

STRATEGIC **DATA** PROJECT

# SDP Summer Melt Handbook:

A Guide to Investigating and  
Responding to Summer Melt



## Acknowledgements

WE GRATEFULLY ACKNOWLEDGE SARAH GLOVER, KORYNN SCHOOLEY, LINDSAY DAUGHERTY, KAREN ARNOLD, AND ALEX CHEWNING FOR THEIR CONTRIBUTIONS TO THIS GUIDE, AND GIVE SPECIAL THANKS TO THE STRATEGIC DATA PROJECT AND TO THE BILL & MELINDA GATES FOUNDATION FOR SUPPORTING ITS DEVELOPMENT. THE RESEARCH ON WHICH THIS GUIDE IS BASED WOULD NOT HAVE BEEN POSSIBLE WITHOUT THE CONTRIBUTIONS AND COLLABORATION OF SEVERAL PEOPLE AND ORGANIZATIONS. WE THANK SYLVIA LOPEZ, SHANE HALL, DOROTHEA WEIR, AND THE SCHOOL COUNSELORS WHO STAFFED THE INTERVENTION IN THE DALLAS INDEPENDENT SCHOOL DISTRICT; ALEXANDRA CHEWNING, ERIN COX, BOB GIANNINO-RACINE, AND THE ADVISORS AND PEER MENTORS WHO STAFFED THE INTERVENTIONS IN THE UASPIRE INTERVENTION SITES; LAURA KEANE AND THE ADVISORS AND PEER MENTORS WHO STAFFED THE INTERVENTION IN THE MASTERY CHARTER SCHOOLS INTERVENTION SITES; KORYNN SCHOOLEY, CHRIS MATTHEWS, NIVEEN VOSLER, G. MARK ELLIS, AND THE COUNSELORS WHO STAFFED THE INTERVENTION IN THE FULTON COUNTY SCHOOLS; AND LINDSAY DAUGHERTY AND THE COUNSELORS WHO STAFFED THE INTERVENTION IN THE FORT WORTH INDEPENDENT SCHOOL DISTRICT. WE THANK BRIDGET TERRY LONG, LAURA OWEN, AND ERIC BETTINGER FOR THEIR PARTNERSHIP IMPLEMENTING A BROADER SET OF INTERVENTIONS OF WHICH THE TEXT AND PEER MENTOR INTERVENTIONS WERE A PART. WE THANK CHRIS AVERY, LARRY KATZ, TOM KANE, RICHARD MURNANE, AND MANY OTHER COLLEAGUES AT HARVARD UNIVERSITY AND THE UNIVERSITY OF VIRGINIA FOR THEIR INSIGHTS INTO THIS BODY OF RESEARCH. SEVERAL ASPECTS OF THIS RESEARCH ALSO WOULD NOT HAVE BEEN POSSIBLE WITHOUT EXCELLENT RESEARCH AND ADMINISTRATIVE ASSISTANCE FROM CINDY FLOYD, ZACK MABEL, ADAM GANIK, ANNA HAGEN, JONATHON DAVIS, LUIS MIRANDA, AND DANIEL GRAFSTEIN. WE ARE ALSO GRATEFUL TO MICHAEL LIN AND THE REIFY HEALTH TEAM FOR DEVELOPING THE TEXT MESSAGING PLATFORM DISCUSSED IN ONE OF THE INTERVENTIONS SUMMARIZED IN THIS GUIDE, AND TO THE STRATEGIC DATA PROJECT, IN PARTICULAR SARAH GLOVER AND JON FULLERTON, FOR SUPPORT THROUGHOUT THESE PROJECTS. FINALLY, WE ARE GRATEFUL FOR THE GENEROUS FINANCIAL SUPPORT OF THE RESEARCH SUMMARIZED IN THIS GUIDE FROM THE BILL & MELINDA GATES FOUNDATION, THE WILLIAM T. GRANT FOUNDATION, THE SPENCER FOUNDATION, THE LINDBACK FOUNDATION, THE HECKSCHER FOUNDATION FOR CHILDREN, AND NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS.

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## A Guide to Investigating and Responding to Summer Melt

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# Introduction

CHRIS, A STUDENT IN ONE OF YOUR LOCAL HIGH SCHOOLS, has worked hard to become the first member of his family to apply to and get into college. Chris' counselor and teachers have supported him through the college application and decision process. As Chris walks across the stage on graduation day, he and his family are proud of his accomplishments but also uncertain of what lies ahead.

A month into the summer, Chris begins receiving mail from the university he plans to attend in the fall. First, he receives a letter that gives him directions on how to sign onto the university's online portal and learn about required tasks for admitted students. Without internet access at home, Chris puts aside the letter and decides to sign in later when he can get to the library. But that letter is just the beginning—soon he starts to receive a flood of information: a bill for tuition and health insurance, a housing application, financial aid forms, an invitation to orientation, and information about placement exams. Though Chris has a strong support system around him, his parents, siblings, and friends do not know how to help. His visits to the library become less frequent as his part-time job requires more attention. Over time, Chris becomes overwhelmed and uncertain about where to turn for guidance. Instead of completing the paperwork, he begins to ignore the mail. Then suddenly it is September, and he finds himself working full time at what was supposed to be a brief summer gig. In spite of his work and aspirations, Chris does not end up enrolling in college that fall.

Does Chris sound like a student in your district? Chris' story is a common occurrence across the country. Our work in several districts and a review of national data indicate that a surprisingly high percentage of college-intending students do not actually enroll in the fall following graduation.

This handbook focuses on an often overlooked time period in students' transition to college: the summer after high school graduation. Recent research reveals that many college-intending students—particularly those from low-income backgrounds—encounter a range of obstacles during the post-high school summer that can lead them to change or even abandon their college plans.<sup>1</sup>

During this period, students are no longer members of their high schools and have yet to become integrated into a college community, leaving them isolated from professional guidance and support to address summer-specific challenges. As a result, a surprisingly high proportion of seemingly college-bound students fail to enroll in college in the fall after high school graduation.<sup>2</sup>

## What is summer melt?

“Summer melt” is a term that has long been used by college admissions officers to refer to the tendency of some students who paid a deposit at a particular college or university to instead attend a different institution, usually presumed to be of comparable quality. **Here, we use “summer melt” to refer to a different, but related phenomenon: when seemingly college-intending students fail to enroll at all in the fall after high school graduation.** “College-intending” students are those who have completed key college-going steps, such as applying and being accepted to college and applying for financial aid if their families qualify. In other cases, they have concretely signaled their intention to enroll in college on a high school senior exit survey. We consider a student to have “melted” if, despite being college-intending, she or he fails to attend college the following fall.

## Why do students “melt”?

After students receive acceptance letters and make their spring-time decisions to attend a particular college, a number of tasks still must be completed for students to successfully matriculate. Many of these tasks may be challenging for students who no longer have access to high school counselors, who may not be familiar with support resources available at their intended college, and whose families may lack experience with the college-going process. Several of these tasks relate to financing higher education, such as making sense of and paying one’s term bill and identifying and budgeting for expenses like health insurance and course textbooks. Colleges also expect students to access, digest, and respond to considerable

correspondence over the summer. Students are often required—but do not always properly anticipate the need—to register for and attend orientation, take placement tests, and complete housing forms. More recently, access to this information is often provided through institution-specific online portals (e.g., <http://utdirect.utexas.edu>). These online portals sometimes can be difficult to navigate. In addition, they create an extra barrier for students who have limited internet access, causing some to miss timely access to essential information.

## How prevalent is summer melt?

Based on data from three large school districts (Boston Public Schools (MA), Fort Worth Independent School District (TX), and Fulton County Schools (GA)) and a national longitudinal survey, we estimate that rates of summer melt range from 10 to 40% of college-intending students.<sup>3</sup> These rates are higher among students from low- and moderate-income families and among those with lower academic achievement. Melt rates are also considerably higher among students who intend to enroll at community colleges compared to their peers intending to enroll at four-year colleges and universities. As these student-level patterns suggest, schools with greater proportions of students qualifying for free- or reduced-price lunch tend to have higher rates of summer melt.

