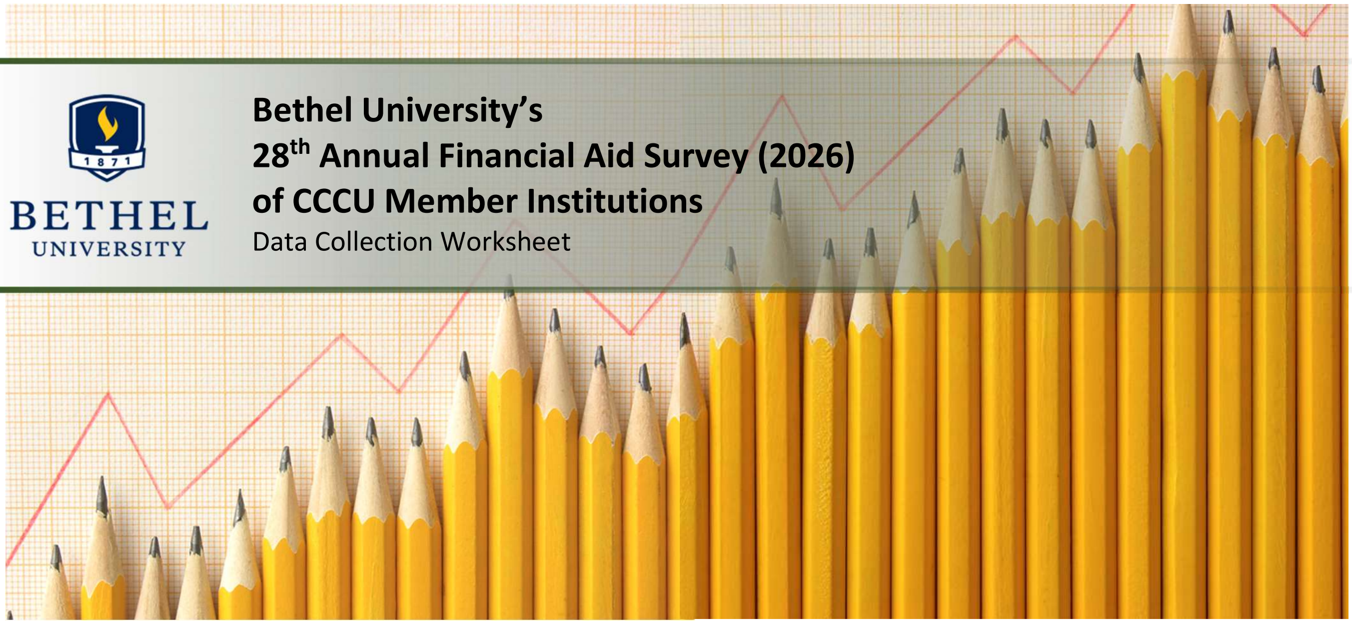

Welcome to Bethel University's 2026 Financial Aid Survey of CCCU Institutions!

The Financial Aid Survey of CCCU institutions is designed for colleges and universities located in the United States. It is sent to all CCCU institutions who report a financial aid director and e-mail address, but colleges outside the United States should not feel obliged to complete the survey.

The final deadline for submitting data is

Wednesday, October 28th, 2026.

No extensions will be granted. Please plan accordingly.

Survey results will be reported at two levels:

- Level one data will not identify individual schools and will be shared with the CCCU via email and via a webinar the week of December 14, 2026. A public version of the slideshow will be available on our website: https://www.bethel.edu/institutional-data-research/bethel-study/survey-presentations
- Level two results, which identify specific school information, will only be shared with schools that supply complete survey information. Our plan is to distribute reports to participating schools by mid-December 2026. (The edited survey database will be available to participants upon request.)

As a service to colleagues in our CCCU institutions we will make survey data available for use in doctoral dissertations and other research. We will limit access only to researchers at CCCU schools, and will assure that your data is not individually identified. By participating in the survey you consent to your data being used for this type of research.

