



# Enrollment Pain Point Audit

Custom Results Report for **Fresno City College**

# Community College Executive Forum

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# Executive Summary

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## Our Approach to the Enrollment Pain Point Audit

The enrollment experience is often segmented into categories or steps students must accomplish before Day 1 of class. This report breaks the enrollment process into eight such categories. Page 6 of this report lists the steps in the enrollment process completed by the EAB research team during an on-campus visit. Researchers entered campus with little prior knowledge of the institution to guide them—much like real college applicants—and a goal of getting as far through the college enrollment pipeline as possible guided solely by staff, students, or resources on campus. Due to federal law, individual researchers were unable to submit Free Applications for Federal Student Aid (FAFSA) and evaluate the processing timeline or application verification process on member campuses. This limitation did not prevent evaluation of individual steps in the enrollment process as well as the holistic experience.

Each campus is unique from the next: our onsite observations take place in rural, urban, and suburban settings at institutions of various sizes, cultures, and demographic makeups. The only constant across these visits is our steadfast adoption of the new student perspective. Despite vast experience in higher education, members of the research team approach each campus as a new student would by relying on campus signage, student advice, and staff instructions to guide us from start to finish. In a few instances, research team members are able to register for classes. However, in the majority of onsite visits, campus procedures prevent such progress.

## Guiding Principles to Prevent Early Attrition from Application Through the First Semester

Our most recent best practice research on student success is strongly influenced by the results of the Enrollment Pain Point Audits conducted in the summer of 2014. For this research, we conducted over 200 interviews with administrators, staff members, and pored over the literature on student enrollment: culminating in a white paper, a book, and an implementation toolkit.

Findings from the secret shopping visits added invaluable student perspectives to the traditional EAB best practice research process. This research uncovered four distinct opportunities for optimizing new student intake and preventing early attrition from application through the first semester.



### Access these findings in on our website:

[\*Eliminating Enrollment Pain Points: Five Strategies to Increase Applicant Conversion Rates\*](#)

[\*Preventing Early Attrition: Simplifying and Supporting Critical Student Decisions from Application Through the First Semester\*](#)

- Supporting Optimal Financial Decisions
- Guiding Intentional Academic Decisions
- Minimizing First Semester Dropout

# Executive Summary (cont.)

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## **In This Report**

The layout of this report is specifically designed to highlight areas of strength and weakness identified throughout the auditing process. Each section of the report (e.g., Welcome and Campus Navigation, Application and Admissions) corresponds to one of the onboarding steps necessary to enroll at your college. At the top of each of these pages, a gauge illustrates your college's overall performance on that step in comparison to the baseline student experience, located adjacent to the illustration. The center of the gauge represents the baseline expectation.

The gray box at the bottom of each of these pages includes quick wins, as well as references to best practices and tools that are tailored for your college based on our team's experience on your campus. All referenced best practices and tools are excerpts of several EAB studies, including *Eliminating Enrollment Pain Points*, *Preventing Early Attrition*, and *The Shifting Enrollment Landscape*.

The diagnostic tools section includes customized questions based on our observations of your enrollment process. Members use these discussion questions as a starting point for faculty and/or administrative meetings as well as a self-reflection exercise.

## **Next Steps**

Our aim in this customized report is to give members a third-party perspective on their onboarding processes, with resources at the end to guide discussion of the results with the appropriate staff or task force on campus. Team members interested in continuing this discussion are encouraged to view recorded webinars and read the studies *Eliminating Enrollment Pain Points* and *Preventing Early Attrition*.



# Findings

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SECTION









1

# Our Experience on Your Campus

The following list segments the onboarding process into eight steps students are often required to accomplish before Day One of class. The items that are checked on this list are those steps in the enrollment process completed by Forum researchers during an on-campus visit in the enrollment period for the Spring 2019 semester. Note that this list is not meant to endorse any one model or order of onboarding. Some institutions, for instance, direct students to advising immediately after application, while others require placement testing as a prerequisite for an advising meeting.

To replicate the student experience as closely as possible, researchers entered campus with little institutional knowledge to guide them. Their goal was to get as far through college enrollment as possible in one day guided solely by college staff, students, or resources. Researchers approached each step by mimicking a prospective student's possible work or family responsibilities and therefore could only spend a limited number of hours on campus. Assessments were not negatively or positively impacted by the number of enrollment steps completed; each step in the onboarding process was evaluated in isolation for the purposes of this report.

## Onboarding Steps Assessed in This Report

	Welcome and Campus Navigation	<input checked="" type="checkbox"/>
	Application and Admissions	<input checked="" type="checkbox"/>
	Advising and Career Counseling	<input checked="" type="checkbox"/>
	Placement Testing	<input checked="" type="checkbox"/>
	Financial Aid Services	<input checked="" type="checkbox"/>
	Orientation	<input checked="" type="checkbox"/>
	Scheduling and Registration	<input type="checkbox"/>
	Payment and Business Office	<input type="checkbox"/>

Source: EAB interviews and analysis.

# Welcome and Campus Navigation

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During the Welcome and Campus navigation phase, the baseline student experience is one in which students are able to navigate a new campus environment with ease. This means students can quickly find the correct starting point for application without asking passersby for assistance or wandering on campus without guidance. Campus environments (e.g., building facades, surrounding neighborhoods, construction, lawn upkeep, etc.) were not considered but signage and available directions were evaluated.

- ✘ **Limited Campus Signage Directing Students to Enrollment Starting Point:** As the EAB researcher approached the **Fresno City College** campus from the intersection of North Maroa Avenue and East Weldon Avenue, she saw signs and banners indicating the campus's location. While she located the Student Services building via an on-site campus map and further signage, she did not see any signs directing her to the Admissions office specifically. Large and clearly-marked signs at all campus entry points directing prospective students to their starting point eliminates any initial confusion and creates a sense of welcome. Additionally, detailing what the Student Services building houses (e.g., offices of Admissions, Registration, Financial Aid) on a campus map can also help students navigate the enrollment process.
- ✔ **Parking Designated for Visitors and Prospective Students:** Signs at the main entrance of campus indicated that visitors can park in any metered spaces. The metered spaces were conveniently located in the parking lot near the campus's main entrance. Since parking guidelines often vary by college and campus (e.g., parking pass requirements for specific spaces or lots), reserved parking near the main entrance for prospective students and visitors—and signage that guides them to those spaces—removes an early barrier for students visiting campus to enroll.
- ✔ **Internal Signage and Centralized Office Location Assist Navigation:** The centralized location and clear signage for the registration, college relations, financial aid, health services, and international student offices enables students to access the services that they need to enroll easily and efficiently. In addition, campus staff members provided additional navigation assistance, directing the EAB researcher to relevant points on campus as needed.

# Application and Admissions



During the Application and Admissions phase, the baseline student experience is one in which students are able to complete an application in full while on campus and progress to the next step in the enrollment process without significant delay. Students with baseline experiences also immediately receive a notice of acceptance and a student identification number upon submission of an application. We consider this to be a critical process step as college enrollment is contingent on these items. Students are also given an overview of the onboarding process and directed to the next enrollment step.

- ✓ **Frontline Employees Available for Personalized Application Support:** When the EAB researcher approached the registration window to begin the application process, the front desk employee gave her critical information regarding first steps of online application, such as the processing period. The registration desk employee directed the EAB researcher to a dedicated space, the Web Room, for application assistance. The employees in the Web Room provided her with an online application and answered questions during the application process. This personalized assistance during the application process helps students feel comfortable while beginning enrollment.
- ✓ **Straightforward Online Application Process Simplifies Admissions:** Students can access the online application via a call-to-action button on the website, which lists out four steps of enrollment (application, orientation, counseling, and registration). The online application was straightforward, and the EAB researcher could complete it even without immediate access to detailed personal information. After creating an account using her email ID, the EAB researcher completed the entire application within 20 minutes. The application did not need any additional documents, however, she needed to select a major to apply (although that selection could be changed later, according to a Web Room employee). The Web Room employee also helped the EAB researcher print the application confirmation page. Removing common barriers, such as technical roadblocks and document requirements, within the application process helps expedite the enrollment process.
- ✗ **Next Steps Not Clearly Outlined:** The registration desk employee did not outline the next steps in enrollment in-person or provide a checklist to the EAB researcher. Six hours after the initial application, the EAB researcher received multiple emails confirming the application and noting the non-resident fee per unit, a student ID number, and a short description of the four enrollment steps. Since there was a delay between application and the confirmation emails, the EAB researcher was unsure how to proceed with same-day enrollment when she was on campus. She did receive an enrollment checklist from the College Relations office later, though she was only directed to that office upon her insistence.

## Recommendations for Refining Application and Admissions

### Quick Wins

**Provide Comprehensive Review of Onboarding To Do List:** New applicants at **South Puget Sound Community College** are provided with an enrollment checklist at the time they apply. In follow-up, student-facing staff at the college carefully review the checklist with students in-person and encourage students to take notes and ask questions. Encouraging the registration desk at **Fresno City College** to provide an enrollment checklist, that students usually receive later in the College Relations office, can ensure students know each upcoming step in the process.

### *EAB Tools and Best Practices (See Report Appendix)*

**Missing Step Enrollment Prompts and Templates**  
*Pages 24-30*

**Non-Cognitive Student Needs Intake Survey**  
*Page 31*



# Application and Admissions (continued)



During the Application and Admissions phase, the baseline student experience is one in which students are able to complete an application in full while on campus and progress to the next step in the enrollment process without significant delay. Students with baseline experiences also immediately receive a notice of acceptance and a student identification number upon submission of an application. We consider this to be a critical process step as college enrollment is contingent on these items. Students are also given an overview of the onboarding process and directed to the next enrollment step.

- ✘ **No Immediate Student ID Number Provided:** The Registration desk and Web Room employees informed the EAB researcher that it would take 24 to 48-hours to process her application and issue a student ID number. The lack of a student ID number proved to be a roadblock for her in completing every additional step of the enrollment process. The EAB researcher was only able to complete these additional steps due to her continued persistence (e.g., repeated requests to staff members). A delay in providing a student ID number lengthens the enrollment process for many students and can lead to student attrition during the onboarding process.
- ✘ **Minimal Follow-up to Complete the Application Process:** Beyond the initial welcome emails, the EAB researcher did not receive any further nudges via email, text, or phone to continue the enrollment process. Follow-up nudges with clear next steps ensure that prospective students have the information and reminders to complete enrolling.
- ✔ **Complete Information Provided at the International Students' Office (ISO):** A staff member at the ISO spoke with the EAB researcher in private about enrolling and transferring as an international student. She offered advice based on the EAB researcher's career plans and visa status, in addition to providing a comprehensive information packet on international student enrollment. The staff member highlighted important enrollment deadlines, next steps, and tuition figures, and made sure the EAB researcher felt comfortable contacting her with additional questions.

