



UNIVERSITY OF PORTLAND

FROM THE OFFICE OF FINANCIAL AID

Congratulations on your acceptance to University of Portland! We are pleased to present you with the enclosed financial aid offer for the 2025-26 academic year.

Gaining a high-quality education at a top-ranked private college like University of Portland is one of the most important personal investments you can make.

This booklet contains important information to help guide you through the financial aid process. Please refer to the following:

PAGE 3
Dates and Deadlines

PAGES 4-5
Financial Aid Checklist

PAGE 6
Outside Scholarships

PAGE 7
Costs and Payment Information

Once you make your decision to attend UP by submitting your enrollment confirmation and deposit, you will be issued a UP email address. Please check your UP email frequently, as this will be our primary means of sending you news and updates.

We recommend that you set up proxy access using the instructions at up.edu/parents/parent-proxy. This is important because it authorizes our staff members to speak to your parent(s) or other designee about your financial aid requirements.

We understand that navigating the financial



4	If your family's financial circumstances have changed since you filed your 2023 taxes, contact the Office of Financial Aid for guidance. See more information at up.edu/finaid/apply/special-circumstance .	11	Review private education loan options at up.edu/finaid/loans/private-loans .
5	If you receive outside scholarships, complete an Outside Scholarship Reporting Form so we can include your scholarship(s) in your aid offer. Contact the Office of Financial Aid for a link to the form and further instructions at finaid@up.edu .	12	Review and apply for outside scholarship. More information can be found at up.edu/finaid/scholarships-and-grants .
6	UP will not reduce merit aid if you receive an outside scholarship, except when total aid exceeds the Cost of Attendance for the year.	13	Review your health insurance coverage, available to you while you are a student health insurance waiver application. Aid about health insurance is available at up.edu/health . The waiver application will be available August 29.
7	To grant proxy access, go to selfserve.up.edu , click on the Proxy Access tab, and complete the proxy access and passphrase creation process. After the first day of the fall semester, proxy access with an established passphrase is required for us to discuss financial aid information with anyone other than the student. Additional information is available at up.edu/parents/parent-proxy .	14	Review campus employment opportunities at up.edu/studentemployment . We have Federal Work Study included in your aid offer. If you plan to work on campus, you will be required to complete hiring paperwork, proof of identity (photo ID) and proof of work in the U.S. (i.e., original birth certificate, security card, or U.S. passport).

30 YEARS AS A TOP-10 UNIV
(U.S. News & World Report)



FINANCIAL AID ENROLLMENT PACKET

July–December 2024 | Marketing & Web Services

PROJECT OVERVIEW

Background

Applying for Financial Aid can be a confusing process, but understanding and evaluating financial aid offers can be even more stressful. We wanted to take the trepidation out of the equation for our admitted students, so we redesigned our financial aid award packet to make the information as easy to understand and user friendly as possible, while aligning it with our overarching Admissions branding for a cohesive look and feel.

Projects

- 2025-26 Financial Aid Brochure
- Pocket Folder
- Sticker
- Self-Mailing Envelope

Brief Summary

The 2023-24 admissions cycle was tough for students applying for financial aid due to the uncertainty and confusion caused by a chaotic rollout of the new FAFSA. University of Portland's Office of Financial Aid worked extra hard to support students during this rocky time and saw first-hand how a confusing process can alienate students and keep them from applying and receiving the financial assistance they need to attend college. The staff vowed to do all they can to demystify the process and make it more accessible for students going forward.

The office reached out to UP's Marketing department over the summer of 2024 to request a more user-friendly redesign of the financial aid packet they send to admitted students. At the time, the packet consisted of a booklet and a personalized letter tucked into a folder, which was then mailed in an envelope. These materials were quiet and understated, embellished simply with a few design elements that were relics of our previous iteration of Admissions branding. The brochure itself was not much more than a multipage checklist.

The marketing department was eager to refresh the financial aid award packets so that the size and graphic elements would align with the Admissions materials that almost all students have seen by that point. We also redesigned the booklet to make what seems like nerve-racking information a lot more approachable. Overall, the design set a tone that reflects the celebratory nature of being admitted to college and receiving aid to attend.

