

# The how-to book on organizing and hosting a FAFSA Event

**Want to organize and host a FAFSA event in your community?**  
Please use this how-to manual to get you on the right track to helping students complete the Free Application for Federal Student Aid (FAFSA).



 (877) 265-4463

 [ReachHigherMontana.org](https://ReachHigherMontana.org)  
or [info@ReachHigherMontana.org](mailto:info@ReachHigherMontana.org)

 Services are provided at no cost to Montana families. Reach Higher Montana is a nonprofit that helps students strategically pursue educational opportunities.



## Overview

**The goal of hosting a FAFSA Event is to provide an opportunity for students to complete their FAFSA accurately and in time to meet early application dates for financial aid.**

All too often, students and families opt out of completing this essential financial aid form.

They assume they won't qualify for aid because they "make too much money." The truth is, EVERYONE who wants to go to college should complete the [FAFSA](#) because it is used to determine federal, state, and some institutional aid.

This how-to booklet will assist groups that want to organize their own **FAFSA Events**.

The [FAFSA](#) has been streamlined over the last few years and is not as difficult to complete

as it used to be. In order to be successful completing the FAFSA, students and parents should have the following information available:

- [FSA ID](#) – to get an FSA ID, log on to fsaid.ed.gov
- Social Security numbers (students and parents)
- Federal tax returns - You'll need the prior, prior year's tax return. That means going back two years. For instance, the 2021-2022 FAFSA, both parents and students would use tax information from 2019
- W-2s, tribal income, other aid information (TANF, child support, other benefits)
- Additional asset information (money market funds, stocks, other investments)
- Untaxed income information

If you need help, please contact the financial professionals at your local college.

## Timeline/Checklist

### Where do I begin?

Your **FAFSA Event** can be as big as your imagination will allow. With proper planning, event promotion, and creative thinking, your **FAFSA Event** will inspire students to prepare for life after high school.

It's time to get the right people involved and start moving forward.

Use this helpful timeline to keep you on track and remind you of tasks you need to complete as you prepare for your event.

## May - August

- Reserve computer labs/rooms.
- Set up a **FAFSA Event** task force at your site (financial aid, admissions, high school counselors, TRiO staff, etc.) and assign duties.
- \_\_\_\_\_

## September

- Advertise your **FAFSA Event** in the school newsletter and social media.
- Remind students and parents to obtain their [FSA ID](#).
- You may choose to have your **FAFSA Event** in October or November in order to meet the priority deadline date of December 1 at most Montana colleges.
- \_\_\_\_\_

## October/November

- Advertise your **FAFSA Event**.
- Post promotional flyers in your area (community centers, grocery stores, churches, etc.) a few weeks prior to the event.
- Visit with students (especially high school seniors) about your **FAFSA Event**. Talk about the purpose of the event and why they should attend.
- Remind students what to bring.
- Send a press release to your local newspapers, tv, and/or radio stations.
- Email students and/or parents to remind them of your event and what to bring.
- Thank your community sponsors.
- Measure your results. Visit the U.S. Department of Education's website to see how many students from your school have completed the FAFSA. <http://studentaid.ed.gov/about/data-center/student/application-volume/fafsa-completeion-high-school>.
- Use GEMS FAFSA completion reports to see your students' completion rates.
- \_\_\_\_\_

**If you need help, please contact the financial professionals at your local college.**

## Volunteers

### Who can I ask to help?

#### Students

Recruit students to help organize and get the word out about your **FAFSA Event**. They might have some great ideas about how to get their peers to the event. In addition, student helpers can assist on event day and post and distribute materials.

#### Teachers/Counselors

Teachers and high school counselors are your greatest allies in motivating students to complete their FAFSA and pursue higher education. It's not only their job; it's their passion. We recommend enlisting their help to make your community's **FAFSA Event** a huge success. Share the timeline with them and ask for their help in brainstorming ways to grab the attention of seniors who need to attend.

Ask teachers to incorporate FAFSA completion instruction into their class time, if possible. With teacher support, students could complete most of the form in class prior to the event. At the event, parents can complete their portion.

Encourage teachers to hang flyers in their classrooms.

#### School Staff and Support Personnel

Successful **FAFSA Events** often get the whole school community involved. Encourage your school staff, including custodians, cooks, administrative assistants, and the bus drivers to post signs and information about your **FAFSA Event** and to encourage students to attend.