## Recommendations for Refining Application and Admissions

### *Quick Wins*

**Encourage Undecided Students to Visit Career Counseling:** Undecided students often underutilize the resources available in career counseling offices. Front-desk staff in the advising center at **Clackamas Community College** ask students about their intended major when they sign up for an advising session. If students are undecided about their major, front-desk staff direct students to career counseling first.

### *EAB Tools and Best Practices (See Report Appendix)*

**Non-Academic  
Resource Matrix**  
*Pages 32-33*

**Immediate ID  
Provision**  
*Pages 34-35*

# Advising and Career Counseling



During the Advising and Career Counseling phase, the baseline experience is for students to receive an interpretation of their placement testing results as they relate to course registration. Students are also able to discuss career and academic goals and best-fit programs with college staff. At some institutions, these conversations occur within a single office, while on other campuses, students are directed to a separate career services office after meeting with an academic advisor. Meeting the baseline experience for this step requires students have both conversations during onboarding, as well as an overview of entry requirements for academic programs of interest, and a discussion of non-academic considerations for college success (e.g., financial aid). Students should also be directed to the next step in the onboarding process.

- ✘ **Walk-In Advising Available, but Discouraged without Student ID:** When the EAB researcher requested a same-day advising appointment, staff members at the registration desk and the Web Room asked the EAB researcher to return to campus with a student ID. These staff members did not mention how to schedule a future advising appointment, which presents logistical challenges for students who must schedule appointments around other external commitments (e.g., employment, childcare). When the EAB researcher repeatedly insisted that she could not return to campus, the registration desk staff pointed her to the College Relations. Instead of asking students to return with a student ID, freely encouraging advising conversations (even ones that are general in nature) early in the enrollment process can ensure that students progress through other enrollment steps without undue delays.
- ✔ **Guidance Provided Through Frontline College Relations Staff:** The front desk staff member at the College Relations office explained key enrollment terminology and processes to the EAB researcher. He provided her with an admissions packet that included useful information (e.g., student logins, portal access, enrollment checklist, campus map). He also walked the EAB researcher through some of the material, taking extra care to explain course-related jargon. When the EAB researcher requested to meet with an academic advisor to map her courses, the staff member informed her that advisors cannot accommodate appointment requests for applicants without student IDs. However, due to her persistence, the staff member and academic advisor did eventually permit an immediate appointment.
- ✔ **In-depth Academic Counseling Ensured in Walk-In Advising:** The academic advisor provided detailed information on course, college, and career-related topics (e.g., transfer pathways, general education curriculum, career outcomes, popular programs). By explaining everything in simple terms and highlighting key information on a paper handout, the advisor ensured that the EAB researcher felt prepared to make her course selections. He also asked questions to make appropriate recommendations for next steps, such as placement testing and financial aid. The EAB researcher left with a positive impression of **Fresno City College's** courses and student career outcomes.

## Recommendations for Refining Advising and Career Counseling

### Quick Wins

**Offer Drop-In Advising Sessions Prior to Assessment:** New students are often uncertain about their intended educational and career path. Advising staff at **Merritt College** encourage undecided students to sign up for drop-in advising sessions prior to placement testing. Students discuss their interests and possible academic tracks during these sessions, and advisors emphasize the importance of studying before placement tests. Additionally, advisors explain to students that acceptance into some programs is contingent on placing into college-level coursework.

**Advisors Encourage Undecided Students to Take Career Interest Inventories:** Students undecided about their educational path benefit from completing self-assessments that allows them to better understand the compatibility of their skills and interests with specific careers. Advisors at **South Puget Sound Community College** encourage new students to complete career inventories after their initial advising session.

### *EAB Tools and Best Practices (See Report Appendix)*

**Jargon Reduction Audit**  
Pages 36-37

**Higher Ed Terminology Translation and Jargon Reduction Exercises**  
Pages 38-44

**Jargon-Free Program Maps**  
Pages 45-47

# Placement Testing

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The baseline student experience during Placement Testing is one in which students are given the right information and a quiet testing environment free of distractions to perform their best on a college placement exam. Prior to sitting for a placement exam, students should understand how the assessment is structured and how scores are used for course placement. This pre-assessment information should include practice questions and study resources for optimal performance. Students should also be directed to the next step in the onboarding process after completing their exams.

*Although the EAB researcher did not complete placement testing at **Fresno City College**, she audited this step through observation of the testing area, placement test scheduling process, and the availability of resources. The academic advisor at the College Relations office recommended the EAB researcher take an English placement test if she had spent less than five years in the United States (though he clarified that it was not required).*

- ✘ **Lack of Signage Directing Students to the Assessment Center:** The designated Assessment Center is not located within the Student Services building and the EAB researcher did not see signage directing her to the Center. Upon reaching the Assessment Center, the EAB researcher was unsure if she was in the right place until a student employee greeted her. Clear signage inside and outside the Assessment Center would help prospective students locate it without any confusion.
- ✘ **Same-Day Testing Unavailable:** According to an Assessment Center staff member, students can only take placement tests after their applications have been processed. Since new students do not need to take placement tests to enroll, this type of delay would not necessarily prevent a new student from enrolling. However, offering flexible and reliable options like walk-in testing and the occasional alternative (e.g., Saturday morning tests) make it easier for students with off-campus responsibilities (e.g., employment, childcare) to complete this step and not lose enrollment momentum or delay other enrollment steps.
- ✘ **In-Person Placement Test Information Inconsistent with Online Information:** After clicking on the "Apply Now" button on the **Fresno City College** website, Step 3 links to "Assessment Center." This webpage includes information about testing, such as required tests, the purpose of different tests, and the Assessment Center schedule. However, in person, the Assessment Center staff member did not provide this information, verbally or on paper, to the EAB researcher. Additionally, students can take placement tests on one Saturday per month. However, the placement center staff member did not know which Saturday of the next month would be designated for testing.

# Financial Aid Services



The baseline student experience during a visit to Financial Aid Services is one in which college staff members explain the concept of financial aid and possible package options to incoming students. In addition, students also receive instructions to locate and complete the Free Application for Federal Student Aid (FAFSA). After a baseline visit to financial aid services, students should understand the timeline between FAFSA submission and aid disbursement, as well as a set of next-steps and point of contact for questions. Students should also be directed to the next step in the onboarding process.

- ✗ **Minimal In-Person FAFSA Guidance Provided:** A frontline staff member at the Financial Aid office briefly explained that the researcher should submit the FAFSA, but she did not provide any additional details on its value. The staff member did not provide any additional information about financial aid eligibility, completing the FAFSA, or types of aid available. She advised the EAB researcher to come back after the online application had processed. For students unfamiliar with financial aid forms and processes, comprehensive resources, especially during peak enrollment periods, would greatly reduce confusion and uncertainty around the complex process of paying for college. Further, the staff members did not warn the EAB researcher that unscrupulous websites will charge students to complete the FAFSA. Warning students about fraudulent websites reduces the likelihood that students fall prey to these scams.
- ✓ **Important Financial Aid Information Easily Accessible on Website:** Students new to financial aid are at risk of undertaking a greater financial burden (e.g., opting for unsubsidized loans instead of subsidized loans) than necessary. The **Fresno City College** Financial Aid webpage can be accessed easily on the college website. It provides an overview of the different types of available aid, important deadlines, and other information that students need to complete the FAFSA. The online orientation also provides information on CalGrants.
- ✗ **Financial Aid Conversations Not Held Privately:** Clear signage directed students to wait in line outside the Financial Aid office until called, to protect student privacy. However, once inside the office, the counters were close enough together that the students could overhear others' conversations. Since others may be able to hear their conversations, students may feel hesitant about sharing personal information (e.g., family income, personal financial limitations). Without full information about students' financial situations, financial aid staff may not be able to connect students with the most relevant resources.
- ✓ **Dedicated Space for Completing the FAFSA:** The academic counselor in the College Relations office suggested that the EAB researcher visit the Financial Aid Lab. The Lab space within the library includes computers open for FAFSA completion as well as employees who can answer student questions. The Lab's operating hours were clearly posted nearby. Having dedicated resources to assist with FAFSA completion eases a big barrier for first-time students, who may struggle with the complexities of the FAFSA.

## Recommendations for Refining Financial Aid Services

### Quick Wins

**Explain Types of Aid Available to Students During Initial Interaction:** Students that meet eligibility criteria are often unversed in the different types of aid available. Financial aid staff at **Clackamas Community College** take several minutes to briefly describe the differences between Pell Grants, subsidized loans, unsubsidized loans, and scholarships. Though a brief description cannot cover all important topics in financial literacy, it draws students' attention to the varying opportunities to finance their educations and can result in students making more informed financial decisions.

### *EAB Tools and Best Practices (See Report Appendix)*

**Preliminary Financial Aid Estimates**  
Pages 48-50

**FAFSA Benefits Eligibility Screens**  
Page 51-54

**SMS Verification Updates**  
Pages 55-60

# Orientation

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The baseline student experience during Orientation is one in which students are provided with basic information about college policies and procedures, as well as any technological platforms used in class or to distribute institutional communications. Students should also be given an opportunity to ask any unresolved onboarding-related questions during Orientation. Students should also be directed to the next step in the onboarding process.

- ✓ **All First-Time College Students Required to Complete Online Orientation:** Orientation is one of the main avenues through which incoming students learn about the various aspects of college life, from academics, to support services, to social activities and policies and procedures. Requiring that all first-time college students complete orientation ensures that every incoming student is equipped with foundational knowledge about the college, especially the next steps of enrollment after the initial application. In addition, the online orientation sessions maximize accessibility for busy students whose off-campus responsibilities could prevent them from attending in-person sessions.
- ✓ **Orientation Covers Student Enrollment and Success in Detail:** New students at **Fresno City College** are given clear instructions (e.g., login information, recommended web browser, time to completion) before they even start the online orientation. The orientation lessons introduce the three colleges in the State Center Community College District, including **Fresno City College**. These lessons highlight the three most important steps to student success (orientation, assessment, and counseling) and cover topics essential for new students (e.g., course registration, financial aid, fees, harassment policies, academic expectations). These lessons also explain some common jargon, such as prerequisites and corequisites, in student-friendly terms. The one-question quiz at the end of each section ensures that students review the content carefully.
- ✓ **Orientation Includes Diverse Student Voices:** The orientation lessons include pictures of diverse **Fresno City College** students. Seeing a representation of the diverse student body during orientation creates a sense that any student can find their place and meet their academic goals at the college.



# Diagnostic Tools: Identifying Next Steps

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SECTION

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# Welcome and Campus Navigation

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## Questions for Team Discussion

- 1** **How can we help new students better navigate and feel welcome on our campus?** Consider the campus from a new student's perspective: where can we add signage or additional explanation to help students navigate this new environment?

- 2** **With whom do we want prospective students to interact during their first visit to campus?** Discuss with your colleagues; why is this person the right point-of-contact for campus visitors? What do we want this person to communicate? What types of student questions will they receive most often?