Messaging, Audience & Tone

UP's overarching brand emphasizes support, inclusivity, compassion and guidance, and this is reflected in Admissions branding that uses hand-drawn lettering and graphics, images of unvarnished and unfiltered real people, and uplifting messaging.

We used the same approach to redesign the financial aid packet. Images of real students in authentic settings gives the audience a sense of the inclusive, supportive community they will find at UP. Hand-drawn embellishments add a sense of enthusiasm and fun, while also inviting the audience to feel engaged with the photo, as if they doodled on it themselves.

FINANCIAL AID BROCHURE

UNIVERSITY OF PORTLAND
2025-26
FINANCIAL AID PACKET

NOW ENTERING PILOT COUNTRY

University of Portland

We understand that navigating the financial aid process can be daunting, but we're here to help. Please reach out to us with any questions. Financial aid counselors are available for telephone or in-person appointments. To schedule, email us at fnaid@up.edu or call 503.943.7311.

University of Portland
OFFICE OF FINANCIAL AID
5000 North Willamette Blvd.
Portland, OR 97203-5798

The booklet features an abundance of purple, our main brand color, to reinforce a sense of solidity and strength in the institution. We rewrote the messaging in the booklet with the goal of demystifying financial aid at UP and making the process easy to understand, easy to navigate, and much more celebratory. Acknowledging that a UP education isn't free, we also incorporated statistics to emphasize the return on investment.

FROM THE OFFICE OF FINANCIAL AID

Congratulations on your acceptance to University of Portland! We are pleased to present you with the enclosed financial aid offer for the 2025-26 academic year.

Gaining a high-quality education at a top-ranked private college like University of Portland is one of the most important personal investments you can make.

UP 39% MORE
ON AVERAGE STUDENTS WHO ATTEND UP EARN 39% MORE INCOME THAN STUDENTS FROM OTHER OREGON UNIVERSITIES.

CHECKLIST FOR UNDERGRADUATE STUDENTS

- 1 Review your financial aid offer (FAO). Contact the Office of Financial Aid at 503.943.7311 or fnaid@up.edu if you have questions.
- 2 Review the financial aid offer for accuracy. Verify your personal information, including your name, address, and contact information. If you are a transfer student, verify your previous institution's name and address.
- 3 If your file is selected for verification (indicated on your financial aid offer), complete the steps and verification Worksheet and submit any other necessary documentation. A link to the form was sent to you by email. Your financial aid offer is not estimate until verification is complete.
- 4 If your family's financial circumstances have changed since you filed your FAFSA, contact the Office of Financial Aid for guidance. See more information at www.up.edu/financialaid.
- 5 If you receive outside scholarships, complete an Outside Scholarship Reporting Form or an outside scholarship verification form in your aid office. Contact the Office of Financial Aid for a link to the form and further instructions at www.up.edu/financialaid.
- 6 UP will not reduce merit aid if you receive an outside scholarship, except when merit aid exceeds the Cost of Attendance for the year.
- 7 To get your money, go to www.up.edu/financialaid to review the terms of each award. Decide which award best fits your needs. More information about financial aid awards can be found at www.up.edu/financialaid. There is information about the Federal Direct Loan (FDL) Loan on www.up.edu/financialaid.
- 8 Go to the Financial Aid web site at www.up.edu/financialaid or, if you are unable to access the site, contact the Office of Financial Aid at 503.943.7311 or fnaid@up.edu.
- 9 If you are using Direct Unsubsidized and Unsubsidized Loans, complete a Master Promissory Note (MPN), and loan entrance counseling at www.up.edu/financialaid.
- 10 If you are using Direct Unsubsidized Loans, have your parent complete a copy of the FAFSA. If you are unable to do so, contact the Office of Financial Aid for additional options. More information can be found at www.up.edu/financialaid.
- 11 Review your education loan options at www.up.edu/financialaid.
- 12 Review and apply to outside scholarships. More information can be found at www.up.edu/financialaid.
- 13 Review your health insurance coverage. If it is adequate and available to you while you are a student at UP, complete a health insurance waiver application. Additional information about health insurance is available at www.up.edu/financialaid. The waiver application will be available from mid-July through August 1st.
- 14 Review campus employment opportunities and requirements at www.up.edu/financialaid. You do not need to work on campus. If you do work on campus, you will be required to complete a background check and provide proof of identity (photo ID) and proof of eligibility to work in the U.S. (i.e., original birth certificate, social security card, U.S. passport).

