

# FAFSA Success Guide

BROUGHT TO YOU BY ACHIEVE ATLANTA



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## WHO WE ARE

Achieve Atlanta is an Atlanta-based nonprofit whose mission is to help Atlanta Public Schools (APS) students achieve their dreams by ensuring post-secondary success. Our work is focused on removing the barriers students face in getting to college, paying for college, and succeeding in college.



## CONTEXT

In 2016, the percentage of APS students who had completed the FAFSA (Free Application for Federal Student Aid) the previous year was 51%. Reflecting the national trend, APS students and their families were leaving valuable federal aid on the table, which made their transition from high school to post-secondary study that much harder. For many families, college was simply out of reach for financial reasons.

In response, Achieve Atlanta made it a priority to improve FAFSA completion rates among Atlanta Public Schools students, believing that in addition to the obvious financial benefits, the experience of completing the FAFSA might build momentum to successfully navigate the path to college. At the beginning of the 2016-17 school year, Achieve Atlanta engaged in a series of deliberate action steps aimed at driving FAFSA completion among that year's Senior class. The positive results were striking, as almost 300 more families completed the FAFSA than the year before, boosting the previously stagnant completion percentage by 10 points.



In 2016, only **51%** of Atlanta Public Schools students had completed the FAFSA the previous year.



## WHY THIS GUIDE

In the hope that others might benefit from our experience, we've created the following guide to assist urban schools, urban school districts, and partners in their collective efforts to:

- » Raise FAFSA awareness
- » Communicate the full value of completing the FAFSA, and
- » Deliver hands-on assistance in completing the FAFSA

...so that ultimately, our students will face fewer financial barriers as they enroll in and complete college.

Using our own experience as an illustration, this guide was designed to suggest an approach and share the lessons we learned along the way.

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## WHERE WE STARTED: OUR ASSUMPTIONS AND BELIEFS

During the summer leading up to the 2016-17 school year, we'd been hearing that college advising staff in our schools (in our case, APS counselors and Advisers from national nonprofit, College Advising Corps) were having good success getting students engaged in the financial aid process. However, they were struggling to secure the necessary participation and information from parents in order to complete the FAFSA. While Counselors and Advisers could usually work with their students to identify workarounds, our conclusion was that engaging parents directly and involving them in a more hands-on way would yield several benefits. These benefits included:

- » Securing the necessary financial information to complete the FAFSA
- » Using the FAFSA completion milestone as a good point of entry into the "college access journey" for parents
- » Using the task of FAFSA completion as a moment to engage parents in a larger conversation about paying for college

- » Creating opportunities for parents to connect with college representatives directly and ask questions
- » Allowing us the opportunity to gain better insight into our parent population

### BELIEFS THAT INFORMED OUR APPROACH

- » Buy-in from district and school leadership was an absolute must to ensure effective, on-the-ground implementation
- » In communicating to students and parents about the FAFSA, we felt we needed to go beyond just explaining the application and the steps to complete it. We needed to drive understanding of the "why"—why taking the time to complete the FAFSA was important, and what was at stake
- » Info sessions are not enough. And from our observation, this was the typical route being taken by schools. With FAFSA completion rates remaining flat year over year, our belief was you must deliver expert, hands-on assistance to help parents act... in the moment

### CHALLENGES TO ANTICIPATE

Anyone who's sought to boost FAFSA completion rates won't be surprised to note the following challenges:

#### Families:

- May have low awareness of the FAFSA, and the opportunity to access federal aid, in general
- May hesitate to share personal financial information
- May experience barriers to learning about and participating in in-person events including: no computer at home, lack of reliable transportation, no evening childcare

#### Schools/districts:

- May place a lower priority on FAFSA completion compared to other school/district level objectives

We expected these same challenges when developing our strategy.





## A 5-STEP APPROACH

In reflecting on our own experience, we've identified five critical steps for making a concerted push to increase FAFSA completion rates in a district. While it may be tempting to cherry-pick from these five, our experience suggests that the prep steps (1 and 2) and the inclusion of Step 5 were important drivers of the results we achieved.



**TIP**

Because of the investment of time and resources required, we suggest executing this approach across multiple schools in a district.

