

This briefing paper examines institutional strategies and success in recruiting and graduating low income students at the University of Florida. Recipients of Federal Pell grants are a key indicator for low income families. The Pell grant program is the federal government's largest direct grant program to students with low incomes. Pell recipients typically have family incomes in the lowest family income quartile for dependent students, are first generation, and often have characteristics that create a higher risk of dropping out of college. Students enrolled in STEM programs with longer time to degree face greater challenges.

The Federal Pell grant program has been a vital resource for the nation's low-income students for forty years, but the amount of the grant has not kept pace with increases in college costs. The amount of money each student receives depends on their financial need, the cost of attendance, their status as a full-time or part-student, and their plans to attend for a full academic year or less. The maximum Pell grant award for the 2020-21 award year (July 1, 2020 to June 30, 2021) is \$6,345. However, the average award is often much less than the maximum award. The national average in 2017-18 was \$4,271 (NCES). The average Pell grant to undergraduates enrolled in fall 2018 at the University of Florida was \$5,205 (IPEDS SFA). The average Pell grant would cover the cost of tuition at the University of Florida (\$4,477 in-state tuition), but not the added cost of fees (\$1904), room and board (\$10,590), or textbooks (\$890). Pell grants are limited to 12 semesters, approximately 6 years.

The national population of college age students has been declining since the 2010-11 academic year. The number of Pell recipients has also declined, as a function of both the change in the population of college age students and the declining value of the Pell grant. These trends are also true in the state of Florida. Fundamentally this means that it will be difficult for every state university to maintain, let alone increase their proportion of Pell recipients from a decreasing population. This also increases the competition between SUS institutions for Pell recipients. That cannot be our long-term strategy for low-income students attending state universities.

The University of Florida is the most affordable leading university in the nation. The University of Florida has the lowest undergraduate tuition of any AAU public or private institutions in AY 2019-20. Two-thirds of undergraduate students at the University of Florida submitted a financial aid application (FAFSA) and 42% of those who applied for aid can contribute less than \$5,000 to the cost of attendance. The University of Florida also has a successful track record in graduating Pell recipients. The six-year graduation rate for Pell recipients is 87%, which ranks 5th in the nation at public universities. Enrollment management has developed new strategies for recruiting Pell eligible students and provided additional financial aid. We have expanded access to our Machen Florida Opportunity Scholars (MFOS) program that supports low-income students who are first in their families to attend college.

Affordability, access to low-income families, and high achievement among these first-generation scholars is a defining characteristic of the University of Florida. Money magazine recently cited the University of Florida as one of the best college values in the nation (UF is #16, right behind Harvard at #14, published Aug 25, 2020). We are working to preserve this legacy for years to come.

Table of contents

- A. Institutional Metrics
- B. Changing population of Pell recipients
- C. Recruitment strategies
- D. Student success strategies

**TABLE 1 – FEDERAL IPEDS
UNIVERSITY OF FLORIDA**

UNIVERSITY OF FLORIDA									
PELL RECIPIENTS IN ENTERING COHORT									
<i>entering cohort</i>	2011	2012	2013	2014	2015	2016	2017	2018	
Group 1									
All undergraduate students	32,598	32,776	33,168	32,829	33,402	34,554	35,247	35,491	
Group 1, Pell recipients	10,587	10,512	10,453	9,944	9,409	9,008	9,390	9,175	
Group 2									
Full-time, first-time, degree/certif-seeking	6,408	6,273	6,348	6,475	6,848	6,801	6,396	6,758	
Group 3									
Group 2, in-state, grant aid	5,998	5,762	5,795	5,422	5,809	5,726	5,473	5,578	
In-state, grant aid as pct of FTIC	93.6%	91.9%	91.3%	83.7%	84.8%	84.2%	85.6%	82.5%	
Group 4									
group 2, in-state, Title IV fed student aid	2,946	2,709	2,538	2,460	2,479	2,275	2,035	2,013	
group 2a, Pell grants	2,055	1,805	1,749	1,733	1,725	1,543	1,512	1,593	
Pell recipients, as pct of Group 1	32.5%	32.1%	31.5%	30.3%	28.2%	26.1%	26.6%	25.9%	
Pell recipients, as pct of Group 2	32.1%	28.8%	27.6%	26.8%	25.2%	22.7%	23.6%	23.6%	
IPEDS source: SFA SFA SFA SFA SFA SFA SFA SFA SFA									
reporting year	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	
submitted	spr 13	spr 14	spr 15	spr 16	spr 17	spr 18	spr 19	spr 20	