# Application and Admissions

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## Questions for Team Discussion

- 1** **What additional information do we want to know about incoming students?** College staff know very little about applicants when they come to campus for the first time. How can we gather data from new students upon intake, through the application or otherwise? How will we serve students more effectively with this new information?

- 2** **What are the most common questions students ask admissions staff?** Adopt the persona of various incoming student types: first-generation students, veterans, adult students, etc. What questions would they ask, and how should admissions staff respond? Discuss strategies to ensure staff have and offer the right information to help students progress toward enrollment.

- 3** **How can we provide new applicants with an overview of the enrollment process without overwhelming them?** Consider all of the steps that make up our onboarding process. What should students know right away through printed materials (e.g., number of steps to complete, average time to complete each step, etc.) and what information can wait until students can sit down with a staff person?



# Advising and Career Counseling

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## Questions for Team Discussion

- 1 Who should be students' main point of contact for major selection guidance?** Consider all of the potential people or resources students may consult when selecting an academic major. What are the virtues of these resources? What are the drawbacks? How can we guide students towards the career resources that are most likely to help them in making an informed academic major decision and career plan?

- 2 How can we prepare students for their conversations with advisors?** Students who have reflected on their past and thought about their future are better prepared to discuss majors, courses, and careers. Can we encourage students to reflect on their plans prior to an advising conversation? What would we ask a student to consider 30 minutes before the advising conversation? 1 day? 1 week?

- 3 How do we provide advisors with up-to-date information on campus policies and procedures to relay to students?** Advisors often become new students' main point of contact during onboarding, offering information outside of academic majors and scheduling. What are the challenges within our current system of communication to advisors and counselors? What are the strengths?

# Placement Testing

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## Questions for Team Discussion

- 1 Are we providing conflicting information about placement exams to new students?** Role-play with a colleague and practice explaining a placement exam as you would to a new student. How do your explanations differ? Consider how inconsistencies in explanations might affect new students on campus.

- 2 Are our current testing practices setting students up for success?** How do our testing center hours affect students with significant off-campus commitments? Are there policies that could be revised in order to ensure that every student has equal access to testing and study materials?

# Financial Aid Services

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## Questions for Team Discussion

- 1** **How would a new student engage with the financial aid website?** Where should a student start for clear, step-by-step instructions? Where can a student go to find answers to frequently asked questions? How can we present where to find critical information on the Financial Aid homepage?

- 2** **Do we have a system in place to check-in with students on the status of their financial aid?** Students often lose track of, forget about, or avoid dealing with the status of their financial aid application. Are all student-facing staff versed in financial aid FAQs? Should student services staff outside of the financial aid office check in with students on the status of their financial aid? How could we follow up without overburdening our staff?

- 3** **What resources can we provide students to encourage them to navigate the financial aid process on their own?** Are the resources on our financial aid website sufficient? How can we encourage more students to use them, while also remaining accessible for students who prefer to speak in-person about sensitive financial matters?

Source: EAB interviews and analysis.

# Orientation

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## Questions for Team Discussion

- 1** **Are we proactively giving students the option to receive personalized on-campus assistance when completing New Student Orientation?** Students main avenue for receiving critical onboarding information is through either an online or in-person orientation session. Are we providing opportunities for students to visit additional offices (e.g., financial aid, career counseling) to have specific questions answered?

Source: EAB interviews and analysis.



# Appendix:

## Excerpted Best Practices and Tools

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SECTION

3

# Tailored Practices for Your Campus

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## Best Practices and Tools Excerpted from our Publications

### **Missing Step Enrollment Prompts & Templates (pp. 24-30)**

Coordinated messaging from **Lake-Sumter Community College** and the **West Virginia Higher Education Policy Commission** offer advice and templates for email and text message campaigns that alert students of missing steps and encourage enrollment.

### **Non-Cognitive Student Needs Intake Survey (pg. 31)**

When students enroll at many community colleges, including **Fresno City College**, staff have very limited insight into new students' non-academic needs. This short survey helps advisors identify indicators of non-academic challenges that students face and enables them to connect students to internal resources.

### **Non-Academic Resource Matrix (pp. 32-33)**

Used in conjunction with the Non-Cognitive Student Needs Intake Survey, this internal document serves as a standardized reference guide for advisors that maps student concerns to campus resources. The matrix can be customized for **Fresno City College's** specific student support structure. While advisors interacting with new students use the Matrix most frequently, other colleges have distributed it to advisors and faculty across campus to help them refer students to on-campus assistance.

### **Immediate ID Provision (pp. 34-35)**

New students are prevented from completing enrollment steps until they have a student identification (ID) number. The EAB researcher's enrollment was hindered during her visit because she did not receive an ID number after applying. This practice profiles **Laredo Community College** which provides immediate student ID numbers when students apply online and in person.

### **Jargon Reduction Audit (pp. 36-37)**

Without assuming prior higher education knowledge, the EAB researcher had some difficulty comprehending some of the academic terms presented throughout the application process. Colleges and universities are making a conscious effort to audit their terminology to ensure that a high school graduate will understand it. This practice and the following tools enable college staff to re-write common academic jargon in student-friendly language.

### **Higher Ed Terminology Translation and Jargon Reduction Exercises (pp. 38-44)**

These tools accompany the Jargon Reduction Audit best practice.

### **Jargon-Free Program Maps (pp. 45-47)**

Providing students with clarity and detail about their route to completion is critical to establishing and maintaining credit momentum. This practice and associated mapping tool assists colleges with creating intuitive and easy-to-understand program maps that help students keep track of their progress.

# Tailored Practices for Your Campus

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## Best Practices and Tools Excerpted from our Publications

### **Preliminary Financial Aid Estimates (pp. 48-50)**

Despite lower tuition at community colleges, perceived affordability is still critical for low-income students. Rather than offer generalities, the **Community Colleges of Spokane** uses preliminary FAFSA data to send an estimated financial aid award that personalizes affordability for each student.

### **FAFSA Benefits Eligibility Screens (pp. 51-54)**

Access to social services is a critical need for many community college students. **LaGuardia Community College** uses FAFSA to predict social need.

### **SMS Verification Updates (pp. 55-60)**

Students are often unaware that they have been selected for verification by the federal government during the financial aid application process. The SMS Verification Tactic was used by the **West Virginia Higher Education Policy Commission** to alert students by text message that they have been selected for verification, and to nudge them to check their email for further information.

# Missing Step Enrollment Prompts

## Lake-Sumter Sends Calls to Action for Each Remaining Enrollment Step

Lake-Sumter State College sends personalized emails to applicants to alert them to remaining steps in the enrollment process. Admissions staff email applicants approximately five times during each admissions cycle. Each message provides instructions to complete a specific enrollment step such as financial aid, orientation, or registration.

Because admissions staff track each applicant's progress through the enrollment process in their student information system (SIS), they can send each email only to applicants who have not yet completed the featured step. To increase the likelihood that applicants will open the email, staff use mail merge to personalize the first line with the applicant's name.



On average, it takes admissions staff only 25 minutes to set up each email campaign and send it to all relevant recipients. However, staff must also set aside time to respond to incoming messages because many applicants reply with questions about the outlined steps.

The college has seen a substantial return on this modest investment of staff time. From 2013 to 2015, applicant conversion rates increased from 59% to 62%. This improvement generated an estimated \$191,000 in annual tuition revenue (calculated under the assumption that the impacted students enrolled in an average of 20 credits per year).

1) Assumes students enrolled in an average of 20 credits per year at in-state tuition rate.



# Not Your Typical Administrative Letter

## Informal, Jargon-Free, and Personalized Messages Prioritize Clarity

Because prospective students tend to ignore lengthy, jargon-heavy communications from college administrators, Lake-Sumter State College’s admissions staff carefully optimize their emails for length and content. Specifically, they personalize each email with the recipient’s first name to capture his or her attention, and they use informal language to ease comprehension. Each email includes a link to a landing page where applicants can complete the outstanding task online, as well as a deadline for the task. Finally, most emails are just three to four sentences long, which increases the likelihood that applicants will read the entire message.

### Prompting Next Steps with Brief Emails

*Sample Email for Applicants Missing Orientation*

The diagram shows an email template with six numbered callouts pointing to specific parts of the text:

- 1** Capture applicant’s attention with her name: Points to the salutation "Hi Jane,".
- 2** Use informal language to improve readability: Points to the main body text.
- 3** Embed links to facilitate quick action: Points to the blue link "here" in the main body text.
- 4** Add urgency with deadline—real or artificial: Points to the phrase "by August 1." in the main body text.
- 5** Include admissions director’s signature for authority: Points to the signature block including the name "John Doe" and contact information.
- 6** Keep body of email to 4 or fewer sentences: Points to the entire main body text.

The email content is as follows:


Hi Jane,

All new LSSC students are required to attend orientation. If you haven’t already registered for orientation, please do so by clicking [here](#) and following the instructions by August 1. If you have already scheduled your orientation session, please disregard this message and we will see you soon!

Let me know if you have any questions.

John

John Doe  
Director of Admissions  
Lake-Sumter State College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



[Like us on Facebook for the latest LSSC news and events!](#)

# Uncovering Barriers to Enrollment

## Applicants Hesitate to Seek Help with Removable Hurdles

Beyond reminding applicants to complete enrollment tasks, admissions staff should also ask applicants about any barriers that prevent them from completing these tasks. Often, conversations with applicants reveal removable barriers to enrollment. For example, an applicant might not have applied for financial aid because he encountered unfamiliar terminology on the Free Application for Federal Student Aid (FAFSA). Alternately, he might not have registered for courses because he lacked awareness of evening options that fit into his work schedule.

If staff identify these removable barriers before the semester begins, they can often address them in time for applicants to enroll.



### From Telling to Asking

“We were doing a good job at customer service in terms of reminding the student, ‘You need to fill out this form, and you need to fill out that form.’ But **we weren’t finding out why the student wasn’t filling out those forms**—what might have changed in their lives since they started applying, and what might be causing delays in taking the next step in the admissions process.”

*Marketing Director,  
Community College (Midwest)*

### Identifying Leaks in the Pipeline

*Common Enrollment Challenges for Applicants*



Needs assistance understanding highly technical FAFSA questions



Confused by academic jargon in course catalog and registration portal



Unable to book advisor meetings that fit into work schedule



Unaware of available resources, such as child care and transportation

# Missing Step Email Templates


## Purpose of the Tool

Missing step emails provide applicants with instructions to complete a specific outstanding task in the enrollment process. The table below describes five tasks that emails may remind applicants about, and it recommends a send date based on how much time applicants need to complete the specified action. The list beneath it summarizes six essential components of a well-designed email. Finally, adapt the five sample templates, informed in part by Lake-Sumter State College’s (LSSC) missing step emails, to address specific enrollment steps on your campus.