#### Volunteers and Community Representatives

Volunteer/community involvement is crucial to the success of your event. Identify contacts in your community who may be interested in helping with your **FAFSA Event** by donating time and/or resources. Community members can serve as volunteers, provide prizes, or simply post information at their businesses or organizations. The presence of community members in your school can lend weight and excitement to the initiative and showcase your community's dedication to promoting student success. Groups to consider include:

School alumni, Students' families, the PTA/O, the school council, Retired educators,

Community service, senior citizen or church groups, Business, community and political leaders, Youth programs (e.g. YMCA, Boys and Girls Clubs, 4-H, Girl and Boy Scouts of America)

## Volunteers (continued)

### Training

Having knowledgeable volunteers staffing your event is crucial to its success. Follow these tips to make sure you are sharing the most accurate information possible with students and parents.

- If possible, recruit the financial aid director at the postsecondary institution in your community to be your subject matter expert and provide good advice to your volunteers.
- Visit the “Filling out the FAFSA” section of the U.S. Department of Education’s Federal Student Aid website to get help with the commonly asked questions. <http://studentaid.ed.gov/fafsa/filling-out>
- Introduce volunteers to FAFSA on the Web – Live Help located at <http://www.fafsa.ed.gov/help.htm>, or make sure they have the phone number for the live call-in line: (800) 4-FED-AID.

### Event Planning

#### How do I get the word out?

Getting the word out about your **FAFSA Event** is essential. Here are a few methods you can use to raise awareness about FAFSA completion and how parents and students can benefit from your event.

#### At school:

- Daily announcements reminding students about the event, and who should complete the FAFSA (seniors).
- Articles in newsletters and school newspapers.
- Send letters, postcards, and/or email reminders to parents, students, and school staff
- Put up posters in the counselors’ offices, the cafeteria, hallways, etc.

#### In the community:

- Put up posters in local libraries, stores, etc.
- Drop press releases at your local news outlets.
- Contact local radio and tv stations about participating in local community news programs to promote your event.
- Post information about your event on community calendars.
- Ask businesses to put your event information on their reader board signs.
- The more information you can share through a variety of sources, the better!

## **Event Planning** (continued)

### **Event day: What do I do?**

#### **One hour prior to event:**

- Preparation of site and volunteers. Inquire about cleanup after the event.
- Make sure volunteers understand the logistics of the event.
- Assign duties for each volunteer.
- Discuss plans for latecomers and overflow crowd.

#### **Session:**

- Greet families and hand out materials.
- Point out or introduce the volunteers.
- Explain the flow of the event.
- Have students and parents log on to [FAFSA.gov](https://fafsa.gov) to complete the FAFSA. Ask families to raise hands if they have questions. Remind them their information is confidential.

#### **End of session:**

- Ask volunteers to begin gathering up materials and returning the site to the original status. Clean up any mess.
- Depart from the site. Thank volunteers and site hosts.
- Later that evening – put your feet up – pat yourself on the back! Enjoy!

#### **After the event:**

- It's a good idea to gather your volunteers together to talk about what worked, what didn't work, and what could be improved next year.
- Cover topics including publicity, organization on event day, etc.
- Extend your thanks to everyone who helped with the event, or made other types of contributions (food, scholarship funds, etc).
- Thank-you notes to volunteers, donors
- Letter to the Editor of your local newspaper.
- Start planning for your next event!

## How to make it better

### Suggestions:

- Visit the site. Ensure necessary equipment and supplies are available: computer labs, tables, and chairs. Check the facility for restrooms, handicap access, and any other logistical challenges.
- Appoint volunteers to greet families, organize the welcome area, count attendees, and perform any other duties needed.
- Ask a volunteer to be the media contact if a tv crew shows up at your site.
- Establish an express table – for families who have one or two questions. People seem to appreciate having the choice between “express” service and regular FAFSA completion service. Use a senior volunteer/expert volunteer to staff the express table.
- Refreshments are optional.
- Signs to recognize and thank any sponsor(s) can be displayed at the event.
- Provide activities for younger brothers and sisters who attend (such as a movie, coloring books).
- Make sure [FAFSA.gov](https://fafsa.gov) is not blocked on the computers in your lab.
- Log all computers on to [FAFSA.gov](https://fafsa.gov), so they are ready to go



 (877) 265-4463

 [ReachHigherMontana.org](https://ReachHigherMontana.org)  
or [info@ReachHigherMontana.org](mailto:info@ReachHigherMontana.org)

 Services are provided at no cost to Montana families. Reach Higher Montana is a nonprofit that helps students strategically pursue educational opportunities.