UF Main

**TABLE 2 - BOG ACCOUNTABILITY PLAN
UNIVERSITY OF FLORIDA**

7. University Access Rate [Percent of Undergraduates with a Pell grant]										
	FALL 2014	FALL 2015	FALL 2016	FALL 2017	FALL 2018	FALL 2019	FALL 2020	FALL 2021	FALL 2022	FALL 2023
ACTUAL	31.6	29.7	27.6	28.6	27.2	.	.	.	.	.
APPROVED GOALS	.	30	30	30	30	30	30	30	.	.
PROPOSED GOALS	.	.	.	.	.	30	30	30	30	30

UF Main and UF Online

**TABLE 3 - BOG ACCOUNTABILITY PLAN
STATE UNIVERSITIES**

2019 ACCOUNTABILITY PLAN SYSTEM SUMMARY		STATE UNIVERSITY SYSTEM of FLORIDA Board of Governors		BOARD APPROVED 10/30/2019									
Performance Based Funding Metrics <i>(continued)</i>													
7. University Access Rate [Percent of Undergraduates with a Pell grant]													
ACTUAL	FAMU	FAU	FGCU	FIU	FPOLY	FSU	NCF	UCF	UF	UNF	USF	UWF	SUS
Fall 2012	65.8	41.5	35.4	49.6	.	30.6	28.8	38.1	32.8	36.2	42.0	39.9	39.8
Fall 2013	61.6	41.2	35.0	51.0	.	30.0	28.6	38.5	32.4	33.5	42.1	40.5	39.6
Fall 2014	64.8	42.3	34.2	51.1	.	28.4	30.0	39.4	31.6	32.6	43.0	41.6	39.7
Fall 2015	65.4	41.8	31.9	51.4	.	27.7	28.3	39.8	29.7	32.1	41.2	41.3	39.0
Fall 2016	62.8	41.1	30.6	50.4	.	28.0	29.5	39.4	27.7	30.2	40.0	39.2	38.0
Fall 2017	65.6	42.9	32.5	52.0	30.3	28.3	33.3	40.6	28.6	30.7	41.7	39.6	39.2
1Yr Δ	2.8	1.8	1.9	1.6	.	0.3	3.8	1.2	0.9	0.5	1.7	0.4	1.2
GOALS	FAMU	FAU	FGCU	FIU	FPOLY	FSU	NCF	UCF	UF	UNF	USF	UWF	SUS
Fall 2018	65	42	33	50	28	29	31	41.0	30	31	42.2	39	39
Fall 2019	65	42	34	50	29	30	32	41.8	30	32	42.2	40	40
Fall 2020	65	42	35	50	29	30	33	42.4	30	33	42.2	42	40
Fall 2021	65	42	36	.	29	30	34	42.8	30	34	42.2	42	.
%pts Δ	-1	-1	4	.	.	2	1	2	1	3	1	2	.

Note: This table reports the number of undergraduates who received a Pell grant while enrolled during the fall term. Unclassified students, who are not eligible for Pell-grants, are excluded from this metric. The System goals are mathematically derived from the institutions' goals. The "Percent Change" row, in the goals section, compares the latest actual data with the planned out-year goal. A dot (".") for the 2021-22 goal results from the fact that the Board did not approve the proposed goals for FIU at the June 2019 meeting. Therefore, the above goals reflect FIU's approved goals from the 2018 Accountability Plan.