Please contact us with questions:

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Survey Notes: We use Qualtrics to create and distribute this survey. Qualtrics **allows the user to exit the survey and come back later** to complete it (this assumes that you are using a computer enabled with cookies and are returning to the survey from the same computer). Because we have no control over the "save" process, our recommendation is still that participants complete the survey in one sitting, completing this paper survey form prior to entering data online.

Changes for the 2026 version: No significant changes have been made to the 2026 survey versions.

Changes for the 2025 version: When calculating Need, negative SAI values should be rounded up to 0. **When calculating family wealth, SAI has replaced EFC references** and we will no longer collect PC or SC values (since they are not always available due to changes in federal need analysis); rather, we will use the SAI in the Wealth index calculations. We added clarifying instructions to ensure data for Dual Enrolled students (high school students taking college credits) are not included in reported enrollment, revenue or aid. **No additional significant changes have been made to the 2025 survey versions**.

Changes for the 2024 version: No significant changes have been made to the 2024 survey versions.

Note: This worksheet should be used to collect your responses. Your responses must be submitted using our web entry form at: https://www.bethel.edu/institutional-data-research/bethel-study/cccu-survey.

Please do not submit this worksheet.

Part I. Institutional Data, Enrollment, Retention & Discount Rates

A. Respondent Information

1. Name: ______________________________
2. Title: ______________________________
3. Email: ______________________________
4. Phone: ______________________________

B. Institutional Demographics

1. Name of School: ____
2. School City:______________________________
3. School State: _________
4. Highest Degree Offered by institution: ❐ Associate's ❐ Bachelor's ❐ Master's ❐ Doctoral
5. Your school's CCCU membership (pick one): ❐ Governing Member ❐ Associate Member ❐ Collaborative Partner ❐ International Collaborative Partner ❐ International Affiliate ❐ Not a CCCU member

   Note: This survey is designed only for U.S. CCCU member schools.
6. Financial Aid Office Website: http://____
7. Is your school a member of NASFAA? ❐ Yes ❐ No
8. Regional Financial Aid Association:

   ❐ EASFAA ❐ MASFAA ❐ RMASFAA ❐ SASFAA ❐ SWASFAA ❐ WASFAA
9. FAFSA school code for main campus (e.g. 002338): _________

C. Enrollment and Revenue.

The data for your "Traditional Undergraduate Programs" reported here are for your regular, foundational, typically term-based program. Most students in traditional programs are full-time and 18-24 years old (although this column includes the older and/or married students who are enrolled in your traditional program).

"Non-Traditional Undergraduate Programs" tend to differ from the traditional undergraduate program in their calendar, tuition rates, age of students, and pattern of attendance (i.e. weekend and degree-completion programs).

High school students who are also enrolled in postsecondary classes are not "regular" students and should not be included in the Fall and All Year enrollment counts. Tuition and fee revenue from these Dual Enrollment programs should also be excluded from the tuition and fee revenue (same rules as on the FISAP, Part II.D.7).

*Note: FISAP data does not segregate "Traditional" and "Non-Traditional" undergraduate enrollment and revenue. Please divide your FISAP data into these two categories. Use estimates if you must. See appendix for FISAP enrollment definition (excludes high school students).

	Traditional Undergraduate Programs	Non-Traditional Undergraduate Programs	Graduate/ Professional Programs	TOTALS
1. Fall 2025 Headcount				
2. Total enrollment for 2025-2026 (FISAP Part II.D.7)				
3. Revenue from Tuition & Fees for 2025-2026 (FISAP Part II.E.22)				
4. Fall 2026 Headcount				

D. Financial Aid Received by Students in Traditional Undergraduate Programs

(Do NOT include aid for Non-Traditional Undergrad programs, like degree completion, Weekend College, etc.)
Note: Report Veteran's Benefits separately from Federal Gift Aid if available. **DO NOT REPORT HEERF MONEY here.**

Institutional Gift Aid for 2025-2026 — **2025-2026 Actual**

1. Institutional Scholarships & Grants from unrestricted funds $__________________
2. Inst. Scholarship & Grants from endowment (named) funds $__________________
3. Inst. Scholarships & Grants from restricted gifts $__________________
4. Tuition Remissions (benefits) for employees/dependents $__________________
    5. Sub-Total, Institutional Gift Aid (sum 1-4) $__________________