### List of Recommended Missing Step Emails

Email Name	Description	Suggested Send Date
<b>Orientation Invitation</b>	Prompts applicants to register for mandatory orientation	Two weeks before event
<b>FAFSA Reminder</b>	Reminds applicants to submit the FAFSA to be eligible for financial aid	Two weeks before deadline
<b>College Welcome Tour Announcement</b>	Invites applicants to attend an on-campus event where prospective students can tour the college and meet faculty and their peers	One week before event
<b>Housing Deadline</b>	Informs applicants to submit necessary paperwork to be considered for on-campus housing	One month before deadline
<b>Registration Reminder</b>	Reminds applicants to register for classes before the deadline	Three days before deadline


### Six Essential Email Components, with Examples

- 


Start the email with applicant’s name to capture their attention

▶ *Hi Jane,*
- 


Include admissions director’s signature to project authority

▶ *John Smith,  
Director of Admissions*
- 


Use informal language to improve readability

▶ *Welcome to EAB College!*
- 

Create urgency with deadlines, real or artificial, to spur action

▶ *Turn in your forms by June 1*
- 

Embed links into the text to facilitate quick action

▶ Click [here](#) to register
- 

Limit email body to four or fewer sentences for quick reading

▶ *All students must submit transcripts by August 1<sup>st</sup>. [Contact student records](#) for more information.*

# Missing Step Email Templates (cont.)

## Sample Email Templates

### Orientation Invitation

Hi Jane,

EAB Community College students are required to attend orientation. You can register by clicking [here](#). Be sure to complete the form by August 5<sup>th</sup>. Please disregard this message if you have already registered. We will see you soon!

Let me know if you have any questions.

John

John Doe  
Director of Admissions  
EAB Community College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



**1** Remind students of required attendance

**2** Acknowledge applicants who already completed enrollment step

### FAFSA Reminder

Hi Jane,


Welcome and congratulations! I see that you have been admitted to EAB college for spring term (classes begin in January), but you haven't applied yet for financial aid. Please remember that you must complete the [FAFSA](#) by the end of October to be guaranteed financial aid consideration in the spring.

Please click [here](#) to complete the FAFSA as soon as possible!

We know this can be tricky, so if you need help, please call us at 123-456-7890, or email [financialaid@college.edu](mailto:financialaid@college.edu).

Susan

Susan Smith  
Director of Financial Aid  
EAB Community College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



**3** Distinguish between fall and spring financial aid deadlines

**4** Communicate urgency with multiple links

**5** Include office contact info for more technical questions

**6** Send emails from financial aid director or staff member

# Missing Step Email Templates (cont.)

## College Welcome Tour Announcement

1 Include all available dates and times

2 Briefly explain the preview day's purpose

Hi Jane,

Since you recently asked for information about EAB Community College, I wanted to let you know about two exciting events on campus:

Washington Campus Welcome Tour–  
Monday, February 16, 2017 – 10:00 AM – 1:00 PM

Baltimore Campus Welcome Tour–  
Saturday, February 21, 2017 – 10:00 AM – 1:00 PM

During our Welcome Tours you will be able to explore the campus and sit in on a mock college class. You will also learn more about financial aid, and, if you apply on the day of the event, **we will waive your application fee!**

[Please click here to register online!](#)

Let me know if you have questions. Hope to see you there!

John

John Doe  
Director of Admissions  
EAB Community College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



3 Waive college application fee to incentivize attendance

## Housing Deadline

4 Give prospects enough time to gather necessary paperwork

Hi Jane,

All EAB Community College students have the opportunity to live in on-campus housing, which are just a few minutes' walk from class. Check them out [here!](#) They are filling up fast so remember to submit your paperwork to the residential life office by August 1<sup>st</sup>.

[Click here to download the housing forms!](#)

Let me know if you have any questions.

John

John Doe  
Director of Admissions  
EAB Community College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



5 Include link for applicants to preview housing

## Missing Step Email Templates (cont.)

### Registration Reminder

1 Explain the importance of early course registration

Hi Jane,  
Fall classes at EAB Community College (EAB CC) are starting soon! You must complete [online course registration](#) to become a EAB CC student. Classes are filling up fast so register now to ensure the best schedule.

Please feel free to call or [schedule an appointment](#) with the advising office if you have any questions!

Mary

2 Include link to academic advising page

3 Send from director of advising

Mary Allen  
Director of Advising  
EAB Community College  
1234 Street Address  
City, ST 12345  
Office: (123) 456-7890  
[emailaddress@college.edu](mailto:emailaddress@college.edu)



# Non-Cognitive Student Needs Intake Survey

## Purpose of the Tool

Colleges collect a wide range of information on student profiles during the student application process but rarely utilize the information collected to tailor student interventions. The following sample student intake survey provides a template for a basic student intake survey that is mapped to the non-academic resource matrix on the following page. These survey questions may be integrated into the application itself or included as an addendum to the application.

<b>Student Intake Survey</b>		
<b>1</b>	<b>Do you need information about housing options?</b>	
	No	Unsure                      Yes
<b>2</b>	<b>Are you comfortable using a computer on a daily basis?</b>	
	No	Unsure                      Yes
<b>3</b>	<b>Do you have regular (daily) access to a reliable computer with reliable Internet access?</b>	
	No	Unsure                      Yes
<b>4</b>	<b>Do you plan on joining any social or extracurricular groups?</b>	
	No	Unsure                      Yes
<b>5</b>	<b>Would you like to learn more about accommodations from Disability Services?</b>	
	No	Unsure                      Yes
<b>6</b>	<b>Do you have reliable transportation to and from class?</b>	
	No	Unsure                      Yes
<b>7</b>	<b>Do you feel confident in your major and/or career pathway selection?</b>	
	No	Unsure                      Yes
<b>8</b>	<b>Are you sure of your declared program/major?</b>	
	No	Unsure                      Yes
<b>9</b>	<b>Do you plan to work while attending college?</b>	
	No	Unsure                      Yes
<b>10</b>	<b>Do you have a financial plan to pay for all present and future semesters?</b>	
	No	Unsure                      Yes
<b>11</b>	<b>Are you responsible for the care of children and/or other dependents?</b>	
	No	Unsure                      Yes
<b>12</b>	<b>Are you or a family member a veteran or a current member of the armed forces?</b>	
	No	Unsure                      Yes
<b>13</b>	<b>Do you or a family member need assistance understanding English?</b>	
	No	Unsure                      Yes
<b>14</b>	<b>Do you have trouble feeding yourself or a family member?</b>	
	No	Unsure                      Yes
<b>15</b>	<b>Do you feel comfortable managing stress?</b>	
	No	Unsure                      Yes

Source: EAB interviews and analysis.

# Non-Academic Resource Matrix

## Purpose of the Tool

Fill out this worksheet with all contact information for all resources in the column titled “Suggested Resources” as well as any other institution-specific resources identified on your campus. Once the table is as comprehensive as possible, formalize the information into a handout for *all* faculty and staff; urge them to keep the handout in plain sight in their offices. Student responses to the survey questions in Practice 3 should guide faculty and staff toward appropriate resources with which students should be connected. In addition, staff and faculty should refer to the handout whenever a student expresses a non-academic need.

Consider the student intake survey as only one supplemental aspect of understanding student profiles, and ensure that faculty and staff continue to gather pertinent information on student needs.

Topic	Questions	Suggested Resources	
<b>Housing</b>	1	<ul style="list-style-type: none"> <li>• Student housing</li> </ul>	
<b>Technology</b>	2-3	<ul style="list-style-type: none"> <li>• Help Desk</li> <li>• Computer Skills Training Workshops</li> <li>• Library</li> <li>• Open Computer Labs &amp; Hours</li> <li>• College Email Support</li> <li>• Technology-Related Grants and Scholarships</li> </ul>	
<b>Connecting with Campus</b>	4	<ul style="list-style-type: none"> <li>• Student Activities Center</li> <li>• Clubs &amp; Organizations</li> <li>• Intramural Sports</li> <li>• Student Counseling</li> <li>• Social Media Resources</li> </ul>	
<b>Disabilities</b>	5	<ul style="list-style-type: none"> <li>• Disability Services</li> <li>• Assistive Technology</li> <li>• Student Counseling</li> </ul>	
<b>Transportation</b>	6	<ul style="list-style-type: none"> <li>• Transportation Hotline</li> <li>• County/City Transit</li> </ul>	
<b>Academic Decisions</b>	7-8	<ul style="list-style-type: none"> <li>• Career Counseling</li> <li>• Advising</li> <li>• Mentor Programs</li> <li>• Occupational Outlook Handbook (Often state/region specific)</li> <li>• Career Coach (EMSI) or other Labor Market Software</li> <li>• Interest Inventories</li> <li>• Career Assessments</li> <li>• Student Success Coach</li> <li>• Internship Opportunities</li> </ul>	



## Non-Academic Resource Matrix (cont.)

Topic	Questions	Suggested Resources	Additional Space (include phone number and website)
<b>Finances</b>	9-10	<ul style="list-style-type: none"> <li>• Financial Aid Office</li> <li>• Veterans’ Benefits</li> <li>• Money Management Workshop</li> <li>• Financial Literacy Programs</li> <li>• Benefits Access Support</li> <li>• Loan Counseling</li> <li>• Pre-loan Debt Management Workshop</li> <li>• Scholarships</li> <li>• Textbook Vouchers</li> <li>• Student Employment</li> <li>• Tax Filing Support</li> <li>• TRIO</li> </ul>	
<b>Family</b>	11-13	<ul style="list-style-type: none"> <li>• College Child Care Services</li> <li>• Veteran Services</li> <li>• Translation Services</li> <li>• ESL Classes</li> <li>• ESL Office</li> <li>• ESL Support Groups</li> </ul>	
<b>Health</b>	14-15	<ul style="list-style-type: none"> <li>• College Health Center</li> <li>• Fitness and Wellness Services</li> <li>• Counseling</li> <li>• Food Pantry</li> <li>• Community Clinics</li> <li>• Public Benefits Office</li> </ul>	

# Breaking Applicants' Momentum

The first barrier students encounter when attempting to self-serve is unexplained delays for their timely progression. These delays are especially frustrating given the number of prospective students who expect to complete the enrollment process during a single campus visit, an often impossible feat.


At most community colleges, students must present a college-issued identification number (ID) at each step in the onboarding process. During on-campus visits, our research team could not sit for a placement test or speak with an advisor until we could present an ID.


On average, students wait between 24 and 48 hours from the time they submit an application to receive an admission letter with a student ID. This page outlines several consequences of this delay, all decreasing the odds of student enrollment at the institution.


## Delay in Providing ID Halts Progress on Enrollment


### Even Short Admissions Delay Has Negative Effects



 **Halts progress:** Planned placement exams not available for students without ID numbers


 **Damages confidence:** Expected instant acceptance to open-access college may lead to discontinued enrollment

 **Requires rescheduling:** Unanticipated delay interferes with time commitments, forcing new travel arrangements



**90%**

Percentage of colleges profiled in CCEF enrollment pain point visits with 24-48 hour minimum waits to receive student ID numbers after application submission



**In, Out, and Gone for Good**

“Every time a student leaves campus, there’s at least a one in five chance they won’t come back.”