30 YEARS AS A TOP-10 UNIVERSITY

FINANCIAL AID GLOSSARY OF COMMON TERMS

COST OF ATTENDANCE
Generally, this includes the costs and fees normally assessed to students, together with the university's estimate of the average cost of housing, food, transportation, commuting costs, personal expenses, books, supplies, and equipment. It is also referred to as the cost of attendance (COA) budget. The cost of attendance includes both indirect and direct costs.

- Indirect costs are charges for the student/family that are not included in the COA.
- Some indirect costs are assessed expenses in the cost of attendance that are not paid directly by the student.

ENTRANCE COUNSELING
Entrance counseling is required for all first-time freshmen and transfer students. It is designed to help students understand the terms and conditions of the loan, as well as options for repayment and loan forgiveness.

FEDERAL DIRECT UNSUBSIDIZED LOAN
Federal Direct Unsubsidized Loans are loans that are not guaranteed by the federal government. Interest on these loans begins to accrue as soon as the loan is disbursed.

FEDERAL DIRECT UNSUBSIDIZED PLUS LOAN
Federal Direct Unsubsidized Plus Loans are loans that are not guaranteed by the federal government. Interest on these loans begins to accrue as soon as the loan is disbursed.

FEDERAL SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT (SEOG)
A federal grant that is awarded to the school's qualified independent students who demonstrate need. Funding is given to Federal Direct Loan recipients with the highest need.

FEDERAL WORK STUDY (FWS)
A federal program that allows students to earn money to help pay for their educational expenses. Funds are paid for hours of work performed weekly. More information can be found at www.up.edu/financialaid.

GRANT
A sum of money that is given to students to help pay for their educational expenses. Grants are not repaid.

MATTER PROMISSORY NOTE (MPN)
The MPN is a legal document that explains the terms and conditions of the loan. It is a promise that you will repay the amount borrowed with any accrued interest and fees to the Department of Education.

ORIGINATION FEE
Some federal student loans include an origination fee. This fee is a percentage of the amount of the loan that is disbursed to the student.

STUDENT AID INDEX (SAI)
An eligibility index that allows financial aid staff to determine the amount of need-based aid you are eligible for based on your financial information. The SAI is calculated based on the information provided on the Free Application for Federal Student Aid (FAFSA).

VERIFICATION
Some federal student loans require that you provide additional information to the Department of Education to verify your financial information. This process is called verification. If you are selected for verification, you will be required to provide additional information to the Department of Education.

FEDERAL PLUS GRANT
A federal grant awarded to independent students who demonstrate need through the Free Application for Federal Student Aid (FAFSA). The Plus Grant is provided based on available resources.

IMPORTANT CAMPUS CONTACTS

QUESTIONS ABOUT FINANCIAL AID OFFERS AND ELIGIBILITY
Office of Financial Aid
Phone: 503.943.7311 or 800.448.4488
Fax: 503.943.7293
Email: fnaid@up.edu
Web: www.up.edu/financialaid

QUESTIONS ABOUT HOUSING AND MEAL PLANS
Office of Residence Life
Phone: 503.943.7301
Email: reslife@up.edu
Web: www.up.edu/reslife

QUESTIONS ABOUT HOW TO REQUEST A CAREER ASSIST OR CONFIRM YOUR ENROLLMENT?
Office of Admissions
Phone: 503.943.7307
Email: admissions@up.edu
Web: www.up.edu/admissions

QUESTIONS ABOUT BILLING AND PAYMENT PLANS
Office of Student Accounts
Phone: 503.943.7307
Email: studentaccounts@up.edu
Web: www.up.edu/studentaccounts

DATES & DEADLINES

UP has long held the highest four-year graduation rate in Oregon. You will have the support to graduate on time and start your career with less student debt.

#1 IN THE PACIFIC NORTHWEST
(Most Recent Survey 2024)

FEBRUARY 15
Oregon residents only: Daily deadline to complete the Office of Student Accounts and Completion Scholarship Application at www.up.edu/financialaid.

MARCH 1
Oregon residents only: Find deadline to complete the Office of Student Accounts and Completion Scholarship Application at www.up.edu/financialaid.