## Why does this matter?

In the United States, having an education matters. For students like Chris, the graduate we describe in the introduction, the consequences of not attending college will be felt for much longer than the next four years of his life. On average, bachelor's degree holders earn nearly twice as much as high school graduates and more than double the wages of workers without high school degrees.<sup>4</sup> In addition, further education has a host of other non-monetary benefits.<sup>5</sup> Nevertheless, postsecondary degree attainment in the United States has stagnated over the past four decades.<sup>6</sup> With such important benefits linked to degree attainment, it is important to find out what can be done to address the summer melt issue. This handbook focuses on discovering if summer melt is a problem in your schools and offers possible solutions to the critical question: **How can you help more of your college-intending high school graduates enroll in college?**

**“It’s freaky. I’m the first generation in my family to go to college and I don’t know what to do.”**

Student, Boston Public Schools

## How can this guide help?

This guide will help you investigate and respond to summer melt for your own students. To help frame the issue, we explore why students who have already overcome so many obstacles on the road to college still do not enroll. To this end, we:

- offer guidance on how to measure the magnitude of summer melt among your high school graduates,
- provide resources and tools that can help you design a summer intervention customized to the needs and realities of your school communities, and

- document the extent of the summer melt problem across several large school districts and provide evidence of the positive impact of additional outreach and support for students during the post-high school summer.

## Who should use this guide?

This guide is written for people who want to understand and confront the summer melt problem. It is intended to provide specific guidance for designing and implementing a summer counseling initiative to mitigate summer melt in your district or student community. It will be useful to people in a variety of roles, including:

- school district administrators,
- school counseling staff and leaders,
- high school leaders (i.e., headmasters, principals and vice-principals), and
- community-based organizations focused on providing resources to high school students.

Please note that this guide, as written, takes a district-focused perspective. Nevertheless, we envision it as a useful tool for a variety of audiences, including non-school district organizations working to support students in the transition from high school to college.

Are you wondering if summer melt is happening among your students? And, if so, what you can do to respond? This handbook will guide you through the steps you can take to investigate and mitigate summer melt. To get started, the next section leads you through four different approaches to discover if summer melt is occurring in your district.

# Is Summer Melt Occurring Among My Students?

## How to get started

WE RECOMMEND INVESTIGATING THE PREVALENCE OF summer melt among your students collaboratively with school counseling staff. Your counseling staff will likely be the most knowledgeable about graduating seniors' plans after high school, including the ways in which students' postsecondary intentions are currently captured and stored. They will have the best understanding about the data that can be used to explore summer melt and sensible processes for gathering additional information that may be necessary to study the issue. In addition, if you find summer melt to be prevalent among your college-intending graduates, counseling staff will likely be integral to the design and implementation of your district's response. To investigate whether summer melt is a problem in your district, you should take the following three steps:

- STEP 1: Determine which of your graduating students intend to go to college in the fall after high school graduation.**
- STEP 2: Determine how many of your students actually enroll in college in the fall after high school graduation.**
- STEP 3: Determine the rate of summer melt among your students using the information gathered in Steps 1 and 2.**

How you go about gathering the needed information depends on what data systems you already have in place and the capacity within your district to collect and analyze additional data. In the following pages, we offer several different approaches to moving through Steps 1, 2, and 3.

## STEP 1:

Determine which of your graduating students intend to go to college in the fall after high school graduation.

### Approach 1 Use senior exit surveys

We have found that the best practice for documenting students' college intentions is through a senior exit survey. Many school districts administer senior year exit surveys that ask about students' postsecondary plans. Specific questions included in the exit surveys vary across districts. In the sample materials in this handbook, we provide examples of exit surveys currently used in the Dallas Independent School District (TX) (page 60) and the Fort Worth Independent School District (TX) (pages 62–63). If you intend to obtain a better understanding of summer melt by developing a survey, or altering the content of an existing survey, we offer several recommendations on the following pages.

## Exit Survey Best Practices

1

Conduct the survey in the last month of school, as close to high school graduation as possible. **Why does this matter?** This is the time by which students must typically finalize their college choice and pay a deposit in order to secure a spot for fall enrollment, so this is when plans are most likely to be finalized.

2

Include information about the survey (or the survey itself) in graduation materials provided to students and parents. **Why is this important?** High schools will often provide lists of to-do's or requirements for graduating students, including ordering a cap and gown, completing a diploma form, and reserving graduation tickets. Adding the completion of the exit survey to this list will help you obtain a higher response rate. Going a step further, make the exit survey a graduation requirement or offer an incentive to obtain high completion rates. **Why do this?** Making the survey a graduation requirement should boost response rates and increase the representativeness of the results.

3

Ask students to report the specific institutions at which they plan to enroll, not just where there have been accepted. **Why ask this?** This will allow you to investigate multiple dimensions of summer melt: whether college-intending students enroll in any institution the fall after high school graduation, and whether they enroll at the institution they planned to attend as of high school graduation.

4

If the timing of your survey makes it possible, explicitly ask whether students' intended schools require a spring financial deposit and if they have paid that deposit (or obtained a deposit fee waiver depending on family income eligibility). **Why ask this?** Not all institutions require a deposit, but in the instances where one is required, the decision to pay a deposit (or to obtain a fee waiver) is a clear signal of a strong intent to enroll.

5

For students who report not paying a deposit, ask whether they intend to enroll in college in the fall. **Why ask this?** Depending on the timing of your survey administration, students may still be undecided regarding their intended college or university. On the other hand, for students who intend to enroll in college in the fall, not paying a tuition deposit in a timely manner may serve as an early indication of decreased likelihood to actually enroll, especially if students do not realize the need to pay a tuition deposit. You could target these students for early summer outreach and support.

6

If possible, administer the survey electronically so that the results are captured immediately in a spreadsheet. **Why do this?** This will save you the time and money associated with data entry and will allow you to synthesize and respond to the information reported more quickly. Electronic administration also facilitates real-time tracking of student survey response.

7

Ask students to provide updated contact information, including their cell phone numbers and email addresses. **Why ask this?** If you plan to provide proactive outreach to students over the summer, it will be beneficial to obtain the most up-to-date contact information possible. Previous efforts to reach out to students tell us that text and Facebook messaging are among the most successful strategies for communicating with students.<sup>7</sup> Of course, which outreach strategies you use will also depend on your organization's policies on communicating with students.



## STEP 1:

Determine which of your graduating students intend to go to college in the fall after high school graduation.

### Approach 2 Use transcript request records

Some districts may neither administer an exit survey nor have the capacity to do so in the near future. Nevertheless, school counselors are typically responsible for submitting final transcripts to each student's intended college or university. When doing so, counselors could—or likely already do—record their students' intended college plans, even if this information does not make its way into a centralized data system. Therefore, collaborating with school counselors to collect and centrally record students' postsecondary education plans would be an effective alternative strategy to capturing the information you need.

## STEP 1:

Determine which of your graduating students intend to go to college in the fall after high school graduation.

### Approach 3 Survey school counselors

If counselors do not keep these transcript request records and it is not possible to administer a student exit survey, consider administering an exit survey to the school counselors about graduating seniors. Ask counselors to indicate, to the best of their knowledge for each student, whether the student:

1. has been accepted to college,
2. is planning to enroll in college (and if so, where), and
3. has paid a deposit to attend a particular institution.

Before implementing this strategy, talk with school counselors about the quality of the information they can provide and the best process for collecting it.

If your district doesn't record this information at the student-level, another option is to collect college-intention reports from counselors at the school level. Often, counselors have to report the number of seniors from his or her high school that plan to attend college in the fall.