Performance Based Funding Model 2020-21 Benchmarks											
EXCELLENCE <i>(Achieving System Goals)</i>											
Points		10	9	8	7	6	5	4	3	2	1
Key Metrics Common to All Universities											
7	University Access Rate Percent of Undergraduates with a Pell-grant	42%	38%	34%	30%	26%	22%	18%	14%	10%	6%

A. Institutional Metrics

Three standard metrics are used in higher education to measure the effectiveness of an institution in graduating low income students. These three indicators are the six-year graduation rate for Pell recipients, the gap in graduation rates between Pell recipients and non-Pell recipients, and the percentage of Pell recipients in the entering class. By each of these measures, the University of Florida is highly successful in graduating low income students.

Tables 1-3 on the preceding pages provide federal and state data on the percentage of Pell recipients over time at the University of Florida. The representation of Pell recipients can be measured against the entering cohort or the total undergraduate population.

The percentage of Pell recipients among all undergraduates at the University of Florida has declined from 32.5% in fall 2011 to 25.9% in fall 2018. The percentage reported by the state for the Access Rate (PBF metric #7) has declined from 31.6% in 2014 to 27.2% in 2018. The state rate for UF is slightly higher than the IPEDS rate because some students (e.g. non-resident aliens, post-baccalaureates) are removed from the state denominator and the state rate includes UF Online.

The percentage of Pell recipients in the entering class at the University of Florida has declined from 32.1% in fall 2011 to 23.6% in fall 2018 (IPEDS). Most Pell recipients enroll in the University of Florida as full-time, first-time college students who are part of the fall entering cohort. Between 9,000 and 10,000 Pell recipients are enrolled at the University of Florida; that represents ten percent of the Pell recipients in the State University System.

Between fall 2012 and fall 2017, few state universities increased their percentage of Pell recipients among all undergraduates (Accountability Plan 2019). Among the larger research universities, Florida International and Central Florida were able to increase their Pell enrollment. FIU is a special case with very high minority and Pell enrollment (67% Hispanic, 12% African American – fall 2019, College Navigator; and > 50% access rate, BOG Accountability Plan 2019).

We have looked at strategies employed by other institutions to increase the percentage of Pell recipients. We have developed new recruitment strategies and student success programs at the University of Florida, described later in this document, to reverse the trends shown on these tables. We are encouraged by the early evidence of the effectiveness of these strategies. We are participating in APLU's Degree Completion project, funded by the Bill and Melinda Gates Foundation, that is helping institutions identify and share effective strategies for increasing the number of bachelor's degree recipients and reducing the gap in graduation rates between majority and minority students.

We understand that recruitment of Pell recipients will be increasingly difficult for every SUS institution as the population of Pell recipients attending public institutions in the state of Florida declines.

PELL Graduation Rates, Six-Year

- The University of Florida has an 87% graduation rate for Pell recipients, which ranks 5th in the nation out of 209 public universities.
- Among the Top 10 public universities in the nation, the six-year graduation rate ranges from 81% to 91%.
- Only 3 schools in the Top 10 have a graduation rate higher than the University of Florida. The schools with a higher rate are UC Berkeley, UC Los Angeles, and the University of Virginia.

PELL GRADUATION RATE 6-YEAR			
NATIONAL, PUBLIC UNIVERSITIES			
	<i>ranking year</i>	2019	2020
T10	Georgia Institute of Technology	80%	81%
T10	University of California--Berkeley	89%	89%
T10	University of California--Irvine	82%	81%
T10	University of California--Los Angeles	87%	88%
T10	University of California--San Diego	82%	84%
T10	University of California--Santa Barbara	82%	84%
T10	University of Florida	85%	87%
T10	University of Michigan--Ann Arbor	87%	85%
T10	University of North Carolina--Chapel Hill	87%	86%
T10	University of Virginia	91%	91%

Graduation Rate Gap between Pell recipients and non-recipients

- The gap in graduation rates between Pell recipients and non-recipients is 4% at the University of Florida.
- Among the top 10 public universities in the nation, the gap in graduation rates for Pell recipients ranges from 3% to 8%.
- Only 1 school in the Top 10 has a smaller gap than the University of Florida. The gap is 3% at UC San Diego.