Federal Gift Aid for 2025-2026

6. Federal Supplemental Ed. Opportunity Grant (FSEOG) $__________________
7. Federal TEACH Grant $__________________
8. Federal Pell Grants $__________________
9. Any other Federal Gift Aid (Byrd, etc., excluding VA benefits) $__________________
    10. Sub-Total, Federal Gift Aid (sum 6-9) $__________________

Not included in totals: ***Veterans Educational Benefits*** *received by students in traditional undergraduate programs. Do not include this value in grand total below. (leave BLANK if not available) $__________________*

State and Other Gift Aid for 2025-2026

11. State Scholarships & Grants $__________________
12. Other Gift Aid (third-party scholarships, etc.) $__________________
    13. Sub-Total, State and Other Gift Aid (sum 11-12) $__________________

    14. TOTAL All Gift Aid (sum 5, 10, 13) $__________________

Loans Received 2025-2026

15. Federal Perkins Loans $ 0
16. Federal Direct Subsidized Loans $__________________
17. Federal Direct Unsubsidized Loans $__________________
18. All other recorded student loans (state, private, alternative) $__________________
19. Federal Parents Loans (PLUS) $__________________

    20. TOTAL All Education Loans (sum 15-19) $__________________

Work Earnings for 2025-2026

21. Federal College Work-Study Program – actual earnings $__________________
22. State Work-Study Program – actual earnings $__________________
23. Institutional Wages & Stipends – actual earnings $__________________

24. TOTAL All Work Earnings (sum 21-23) $__________________

25. GRAND TOTAL, ALL FINANCIAL AID FOR YEAR (sum 14, 20, 24) $__________________

*Not included in totals: **Income Share Agreements** received by students in traditional undergraduate programs. Do not include this value in grand total above. (leave BLANK if not available)*
$________________

E. Average Loan Debt

For the following four questions, use the cohort of undergraduate students who (a) received a bachelor's degree between July 1, 2025 and June 30, 2026 and (b) started at your institution as first-time students. These questions are intended to match the 2026-2027 Common Data Set: Section H5. Exclude students who transferred in to your institution. Include only loans made to students who borrowed while at your institution. Include co-signed loans. Exclude money borrowed at other institutions.

Please indicate which programs are included in your Loan Debt responses below:

- ❑ Traditional Undergraduate Programs Only (preferred)
- ❑ Traditional and Non-Traditional Undergraduate Programs

What percent of these students borrowed through **any loan** programs (include institutional, state, Federal Perkins, Direct Subsidized and Unsubsidized, private loans that were certified by your institution, etc.; exclude parent loans). ______%

What percent of these students borrowed through **federal loan** programs (include **only** Federal loans, which includes Federal Perkins, Direct Subsidized, and Direct Unsubsidized; exclude institutional, state, private alternative, and parent loans)? ______%

What was the average per-borrower cumulative undergraduate indebtedness of those who borrowed through **any loan program** (include institutional, state, Federal Perkins, Direct Subsidized and Unsubsidized, private loans that were certified by your institution, etc.; exclude parent loans)? $_____________

What was the average per-borrower cumulative undergraduate indebtedness of those who borrowed through **Federal loan programs** (include only Federal loans, which includes Federal Perkins, Direct Subsidized and Unsubsidized; exclude institutional, state, private alternative, and parent loans)? $_____________

F. Student Expense Budgets – Traditional Undergraduate Programs

Standard, On Campus Budget	2025-2026 (Note: last year!)	2026-2027
1. Tuition	$	$
2. Fees	$	$
3. Housing (formerly "Room")*	$	$
4. Food (formerly "Board")*	$	$
5. Books, Supplies & Equipment	$	$
6. Personal & Misc Expenses**	$	$
7. Transportation/Travel	$	$

Standard, On Campus Budget	2025-2026 (Note: last year!)	2026-2027
8. TOTAL	**$**	**$**

*If your institution does not separate out housing and food expenses, please allocate to the best of your ability. If you only provide a combined amount, we will split the reported amount equally between room and board.