## STEP 1:

Determine which of your graduating students intend to go to college in the fall after high school graduation.

### Approach 4 Collaborate with colleges directly

A final strategy is to collaborate with area colleges and universities to estimate the extent of summer melt in your district. In our experience, there is a relatively small number of local higher education institutions at which the vast majority of a district's students intend to enroll. While colleges and universities might not be able to provide information about whether individual students paid a deposit (or obtained a deposit waiver) to attend in the fall, they might be able to provide aggregate reports on the total number of students from your district who paid a deposit to attend in a given year. These aggregate numbers of paid deposits (or deposit waiver requests) can be used as an approximation of how many of your graduating students intend to go to college in the fall. Note that this approach does not capture the students who fail to pay a deposit in a timely way.

## STEP 2:

Determine how many of your students actually enroll in college in the fall after high school graduation.

The first two approaches to Step 2 involve capitalizing on data available through the National Student Clearinghouse (NSC). The NSC is a national nonprofit that provides enrollment and degree verification data for more than 3,500 colleges and universities in the United States (representing more than 96% of students enrolled in college nationwide). For the most robust analysis of summer melt, we recommend using student-level data as laid out in Approach 1. However, if it is not possible for you to obtain individual postsecondary records from the NSC, we provide several other alternatives in Approaches 2 and 3.

Before pursuing any approach that utilizes data from the NSC, however, it is important to confirm that the colleges that historically enroll the largest numbers of your students are part of the NSC. You can go to <http://www.studentclearinghouse.org> for more information.

## STEP 2:

Determine how many of your students actually enroll in college in the fall after high school graduation.

### Approach 1

#### Use individual postsecondary enrollment records from the NSC

To make use of NSC postsecondary enrollment data, your agency will first need to establish a contract with the NSC. You will then be able to provide the NSC with student-level information about your recent graduates to which they will match postsecondary enrollment records. These records will provide information such as the institution each enrolled student is attending as well as whether each student is enrolled full- or part-time. By collecting these postsecondary enrollment records, you will be able to determine which of your students actually enroll in college the fall after high school graduation.<sup>8</sup>

## STEP 2:

Determine how many of your students actually enroll in college in the fall after high school graduation.

### Approach 2

#### Use school-level postsecondary enrollment records from the NSC

If you are not able to work with NSC student-level data, find out if your district receives NSC Student-Tracker reports for individual high schools. These reports provide the number of students (by high school) that enroll in college the fall after graduation. By comparing these school-level enrollment numbers to expected enrollment numbers at the school level, you can estimate rates of summer melt by high school. While student-level data will allow for greater accuracy, this comparison will provide an indication of which schools may benefit from further examination and/or intervention.

## Step 2:

Determine how many of your students actually enroll in college in the fall after high school graduation.

### Approach 3 Work with local institutions or higher education agencies

If NSC data is not available, you can reach out to local colleges and universities that historically enroll large percentages of your students. You can also check to see if your state has a higher education agency that tracks the number of students who enroll in state institutions from each district in the state. While these sources do not allow you to calculate melt for all of your students, you can still use this data to find out if part of your student population is melting. By collecting these enrollment numbers, you can estimate the college-specific summer melt that is occurring among your students.

## Step 3:

Measure the summer melt rate using the information gathered in Steps 1 and 2.

After collecting data on the number of students who intend to enroll in college versus those who actually do enroll, you will be well equipped to identify the degree to which summer melt is occurring in your district.

To do this, you will need:

- the number of college-intending students (gathered in Step 1), and
- the number of students enrolled in college (gathered in Step 2).

There are two different approaches for Step 3 depending on the level of data you obtained in Steps 1 and 2. Approach 1 requires student-level data and Approach 2 uses school-level information.

### Step 3:

Measure the summer melt rate using the information gathered in Steps 1 and 2.

#### Approach 1 Use student-level information

If you have student-level information, you can calculate an estimated rate of summer melt:

$$100 \times \left( 1 - \frac{\text{Number of enrolled students}}{\text{Number of college-intending students}} \right) = \text{percent of students "melting"}$$

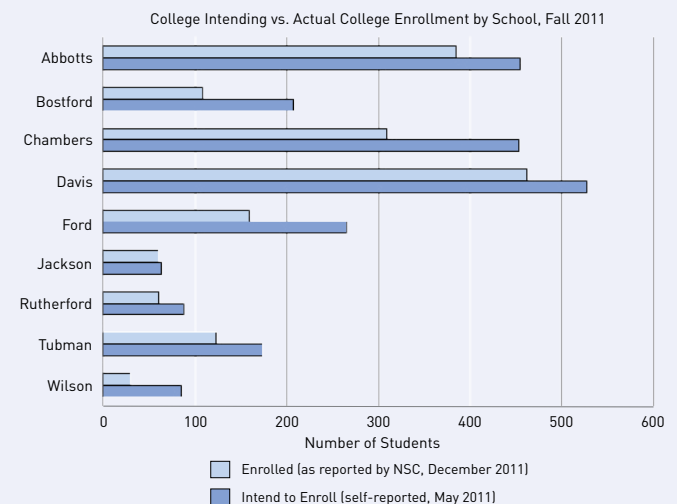
If you are using student-level data to investigate summer melt in your agency, in addition to calculating an overall rate, we recommend estimating rates separately by high school and within salient subgroups of students, such as those defined by socioeconomic status (proxied by free or reduced-price lunch), level of prior academic achievement, or characteristics of intended postsecondary institution (such as whether students intend on a two-year or four-year school). These analyses will help you to understand whether certain groups of your students are particularly susceptible to summer melt and will inform the ways in which you target programs and policies in response.

### Step 3:

Measure the summer melt rate using the information gathered in Steps 1 and 2.

#### Approach 2 Use school-level information

If you only have access to school-level data, focus your analyses on school-level estimates of summer melt. You can create a graph, such as the one below, to compare expected and actual college enrollment for each of your high schools. While student-level data will give you more accurate estimates, such school-level analyses can still highlight where interventions might be most needed and most beneficial. For example, looking at this graph, you can see that approximately 90 students from Wilson High School intend to enroll, but less than half actually do.



BOTH THE EQUATION AND GRAPH ON THE preceding pages demonstrate very simple approaches to identifying summer melt in your organization. A key question for any analyst hoping to identify summer melt in your agency is: Are you able to match students' post-secondary data with exit survey data collected by your district? You may want to collaborate with someone who has experience assembling data files at the student level and conducting the relevant descriptive analyses. Once you have the individual student information, you can combine it into a single dataset to examine the extent to which your high school graduates are following through on their specific college plans.