*Community College President*

# Immediate ID Provision

In 2012, Laredo Community College began to automatically admit all applicants to the college. Any student who submits an application, either in-person or online, is issued an ID number immediately, effectively enabling students to proceed through the rest of enrollment.

The technological investment to support this change is minimal. Colleges with similar policies note that most student information systems (SIS) can automatically generate a student ID number for each new applicant. If an institution uses a separate web portal for online applications, as Laredo does, students can immediately receive a temporary ID that can be replaced later with a permanent student ID number.

Leaders can expect some staff resistance to an automatic college acceptance policy, particularly a fear that the policy will degrade the thoroughness of incoming admissions applications.

However, staff at Laredo observed that across thousands of students admitted, less than 3% had transcript discrepancies requiring follow-up. Students who were missing paperwork such as high school transcripts and residency forms submitted them when prompted, so the college could comply with state regulations, but on *students'* timelines, not administrators'.

## Laredo Sends ID Numbers Within Minutes, Not Days

### Simple Process Produces Meaningful Results

1

**Applicant submits completed application online or in-person**

Recruiters encourage students to complete paper applications during on-site visits and community events. Since fall 2011, prospective students are able to submit online applications through Laredo's homegrown application portal.

2

**College issues ID number**

Recruiters encourage students to complete paper applications during on-site visits and community events. Since fall 2011, prospective students are able to submit online applications through Laredo's homegrown application portal.

3

**Student proceeds through remaining enrollment steps**

Upon receiving either a permanent or temporary ID number, students are allowed to complete remaining enrollment steps (placement testing, advising, etc.). Online applicants receive an acceptance letter in the mail with a permanent ID number to replace their temporary number.

2.5%

Applications with **discrepancies** that required follow-up in fall 2014

75%

Laredo's applicant to enrollee **conversion rate** in fall 2014

#### **Institution in Brief: Laredo Community College**

- Located in Laredo, Texas (midsize city)
- Enrolls 8,726 undergraduates
- 37% full-time enrollment



# Do You Speak Higher Ed?

Once students find the right content online, it is critical for them to comprehend the information. Unfortunately, higher education as a sector often uses foreign, industry-specific jargon, which students struggle to comprehend—especially first-generation college attendees, who make up over one-third of community college students.

Confusion born from students' inability to understand college jargon often damages students' chances of progressing through enrollment. Too often, students reading college websites either give up on enrollment or get in line at their community college for help from a staff professional.

Please refer to page 38, Higher Education Terminology Translation Exercise, part of this publication's Implementation Toolkit.

## Students Unfamiliar with College-Specific Jargon



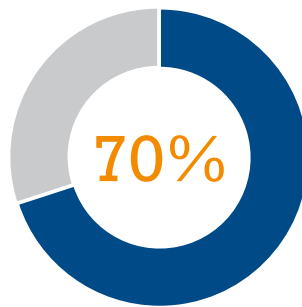
### Seemingly Foreign Language

#### *Common Higher Education Terminology*

- Prerequisite
- FAFSA
- Credit Hours
- Syllabus
- Semester
- Course Catalog
- Bursar
- Course Sequence
- Registrar
- Liberal Arts
- Distribution
- Developmental
- Disbursement
- Program of Study
- Elective
- Work Study
- Cutoff Score
- Remedial
- Subsidized
- Certificate
- Withdrawal

### Jargon Abundant on Student Portals

#### *Community College Journal Study of Accessibility and Usability of College Websites*



Portion of students surveyed who were confused by higher education terms on institutional websites<sup>1</sup>

“We realized that we were explaining things from the point of view of the college, but new students don't know that language yet.”

*Dr. Joyce Romano, Vice President Student Affairs  
Valencia College*

1) n=30

Source: Erickson W, Trerirse S, et al., “The Accessibility and Usability of College Websites: Is your Website Presenting Barriers to Potential Students?” *Community College Journal of Research and Practice*, 2013; EAB interviews and analysis.

# Jargon Reduction Audit

In 2001, executives at Travelocity, an online travel agency, noticed that call and email volume to their customer service lines was at an all-time high. Most notably, most of the questions prompting customers to reach out to the customer service department were already answered in the company's online Frequently Asked Questions (FAQ) section.

Upon further investigation, Travelocity's executives uncovered the reason that their customers could not find the answers to their questions in the FAQs: that section of the website was littered with passive-voice sentences, dense chunks of text, and travel industry jargon (e.g., "forced connection," or "oversold situation") that were difficult to interpret.

To simplify their online content, Travelocity conducted a jargon reduction audit using a free, online language simplicity calculator tool called the Gunning-Fog Index. The index score represents the number of years of education a person would need to comprehend a piece of text. Travelocity aims to keep their website language between a score of 8 and 9.

Through this exercise, the company reduced call volume to their customer service lines by 5% at little cost.

## Translating Online Content to Student-Friendly Language



### Simplifying Content Reduces Call Volume



In 2001, measured spike in call and email volume for FAQs answered online



Gunning-Fog Index calculates reading level required to read online content



Removed jargon, used active voice, and simplified language used on website

#### BEFORE

Your airline may require either your e-ticket number or confirmation number when checking in. Both of these numbers are available in the Passenger and Ticket Information section of your itinerary.

Gunning Fog Index Score: **15.33**

#### AFTER

Be sure to bring your Travelocity itinerary when you check in. This includes your e-ticket and confirmation number which you may need to show when you check in.

Gunning Fog Index Score: **9.88**

**5%**

Drop in call volume to Travelocity customer service call center after website content simplification



# Translating Higher Education Terminology

Colleges can use a similar audit on their own websites. In 2013, the University of North Carolina (UNC) at Chapel Hill hired Eric Johnson as Director of Communications for Financial Aid and Scholarships. His first responsibility was to take the arcane language on the financial aid website and translate it into content that students and parents can easily understand.

Few community colleges have sufficient resources to hire new staff members in the financial aid office, particularly in an era of constrained budgets. However, colleges can conduct these audits without dedicated staff.

Consider including website audits as part of staff training exercises and professional development retreats. New staff who enter higher education for the first time are well-suited to identify and translate jargon into easily understandable language.

Please see page 42 for the Higher Ed Jargon Reduction Exercise, part of this publication's Implementation Toolkit.

## Simplifications Make Website More Accessible



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

### Bringing in a Fresh Pair of Eyes

*Financial Aid Outsider Simplifies UNC's Financial Aid Website*



UNC staff identify financial aid language as barrier for nontraditional students



Hired Eric Johnson as Director of Communications for Financial Aid in 2013



Johnson's first duty was decoding financial aid jargon into plain English for students

#### BEFORE

The Carolina Computing Initiative ensures that students have access to high-quality and affordable technology. Through CCI, all students are required to own a laptop computer, and grants are available to help eligible students purchase their laptops.

Gunning Fog Index Score: **17.2**

#### AFTER

UNC requires you to have a laptop computer. If you can't afford one, grants are available.

Gunning Fog Index Score: **10.7**



#### Institution in Brief: UNC at Chapel Hill

- Four-year research university
- Located in Chapel Hill, North Carolina (small city)
- Enrolls 29,127 students (18,370 undergraduates)

# Higher Ed Terminology Translation Exercise

## Website Jargon Reduction Audit

### Purpose of the Tool

This worksheet identifies language commonly used by administrators and in new-student onboarding materials (e.g., handouts, webpages, etc.). This worksheet is designed as a group or individual activity to create student-friendly translations of technical jargon.

### Directions

- Complete worksheet in a group or alone
- Fill in the translation section with a brief and simple definition of a term (recommended length: 7-10 words)
- Use Gunning Fog Index (GFI) online tool to assess the readability of your translation ([www.gunning-fog-index.com](http://www.gunning-fog-index.com))
- Share group or individual translations with colleagues and determine most suitable, concise, and lowest GFI score translation
- Optional: Formalize into handout for all staff, new hires, and even students
- Optional: Consider with staff how these translations may vary based on a student or parent audience

Admissions		
Term	Translation	Gunning Fog Index Score (GFI)
High School Transcript		
GED		
ESL		
Credit for Prior Learning		
Certificate		
Degree		
Transfer		
Residency		
Early College Enrollment		
Prospective Student		
Course Load Status		
Class Status		
Tuition and Fees		
Tuition		
Payment Plan		
Tuition Schedule		
Subsidy		
Fee Schedule		
Tuition and Fee Refund		
Withdrawal		
Registration Fee		

Source: EAB interviews and analysis.

## Higher Ed Terminology Translation Exercise (cont.)

Financial Aid		
Term	Translation	Gunning Fog Index Score (GFI)
Accreditation		
Additional Eligibility		
Adjusted Gross Income		
Associate Degree		
Attending School		
Award Amount		
Award Letter		
Award Year		
Cancellation		
Collection Agency		
Collection Charges		
Cost of Attendance (COA)		
Data Release Number (DRN)		
Default		
Default Rate		
Deferment		
Delinquent		
Dependency Status		
Direct Loan		
Disbursed Amount		
Disbursement		
Discharge		
Eligible Noncitizen		
Eligible Program		
Enrollment Status		
Entrance Counseling		
Exit Counseling		
Expected Family Contribution (EFC)		
FAFSA		
Federal Pell Grant		



## Higher Ed Terminology Translation Exercise (cont.)

Financial Aid, (cont.)		
Term	Translation	Gunning Fog Index Score (GFI)
Federal School Code		
Federal Student Aid		
Federal Student Aid PIN		
Federal Student Loan		
Federal Work-Study		
Financial Aid Offer		
Financial Aid Package		
GED		
Grace Period		
Grant		
Guaranteed Student Loans		
Income Tax		
Independent Student		
Interest		
Legal Guardianship		
Lender		
Loan Forgiveness		
Loan Holder		
Loan Services		
Master Promissory Note		
Merit-Based		
Need-Based		
Net Price		
Net Price Calculator		
Overpayment		
PLUS Loan		
Private Loan		
Promissory Note		
Regular Student		
Repayment Date		

## Higher Ed Terminology Translation Exercise (cont.)

Financial Aid, (cont.)		
Term	Translation	Gunning Fog Index Score (GFI)
Satisfactory Academic Progress		
Scheduled Award		
Scholarship		
Standardized Test		
Student Aid Report		
Subsidized Loan		
TRIO		
Unsubsidized Loan		
Verification		
Work-Study		
Placement Tests		
Evaluation of Prior Coursework		
COMPASS/ACCUPLACER		
ACT		
Remedial		
Developmental		
Cutoff Score		
Accelerated		
Placement		
Registration		
Registrar		
Elective		
Prerequisite		
Course Load		
Credit Hour		
General Degree Requirement		
Additional Terms		
GPA		
Office Hours		

# Higher Ed Jargon Reduction Exercise

---

## Purpose of the Tool

The following exercise may be used with staff members to conduct a jargon reduction audit, so that students and other audiences may more effectively navigate the college website, newsletters, handouts, and other written materials.