**If your budget includes loan fees, please include them in the personal and miscellaneous category.

G. Wealth and Need Calculations – Traditional Undergraduate Programs

The following questions are used to calculate the Wealth Index and Net Price comparisons. Data must accurately reflect students in traditional undergraduate programs in 2025-2026 to be included in the Wealth Index calculation.

(Do NOT include aid for "Non-Traditional Undergraduate" Programs, like adult education, degree completion, Weekend College, etc. *The sum of questions 1 and 2 below should equal the total number of students in your **traditional undergraduate programs** reported on the FISAP [C.2. on page 3]*.)

***Beginning in 2024-25, documented need is calculated as "Cost of Attendance minus the greater of zero (0) or the Student Aid Index (SAI)." In other words, round negative SAIs to zero (0) when calculating need.**

****Beginning with 2024-25 data, the Bethel Study will use "SAI" instead of "PC" when calculating the Wealth Index. As above, convert all negative SAIs to zero (0) when reporting your data. This is comparable to current federal guidance.**

Needy Students

1. Number of students who demonstrated financial need (using FM) #__________________
   (Number of students enrolled in at any point during the year in traditional undergraduate programs who filed a FAFSA and whose SAI was less than their Cost of Attendance. This group is called "Needy" for the remainder of the survey.)

   a. Aggregate Demonstrated Need of Needy Students $__________________
      (It is important to first calculate the demonstrated need **of each student** [Cost of Attendance minus SAI*]. The demonstrated need for each student should never be less than 0 [e.g. 40,000 COA minus 41,000 SAI equals need of 0]. After calculating demonstrated need for each student, calculate the aggregate demonstrated need by summing the demonstrated need of all needy students.)

   b. Total Institutional Gift Aid to Needy Students $__________________
      (Include all gift aid from your school, including endowed, restricted, unrestricted, and tuition remission)

   c. Total Federal Gift Aid to Needy Students $__________________
      (Excluding VA Educational Benefits)

   d. Total State Gift Aid to Needy Students $__________________

   e. Total Other Gift Aid (third-party) to Needy Students $__________________

   f. TOTAL GIFT AID TO NEEDY STUDENTS $__________________
      (Sum of institutional, federal, state, and other gift aid)

   g. Number of Needy Aid Recipients: #_________________

(Number of Needy students enrolled in traditional undergraduate programs that received any type of financial aid [grant, scholarship, loan, student employment, tuition remission] from any source [school, federal, employer, state, third-party].)

h. Number of Needy students classified as "dependent": #________________

   I. Avg. Student Aid Index (SAI) for needy dependent students (FM): $____________________
   (Average SAI values of students in line "h.") (**See explanation above.)

i. Number of Needy students classified as "Independent": #______________

   I. Avg. Student Aid Index (SAI) for students in H, above (FM) $________________
   (Average SAI values for students in line "i.")

Did you include negative SAI numbers in your data? If so, please revise your response before submitting.

Non-Need Students

2. Number of students who did not demonstrate financial need (all other enrolled students) #____________
(Whether they received financial aid or not. The sum of questions 1 and 2 should equal reported traditional undergraduate attendance from the FISAP [C.2. on page 3]. This group is called "Non-need" for the remainder of the survey.)

a. Total Institutional Gift Aid to Non-Need Students $________________
(Include all gift aid from your school, including endowed, restricted, unrestricted, and tuition remission)

b. Total Federal Gift Aid to Non-Need Students $________________
(Excluding VA Educational Benefits)

c. Total State Gift Aid to Non-Need Students $________________

d. Total Other Gift Aid (third-party) to Non-Need Students $________________

e. TOTAL GIFT AID TO NON-NEED STUDENTS $________________
(Sum of institutional, federal, state, and other gift aid)

f. Number of Non-Need Aid Recipients: #____________
(Number of Non-Need students enrolled in traditional undergraduate programs that received any type of financial aid [grant, scholarship, loan, student employment, tuition remission] from any source [school, federal, employer, state, third-party].)