PELL GRADUATION RATE GAP			
	<i>ranking year</i>	2019	2020
T10	Georgia Institute of Technology	-7%	-8%
T10	University of California--Berkeley	-3%	-4%
T10	University of California--Irvine	-4%	-4%
T10	University of California--Los Angeles	-5%	-4%
T10	University of California--San Diego	-4%	-3%
T10	University of California--Santa Barbara	-7%	-5%
T10	University of Florida	-5%	-4%
T10	University of Michigan--Ann Arbor	-6%	-8%
T10	University of North Carolina--Chapel Hill	-5%	-5%
T10	University of Virginia	-4%	-4%

B. Changing Population of Pell Recipients

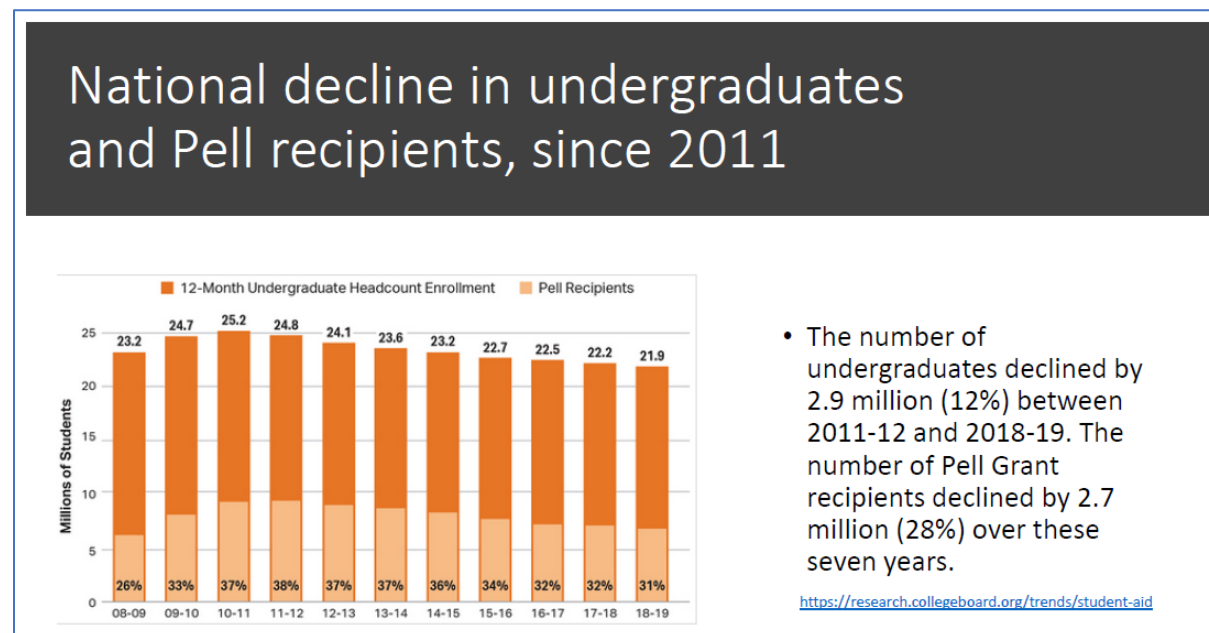
College Board's annual study of student aid tracks changes in the national population of Pell recipients. Since 2011-12, the number of undergraduates has declined 2.9 million (12%) and the number of Pell grant recipients has declined by 2.7 million (28%). The percentage of Pell recipients among all undergraduates decreased from 38% in 2011-12 to 31% in 2018-19.

Federal data tracks a similar shift in the number of Pell recipients enrolled in public institutions in the state of Florida, since 2012. There are 47,000 fewer Pell recipients enrolled in Florida public institutions (2-year and 4-year colleges and universities) in 2017-18 compared to 2012-13. This decrease has occurred largely outside the state university system. The state universities in Florida must increase their share of this declining population just to maintain Pell enrollment. The SUS institutions were able to increase the number of Pell recipients from 114K to 117K between 2012-13 and 2017-18.