## Directions

- Ask IT Department staff to identify top 10 college webpages with highest volume of traffic
- Brainstorm all student- and parent-facing material that generates a high volume of in-person traffic
- Provide staff with print copies of webpages identified by IT staff and additional self-identified webpages
- Ask staff to complete the following tasks:
  - 1. Reduce multisyllabic words:** Underline all words with more than two syllables. Identify and replace them with shorter words (even if this requires using multiple words in the place of one multisyllabic word)
  - 2. Remove passive voice:** Ask staff to highlight all language in passive voice; rephrase sentences to be in active voice
  - 3. Group related information:** Condense all text that pertains to the same topic in a specific area and use white space to separate it from information pertaining to another topic
  - 4. Translate jargon:** Use the results from the Higher Ed Terminology Translation Exercise (page 40) to replace jargon (where appropriate) with translations for a non-higher education audience (this step is especially effective when completed with new employees unfamiliar with higher education jargon)

## Higher Ed Jargon Reduction Exercise (cont.)

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### Example:



Original Text:

#### Take the College Placement Test

After you have been admitted to the college, you must take the **college placement test**. Schedule your test by going to [www.eabcc.edu](http://www.eabcc.edu) or by calling. If you have successfully completed a **college-level** English or math course from another college or have taken EABCC placement testing at an earlier date, you may qualify for an **exemption** from all or part of the test. In order to be **eligible** to participate in a specific academic program and/or enroll in **credit classes**, students must achieve a **minimum score** of 33 out of 120 on the reading portion of the test.

**Gunning Fog Index Score: 12.65**



Revised Text:

#### Take the College Placement Test

If you are an admitted student, you must take a test that measures what classes you are ready to take, called "Placement Tests." It's important to prepare for this test because it could impact how fast you can graduate if you place into classes that do not count towards your degree. To enroll in classes that do count towards your degree, you need score at least 33 out of 120 on the reading section.

You'll need an appointment to take the test. You should schedule it by going to [www.eabcc.edu](http://www.eabcc.edu) or by calling (XXX-XXX-XXXX).

There are two reasons you may not need to take the test.

- 1) If you completed and passed an English or math course for college credit at another school
- 2) If you took the placement test at EABCC in the past

**Gunning Fog Index Score: 8.79**

Key:

*Passive Voice*

**Jargon**

Multisyllabic

# Providing a Clear Route to Completion

Many colleges have implemented Guided Pathways reform efforts as a way to streamline students' educational paths, while still providing opportunities for academic and career exploration. One of the most critical steps involves constructing and communicating program maps, which chart out a path to completion from Day 1.

While administrators and campus leaders often spend a lot of time on the changes involved in restructuring academic programming, it's important to also consider how these changes are communicated to students.

Middlesex Community College uses a visually appealing and jargon-free template to present program maps to students, advisors, and faculty. Their interactive checklist provides students with a view of an entire program map with program requirements clearly labeled and course names presented in simple terms. This easy-to-navigate platform gives students a clear picture of what is required for completion and allows them to track their own progress through a given program.

## Jargon-Free Maps Minimize Confusion, Ensure Clarity



### Simplified Maps Enable Easier Self-Navigation

*Abridged Screenshot of MCC Business Program Map*

**START here**

**1**

SEMESTER 1 – FALL	CREDITS	MILESTONE	COMPLETED
ENG 101 – English Composition I	3		<input type="checkbox"/>
BUS 110 – Introduction to Business	3		<input type="checkbox"/>
CAP 101 – Computer Applications	3		<input type="checkbox"/>
Behavioral Science elective – Recommended: PSY 101– Intro to Psychology	3		<input type="checkbox"/>
MAT 120, MAT 177, MAT 182 –or– higher level math	3		<input type="checkbox"/>
IDS 101 – First Year Experience	1		<input type="checkbox"/>
TOTAL CREDITS		16	

**4**

SEMESTER 4 – SPRING	CREDITS	MILESTONE	COMPLETED
BUS 224 – Intermediate Accounting	3		<input type="checkbox"/>
Science Elective	3-4		<input type="checkbox"/>
BUS 226 – Computerized Accounting	3		<input type="checkbox"/>
BUS 227 – Taxation	3		<input type="checkbox"/>
BUS 214 – Business Internship	3		<input type="checkbox"/>
TOTAL CREDITS		15-16	

**You've FINISHED!**

### Milestone Markers Create Clarity

- 1** Indicate a clear start and end point
- 2** Denote essential degree-advancing courses
- 3** List course names in simple terms
- 4** Adopt colors consistent with college brand

# Jargon-Free Program Mapping Tool

## Purpose of the Tool

Guided Pathways are often presented to students in the form of inconsistent or administrative language. Middlesex Community College uses a simplified jargon-free Pathways map to help students clearly identify the sequence of essential courses needed to complete their program of study. Modify the program-map template below to create your own student-facing program map. Refer to the callout boxes for essential components of a clear and consistent program map. Then, use the “Higher Ed Jargon-Reduction Audit” (Practice 5) to ensure clarity in your language.

## Program Map Template, Semesters 1 and 2

**Start Here**

Indicate a clear starting point

Semester 1	Credits	Graduation Requirement	Completed
Example: ENG 101—Composition 1	3	Yes	<input type="checkbox"/>
Example: First-Year-Experience Course	1	Yes	<input type="checkbox"/>
Example: Writing Elective—Recommended: ENG 104—Intro to Digital Writing	2	No	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
Total Credits:			

List course names in simple, jargon-free terms

Specify essential degree-advancing courses

Semester 2	Credits	Graduation Requirement	Completed
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
Total Credits:			

Provide checklist to encourage students to track their own progress

# Jargon-Free Program Mapping Toll (cont.)

## Program Map Template, Semesters 3 and 4

### Major Declaration Occurs Here

Call out critical student decision points

Semester 3	Credits	Graduation Requirement	Completed
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
Total Credits:			

Semester 4	Credits	Graduation Requirement	Completed
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
Total Credits:			

Format using colors consistent with college branding

Indicate a clear end point

***Congratulations! You've finished!***

**Other Essential Components**

- Indicate any educational on-ramps along the way
- Highlight opportunities for stackable elements, such as industry certifications and credentials

# Preliminary Financial Aid Estimates

## SFresno City College Sends Personalized Award Letters to Prospects Who Submit FAFSA

The sheer volume of university communications can make it challenging for community colleges to capture the attention of prospective students. In response, Spokane Falls Community College sends prospects personalized financial aid letters that distinguish the college based on its affordability. All prospects who list the college on FAFSA receive a letter that estimates their net cost of attendance, based on their Pell grant eligibility. Financial aid staff send about 10,000 of these letters each year.



### Early Outreach to a Targeted Prospect Pool



Sends financial aid award estimates to all prospects who list SFresno City College on FAFSA



Calculates net cost of attendance for each prospect based on Pell eligibility



Mails letters out within one week of receiving prospect's FAFSA record



## 10K+

Number of financial aid estimates sent out per year

### Letters Highlight Low Cost of Attendance

#### *Financial Aid Estimate Letter (Simplified)*

Tuition and Fees	\$5,389
Estimated Pell Award	− \$5,645
<b>Net Cost</b>	<b>\$0.00</b>

#### Possible Additional Funding Sources

- State grants
- Institutional grants
- Work-study earnings
- Student loans

The graphic above includes a simplified version of the letter template. The template includes the college's annual tuition and fees, the prospect's estimated Pell award, and the net cost of attendance. Importantly, many prospects have no net cost because full-time enrollment at the college costs less than the value of a full Pell grant.

The template also includes a list of state and institutional aid sources for which the prospect qualifies, including grants, loans, and work-study programs. Even prospects who qualify for full Pell grants may rely on these sources to cover the indirect costs of their education.



# Making a Competitive First Offer

## Early Financial Aid Estimates Promote Application and Matriculation

Financial aid staff at Spokane Falls Community College typically mail estimate letters within one week of receiving a prospective student's Institutional Student Information Record (ISIR).<sup>1</sup> As a result, prospects receive these letters as early as January. This reminds them of the affordability of community college before they receive financial aid offers—or in many cases admissions offers—from the universities to which they applied.

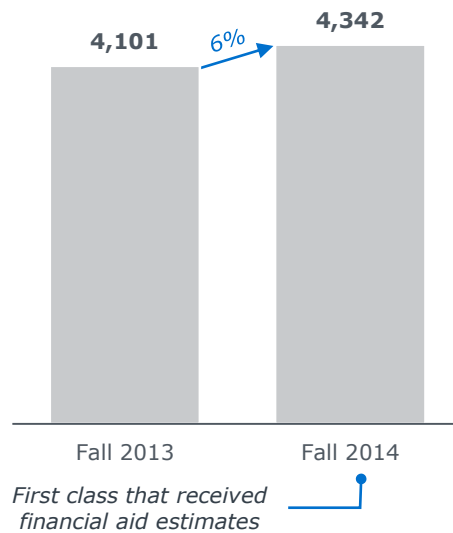
### Putting University Costs in Perspective

“When students start hearing from the four-year universities they applied to, they see that the cost of attendance is \$20,000 once they include the dorms and all the other things they might have to pay for if they leave town. **We get our preliminary letter to them first.** Hopefully their parents are looking at our letter. Then, as those other award letters come in, they have a little more perspective.”

*Marjorie Davis, Director of Financial Aid  
Spokane Falls Community College*

### Driving Enrollment Growth

FTE at Spokane Falls Community College



The college first implemented this practice with applicants for the fall 2014 semester. In that semester, the college experienced a 6% increase in full-time enrollment (FTE) from the previous fall. Although the letters were one of several concurrent recruitment initiatives, administrators believe that they contributed to this substantial enrollment increase.

1) Colleges receive an ISIR for each student who lists the college on FAFSA.

# Preliminary Financial Aid Estimate Template

## Purpose of the Tool

Preliminary financial aid estimates demonstrate the affordability of community college to prospective students. College administrators can send these estimates to any prospects who request that the institution receive their FAFSA information. Financial aid staff can use this information to estimate each prospect's net cost of attendance based on his or her Pell eligibility. Use the template, informed by Spokane Falls Community College's preliminary financial aid letter, to show prospective students the affordability of your college's tuition and fees when supplemented with financial aid.

## Sample Financial Aid Letter

Dear Student,

Congratulations and welcome to EAB Community College! EAB CC's Financial Aid Department is here to help you access financial resources to meet your education expenses.

Based on a **preliminary** review of your 2017-18 FAFSA information, we are pleased to provide award **estimates** that show how financial aid could cover your full-time tuition and fee expenses.

EAB CC's Financial Aid Department communicates electronically. Please check your email regularly for important information from our office and be sure to update your email with us if it changes.

