PURSUIT OF EXCELLENCE

Mentor Training 2016

Timeline Overview of POE's Process

Sep – Dec
Fundraising

Jan-Feb
New Students Apply

March
Award Estimates

Mar-May
Read Apps, Select New Students, Set New Awards

Jun-Aug
Renewal Interviews, Get NEW Awards

1 → 2 → 3 → 4 → 5

ANNUAL AWARD CYCLE

March
ESTIMATE Awards

Summer
Get Students Budget

Summer
REQUEST Award

Summer
Award is APPROVED

After Approval
Request Student Payments

1

2

3

4

5
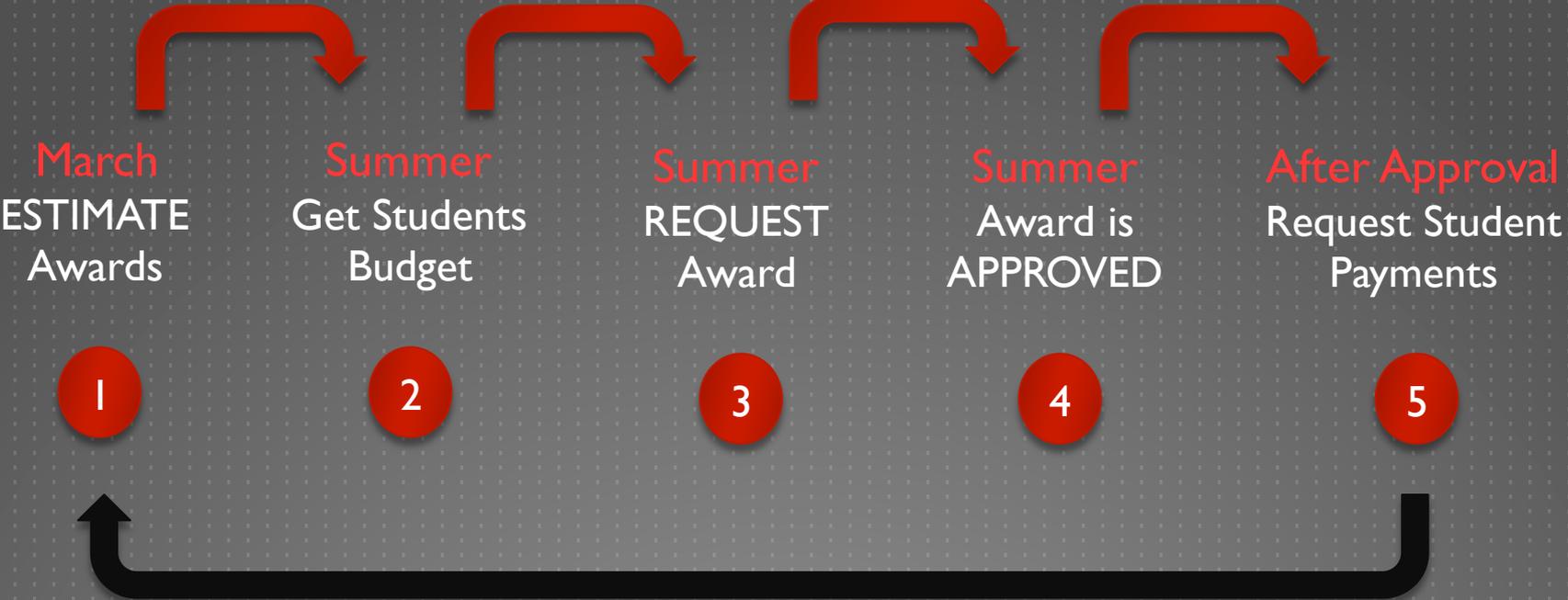
MENTOR RESPONSIBILITIES

1. Primary contact for student – gatekeeper to the $$$$
2. Contact student ~once a month
   - Follow academic progress (mid-year and end-of-year transcripts)
   - Update Caspio student database – comments and contact info
3. Request money when student needs it
   - Keep receipts for money sent directly to student
4. Renewal meeting in the summer – update student budget in Caspio to determine student award for following academic year
5. March update – inform POE who will graduate, who needs more money

Be their safety net – if they need something, they will come to you

UPDATE STUDENT DATA

▶ Select "Update Student Info" on Mentors Page

▶ Search for your student (by mentor or by student name)