# How Can My District Address Summer Melt?

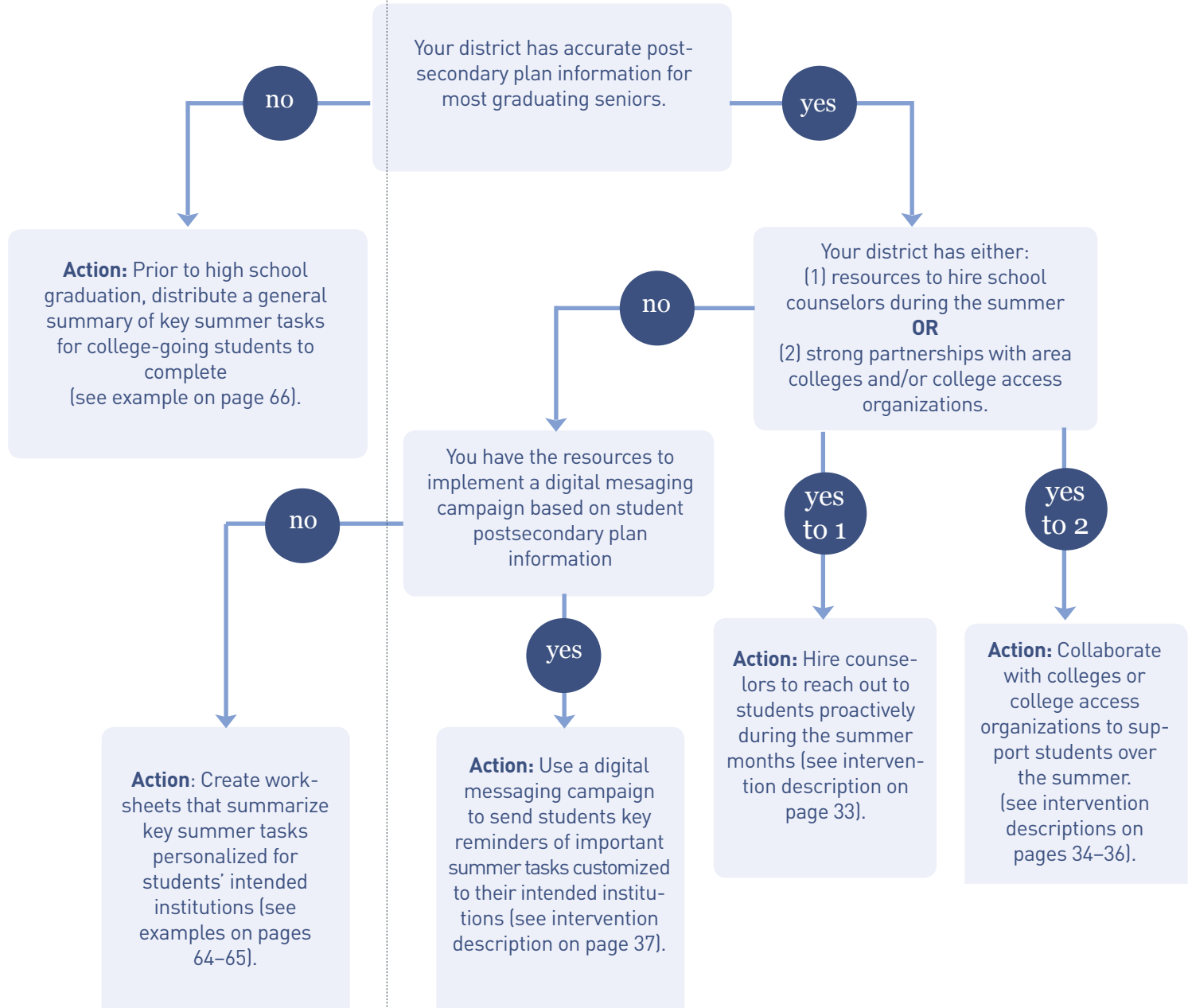
## How can my district address summer melt?

You can take a variety of approaches to increase the share of your of college-intending seniors who successfully enroll in college. To determine the right approach for your agency, consider:

- the availability of resources;
- the quality of information you have; and
- the strength of your connections with area colleges, universities, and college access organizations.

Here, we provide a visual overview of various intervention approaches you can implement based on these considerations. These approaches can be implemented alone or in combination, and you may be able to identify alternate approaches that capitalize on the resources and strengths within your district. This model can serve as a useful starting point for assessing the approach or combination of approaches that suits your context and best leverages your data availability and network of relationships.

Detailed descriptions of these intervention options can be found on the following pages.



## Intervention Descriptions

The intervention approaches discussed here fall into three primary categories:

1. proactive personal outreach to college-intending seniors,
2. digital outreach to college-intending seniors, or
3. a combination of personal and digital outreach.

In the following section, we describe the first two approaches. The third approach is another option if you prefer to combine different aspects of personal and digital outreach.

Most of the interventions described here are based on initiatives we implemented in several school districts throughout the United States. Section 4 of this guide includes mini-case studies that describe the interventions and successes of these approaches in the field.



## A Reminder

The tasks that college-intending students must complete during the summer after graduation are numerous. Even seemingly simple tasks can become significant barriers to timely college enrollment. Common summer tasks include attending orientation; completing financial aid and other paperwork; paying for tuition, room and board, and student fees (including health insurance); taking placement exams; and selecting classes. Providing students with modest levels of assistance with these tasks has the potential to significantly improve timely college enrollment among your graduates.



How can my district address summer melt?

## Intervention Approach 1 Proactive Personal Outreach

Several different groups of people might be able and available to provide personal outreach to college-intending seniors over the summer. These include high school counselors; admissions or other staff at local colleges and universities; and local college access organizations. Further, after outreach efforts are well established, other groups—such as staff of faith communities, after-school programs and tutoring organizations—may also be able to become involved.

In the following pages, we briefly describe the proactive personal outreach in which these groups could engage, noting resources that might assist you.

“What I found was that there were particular students who were lost in the sauce, if you will...and so, we were able to assist those students and those students required a great deal of help”

PACE Counselor,  
Fulton County Schools

## Proactive Personal Outreach Conducted by High School Counselors

**A good match for you if:** You have the resources to hire counselors over the summer; the counselors are able to allocate 2–3 hours per student over the course of the summer; you have good student information so that counselors can personalize their outreach; and you have strong data collection processes in place to learn from and act upon what counselors learn. (See pages 38–39 for critical success factors.)

**Description:** Through phone calls, text messages, and face-to-face meetings, counselors offer additional college-related support and guidance during the summer months. Counselors help students review their financial aid packages, understand and complete required paperwork, and negotiate social/emotional barriers to enrollment. In some school communities, one could imagine other staff being well-positioned to do this work, including teachers, librarians, custodians, receptionists, or coaches.

**Resources:** The case studies on pages 52–53 and 56–57 detail two counselor-based interventions in Fulton County Schools and Fort Worth ISD, respectively.

**Cost:** Approximately \$50 to \$200 per student, depending on the site.<sup>9</sup>

## Proactive Personal Outreach Conducted by Local Colleges/Universities

**A good match for you if:** You have strong partnerships with area colleges and universities, and many of your college-intending students intend to enroll in these colleges and universities.

**Description:** Higher education staff (such as admissions officers) call, text, and/or meet with college-intending students. Students may be more inclined to engage with college staff because the outreach is coming from the institution where the student has indicated a desire to enroll. Personalized summer contact is likely to make students feel valued by the institution, which could increase their commitment to matriculating. Additionally, colleges have access to information about the tasks students have and have not completed over the summer months. As a result, colleges are better positioned than high schools or community-based organizations to target their outreach to students who have missed key summer benchmarks. Depending on the staffing structure at individual colleges and universities, admissions officers or first-year transition team members could lead outreach to students. Alternatively, higher education institutions could rely on currently enrolled students to provide outreach to students during the summer. Colleges and universities could match

prospective students with enrolled students who are alumni from the given high school. Currently enrolled students could communicate with prospective students throughout the summer, providing institution-specific advice and encouragement. They could refer students to college staff members when the prospective students need professional guidance or help completing specific tasks. The relationships that the prospective students form with the currently enrolled students at their intended institution could continue into freshman year, providing the prospective students with valuable on-campus student mentoring and support.

**Resources:** The case study on pages 50–51 of this guide provides a synopsis of a peer mentor intervention conducted in multiple sites.

**Cost:** Approximately \$80 per student, depending on the site.

## Proactive Personal Outreach Conducted by Local College Access Organizations

**A good match for you if:** You have active and well-organized college access organizations in your area, and you have staff available to manage partnerships with these organizations.

**Description:** You may be able to provide (or supplement) proactive personal outreach to college-intending students by partnering with college access organizations in your area. The mission of these organizations is to increase college access and enrollment, and they may have staff capacity during the summer to conduct and/or support personal outreach. For example, uAspire, a national college access organization based in Boston, MA, led outreach to college-intending high school seniors in Boston. The program significantly increased rates of on-time college matriculation for participating students.<sup>10</sup>

**Resources:** The case study on pages 48–49 of this guide provides a synopsis of uAspire’s summer outreach to college-intending graduates from Boston Public Schools.