Wealth Index Comments (optional):

H. Projections for 2026-2027 – Traditional Undergraduate Programs Only

(Do NOT include aid for "Non-Traditional Undergraduate" Programs, like adult education, degree completion, Weekend College, etc., or Graduate School in your projections)

This information will be used to calculate estimated discount rates for traditional undergraduate programs. ***We are looking for broad round numbers as an estimate.***

Projected Tuition & Fee Revenue

a. Traditional undergraduate programs in 2026-2027 $ ____________________________

Projected Institutional Gift Aid

a. Traditional Undergraduate Programs in 2026-2027

i. Institutional Scholarships & Grants from unrestricted funds $ ____________________________

ii. Inst. Scholarships and Grants from endowment (named) funds $ ____________________________

iii. Inst. Scholarships and Grants from restricted gifts $ ____________________________

iv. Tuition Remissions (benefits) for employees/dependents $ ____________________________

v. Total Projected Institutional Gift Aid $ ____________________________

Projected Unfunded Institutional Discount for New Students

a. What is your "target" unfunded discount rate for ***entering new first-year students*** for 2026-2027? (Students in traditional undergraduate programs, only.) ___________________%

I. Financial Aid Offers for 2027-2028 – Traditional Undergraduate Programs Only

Financial Aid Offers

1. When do you plan to start issuing 2027-28 financial aid offers to ***new*** students?
   a. Prior to December 1, 2026
   b. Sometime in December 2026
   c. Sometime in January 2027
   d. Sometime in February 2027
   e. March 1, 2027, or later

PART II. QUESTIONS ON ROTATION – LAST REPORTED IN 2022

A. Staffing: *(last reported in 2022)*

1. What are your normal office hours? ______________________________________

2. Are you a part of a "one-stop shop"? If so, what non-financial aid functions are included in your office's responsibilities?
   - ❑ N/A – Our office is not a part of a "one-stop shop"
   - ❑ Admissions
   - ❑ Registrar
   - ❑ Bursar/Business office
   - ❑ Academic Advising
   - ❑ Student life/ student development
   - ❑ Student employment administration
   - ❑ Veterans' Affairs (military educational benefits)
   - ❑ Other ________

3. Check all the functions that are included in the tasks performed by your financial aid office staff:
   - ❑ Packaging financial aid
   - ❑ Developing packaging strategy
   - ❑ Loan processing
   - ❑ Loan/fund reconciliation
   - ❑ Loan collections
   - ❑ Student account administration
   - ❑ Assigning campus jobs
   - ❑ Student employment administration
   - ❑ Student payroll
   - ❑ Student/parent financial aid counseling
   - ❑ Default management
   - ❑ Financial literacy training
   - ❑ Basic IT functions (running reports, etc.)
   - ❑ Advanced IT functions (programming reports, processes, etc.)
   - ❑ Website maintenance
   - ❑ State/federal advocacy
   - ❑ Scholarship administration
   - ❑ Monitor/enforce satisfactory academic progress
   - ❑ Gainful employment
   - ❑ State authorization
   - ❑ FERPA administrator
   - ❑ Consumer information coordination
   - ❑ Completing surveys (like this one)
   - ❑ Clearinghouse/NSLDS reporting

B. Student Employment Responsibilities *(last reported in 2022)*

1. During 2025-2026, what was the normal hourly rate of pay for a first-time student employee working in the following positions?
   a. Clerical_________________/hour
   b. Food Service ___________/hour
   c. Maintenance/housekeeping ______________/hour
   d. Teacher Assistants ___________________/hour

2. Do you employ resident assistants ❒ No ❒ Yes - if yes, please answer the following:
    a. How many resident assistants were employed in 2025-2026? _____________.
    b. How much did you pay resident assistants during 2025-2026?
        i. Taxable Stipend ______________ (average per recipient per year)
        ii. Untaxed Grant _______________ (average per recipient per year)
        iii. Total (sum of "i" and "ii" above) ________________ (avg. per recipient per yr.)