MARCH 14
Priority deadline for new students to submit additional information, verification materials (if required), and any other documents the Office of Financial Aid has requested. We will process documents submitted after this date, but your financial aid offer notification may be delayed.

MAY 1
Enrollment confirmation due to the Office of Admissions. Log in to your enrollment portal to confirm your enrollment and pay the Early Deposit option.

JULY 7 (approximate)
Health insurance waiver application available at www.up.edu/financialaid. All full-time undergraduate students are required to have adequate health insurance coverage, as defined by UP. If your current coverage is insufficient, you will be required to purchase health insurance through the University. Additional information about health insurance is available at www.up.edu/financialaid/health_insurance.

JULY 18
Priority deadline to complete loan application processes (Direct Unsubsidized, Unsubsidized, Direct PLUS, and private loans) for fall semester. Note that loans can take three or more weeks to process. We will process loan applications submitted after this date, but funds for fall semester may be delayed.

AUGUST 1
On-campus jobs posted for fall semester at www.up.edu/employment.

AUGUST 7
Payment due to the Office of Student Accounts for the fall semester. The amount due will be the difference between your direct billable charges and your unaided financial aid. For www.up.edu/financialaid for payment options.

AUGUST 25
First day of fall semester.

AUGUST 29
Last day to waive health insurance at www.up.edu/financialaid (see "July 7" entry for additional information).

OUTSIDE SCHOLARSHIPS

Outside scholarships are a great way to close the gap between the aid offered to you and the cost of attendance. Here are some quick tips to help you get started.

START EARLY
The earlier you start, the more scholarship applications you can complete.

RESEARCH ALL OPTIONS
Research all options, including family, friends, employers, churches, community organizations, high school counselors, and local businesses if they have knowledge of scholarship opportunities.

APPLY FOR ALL OPPORTUNITIES
Think of applying for scholarships as a job. If you spend more time applying for scholarships and are awarded a more generous scholarship, there is the opportunity of earning \$0.00.

STAY ORGANIZED
Use a scholarship tracking worksheet to keep up with deadlines. UP's Scholarship Tracking Worksheet is available on our website at www.up.edu/financialaid.

READ AND FOLLOW DIRECTIONS
Every scholarship is different. Ensure you meet all scholarship criteria and follow application instructions.

WRITE A POWERFUL ESSAY
Tell your story, bring it alive, and connect your story to your hopes and dreams.

SAVING "THANK YOU"
Think of your scholarship as a gift. Write a thank-you letter, and include it with your application materials. It shows your appreciation and may help you stand out.

REGIONAL RESOURCE EXAMPLES

- Oregon Community Foundation www.oregoncf.org
- Washington State Scholarships www.washstate.edu/scholarships
- Washington State Scholarship Foundation www.washstate.edu/scholarship
- Alaska Community Foundation www.alaska.org
- Hawaii Community Foundation www.hawaii.org

PAYMENT PLAN OPTIONS

UP offers payment plan options for students and families. Contact a payment plan advisor in your college center to learn more about payment options. More information can be found at www.up.edu/financialaid.