You should check the status of your financial aid application and award via EAB CC's Financial Aid page at [http://eabcc.edu/financial\\_aid](http://eabcc.edu/financial_aid). Please respond to requests for additional documents and complete any steps required so we can process your award. **YOU MUST SUBMIT ALL PAPERWORK BY THE PRIORITY DEADLINE TO ENSURE YOUR AWARD IS AVAILABLE BY THE TUITION DUE DATE.**

Financial aid is one of the most important aspects to college success! Remember to complete the financial aid application process early. Welcome again to EAB CC!

### Estimated Annual Award

Tuition & Fees	\$5,400.00
Estimated Federal Pell Grant Award*	\$5,645.00
Net Cost (Out of pocket expense paid by student)	<b>\$0.00</b>

*\*This is an estimate only and contingent upon eligibility and availability of funds*

### Possible Additional Funding Sources

- State Need Grant (resident students)
- Other Federal/State/Institutional Grants
- Federal/State Work Study (paid to you as you earn it)
- Federal Direct Subsidized & Unsubsidized Student Loans

### Award Eligibility

- Up to \$3,696.00
- Up to \$1,050.00
- Up to \$4,992.00
- Up to \$10,500.00

Welcome students and explain the role of financial aid office

Indicate that estimates are preliminary and subject to change

Remind prospects to stay in touch with financial aid staff

Include a link to the college financial aid page

Instruct prospects to submit all paperwork to receive the award

Include estimated tuition cost after subtracting Pell Grant

Reiterate the preliminary nature of the estimate

Provide alternative funding sources for students who do not qualify for Pell or need additional funds to cover non-tuition expenses

Source: EAB interviews and analysis.

# A Helping Hand, Not a Handout

Even students who receive financial aid have unmet needs that demand attention to make college attendance a reality—this may include securing health insurance, food stamps, or even assistance paying for basic utilities.

Despite the number of government support services available to low-income students, few students use them. Even among Pell-eligible community college students, who traditionally have the highest support needs, only 14% of students receive public benefits.

When we interviewed students and staff who work closely with low-income students, they offered a range of explanations for such low uptake; many revolve around students’ misconceptions about the purpose of the programs or their own eligibility for the benefits.

## Students Avoiding Social Stigma Miss Widely Available Public Benefits

### Many Government Support Services...



Temporary Assistance Programs



Women and Children Programs



Child Care



Supplemental Nutrition Assistance



Public Health Insurance



Energy Assistance

### ...But Public Benefits Underutilized



Lack of awareness



Fear of social stigma



Perception of benefits as charity



Assumption of ineligibility

### Missing a Target Audience

14%

Percentage of community college students eligible for maximum Pell grants who receive public benefits<sup>1</sup>

1) n=6,203

Source: Price D, Long M, et al., "Lessons from the Benefits Access for College Completion Evaluation," OMG Center for Collaborative Learning, 2014, <http://www.equalmeasure.org/wp-content/uploads/2014/12/BACC-Final-Report-FINAL-111914.pdf>; EAB interviews and analysis.

# FAFSA Benefits Eligibility Screens

To ensure student awareness of available public benefits, LaGuardia Community College formed a partnership with Single Stop USA, a national nonprofit network that connects students with public benefits assistance, including free legal and tax counseling.

The financial aid staff at LaGuardia use information on students' FAFSA forms (e.g., annual income and number of household residents) to identify students who might be eligible for public benefits.

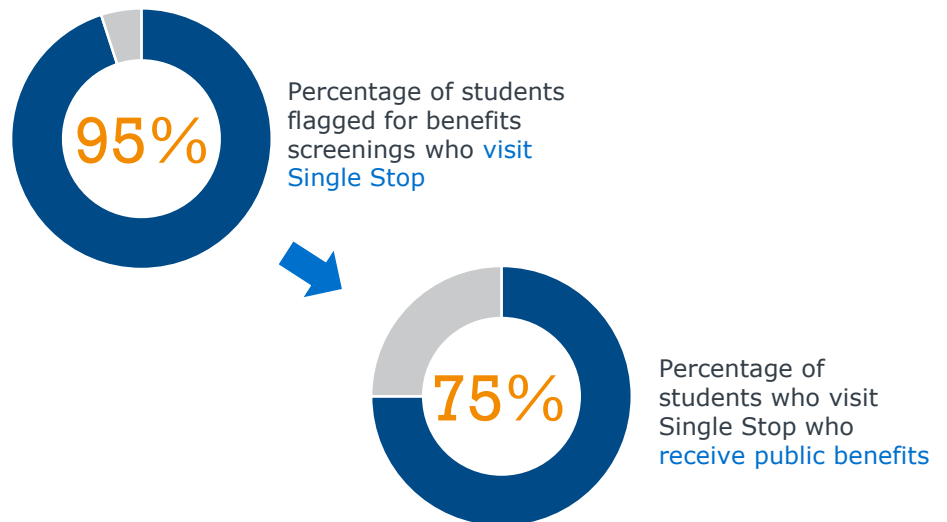
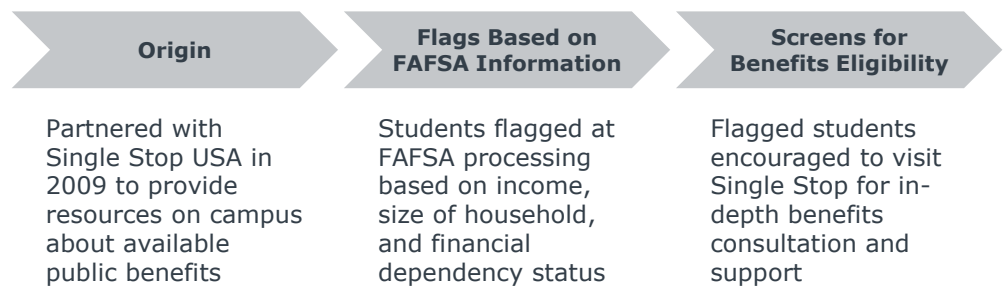
These public benefits pre-screens result in flags on students' SIS records, prompting them to visit the on-campus Single Stop office. At LaGuardia, the Single Stop office is located directly next to the financial aid office.

The flags present Single Stop visits as mandatory, even though the follow-up visits are in fact optional: a flag remains on a student's SIS record until she visits Single Stop. Even though the flag doesn't prevent students from completing any other enrollment steps, the vast majority of students with these flags visit the Single Stop office and receive public benefits.

## LaGuardia Flags Needy Students for Public Benefits

### FAFSA Inputs Inform Benefits Flags

*LaGuardia CC Sends Needy Students to Single Stop Benefits Screens*



#### Institution in Brief: LaGuardia Community College

- Located in Long Island City, New York (large city)
- Enrolls 19,564 undergraduates
- 53% full-time enrollment

Source: National Center for Educational Statistics; <https://nces.ed.gov/ipeds/datacenter/> (accessed April 2015); EAB interviews and analysis.

# Public Benefits Screening Form

## Purpose of the Tool

Benefits access programs often utilize a questionnaire during the new student intake process. Students are prompted to fill out several basic questions that provide college staff with indicators of whether or not they may qualify for public benefits assistance.

Though it is optimal for financial aid offices to direct students to the benefits access office directly, staff members must collect more detailed information from students about their financial and family situation to flag potentially eligible students. These questionnaires should be no longer than one page, so as not to deter students from completing the form.

The following questionnaire is an adaptation of several benefits screening forms from colleges profiled in this study.

**Benefits Screening Form**

Date: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle: \_\_\_\_\_ Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

Unit #      City      State      Zip

Student ID: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Gender: M or F      Marital Status: \_\_\_\_\_      DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_

Military Service:  Active Duty     Veteran     Never Served

Are you married to, or the dependent of, someone in the military?  Yes  No

Do you receive financial aid? Describe: \_\_\_\_\_

Number of semesters completed: \_\_\_\_\_

Do you need help with groceries?  Yes  No

Are you currently working at least 20 hours per week?  Yes  No

Do you or any member of your family need health insurance?  Yes  No

Please list any benefits (e.g., WIC, SNAP) you are currently receiving: \_\_\_\_\_

\_\_\_\_\_

Please check next to any services which you may be interested in receiving or learning more about:

Legal services\_\_\_\_      Health screening services\_\_\_\_

Filing taxes\_\_\_\_      Child care\_\_\_\_

Include any additional services offered to students in this space

# Public Benefits Screening Providers Evaluation Matrix

## Purpose of the Tool

Community colleges have several options when it comes to implementing a service that screens and refers students to publicly available benefits. This tool is designed to assist in the decision making process by allowing staff to clearly outline the requirements and considerations necessary for each service provider.

This public benefits screening provider evaluation matrix provides the key considerations college leaders should think through when selecting a screening provider. For each question, write down a detailed response and utilize the results in discussion with staff. Staff may consider using this chart to determine which questions require the most consideration when pursuing a screening provider. For each provider, staff should identify how screening services will be administered and the logistics associated with each decision.

Consideration	Homegrown Screening Services	Third Party Vendor	State or Local Provider
What is the start-up cost?			
Is there room in the budget to accommodate the start-up and annual costs?			
Will we need to apply to participate? Is the provider readily available to us?			
Is the provider currently taking on new college partnerships? Is there a wait-list?			
Will we need to hire additional staff?			
Will this require additional space in one of our current buildings?			
How long will it take to integrate this provider with our current system?			
When will students access the screening services? How frequently?			
Under which departments' responsibility will the provider fall?			

# There's More Than One Step?

Students eligible to receive aid often still face difficulties in securing financial support if they are selected for federal verification. If submitted FAFSA forms contain missing, inaccurate, or "suspicious" information, the Department of Education can flag the student for additional verification.

The government selects more than 12 million students for federal verification each year, requiring these students to submit documentation to prove residency, for instance, or to add a missing signature to their application.

Unfortunately, many students are unaware that the verification process even exists, and miss out on millions of dollars of aid as a result of the smallest errors. Our interviews with students and administrators revealed a major reason verification eludes so many students: communication about the process and next-steps takes place through institutional email. Most students fail to check their college email inbox before the first day of class, causing them to miss out on available (and much-needed) aid.

## Federal Verification Creates Unforeseen Barrier to Aid



### Applicants Caught Off Guard

**62%**

Percentage of students selected for federal verification who thought financial aid application process was complete



### Aid Loss for the Smallest Reasons

**\$39M**

Amount of available Pell funds denied to applicants whose FAFSA forms are rejected due to missing signatures



### No Guide for Next Steps

**15%**

Percentage of students selected for federal verification who did not know how to correct errors on aid application



### High Costs to Verify Students

**\$130K**

Average annual cost to the college to verify student aid applications beyond minimum required by Dept. of Ed.



"The challenge for me was verification. I didn't know I needed to submit more stuff. They emailed me at the college's email, but I didn't even check it until the first day of class! By then I had paid for my textbooks myself, which was a lot of money."