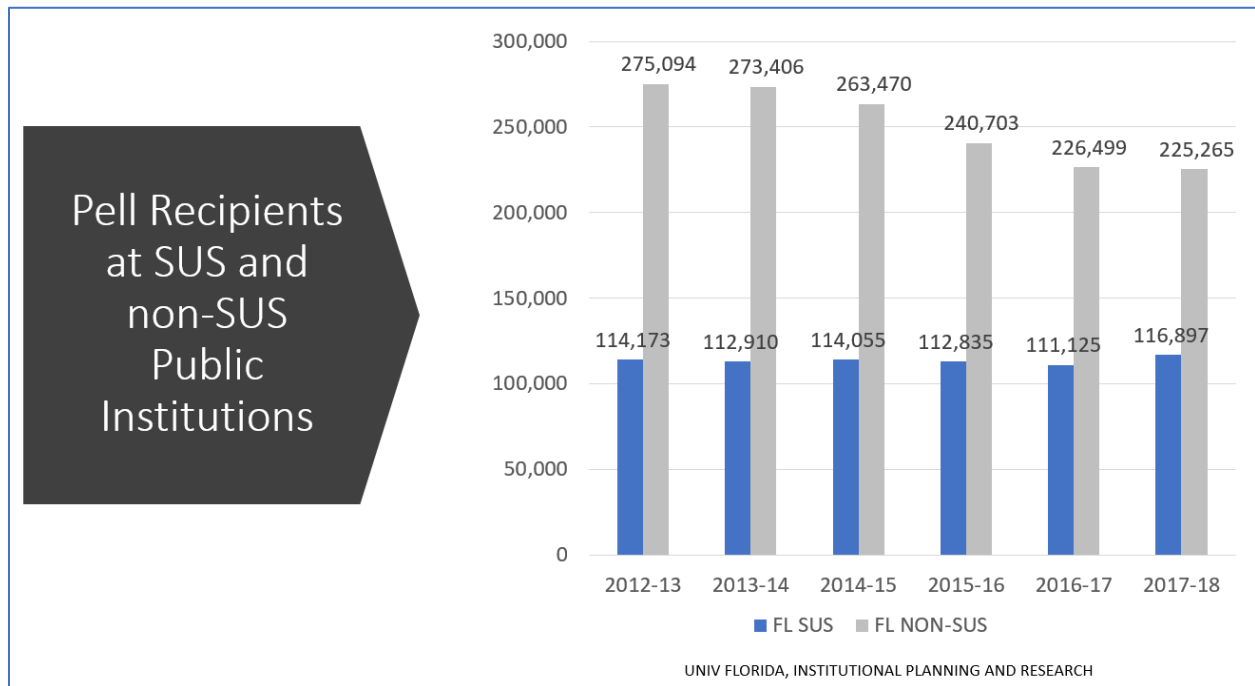
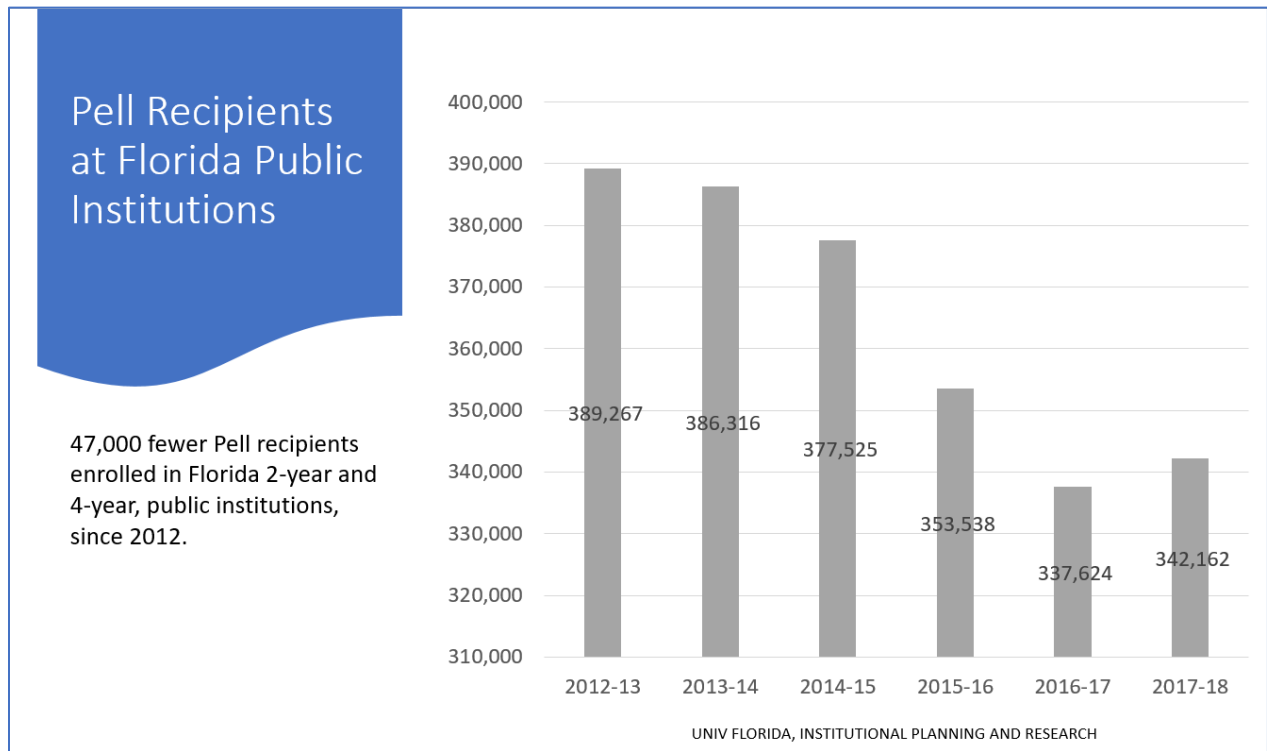
The American Talent Initiative funded by Bloomberg Philanthropies recruited 128 institutions and set an ambitious goal to enroll 50,000 more low- and moderate-income students at institutions with graduation rates of 70 percent or higher by 2025. They recently reported that initial gains in low- and middle-income enrollment during the first two years were offset by declines at other institutions resulting in a net aggregate increase of just 8 lower income students (ATI Exec Summary, Feb 2020, :2).

