

Reducing Barriers Linked to Financial Holds at California State University, San Bernardino

Improving Policies, Refining Processes, and Supporting Outcomes

California State University, San Bernardino (CSUSB) is a public university located in San Bernardino, California. Established in 1965, CSUSB enrolls approximately 20,000 students each year. Known for its commitment to student success, diversity, and community engagement, CSUSB serves a diverse student population and has the second highest African American and Hispanic enrollments of all public universities in California. The university is also recognized for its strong ties to local industries, research opportunities, and vibrant student life, making it a sought-after institution for higher education in the area.

Collaboration in Support of Change

CSUSB started its efforts by assembling a team of subject matter experts representing divisions that support students. Participants in this initiative were willing to explore more deeply the implications of financial processes on student outcomes. The team included representatives from Finance, Student Account Services, Financial Aid, Advising, Advancement, Institutional Research, and the institution's College of Extended Global Education.

The initial charge to the group was focused on the identification of strategies to improve enrollment and specifically on efforts to improve retention or re-engage students who had unpaid account balances that resulted in a hold. These financial holds blocked students from registering for classes and ultimately, in many cases, led to students being removed from the roster of matriculated students.

Improvement Project

Address Barriers to Student Enrollment Linked to Outstanding Balances on Student Accounts

Resource Used

Guiding Questions for Student-Centered Decision-Making

Results

- A cross-functional team of leaders, committed to reducing barriers to student retention, used the Guiding Questions for Student-Centered Decision-Making tool to support their efforts to implement more effective policies and communications for students who had high account balances that prevented them from registering for classes.
- New policies resulted in the development of a sustainable debt forgiveness program linked to re-enrollment and registration support practices.



“This resource and our improvement project helped us realize what is possible when we work across departments toward the same goal. We plan to use this tool to determine new initiatives and evaluate the performance of existing ones.”

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Maria Badulis,

*University Controller,
Finance and Administrative Services*

Breaking Down Silos and Developing Solutions

As the group began its work, the importance of focusing on students' experiences and needs was reinforced. The Guiding Questions for Student-Centered Decision-Making tool was used to help anchor discussions and prompt consideration of different issues that potentially needed to be addressed as changes to policies and procedures were discussed.

Specific objectives were established and agreed upon by the group. These objectives were (1) increase overall enrollment, (2) increase the number of students who re-matriculated after leaving active engagement with the university, (3) improve collaboration across the divisions involved in the project that would be sustained beyond the project, and (4) create a standard student account balance report that could be used on an ongoing basis to support efforts to reduce financial holds on students' accounts.

From Concept to Practice

Through the development of a standard student account balance report and the revision of guidelines for debt forgiveness linked to a commitment to reenroll, register, and attend classes, CSUSB forgave close to \$2M in support of the reenrollment campaign. The initiative decreased the university's accounts receivable (AR) balances. At the end of the program's first fiscal year, the university also reduced its allowance for doubtful accounts.

CSUSB saw a material increase in the number of students who reenrolled or remained enrolled after their financial hold was cleared, leading to the achievement of the university's fall enrollment targets. The success of this effort also led to a spin-off initiative that provided financial support for international students enrolled in Summer 2023. To better understand the profile of students who benefited from these revised policies, the Institutional Research team will evaluate outcomes for each fiscal year of this effort.

Sustaining Momentum

With positive outcomes realized from this focused initiative, CSUSB's cross-functional team will continue to work collaboratively both formally and informally to solve problems and reduce barriers to student outcomes. The Guiding Questions for Student-Centered Decision-Making will continue to be leveraged as a resource, supporting those collaborative efforts as the university builds capacity for continuous improvements to student outcomes.