SPECIAL AND UNUSUAL CIRCUMSTANCE APPEALS

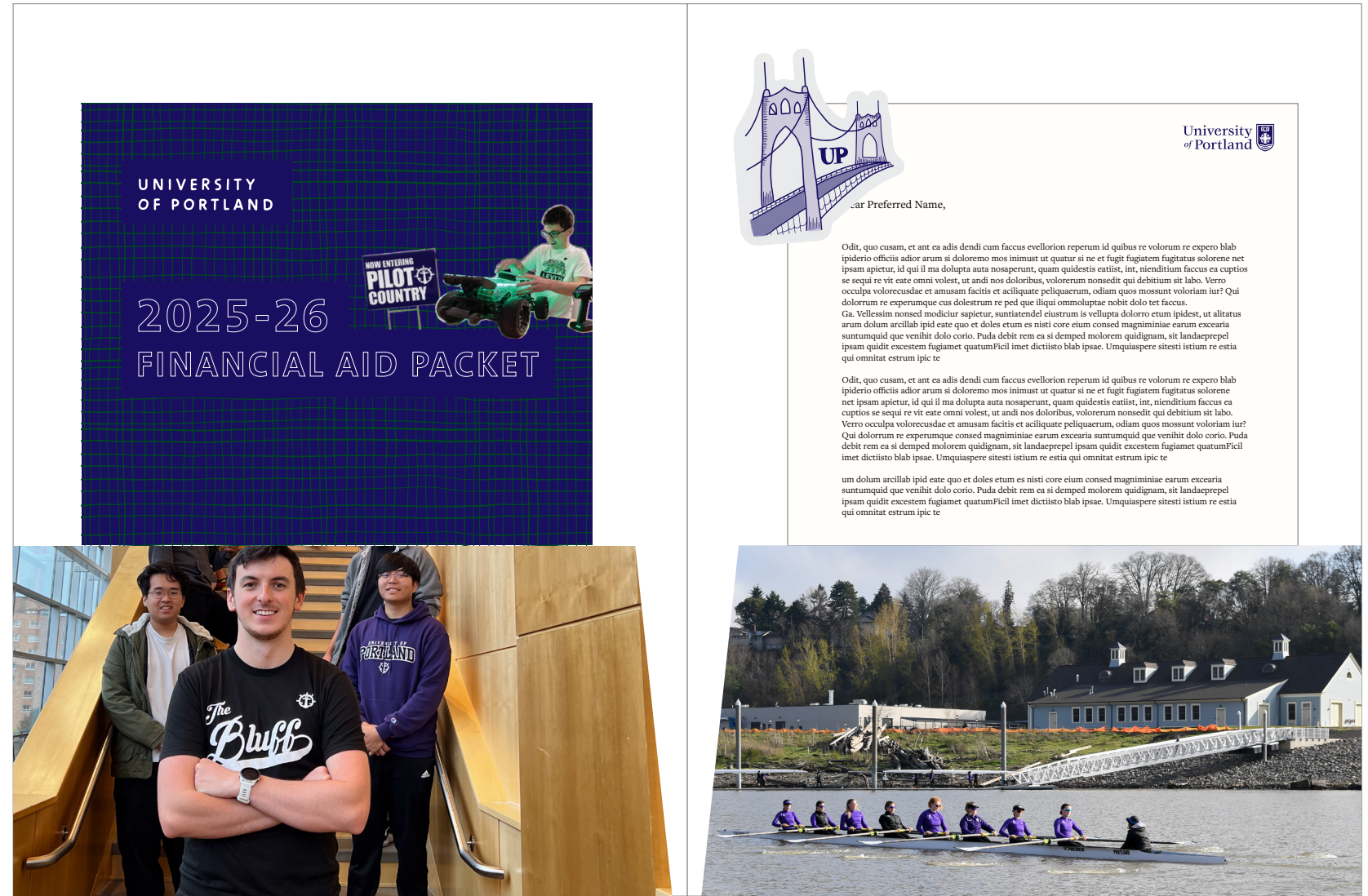
We recognize that the Free Application for Federal Student Aid (FAFSA) may not always accurately reflect your current financial situation and/or dependency status. Please use www.up.edu/financialaid for information on special circumstances for financial aid.

Bachelor's degree holders earn 31% more lifetime earnings than workers with an associate's degree and 74% more than those with only a high school diploma.

Source: U.S. Department of Education

The design worked to break the information into digestible chunks that are easy to skim and process. The use of bold numbers highlights the action-items on the checklist, while highlighting within the text draws the reader's eye to crucial information. Graphic elements add variety, while photos and testimonials emphasize that the student is part of our community and not alone in the process.