**Cost:** Approximately \$150 to \$250 per student.

How can my district address summer melt?



## Intervention Approach 2 Digital Outreach

**A good match for you if:** You can conduct a high school exit survey to gather accurate contact and postsecondary plan information for graduating seniors.

**Description:** Reach out to students with a digital messaging campaign in which you send text messages to students with reminders of key summer tasks they need to complete. The text messages can be customized to students’ intended institution, and timed for delivery just before each key task needs to be completed. For instance, if students are expected to attend a required orientation on June 1, you could send them a text message on May 24 and May 31 reminding them about the time and location of the orientation.

*continued on next page*

How can my district address summer melt?

## Intervention Approach 2 Digital Outreach

*continued from previous page*

In order to implement a digital messaging campaign, first find out if your district's student portal has text capabilities. If not, you should consider contracting with a message delivery service that allows for text message customization and automation. Once this contract is established and the initial messaging system is in place, the cost of contacting an additional student or sending an additional message to all students is minimal. Digital messaging can be a good intervention for organizations that do not have the resources to support individualized, personal outreach. It also can be a strong complement to personal outreach interventions.

**Resources:** The case study on pages 54–55 provides a synopsis of a texting intervention that took place in Dallas Independent School District.

**Cost:** \$7 (or less) per student for digital messaging campaign, inclusive of counselor follow-up with students and families.

## Before the intervention: critical success factors

Before getting started on these interventions, there are key steps you can take to increase the chance of success. While not intended to be comprehensive, we recommend the following components as those that will help to maximize your program's potential for success. First we list factors applicable to any intervention and on the following page, we detail factors only applicable to interventions involving personal outreach.

Some critical success factors for any intervention:

- **Conduct a senior exit survey.** As discussed in pages 13–15, conducting a senior exit survey to collect up-to-date summer contact information from students (including cell phone numbers, email addresses, and Facebook user names), as well as where students are intending to enroll in college, will greatly enhance the success of any intervention. The more you know about students, the more likely your outreach to them (personal or digital) will be timely and relevant. This information is important both to ensure successful communication with students and to provide them with information about key summer tasks specific to their intended institution (see pages 60–63 for sample high school exit surveys).
- **Assemble short summary documents, specific to area colleges and universities, that list key summer tasks that students must complete.** Counselors have reported that such summary documents are highly useful in helping students identify summer tasks they need to complete in order to successfully matriculate (see pages 64–65 for sample briefing documents). You can also make these documents available on school and district websites and provide them in hardcopy to students and families prior to graduation.

Some critical success factors for Proactive Personal Outreach interventions:

- **Provide adequate training for people conducting the outreach.** Take time to develop materials and provide training to anyone who will be providing outreach to college-intending students. Key things to address are: the goals of the intervention, the responsibilities of those contacting students, information about financial aid, the data that needs to be gathered, and the ways in which information is provided to the intervention coordinators. One district with which we partnered conducted a four-hour training for their school counselors. Upon reflection, the district felt as though additional training would have been beneficial, particularly focusing more time on the FAFSA and general financial aid issues and processes.

- **Have counselors (or others who are performing personal outreach) conduct a comprehensive assessment of students' readiness for college enrollment at the start of summer.** Develop a checklist of key topics for counselors to discuss with students (see pages 68–69 for a sample initial outreach checklist). The person contacting the student can then schedule follow-up meetings and conversations with students as needed, based on the issues that arise during the assessment meeting (see pages 70–71 for a sample follow-up assessment meeting checklist). While this meeting ideally takes place in person, it can also occur over the phone, on Facebook, or through text messages (see page 72 for a sample student intake form that can help you to organize information from these meetings).

- **Decide what data counselors should record during the intervention.** There is a trade-off in data gathering. Be careful to find a balance between the data that is needed in order to manage, monitor, and rigorously evaluate your intervention and the data collection requirements imposed on your project staff. Extensive data collection requirements can take away from time that counselors could otherwise spend helping students (see pp. 74–75 for a sample interaction log that can be used as a template).

## Before the intervention: create a data collection plan

Implementing any of these interventions will lead to collecting new and different information from students, families, and anyone who is conducting the personal outreach to college-intending students. To benefit from this, at the beginning of the project carefully consider collection processes that will render your data both useful and reliable. Think through what data you are collecting; who is collecting it and when; and how it can be gathered, assembled, and managed to support analysis that will help you understand what is working and how to target future outreach. If data collection and management are new to you, consider engaging experienced partners who can provide some guidance. For assistance in identifying partners, you should consider contacting researchers or analysts at local higher education institutions, nonprofits, or even your local chamber of commerce.

Key questions to consider before embarking on any intervention include:

1. **Who will own and be accountable for the collection of data?**
2. **Where will the data live?**
3. **How will we keep the data consistent and clean? (The examples on pages 68–75 can help maintain consistent recording practices and information flow.)**

With answers to these questions and a well-articulated data collection plan, you are ready to launch and assess the impact of your intervention.

## After the intervention: determine impact

The final stage of the process is evaluating your intervention. Detailed program evaluation instructions are outside the scope of this guide, but below are some steps to consider as you think through how to get started:

1

**1. Begin with your current seniors.** Make sure that your data system allows you to track individual students through graduation and into the fall semester of college. Identifying each student with a unique ID number will facilitate this tracking.

2

**2. Gather data on students' postsecondary intentions, either through counselor records or a senior exit survey.** If you develop an exit survey, be sure to consider how you will connect the exit survey data to high school graduation and college enrollment data. To do this, one possibility is to pre-label the surveys with the student ID number. Or, if the survey is online, consider providing students with a unique log-in, which can also allow for an easier connection.

3

**3. Implement the intervention that best suits your organization.** Use the templates and samples provided in this handbook to help you create informative documents for your students. When you design your intervention, keep in mind that one of the best strategies for understanding the impact of an intervention is to assign students to the initiative via lottery. A lottery can be particularly useful when your organization doesn't necessarily have the capacity to serve all students. In addition, it provides the most equitable way to allocate the additional support, especially when you do not have good information on who might stand to benefit the most.

*(3 continued)*

By comparing outcomes for students who did and did not experience the initiative (based on the lottery assignment), you are able to assess accurately the impact of your intervention on outcomes of interest, such as timely college enrollment.<sup>11</sup>

4

**4. When NSC data is available the following fall, collect the data, obtain postsecondary enrollment information for your recent high school graduates, and find out which students actually enrolled following the intervention.**

5

**5. Compare the postsecondary enrollment rate among students targeted by your intervention to that among an appropriate comparison group of students not targeted by your intervention.** If you have assigned outreach by lottery, then this is a straightforward comparison between those who were and were not assigned to outreach. If you are comparing groups of students across years, then you will need to utilize more sophisticated analyses to account for other differences between the groups being compared.

If your organization has a research department, bring them in at the beginning. They can assist in planning the intervention in a way that also allows for the evaluation of the intervention's impact on college going among your district's graduates. If you do not have a research department, consider inviting researchers from a local institution of higher education to support you in the program design and evaluation effort.