## MAKE THE CASE

Convinced that a successful effort to drive FAFSA completion in our schools would depend on cooperation and support at all levels, we made it our first priority to align and inspire district and school leadership.

**RECOMMENDATION:**

*Have a focused and candid conversation with partners that:*

» **Includes all key players**

We brought principals, counselors and nonprofit partners, as well as the key district leaders overseeing college readiness around the table to discuss the issue of FAFSA completion and share our plan of action.

» **Is rooted in relevant data**

In our case, we shared data and facts that highlighted the status quo as well as the relevance and importance of FAFSA completion for our students:

- 85% of FAFSA filers qualify for financial aid
- Historically, the cost of college for APS graduates has been a barrier to enrolling in and completing college
- Every year, students leave \$24 billion in federal financial aid on the table
- Many scholarships—money the student or parent does not have to pay back—require students to complete the FAFSA.



**TIP**

FAFSA completion is not necessarily a core responsibility of high schools and principals are juggling a long list of priorities. Securing buy-in from a district-level principal supervisor can go a long way toward elevating the goal of increasing FAFSA completion rates and creating the right amount of accountability.

**RECOMMENDATION (cont.):**

*Have a focused and candid conversation with partners that:*

» **Rallies critical partners around a specific problem to solve**

This conversation can essentially serve as the kickoff to a large team effort to boost FAFSA completion. In our case, the “team effort” meant the district helped by providing parent phone numbers and deploying IT staff to manage tech for our FAFSA completion events, school principals gave us access to their buildings and computer labs, and other implementation partners stepped up to provide FAFSA completion expertise and counsel to parents.

» **Produces specific and ambitious, yet achievable targets**

Publicizing these targets among district administrators and school leadership served to create a sustained sense of urgency and clear accountability.



## TAILOR YOUR APPROACH

This is your reminder that one size does *not* fit all.

While there is no need to re-invent the wheel, and there are some good, free templates available (like NCAN's "[Form Your Future](#)"), the most effective efforts to drive action among families in your community will require specific insights that allow you to meet your families where they are.

Prior to planning our FAFSA push, we sat down with parents for a series of "listening sessions" where we talked to parents about their engagement in their child/ren's college access journey. We also asked specific questions to understand how parents preferred to receive information and what it would take to motivate them to attend in-person events. These insights gave us a better understanding of our particular community and pointed us toward specific ways to design and promote our FAFSA completion events.

For example, after listening to parents we knew we'd need to:

- » Increase basic understanding among parents of the core benefit of completing the FAFSA (the WHY)
- » Deliver hands-on help via FAFSA completion events, where families walked away having completed their application
- » Supplement messages sent home via students with phone calls to parents that explained and promoted events
- » Tap trusted third parties like churches and after-school programs to carry our message
- » Reach parents multiple times and in multiple ways with our message



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# COMMUNICATE TO FAMILIES

Once we'd committed to engaging families at in-person events, it was clear that communicating the value of what we were offering was critical.

Because we believed the best way to increase our chances of connecting with our parents was to use a combination of one-on-one and broad communications, we decided to engage a marketing agency to supplement our team's capacity. These professionals assisted with creative development and production as well as executing a media plan.

### FIRST: CRAFT THE MESSAGE

From our conversations with parents, we confirmed that while some parents weren't necessarily aware of the benefits of completing the FAFSA, they all expressed a desire to be the type of parents who do all they can to put their children in a position to succeed.

Based, in part, on this insight, we crafted our messages to highlight the opportunity and communicate what families stand to gain. Our slogan was:

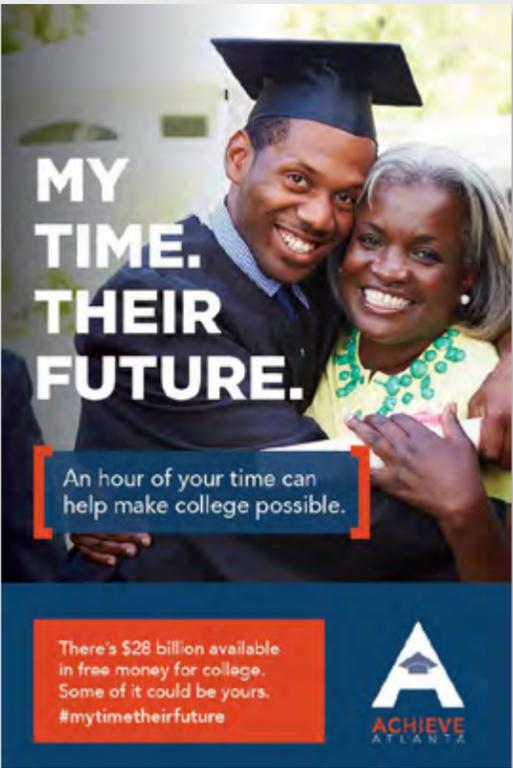
**"My Time. Their Future."**

### THEN: GET THE WORD OUT

Another key takeaway from conversations with parents was that repetition and personal outreach were critical if we wanted to motivate parents to turn out for events. We were also convinced that we needed to use the right messengers to help spread the word (e.g., churches, community-based organizations, local influencers).

## CAMPAIGN TACTICS

<p><b>Local media</b> Newspaper and radio</p>	<p><b>Social media</b> – Paid campaign – Endorsement posts from local influencers</p>	<p><b>Flyers and Promo Cards</b> distributed at schools and community events</p>
<p><b>Outreach</b> to churches and community-based organizations</p>	<p><b>In-school promotion</b> Posters and word-of-mouth via school counselors and administrators</p>	<p>★ We followed-up on all of this with <b>direct phone calls</b> to parents. If you used only one tactic to promote your FAFSA completion events, make it this one.</p>



Posters, flyers, and promo cards



Top: Social media; Bottom: Endorsement posts from local influencers



# EXECUTE THOUGHTFUL FAFSA COMPLETION EVENTS

This is where the rubber hits the road. You should consider getting to this stage a win in and of itself. If you’ve secured support from district- and school-level leadership, tailored your approach based on community insight, and been thoughtful in the messages and promotional tactics you’ve used, you should be set to bring things home with well-executed FAFSA completion events.

**Our main recommendation here is to consider the design of your events from end to end. Here’s how we thought about it:**

### ENTICING OUR FAMILIES

- » Employ a multi-channel promotional campaign (outlined previously)
- » Use phone banking to connect directly with parents
- » Deliver reminders and registration link via text message

### ENTERING THE EXPERIENCE

- » Allow for easy, online event registration (We used Sign-up Genius)
- » After registration, make sure families know what documentation/information they’ll need for the event
- » At the venue:
  - Post clear directional signage
  - Greet families and, if possible, introduce them to an expert who will assist them in completing the FAFSA.

### ENGAGING FAMILIES IN ACTION STEPS

- » Employ FAFSA experts/trained staff to guide families through the process of completing the application
- » Bring in financial aid representatives from colleges your students typically attend to share information and field questions

### EXITING THE EVENT

- » Have parents “checkout” and ask them if they were able to successfully complete the FAFSA.
- » Congratulate families on taking an important step along the path to college

### EXTENDING OUR ASSISTANCE

- » Have a clear avenue for students and parents to get more help with the final steps after they’ve submitted their FAFSA at the event. We provided a “What’s Next” sheet and made sure students knew who to speak with at their school. We also provided Advisers with lists of students who might need follow-up so they could reach out appropriately.

The above is inspired by the Doblin Group’s “Compelling Experiences” or “5Es” framework.



**TIP**

For a successful event, remember the devil is in the details and technology can trip you up.

A few suggestions: Remove login requirements for computers; Have spare hot spots in case internet connections fail; Ensure printer is available

# I submitted my FAFSA. Now what?

Excerpted from *Form Your Future* ([www.formyourfuture.org](http://www.formyourfuture.org))

Here is what you can expect to happen next:

1

## Review your Student Aid Report (SAR)

After you submit your FAFSA, you'll get a Student Aid Report (SAR) within three days if you signed online or three weeks if you mailed a signature page. Your SAR is a summary of the FAFSA data you submitted.