POCKET FOLDER

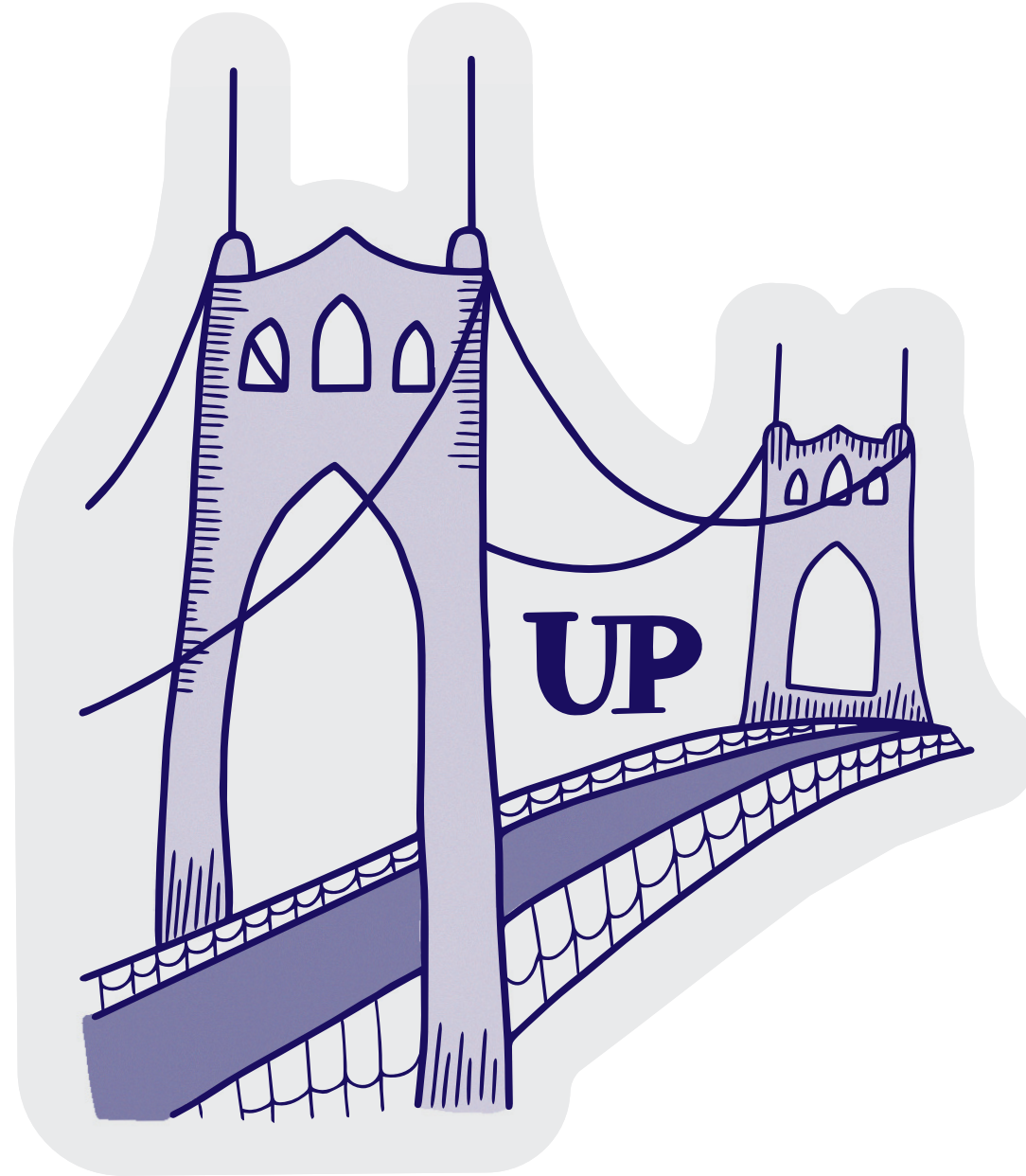


9x10" Pocket Folder with Brochure, Financial Aid Letter and Sticker

We increased the size of the pocket folder to match the size of the Admissions admitted student packet. Photos of real students to help our audience gain a sense of connection with their peers on campus and see themselves at UP.

STICKER

Ultimately, financial aid is a gift, so to emphasize this, we added a sticker as a welcoming gift for our admitted students. But this isn't just a generic sticker or something generated by AI. Our sticker of the St. Johns Bridge, a famous Portland landmark just two miles from campus, was hand-drawn by one of our designers, adding a personal touch that reflects our brand and the personal attention students receive at UP. It's also a design that is echoed on the envelope and in the suite of Admissions materials students have likely seen.



2.5" Hand-Illustrated Sticker



ENVELOPE

To build excitement and enthusiasm, we added design elements to the envelope that would compel students to want to open it. From the bold use of type to the hand-drawn images to copy on the front, our goal was to get students excited to be aligned with our brand, and eager to find out how UP would help them afford their college education.



10x13" Envelope, 1-color UP Purple