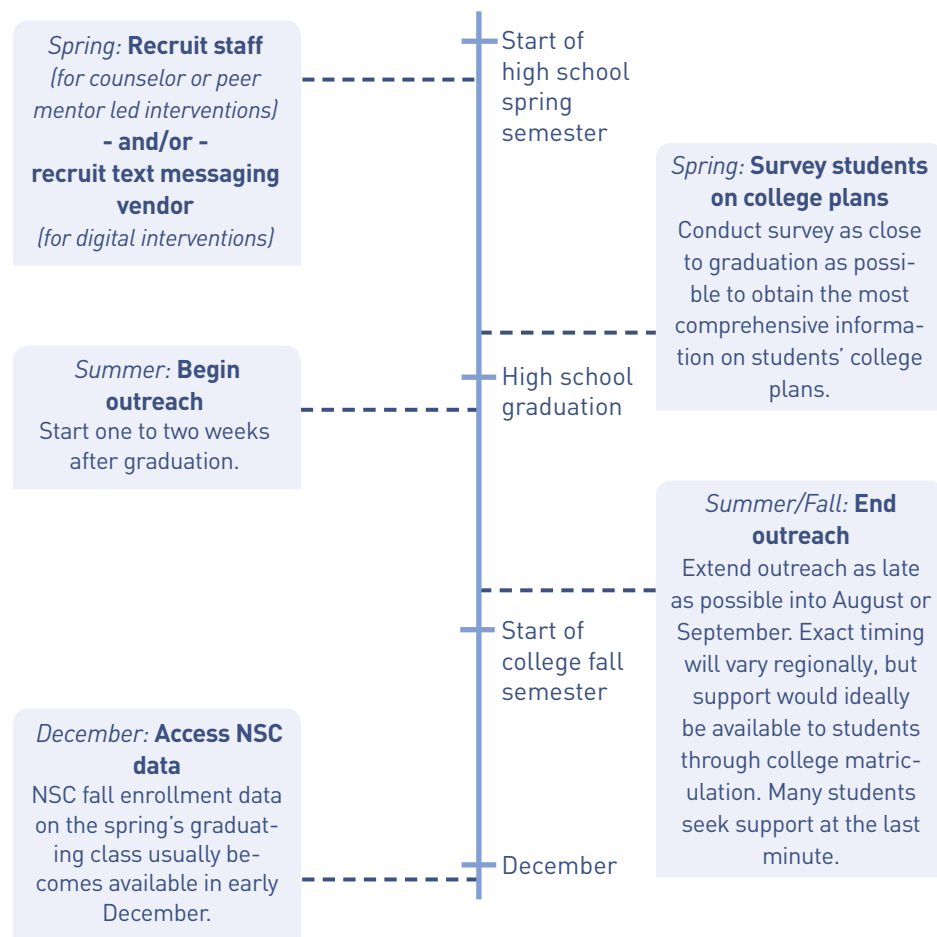
## Summary of Intervention Options

Category	Outreach Approach	Cost per student*	Pros	Cons
Personal	High school counselors	\$50–200	<ul style="list-style-type: none"> <li>Intensive</li> <li>High impact</li> <li>Personalized</li> </ul>	<ul style="list-style-type: none"> <li>More resource intensive than other intervention options</li> </ul>
	Peer mentors	\$80	<ul style="list-style-type: none"> <li>Capitalizes on students' comfort with their peers</li> </ul>	<ul style="list-style-type: none"> <li>Requires strong staff management</li> </ul>
	Local college access organizations	\$150–200	<ul style="list-style-type: none"> <li>Utilizes existing experts</li> <li>High impact</li> </ul>	<ul style="list-style-type: none"> <li>More resource intensive than other intervention options</li> </ul>
Digital	Text messaging campaign	\$2	<ul style="list-style-type: none"> <li>Broad reach</li> <li>Customizable</li> <li>Automates outreach</li> </ul>	<ul style="list-style-type: none"> <li>Dependent on accurate exit survey and student contact information</li> <li>May need to contract with an outside message delivery service</li> </ul>
	Text messaging campaign with follow-up counselor support	\$2–7	<ul style="list-style-type: none"> <li>Same as text messaging, with the additional pro that personal help is available to students who need it</li> </ul>	

\*Cost varies by site; calculation is based on number of students assigned

## Timeline for Implementing an Intervention

WHILE THE EXACT TIMELINE FOR IMPLEMENTING AN INTERVENTION WILL VARY based on your district's calendar and available resources, below is a general outline to help you with your planning.



In the next section, we describe the implementation and impact of summer counseling interventions in five different sites. For more details about the analyses behind these evaluations, you can visit [www.gse.harvard.edu/sdp/summermelt](http://www.gse.harvard.edu/sdp/summermelt) and read the full research papers associated with each site.

# Summer Melt Interventions:

Five case studies from  
the field



## uAspire (Boston, MA)

DURING SUMMER 2011, UASPIRE (FORMERLY KNOWN AS ACCESS), a national, nonprofit college access organization based in Boston, implemented an intervention to reduce summer attrition among college-intending graduates from public high schools in the city. As an organization, uAspire primarily focuses on ensuring that students have the financial information and resources necessary to find an affordable path to and through college.<sup>12</sup>

### Summer Melt Interventions:

#### uAspire

uAspire targeted its summer outreach to students who had applied for a supplemental scholarship that the organization awards to Boston-area high school graduates. Scholarship applicants had been accepted to college, received financial aid, decided which college to attend in the fall and, in most cases, had met with a uAspire advisor during the school

year.

At the end of June (approximately two weeks after high school graduation), uAspire began reaching out to students and continued reaching out to them through the middle of August. In the initial phase of the intervention, uAspire advisors contacted students with the goal of setting up in-person meetings to assess students' readiness for college enrollment. Advisors used a range of contact methods in this outreach: email, phone, text message, and Facebook. Advisors reported the greatest success using text and Facebook messaging. Roughly half of students to whom advisors reached out had at least one meeting over the course of the summer. Almost all meetings took place at uAspire's Center for College Affordability, located in Boston's city center.

Advisors reported spending the majority of their time with students addressing financial aid issues and helping students access and complete required paperwork. They helped a number of students waive the cost of their intended college's health insurance plan in favor of staying on their parents' insurance. Waiving the college's insurance typically saved students at least \$1,000 on their tuition bill.<sup>13</sup> Advisors also helped clarify a range of misconceptions students faced about the cost of college. For instance, a number of students interpreted their tuition bills as the cost of the entire year, rather than the cost for one semester.

In addition to financial issues, advisors reported that many students were unfamiliar with the web portals through which colleges now disseminate much of the paperwork students are required to complete over the summer. Advisors helped students access these portals and answered questions about required paperwork (for instance, housing forms).

**Cost:** During the summer, advisors spent an average of 2–3 hours per student, and the total intervention cost approximately \$200 per student served.

**Results:** Students who were offered additional summer counseling support were 5 percentage points more likely to enroll immediately in college compared to students who did not receive outreach and were nearly 9 percentage points more likely to be enrolled continuously through the fall of sophomore year.

**“Financial aid is the biggest issue, obviously, because it comes from other issues. They’ll all connect, but at the end of the day, you can’t even begin to address those things unless you address those emotional issues that are going on that are not so much money or the bill or the filling out the form.”**

uAspire Advisor,  
Boston, MA

## uAspire & The Mastery Charter Schools

DURING SUMMER 2012, uASPIRE IN BOSTON, LAWRENCE, and Springfield, MA and the Mastery Charter Schools in Philadelphia, PA hired peer mentors to reach out to college-intending high school graduates and help them address barriers to successful fall matriculation. The peer mentor intervention built largely on uAspire's summer 2011 college counseling intervention (see p. 44–45 for a

description of this intervention). uAspire and Mastery selected peer mentors based on several primary criteria: students had to have worked with uAspire during high school or have graduated from a Mastery high school; be enrolled in college and in good academic standing; and have received financial aid and have an understanding of the financial aid process. The organizations also screened for

other qualities that indicated candidates' potential as a peer coach. Peer mentors were employed from mid-June, 2012 –mid-August, 2012, and worked approximately 20 hours per week. Most peer mentors were juniors or seniors at four-year colleges and universities, and there was a roughly equal balance between male and female mentors. uAspire and Mastery provided several days of training for the peer mentors, as well as ongoing support for peer mentors throughout the summer.