C. Packaging *(last reported in 2022)*

1. Need Analysis
    a. Do you use FM exclusively? ❒ Yes (go to question 2) ❒ No
    b. Do you require the CSS Profile? ❒ Yes ❒ No Comment: _____________________________

2. Have you used a financial aid consultant in the past five years? ❒ Yes ❒ No
    a. If yes, who did you use? ____
    b. Was the primary role of the consultant to advise on packaging? ❒ Yes ❒ No
    c. What did you learn from this experience that you are willing to share with your CCCU peers?
    ____
    ____

3. Net Price Calculator:

    a. When did/will you populate your net price calculator with your 2027-28 awarding strategies?
        ❒ Before September 2026
        ❒ Between September and December 2026
        ❒ Between January and April 2027
        ❒ May 2027 or later

        Comments: ____

    b. How did you develop the net-price calculator?
        ❒ Purchased from a private vendor (Name of vendor: ________________________)
        ❒ Use the federally supplied net price calculator
        ❒ Developed our own

    c. How well does your net price calculator work for you? (A-F. A = excellent) ______

D. Developing Enrollment and Retention Policy *(last reported in 2022)*

1. At your institution, to what extent is the financial aid director involved in the following activities?

	Topic	Response 1=Direct involvement (participate in decision) 2=Indirect involvement (provide data/input to decision maker) 3=Not involved
a.	Setting tuition rates	
b.	Determine changes in the target discount rate	
c.	Planning for enrollment changes	
d.	Establishing new financial aid strategies	
e.	Establishing retention programs/strategies	
f.	Developing donors for scholarships	
g.	Advocating for increased funding in state financial aid programs	
h.	Advocating for increased funding in federal financial aid programs	

E. State Aid and Competitors *(last reported in 2022 and 2025)*

1. State aid to students in traditional undergraduate programs at CCCU institutions.
   a. Does the state in which you are located have a state grant program in which your state resident students participate? ❒ Yes ❒ No (if no, go to question 2)
      b. Is the grant need-based? ❒ Yes ❒ No
      c. What percentage of your state resident students received the state grant in 2025-2026?
      d. What is the size of the state grant for your undergraduate students enrolled full-time, and full-year?
         i. Minimum award offered (not $0) $________.00
         ii. Average $________.00
         iii. Maximum $________.00

   Comments: ____

2. How do you determine which schools are your main competitors for incoming new students?
   a. Submit your non-enrolling admitted students to Student Tracker (to see where they went).
   b. Ask non-enrolling students where they went.
   c. Rely on Admissions to identify top competitors.
   d. Other: ____

3. Who are your top seven to ten competing institutions for your **traditional undergraduate program** (list biggest competitor first)?
   List FAFSA code (or IPEDS code if FAFSA code not available), full school name and state.
   Look up FAFSA codes here: https://fafsa.ed.gov/FAFSA/app/schoolSearch

FAFSA Code (or IPEDS# if FAFSA code not available)	School Name	State
1.		
2.		
3.		
4.		
5.		

FAFSA CODE (OR IPEDS# IF FAFSA CODE NOT AVAILABLE)	SCHOOL NAME	STATE
6.		
7.		
8.		
9.		
10.		

F. Financial Aid Appeals and Adjustments *(last reported in 2022)*

1. What is your institutional policy regarding requests for more gift aid from students and their families (check all that apply)?
   - ❑ We typically do NOT increase our award
   - ❑ We increase need-based gift aid in response to documented unusual circumstances (see question 4 for examples)
   - ❑ We increase non-need-based gift aid in response to new data (e.g. updated test score)
   - ❑ We make a token increase in need-based gift aid without documented unusual circumstances (e.g. "we feel your pain" award)
   - ❑ We make a token increase in non-need-based gift aid, without new academic information, in an attempt to mollify the student (or parent)
   - ❑ We increase need-based gift aid in an attempt to match competing packages
   - ❑ We increase non-need-based gift aid in an attempt to match competing packages

   Comments:

2. Who has authority to make decisions to increase the amount of gift aid in a financial aid award (check all that apply)?
   - ❑ Financial aid director
   - ❑ Financial aid staff member (other than the director)
   - ❑ Committee that reviews and decides upon all requests
   - ❑ An enrollment manager, or other individual who does not work directly in the financial aid office (check this option even if the enrollment manager discusses these decisions with the financial aid office staff)

   Comments:

3. How have adjusted aid packages affected enrollment?
   - ❑ The yield rate for students with adjusted packages is higher than normal
   - ❑ No noticeable change in yield rates
   - ❑ The yield rate for students with adjusted packages is lower than normal
   - ❑ We do not track this data

   Comments:
4. Using the table below, indicate whether you adjust need (and thus need-based aid) when families submit the following types of appeals.

Nature of appeal	**Typical Response** Yes (Adjust need) No (Do not adjust need) ID = "It Depends"	**Comments** (Explain "It Depends" responses)
a) Adjust for higher cost of living overseas	Yes No ID	
b) Adjust for unusually high house payments in U.S.	Yes No ID	
c) Adoption expenses	Yes No ID	
d) College expenses for parents	Yes No ID	
e) High out-of-pocket medical expenses	Yes No ID	
f) Ignore parents' income from "cashed in" retirement savings	Yes No ID	
g) Ignore the amount of the parents' "S" corporation income that was not taken as wages	Yes No ID	
h) Need for parents to repay loans from their own college education (i.e. Parents' Stafford)	Yes No ID	
i) Need for parents to repay older siblings' educational loans (i.e. PLUS, students' Stafford)	Yes No ID	
j) Need to repay excessive personal debt (i.e. credit cards)	Yes No ID	
k) Private (elementary/secondary) school expenses for siblings	Yes No ID	
l) Reduced dependent student income in current year	Yes No ID	
m) Reduced independent student income in current year	Yes No ID	
n) Reduced parent income in current year	Yes No ID	
o) Wedding expenses for siblings	Yes No ID	

5. Under your current awarding policy, what percent of institutional gift aid (excluding tuition remission) is used for the following? *(Answer to the best of your ability as you are able.)*
   __________% Awarded based on need, and used to meet need
   __________% Awarded as merit or circumstance, but used to meet need
   __________% Awarded as merit or circumstance, beyond need
   =100% Institutional gift aid
   Comments:

6. Answer the following question as though you had complete authority to decide how to award your institutional aid. What criteria should be used to award gift aid (choose the best answer)?
   - ☐ Only consider need
   - ☐ Consider need more than merit
   - ☐ Consider need and merit equally
   - ☐ Consider merit more than need
   - ☐ Only consider merit

   Comments:

H. Hot Topics in Financial Aid - 2026

1. **Pell Grants -** How many Federal Pell Grant **recipients** are in your institution in the following programs and years? This question is used to gauge the impact of the new Federal Need Analysis. *(please enter the number of recipients, not a dollar amount)*

	Traditional Undergraduate Programs	Non-Traditional Undergraduate Programs
Pell Recipients in 2023-24		
Pell Recipients in 2024-25		
Pell Recipients in 2025-26		
Pell Recipients in 2026-27 (estimated)		

2. **Artificial Intelligence (AI) -** Are you using Artificial Intelligence (AI) in the Financial Aid Office?
   a. Yes
   b. No

3. If yes, what AI Search Engine are you using?
   a. ChatGPT
   b. Claude
   c. CoPilot
   d. Gemini
   e. Grok
   f. Other:______________________

4. Artificial Intelligence (AI) can streamline a college financial aid office most effectively by **automating repetitive administrative work while keeping human staff responsible for decisions and sensitive student interactions**. *(Generated using ChatGPT.) Please respond to the following statements.*