Caroline Hoxby and Sarah Turner, economists at Stanford and the University of Virginia, have released a paper through the National Bureau of Economic Research, which asserts that well-intentioned efforts to increase enrollment of low-income students do not always lead to the desired results. For example, students just above the threshold for Pell are often disadvantaged.

The declining value of the federal Pell grant against the total cost of attendance presents a significant financial challenge for institutions striving to maintain or increase enrollment of Pell recipients.



<https://www.insidehighered.com/admissions/article/2019/01/28/study-pressure-enroll-more-pell-eligible-students-has-skewed-colleges>



Enrollment of Pell recipients at public, 2-year and 4-year institutions, in Florida
 source: IPEDS Student Financial Aid

Pell enrollment in public institutions in Florida is decreasing at the same rate (12%)
 as the national decrease in undergraduate enrollment.

C. Recruitment Strategies

The University of Florida has developed specific strategies to increase the enrollment of low-income students in the entering cohort. The strategies for Pell eligible students include targeted communication, additional need-based financial aid, welcome grants of \$1,000, and waivers for enrollment deposits. We have increased the number of students in the Machen Florida Opportunity Scholars program from 300 to 350 students. Admissions has also identified 56 Gator Access Program (GAP) schools targeted for additional outreach. These efforts are essential to increasing our share of a declining population of Pell recipients in the state of Florida and the nation.