Throughout the summer, peer mentors proactively reached out to students to offer them help addressing potential barriers to college enrollment. In their initial outreach to students, peer mentors' primary goals were (1) to make contact with students and (2) to assess their readiness for fall college matriculation. Following this initial assessment, peer

mentors scheduled in-person meetings or follow-up phone conversations to help students address issues that arose during the initial conversations. Peer mentors assisted students with tasks such as interpreting their financial aid award letters, exploring tuition payment plans, navigating online college portals, registering for orientation, and organizing transportation for the beginning of the academic year. Peer mentors did not, however, work on any tasks that required students to provide financial information about themselves or their families, such as completing the FAFSA or applying for supplementary loans. For these tasks, and any other areas in which the peer mentor felt they needed additional guidance to support the student, peer mentors referred students to meet with a supervising counselor.

**Cost:** Each of the 20 participating peer mentors earned approximately \$2000 and collectively served 934 students across the two sites. Counselors typically supervised one to three peer mentors and devoted 15–25 hours per week to managing peer mentors and following up with students and families as needed. Inclusive of peer mentor and counselor time, the peer mentor intervention cost approximately \$80/student to implement.

**Results:** Across locations, between 40 and 60 percent of all students targeted for outreach interacted with a peer mentor or counselor at least once during the summer. The peer mentor outreach increased timely college matriculation in four-year institutions by 4.5 percentage points. Across the uAspire sites, where peer mentors were matched to students based on gender, peer mentor outreach increased enrollment among male students by 7 percentage points.

### Summer Melt Interventions:

#### uAspire & Mastery Charter Schools

## Fulton County Schools

IN AN EFFORT TO SUPPORT STUDENTS AFTER GRADUATION and improve college enrollment rates, Fulton County Schools (FCS) implemented a counseling intervention for college-intending graduates in six of the district's high schools during the summer of 2011. The program, known as Summer PACE (Personalized Assistance for College Enrollment), targeted students who reported that they intended to go to college in fall of 2011 and had applied and been accepted to at least one college.<sup>14</sup>

### Summer Melt Interventions:

#### Fulton County Schools

FCS hired current high school counselors to serve as PACE counselors; most were hired to work in their own high schools so students would be familiar with them. In early June 2011, the district provided PACE counselors with training on some of the services and

supports they would be expected to provide to students, such as helping students to understand HOPE scholarship<sup>15</sup> eligibility and to complete the Free Application for Federal Student Aid (FAFSA). The counselors began outreach to their assigned caseload of students shortly after the June training and continued through the third week of July. PACE counselors contacted students via phone, email, text, Twitter, and Facebook to gain an understanding of students' needs with respect to college enrollment and to offer assistance. About 43 percent of students identified for PACE assistance responded to PACE counselors' outreach.

The most popular type of help provided to students was assistance with financial aid. Almost 1 out of 3 students who received support from a PACE counselor received services

that fell into this category, seeking advice around completing the FAFSA, assistance with locating loans or scholarships, and understanding tuition and other expenses, to name a few. PACE counselors also provided encouragement and reassurance, connected students to college staff, and worked with the students' families to finalize plans.

Summer PACE was a relatively low-cost, simple intervention that generated positive results. Aside from an initial training focused on the nuances of financial aid, the program did not require intensive preparation or outside expertise, and employed existing staff who were interested in acquiring additional work hours over the summer.

**Cost:** The cost of the intervention was about \$115 per student targeted.

**Results:** The program increased on-time college enrollment of low-income students by 8 percentage points. In addition to the strong impact results, Summer PACE offered an important opportunity for high school counselors to provide focused supports to students. PACE counselors provided overwhelmingly positive feedback about their Summer PACE experience.

**“Increasing our students’ successful transition to college through the PACE program was a remarkable, but humbling experience. I was elated when I was told about the statistical gains made [in increasing on-time college enrollment]—it showed that this program unequivocally makes a difference.”**

PACE Counselor,  
Fulton County Schools

## Dallas ISD

DURING SUMMER 2012, THE DALLAS INDEPENDENT SCHOOL District implemented a personalized and automated text messaging campaign to inform college-intending students and their parents about important tasks to complete in order to successfully matriculate in college. The district targeted students who had started or completed the free application for federal student aid (FAFSA) prior to high school

### Summer Melt Interventions:

#### Dallas ISD

graduation. The messages were customized to the institution that each student planned to attend as of high school graduation and covered topics such as registering for freshman orientation and placement tests. The messages also offered students help resolving any errors on their FAFSA and interpreting and acting on financial aid award letters and tuition bills. Most of the

messages included web links that allowed students to complete next steps directly from their phones. For instance, a student planning to enroll at the Texas Woman's University (TWU) received a message reminding her to register for the required summer orientation; the message included a web link to the TWU orientation registration web site. Finally, each message offered to connect recipients to a school counselor for additional individualized assistance when needed.

Dallas ISD relied on two sources of information to implement the text messaging campaign. First, the district administered a high school exit survey to collect the information required for message delivery: students' and parents' names, cell phone numbers, and intended postsecondary institution. Dallas ISD then identified the 10–15 colleges and

universities most frequently attended by district graduates, and worked with a research team to assemble institution-specific tasks, due dates, and web links. Reify Health, a company aimed at improving health and education outcomes through the application of mobile technologies, automated the delivery of personalized messages to students and their parents.

**Cost:** Inclusive of the cost of having counselors provide follow up assistance when requested, the text intervention cost approximately \$7 per student.

**Results:** The text message campaign in Dallas had particularly pronounced impacts on students who qualified for free or reduced-price lunch (FRPL) and on students in the middle of the distribution of academic achievement. FRPL students in the treatment group were over 4 percentage points more likely to enroll in college than their counterparts in the control group, while the text intervention increased overall enrollment by over 5 percentage points for students in the 2nd and 3rd quartile of the distribution of senior year GPA. For the overall sample of college-intending students in Dallas, the text campaign increased enrollment at two-year colleges by over 5 percentage points.

## Fort Worth ISD

IN THE SUMMER OF 2011, FORT WORTH INDEPENDENT School District (FWISD) implemented a summer counseling intervention to address summer melt among the district's 2011 graduates. The goal of the intervention was to provide college-intending students with informational, technical, and emotional support that would smooth the transition from high school to college.

### Summer Melt Interventions:

#### Fort Worth ISD

The district used senior exit survey data to identify students who reported plans to attend college and had been accepted to at least one college. Case files were created for each college-intending student. These files contained current contact information, information on plans and preparation for college, and student-anticipated needs for

assistance over the summer. Counselors, teachers, and staff participated in the intervention and were responsible for providing students with proactive outreach and counseling from late June through early August. Implementation was largely staff-driven, with principals choosing the staff and staff members managing the methods and timeline for their efforts. Advisors provided assistance in person, over the phone, through email, and on Facebook pages. Schools that collected contact information immediately before graduation had the greatest success reaching students.

The most common area of assistance was financial aid. Advisors helped students to complete the FAFSA and state financial aid forms, worked with students to confirm residency, searched for scholarship opportunities, and counseled students to consider other colleges when plans were not financially viable. Other common areas of assistance were processing transcripts, providing guidance on

placement testing, and addressing students' anxiety about college. As part of the outreach, counselors utilized checklists that provided students with key steps to college enrollment and important dates and contacts for each of these tasks. Many advisors reported that these checklists, along with the student case files, were critical to allowing them to utilize the full time allotted for assisting students. In general, advisors were extremely excited about the opportunity to participate in the program. Many noted that this type of work was the reason they had chosen their profession, and the opportunity to work with students on future plans was relatively rare. The opportunity to make additional money over the summer was also an attractive aspect of the program.

**Cost:** The program was funded at \$48 per student and provided two hours of outreach and counseling per student.

**Results:** The enrollment rates of targeted students increased by nearly 5 percentage points compared to a previous cohort of students, while enrollment rates at two non-participating schools decreased by 4 percentage points. Three participating schools saw enrollment rates for college-intending students increase by more than 15 percentage points. The impact of the program was sizable and significant for students who intended to attend a four-year college and had already taken important steps toward enrollment (e.g., completed the FAFSA, took SATs/ACTs). The impact of the program was small and not statistically significant for students planning to attend two-year colleges. This suggests that interventions may need to differ in strength or design to effectively impact enrollment outcomes among students who plan to attend a four-year college versus those who plan to attend a two-year college.