Topic	Response to all of the following items A. Now: Used for 2026-2027 or earlier B. Next Year: Will begin 2027-2028 C. Future: Interested in future use D. Not interested E. Not applicable	Comment
1. **Student question triage:** An AI assistant could answer routine questions about FAFSA, deadlines, verification, satisfactory academic progress, required documents, and award letters. More complicated cases could automatically be routed to a financial aid counselor.	A B C D E	
2. **Document processing:** AI/OCR could extract information from uploaded tax documents, forms, or verification materials and identify missing fields or inconsistencies, reducing manual data entry.	A B C D E	
3. **Application/verification workflow:** AI could prioritize files based on urgency, identify applications that appear incomplete, and flag cases requiring human review.	A B C D E	
4. **Student communications:** AI could draft personalized emails and text messages reminding students about missing documents, upcoming deadlines, or changes to their aid. Staff could review and approve messages before they're sent.	A B C D E	
5. **Case summarization:** When a student contacts the office repeatedly, AI could summarize prior interactions, outstanding requirements, and relevant notes so a counselor doesn't have to reconstruct the case history.	A B C D E	
6. **Call-center assistance:** During phone or chat interactions, AI could surface relevant policies and knowledge-base articles for staff in real time and generate a summary afterward.	A B C D E	
7. **Financial aid packaging support:** AI could help staff identify potential packaging issues—for example, conflicting awards, unusual changes in enrollment, or situations that may warrant review—without making the final award decision.	A B C D E	
8. **Deadline and compliance monitoring:** AI could monitor workflows and alert managers to backlogs, approaching deadlines, or cases that haven't progressed.	A B C D E	
9. **Data analysis:** AI could help leadership identify patterns such as where students are getting stuck, which communications produce the best response rates, or which populations have unusually high rates of incomplete applications.	A B C D E	
10. **Training and knowledge management:** Staff could ask an internal AI system questions about institutional policies and procedures instead of searching through lengthy manuals. It could also help onboard new employees.	A B C D E	

5. Does your institution offer programs that will likely fall below the Earnings Accountability (STATS) threshold?
    a. Yes
    b. No
    c. Do not know

6. If yes, please list the program names *(ex., Undergraduate Ministry, Graduate D.Min)* : _________________
____

7. How will your institution proceed with these programs?
    a. Continue the program as is without Federal Aid support
    b. Alter the program *(ex., reduce the program cost)*
    c. Discontinue the program
    d. Do not know
    e. Other/Comments: ____

8. What phone number or email do you use for reliable/meaningful answers from Federal Student Aid or the US Dept of Education?
    a. Email address: _________________________________
    b. Phone number: _________________________________
    c. Other/Comments: ______________________________

Thank you for completing the Annual Financial Aid Survey of CCCU Member Institutions!

Please do not submit this worksheet. All responses must be submitted using a web-based survey located at
www.bethel.edu/institutional-data-research/bethel-study/cccu-survey

Please submit your responses by **Wednesday, October 28th, 2026**.

Appendix: Glossary of Terms

From Part I, Section C – Enrollment and Revenue,

- **Fall Enrollment & Total Enrollment (FISAP, Part II.D.7)**: Enter your total enrollment according to FISAP enrollment instructions. FISAP instructions: Include all postsecondary students enrolled in at least one undergraduate or graduate/professional course that met one of the following criteria: 1) creditable toward a degree or certificate, 2) listed as an undergraduate or graduate/professional course in the school's catalog, 3) offered as an elective or required course as part of the undergraduate or graduate/professional curriculum, 4) required as a remedial course as part of the student's degree or certificate program, or 5) otherwise considered by the school to be an undergraduate or graduate/professional course (note: high school students who are also enrolled in postsecondary classes are not "regular" students and are not reported as enrolled). Note: FISAP does not separate traditional undergraduate and non-traditional undergraduate enrollment; please separate these numbers in your response.

From Part I, Section D – Financial Aid Received, and
Part I, Section H – Projections:

- **Unrestricted Funds**: Also called "unfunded," these monies are generated by tuition revenue and awarded as institutional grants or scholarships. Does not include monies awarded as tuition remissions (benefits) for employees and their dependents.
- **Endowment (Named) Funds**: Monies awarded to students from the earnings on institutionally controlled endowments. Does not include scholarships from endowments not controlled by the institution (e.g. Dollars for Scholars).
- **Restricted Gifts:** Monies awarded as grants or scholarships from annual donations to named scholarships. Excludes monies raised as part of the "annual fund" which are not specifically designated for targeted scholarships.