of this process was hearing what our students have to say. Hearing what they need to know was invaluable.”**

Shawn comments that the uAspire team’s deep knowledge of financial aid, as well as student perspectives, was instrumental in making the focus groups successful. “They know this material and the questions to ask—and they structured the sessions beautifully, which helped to produce our desired outcomes.”

According to Shawn, there were three significant results from the engagement:

- Development of best practices for financial aid offers and websites
- Creation of a glossary of financial aid terms to be used across all schools
- Recognizing the need to clarify the way health insurance costs are addressed for students

“We include the insurance expense in the cost of attendance, but it gets complicated when a student opts out,” says Shawn. Some schools remove the insurance cost from the cost of attendance displayed, others insert a waiver; some still provide grant assistance associated with this expense, and others offer loan eligibility.

**“This may seem like a small issue, but it can add up to a \$2,000 difference to a student. I didn’t know this was such a problem until the analysis with uAspire.”**

## Building Tools

Kerry Franzetta, associate director of financial aid and scholarships at UC Berkeley, says the systemwide recommendations have already resulted in the adoption of tools and practices that are helping students. “One of the recommendations focused on clarifying costs, billing, and refunds, and we incorporated our learning into a financial aid navigation guide that we send to admitted students,” says Kerry.

**“The guide has a worksheet for students to calculate what they owe. We know it’s effective because they’re bringing it to meetings with our counselors.”**

Nate Cook, associate director of financial aid and scholarships at UC Santa Barbara, created an estimated bill tool and says, “it has been an incredibly valuable resource for advisors to use with students.”

Both Kerry and Nate also say that the opportunity to meet with colleagues across the UC system provided a rare moment for reflection and sharing of ideas. “It was wonderful to share our learnings with others and to hear about their experience,” says Nate. “I also challenged my colleagues to consider whether all of our verification efforts were necessary. We have reduced ours and think that our practice has benefited.”

## Leveraging uAspire’s Expertise

According to Nate, this project was valuable in large part due to “uAspire’s understanding of financial aid and the student experience, which comes from their extensive direct contact with students. It’s rare for non-financial aid professionals to understand all this; they were astute in their observations, leading to effective recommendations.”

Kerry comments that uAspire’s knowledge of the field enabled them to conduct in-depth analysis and make insightful observations across the complex UC system:

**“uAspire brought perspectives that none of us as a professional within an individual institution could have. Their experience and knowledge delivered a lot of value.”**

Want to improve postsecondary outcomes for your students?  
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