▶ See payments that have been made

- Payments without a date are REQUESTS that have NOT been made yet

▶ Click on "Edit student data for renewal" to see student data

▶ Start the comment with a date (incl year) – then add your update

▶ New students – update ACH banking info

▶ You CANNOT update budget info here

- new budget process will update these fields when you enter a budget and request a new award

REQUEST MONEY

► Request money by 14th or 29th as it goes out the 15th and 30th of the month

► Mentors Page – select "Give Student Money"

1. Check student's current award and payments so far this fiscal year - If nothing comes up, then no payments were made for this year

2. Update student information in Caspio

   • If bank account info is new or changed, update in Caspio

   • Add a comment on student's Caspio page if need be

3. Enter Payment Request

► Ask for receipts if money goes to student (you keep receipts)

SUMMER RENEWAL INTERVIEW

▶ Ideally, meet after they have their financial aid package

▶ Send student the POE budget form to fill out before you meet

▶ Ask them to bring financial aid package and transcript

▶ Ask basic questions about roommate, activities, classes, majors

▶ Discuss any class difficulties – suggest EOP programs, tutoring, talking to professors and generally advocating for themselves

▶ Go over budget in detail!

▶ You will need to know the answer to every question to complete budget!

▶ Update Caspio comment and contact fields

▶ Do NOT mention an award amount to the student - yet

If you have all the student's budget info, then request an Award now

SUBMIT BUDGET & REQUEST AWARD

▶ To get an award for your student, you must ENTER BUDGET information and REQUEST an AWARD.

- You may start this process if you don't have all the budget information, but you won't get an APPROVED award until it is complete

▶ Select "Summer Renewal – Submit Budget and Request Award" from Mentors page

▶ Search for your student's budget

- If it's not there, start a new one by clicking on the link in the footer to start a new budget

- If you have already started a budget it will be listed – see if an award has been APPROVED

- If no award has been APPROVED, then you can click on the first name to edit and REQUEST an award

ENTERING BUDGET & REQUEST AWARD FIRST TIME

- ▶ Transfer all the information from the paper budget to Caspio
- ▶ If the student has no cost (eg is not paying rent because they are living on campus) then enter 0.
- ▶ If you do not know the answer to one of the budget questions, enter "-1" (negative one) – you will need to come back later to edit this.
- ▶ Last year's budget information is listed on the right, this is fyi, you can't change any of that data
- ▶ Your student's "Total Expected Cost" and "Gap" will be automatically updated as you fill in the form.
- ▶ All fields are required – hover over the "?" for help on a question

REQUESTING AWARD

▶ Enter the amount you would like to REQUEST for their AWARD

▶ Comment field – if appropriate, copy your comment in here from your renewal interview with the student.

▶ If you have all the information, enter the amount you are REQUESTING for your student's award

▶ After you submit, you will get an email confirmation

▶ Once the award is APPROVED, (by Anne or Jean) you will receive another email and the APPROVED AWARD will be in your student's Caspio database with all their updated budget information

INCOMPLETE BUDGET

▶ If you need to gather more information, note that in the comment field so we will wait to APPROVE your student's AWARD

▶ You will need to return to update the budget information when you have the information

▶ Request an award, when there are no more "-1"s (negative ones) in your budget

MARCH UPDATE - ESTIMATE

▶ Mentors Page – Select "March Update"

▶ Select your name from the mentor list to find your current students

- If you have students you have listed as "stopped out" or "lost contact with mentor" who will need money next year, search on them as well

▶ Click on the details page for each student and Indicate your student's anticipated situation for next year

▶ If you know your student's situation is changing and they will need more or less money, indicate how much you think they will need in the comment field

CONNECTING POE STUDENTS

▶ Select "Connect Students" on Mentors page

▶ POE Groups

  ▶ Search on other students currently or previously at same college

  ▶ Contact info is on details page

▶ Alumni Search

  ▶ Search alumni database for students with similar major or from same college

  ▶ Alumni indicate if they are willing to do informational interview or help with internships

▶ High School Application Info

  ▶ Can also search your students application data – reread their essay and look at their recs or activities.

OTHER THINGS

- Community College Students – make sure they look into TAG (Transfer Agreement Guarantee) – Nov 30 deadline for following year
- Encourage all students to get a 3.0 – common cutoff for internships and study abroad opportunities
- Talk about importance of networking
- We will provide stipends if they have unpaid internship
- Encourage to get involved in at least one club or activity
- Freshmen/transfers – first few days on campus are the most important for making friends – put yourself out there
- Remind them, we are the safety net… talk to us if they need anything
- Mentor resources on website