Pell Specific

- Automatically waived enrollment deposit for all Pell eligible students
- SFA did additional targeted outreach to population post-admission
- Modified financial aid packaging philosophy to provide more institutional grants to neediest students
- Introduced the \$1,000 Welcome Grant to provide students with start-up monies for college essentials ahead of the start of the fall term
- Increased outreach, including phone calls, to prospective students to explain financial aid awards

MFOS and First Gen

- Increased MFOS capacity from 300 to 350
- Additional outreach to high school counselors in FL highlighting MFOS program
 - Via email, in person workshop Fall 2019, and upcoming outreach Fall 2020
 - Planning targeting high schools that are 'feeder' MOFS schools this fall with MFOS office
- Additional outreach to MFOS offered students by SFA this year via phone and email
- Removed supplemental application for awarding
- For first gen, did two yield information sessions with First Generation Student Success Office
- Targeted communication to admitted first generation students

General Recruitment

- Identified 56 Gator Access Program (GAP) schools who get additional outreach each fall
 - Model moving online for Fall 2020 with info session, application workshop, and SSAR workshops planned
 - These students can also earn scholarships via Raise.Me, a college planning tool, provided they have financial need: <https://www.raise.me/>
- Additional partnering with CBOs in South Florida for programing, and looking to continue to increase. Examples are presentations for Overtown Youth Center and Breakthrough Miami this summer.
- In high schools that are not GAP schools but have high number of low-income students, recruiters emphasized financial aid, FAFSA, and student supports (First Gen, Promise, etc.) where appropriate
- Financial aid has highlighted main session at Summer 2020 Virtual Open House; looking into partnerships for virtual SFA sessions for applied students in Fall 2020 (logistics TBD)

Application Process and Review

- Students self-report needing application fee waiver, no barrier of needing supplemental information to get waiver

- Implemented College Board Landscape, which allowed us a better picture of student environment and context
- Put additional emphasis on low SES student status in application review

D. Student Success Strategies

The Machen Florida Opportunity Scholars Program supports low-income students who are first in their families to attend college. The University of Florida is committed to financially supporting talented students who might not otherwise attend UF because of financial barriers. National studies have shown that students from low socio-economic backgrounds can be deterred from enrolling in a four-year college or university because of fear of debt and concerns that working while in school could hamper their chances for academic success. Many of these students opt instead to enroll in community colleges or choose not to attend college at all.

“First generation” refers to students from families whose parents have not earned a bachelor’s degree. Students who have siblings in college but whose parents did not earn a bachelor’s degree are also considered to be first-generation college students.

Started in 2006 by President Bernard Machen, the program continues to receive support from President Kent Fuchs. Financially the program is supported by the University of Florida, the state of Florida, and generous donors. Over its first decade, the program provided scholarships to nearly 4,000 students. In fall 2019, the program supported 284 new first-time in college students (FTIC) and 1,228 undergraduates. The university has taken steps to expand support from 300 to 350 students in the entering class.

This is a highly diverse population – 66% female, 19% African American, and 47% Hispanic in fall 2019. MFOS scholars come from nearly every county in Florida. Many students come from south Florida (Miami-Dade, Broward, Palm Beach, and Orange counties).

The scholarship covers expenses up to the student’s need for the full cost of attendance. In other words, the scholarship covers tuition and books, as well as living expenses after any family contributions (EFC) are made. The goal is for students to earn a bachelor’s degree and graduate without student loans. The average family income is \$19,689. The average annual Opportunity Scholarship in 2019 was \$8,933.

Student programming, peer mentoring, and academic tracking is highly successful in helping MFOS students make progress toward graduation. For the 2012 and 2013 cohorts respectively, the freshman retention rate was 98% and 99%, the four-year graduation rate was 62% and 71%, and the six-year graduation rate was 86% and 90%.

To date more than 500 MFOS scholars have earned a graduate or professional degree from UF or are currently enrolled in a graduate or professional degree program at UF. Other students are enrolled in graduate programs at Stanford, Harvard, Northwestern, and other top academic institutions. Program alumni are teachers, police officers, nurses, lawyers, engineers, accountants, and other professionals.

The MFOS scholars from the University of Florida are changing their communities and their families as first-generation recipients of a bachelor’s degree.