*Student*

Source: Cochrane D, LaManque A, Szabo-Kubitz L, "After the FAFSA: How Red Tape Can Prevent Eligible Students from Receiving Financial Aid," The Institute for College Access and Success, 2010 [http://ticas.org/sites/default/files/pub\\_files/AfterFAFSA.pdf](http://ticas.org/sites/default/files/pub_files/AfterFAFSA.pdf); EAB interviews and analysis.

# Nudge in the Right Direction

The West Virginia Higher Education Policy Commission (WVHEPC) launched an initiative to support prospective college students during the enrollment and financial aid application process using SMS text messaging.

In 2014, the organization partnered with Ben Castleman, a scholar at the University of Virginia, to communicate with high school students about the college enrollment process early, starting in the winter of their senior year. Messages clearly outline steps for submitting applications and securing financial aid, and the messages continue to support students even after they matriculate to college through the completion of their first semester.

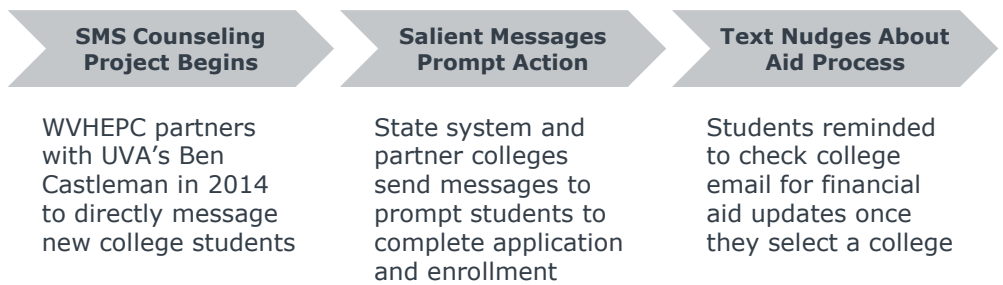
SMS messages are sent using Signal Vine, a text messaging platform, and have proven to be highly effective. Each message prompts students to complete discrete enrollment steps, including checking their aid status.

Students stated that without the text message intervention, they would have been unaware of steps necessary to complete college enrollment.

## SMS Updates Remind Students to Check Aid Status

### Double Checking Aid Progress

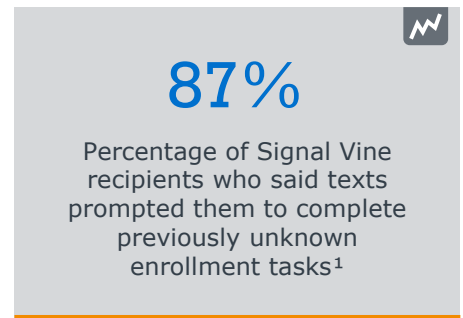
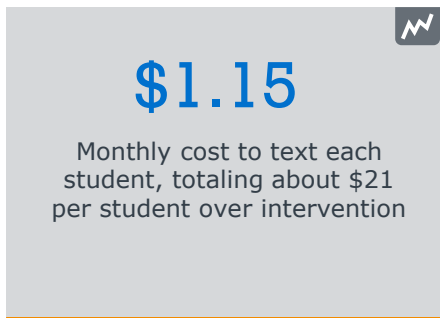
*State Project Sends Reminders of Next Steps*



**SMS Counseling Project Begins**  
WVHEPC partners with UVA's Ben Castleman in 2014 to directly message new college students

**Salient Messages Prompt Action**  
State system and partner colleges send messages to prompt students to complete application and enrollment

**Text Nudges About Aid Process**  
Students reminded to check college email for financial aid updates once they select a college



1) n=799

Source: Owens A, "Teens, Smartphones & Texting," Pew Research Center, 2012, <http://www.pewinternet.org/2012/03/19/teens-smartphones-texting/>; Phillips O, "How A Text Message Could Revolutionize Student Aid," National Public Radio, 2014 <http://www.npr.org/sections/ed/2014/07/08/329465900/how-a-text-message-could-revolutionize-student-aid>; Signal Vine, [www.signalvine.com](http://www.signalvine.com), accessed Feb. 2015; EAB interviews and analysis.



# Optimizing Messaging for Community Colleges

Despite the ubiquity of text messaging in our social lives, many community college executives do not use texting to communicate with students directly. Several administrators we interviewed raised potential pitfalls of direct text message communication with students.

First, leaders worried that students may not desire or be able to afford regular text message communication with the college. Secondly, research contacts suggested that the college may over-message students, becoming more of a nuisance than support. Lastly, administrators feared that each department would become so enamored with text message communication that messages would originate from all over campus, compounding the issue of over-messaging.

The recommendations outlined on this page help college leaders avoid these pitfalls and ensure broad access to financial aid updates among incoming students.

## Quick Wins to Ensure Broad Access to Aid Updates

### 1 Provide Alternatives to Text Messages

In the body of the first text message, allow students opportunity to update their preferred mode of contact

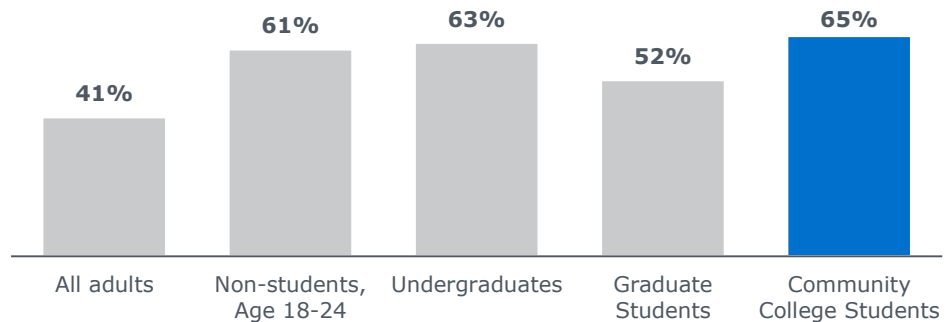


Text messages may be poor-fit for:

- Students with pay-per-text plan
- Older students with low cell phone utilization

### Cell Phone and Internet Connectivity

*Percentage of Cell Phone Owners in Each Group Who Use the Internet or Email on Their Cell Phones*



### 2 Allow Students to Opt Out of Reminders

Include an “opt-out” feature in all text notifications (e.g., “To opt out of receiving further text messages, reply STOP to this message.”)



Only 11% of students in WVHEPC intervention opted out of receiving text messages in first 14 months; likely due to cell phone turnover

### 3 Limit Frequency of Messages with Centralized Schedule

Set up a meeting for all student services officers to suggest topics for SMS reminders; set limit to five messages per month



Designate one staff member with “veto power” over all text message communication; consider the Vice President of Student Services as initial choice

Source: Pew Research Center’s Internet & American Life Project, 2010; EAB interviews and analysis.

# Tips for Texting Students and Parents

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## Purpose of the Tool

The following list of best practices for texting students and parents was compiled by experts at Signal Vine, a text messaging provider that works with many colleges, school districts, and community-based organizations nation-wide. These tips are intended to provide additional context for practitioners when devising text messaging calendars, schedules, and content.



### 1 Frequency

The recommended number of prescheduled or programmed messages is 2-5 per month. We discourage more than that, but strongly encourage back-and-forth conversation if a student replies to the message.

### 2 Personalization

Make sure that the messages are personalized and include relevant student information (e.g., student's first name, grade, school, etc.) and the counselor/advisor's name, especially in the first message. The more personalized the message, the higher the response rate.

### 3 Relevancy

The content of the messages should be relevant to the particular recipient's needs. Colleges often filter messages to only those students who meet certain criteria that would make the message relevant. We strongly discourage mass texting where everyone receives the same message.

### 4 Action

Include "calls to action" in the text messages that will nudge students and/or parents to complete their necessary tasks or to take an action which moves forward in the process. For example, you might include a short link (e.g., bit.ly or goo.gl) to a resource or have a student respond back to answer a question about their progress.

### 5 Urgency

When possible, create urgency by using dates and sending messages about 3 days prior to deadlines. Make sure that you send the message on a date that is not too close to the deadline (so recipients aren't overwhelmed) but that also is not too far away from the deadline (so they don't forget about the deadline).

### 6 Timing

Timing can impact the rate of student responses to text messages. During the school year, K-12 students reply most frequently before school (7am) or after school (4-7pm). College student messaging should begin between 10-11am; the lunch hour is popular and we have found no need for class-day limitations.

### 7 Interactive

Ensure that the conversations are two-way and interactive, and that counselors are responding to students' messages by answering questions in a timely manner. Prepare staff to monitor/reply to messages the hour after a programmed message is sent. Most student replies will be sent back within the first 15 minutes.

### 8 Programmed

Productivity increases when time is spent up-front to design a program of messages around key dates, which reduces the pressure on staff to remember when to engage specific students. We have seen a 4x-10x increase in counselor capacity when they are able to readily respond to student replies from programmed messages.

## Tips for Texting Students and Parents (cont.)

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### 9 Opt-Out

Recipients need to be able to opt out of receiving text messages. In the first message, let students know that they always have the option to text back STOP or CANCEL to stop receiving messages. They can always opt back in at a later time and start receiving text messages again.

### 10 Introduction

It's best to begin the engagement with an introduction message that introduces the counselor and solidifies the connection. We also recommend that you suggest students save the number and text anytime they need help.

### 11 Prepared Responses

To further productivity, prepare responses to common or anticipated questions in advance to avoid duplicative or inconsistent work on behalf of staff.

### 12 Prepared Links

Often students would be best suited to utilize an online resource, rather than including all of the content in a text. Make these links readily available for counselors to send students to improve productivity and responsiveness.

### 13 Link Shortening

When including web links, we find using a link shortener like bit.ly or goo.gl to be useful in conserving characters in programmed messages.

### 14 Less is More

The 160-character limit can be challenging for some organizations that want to send two- and three-part messages. Do not exceed the 160 character limit: the process of honing the content of a text message down to its main point ensures students are able to digest the content quickly.

### 15 10-Digit Personal Touch

Although short codes (3-6 digit numbers) are popular for marketing companies and some may consider sending texts via email (from an email address), students are most likely to trust a 10-digit phone number.

### 16 Ad-Hoc Messages

Programmed messages can only cover the expected communications, so counselors should text students with one-off, ad-hoc messages as necessary. This keeps the texting informal and relevancy high.

### 17 Ask Questions

The best interactions happen when you ask students a question that invites a response. Messages that contain questions have 30%-40% higher response rates, and they are a great way to get information from students.

## Tips for Texting Students and Parents (cont.)

### 18 Limited Automation

There is value in automating some student messages, but students are perceptive and therefore quickly recognize when a “computer” has taken over the conversation. We generally advise no more than 2-3 automated messages in a row if you’re looking to keep the relationship personal.

### 19 Group Messaging

Messaging students in large groups may save time up-front, but it’s important that each message is still sent one-on-one to avoid unintended connections being made between text message recipients.

### 20 Multi-language for Parents

When messaging parents, determining the parent’s language of choice is important when engaging them, or you can give them an option to select their native language.



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