You can print your SAR by logging into [FAFSA.gov](http://FAFSA.gov) with your FSA ID and clicking on the appropriate school year. You can also check the status of your application if you have not yet received your SAR.

Once you receive your SAR, make sure all the information is correct!

2

## Review your EFC

When reviewing your SAR, look for the expected family contribution (EFC) number. You can find your EFC in the box at the top of the first page of your SAR, under your SSN. The Federal Government will determine whether you are eligible for federal aid based on your EFC. **Achieve Atlanta Scholarship eligibility also depends, in part, on your EFC.**

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## Make corrections if you need to

You must wait for your most recent FAFSA submission to process before you can update or make corrections to your FAFSA. That usually takes about three days.

### What if you realize you need to correct some information?

- Log in with your FSA ID.
- Click "Make FAFSA Corrections."
- Corrections should be processed in three to five days and you should receive a revised SAR.
- After you click "SUBMIT," you cannot make another correction until your FAFSA has been processed successfully.

### What if my income or family circumstances change after I submit the FAFSA?

You usually cannot update these parts of your FAFSA because it must be accurate as of the day you originally signed it. However, you should speak to the financial aid office at the school you plan to attend if your parent's income for the present year has changed or if any other family circumstances have occurred that cannot be reported on the FAFSA.

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## Be prepared if you are selected for verification

Verification is the process your school uses to confirm that the data reported on your FAFSA is accurate.

If you are selected for verification, provide the documentation your school asks for by the school's deadline, or you won't be able to receive aid. For more information, visit:

<http://blog.ed.gov/2016/02/5-things-after-filing-fafsa/>

"What's Next" sheet distributed at FAFSA completion events, excerpted from *Form Your Future*.

# WHAT PARENTS HAD TO SAY AT FAFSA NIGHTS...

That was super easy!

Complete your FAFSA so you won't come out of pocket or be in debt with college loans.

Invaluable information. The adviser was very informative, patient and resourceful.

It's easy, It's fast, Let's get our kids in college!

You will love this! This is really good for the kids, Great Job!



That was it? It was so much easier than I thought!

Very clear and understandable.



## TRACK AND CELEBRATE PROGRESS

With promotional communications and in-person events underway, a lot of the work is done. However, there's one key element left. From our experience, we found that consistently tracking and celebrating progress toward your ultimate goal is a piece of the puzzle you shouldn't neglect.

**Tracking and sharing progress:** Doing this consistently throughout your FAFSA push can be a powerful way to keep stakeholders motivated and accountable, create incentives, maintain a sense of urgency, and generally keep FAFSA completion top of mind for school and district-level leaders.

The trick is to find the right forum to share wins and apply "healthy pressure" on everyone who has a vested interest in seeing FAFSA completion rates improve. In our case, we published monthly dashboards that tracked progress against our agreed-upon metrics and discussed progress at monthly district and high school principals meetings.

**Celebrating progress:** In a nutshell, this is about recognizing the collective effort and spotlighting individuals. While we were able to provide small cash prizes/incentives to schools that met their targets, simple public recognition or congratulations cards can help keep people motivated. We found that celebrating progress along the way had a powerful double effect. In the short term, prizes/incentives seemed to help motivate schools to up their existing efforts to drive FAFSA completion. In addition, we found at the end of the campaign, schools that had received small awards acknowledging their efforts (and even those that didn't) expressed a desire to earn the award the following year.

## OUR RESULTS

**Increased FAFSA completion by 22%** across the district.

Successfully **drove a collaborative effort** among school and district staff, and post-secondary and nonprofit partners, leveraging each player's expertise in an efficient way.

**Set a new baseline** for FAFSA completion. Prior to our effort, completion rates had been hovering in the low to mid 50s. Afterwards, we'd boosted it to 61%.

### Effected a cultural shift

The results we achieved:

- » challenged the longstanding assumption about what was possible,
- » sparked a widespread recognition that a "high-touch" approach to engaging and guiding parents could indeed move them to action, and
- » left us feeling more confident in our collective ability to influence this part of the college access process.

Special thanks to the SunTrust Foundation for their generous support of the FAFSA campaign.

[www.achievetlanta.org](http://www.achievetlanta.org)



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