## Conclusion

Through our experience and research to date, we have learned that many students face summer-specific obstacles in successfully transitioning to college. Encouragingly, we have also learned that interventions, such as those discussed in this guide, have the potential to make a real difference. Our hope is that this handbook will serve as a practical resource for districts and other educational organizations who want to investigate and address the issue of summer melt. The research, interventions, and tools summarized here are a starting point for you to consider what initiatives and supports have the greatest potential to impact your students' college enrollment in the fall after high school graduation.

We conclude with a section providing resources to support your efforts to investigate and develop a strategy for responding to summer melt. Resources provided here include:

- sample high school exit surveys,
- examples of summer task lists, both personalized for specific institutions and generic, and
- sample documents for proactive personal outreach, such as an initial outreach checklist, assessment meeting checklist, intake form, and counselor interaction log.

For additional resources and information, please visit:  
[www.gse.harvard.edu/sdp/summermelt](http://www.gse.harvard.edu/sdp/summermelt)

# Resources

DALLAS INDEPENDENT SCHOOL DISTRICT – SENIOR EXIT SURVEY – CLASS OF 2012

**Dallas school counselors want to help make your postsecondary plans a reality!**

This summer Dallas counselors will be reaching out to students and their families to offer help with the final steps in the college-going process, and to help you work through any challenges that come up in making your postsecondary plans happen. So that we can get in touch with you, please provide the following updated contact information.

**Students who submit complete exit surveys will be entered into a raffle for a free iPad!**

\_\_\_\_\_  
LAST NAME (PRINT)

\_\_\_\_\_  
FIRST NAME (PRINT)

\_\_\_\_\_  
ID#

\_\_\_\_\_  
YOUR CELL PHONE #

\_\_\_\_\_  
YOUR EMAIL ADDRESS (PRINT)

\_\_\_\_\_  
NAME OF PARENT/GUARDIAN YOU PREFER WE CONTACT (PRINT)

\_\_\_\_\_  
PARENT/GUARDIAN'S CELL PHONE #

\_\_\_\_\_  
PARENT/GUARDIAN'S EMAIL ADDRESS (PRINT)

**Please also let us know what you plan to do after high school graduation:**

**Attend a four-year college/university in Texas:**

- University of North Texas    Texas Woman's University    Texas A&M, Commerce  
 UT – Arlington    UT – Austin    UT – Dallas    Other: \_\_\_\_\_

**Attend a four-year college/university out of state:**

Name of college \_\_\_\_\_ Location (city/state): \_\_\_\_\_

If you plan to attend a four-year college/university, did you pay a deposit to enroll at (or get a deposit fee waiver from) your intended college/university?  Yes  No  Don't Know

**Attend a two-year college:**

- DCCCD    Other: \_\_\_\_\_

**Attend a Trade School:**

Name \_\_\_\_\_ Location (city/state): \_\_\_\_\_

**Enlist into Military Service:**

Military Branch \_\_\_\_\_

**Work full-time** (list type of work/place of employment): \_\_\_\_\_

**Unsure of plans**

Approximately how many times during senior year did you meet individually with a school counselor to discuss your postsecondary plans?  0  1 – 3  4 – 6  more than 6 times

THANK YOU FOR COMPLETING THE EXIT SURVEY!

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# Fort Worth ISD SENIOR EXIT SURVEY

Name: \_\_\_\_\_

School: \_\_\_\_\_

### Marking Instructions

- Use a No. 2 pencil or a blue or black ink pen only.
- Do not use pens with ink that soaks through the paper.
- Make solid marks that fill the response completely.
- Make no stray marks on this form.

CORRECT: ● INCORRECT: ○/X/□/○

LOC	Student ID
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3 3 3	3 3 3 3 3 3
4 4 4	4 4 4 4 4 4
5 5 5	5 5 5 5 5 5
6 6 6	6 6 6 6 6 6
7 7 7	7 7 7 7 7 7
8 8 8	8 8 8 8 8 8
9 9 9	9 9 9 9 9 9

### Extra-Curricular Activities

In which of the following activities did you participate **IN** and **OUTSIDE** of school during your senior year? (Bubble all that apply)

#### IN School

- Music
- Theater/Drama
- Dance
- Sports
- UIL Academic Competition
- Journalism
- Speech/Debate
- Fort Worth After School

#### OUTSIDE of School

- Sports
- Art/Music/Performance
- Community Service
- Environmental Projects
- Other Organizations
- Family Care

### Post Graduation Plans

What do you plan to do following graduation?

- Four-year public college or university
- Four-year private college
- Two-year college
- Career or Technical college
- Military Service
- Work
- Undecided

### Go Center

Did you use the GO Center in your high school?  
 Yes  No

If yes, which of these services did you use in the GO Center. (Bubble all that apply)

- College search and information
- College application
- Scholarship search and information
- FAFSA pin number and information
- Registration for tests (SAT/ACT)
- Career exploration
- Received G-Force help
- Attended presentations

Thinking back, at what time in your life did you start thinking about college as a possibility after high school?

- 11th Grade
- 10th/9th Grade
- Middle School
- Elementary School
- Always Knew

### Quality of Instruction

Please rate the quality of your instruction in the following areas:

Very Good	Good	Fair	Poor	Highest Level Taken		AP	
				Dual Credit	Honors	Regular	
English/Writing	English/Writing	English/Writing	English/Writing	English/Writing	English/Writing	English/Writing	English/Writing
Mathematics	Mathematics	Mathematics	Mathematics	Mathematics	Mathematics	Mathematics	Mathematics
Science	Science	Science	Science	Science	Science	Science	Science
Social Studies	Social Studies	Social Studies	Social Studies	Social Studies	Social Studies	Social Studies	Social Studies
Computer/Technology	Computer/Technology	Computer/Technology	Computer/Technology	Computer/Technology	Computer/Technology	Computer/Technology	Computer/Technology
World Languages	World Languages	World Languages	World Languages	World Languages	World Languages	World Languages	World Languages
Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts	Performing/Fine Arts
Health/Physical Education	Health/Physical Education	Health/Physical Education	Health/Physical Education	Health/Physical Education	Health/Physical Education	Health/Physical Education	Health/Physical Education

Did you complete the FAFSA or TASFA?

FAFSA  Yes  No TASFA  Yes  No

If you did not submit a financial aid application, why not? (Select one that applies the most)

- I do not need financial aid to attend college.
- My parents were not willing to submit private financial information.
- My parents did not think we would qualify for or were eligible for financial aid.
- I did not know about the financial aid process.
- I do not plan to go to college.

If you plan to go to college, which of the following might prevent you from attending this fall? (Mark all that apply)

- I did not get accepted to the college(s) I wanted.
- I did not complete all of the application requirements (SAT/ACT, application, transcript).
- I might not have the money and/or financial aid.
- I might choose to work full time.
- I might have family responsibilities (e.g. child care).
- My parents do not want me to go to college.
- Nothing will prevent me from going. I will definitely be in college this fall.
- I do not plan to go to college.

### Guidance and Counseling Services

Please indicate which of these events you and/or your parent/guardian attended. (Bubble all that apply)

- Attended an evening parent conference session
- Attended a Financial Aid Workshop
- Attended District-wide College Night in September
- Received Senior Newsletters with scholarship information included
- Met with school counselor to review graduation requirements
- Met with school counselor for Senior Exit Interview either in classroom, small group or individually
- Completed a Career search or Career unit during high school (9 -12 grade) (Kuder or College for Texans)
- Attended a workshop or class for test preparation during high school (9 -12 grade)
- Completed the Accuplacer exam
- Attended at least one Super Saturday

### Areas of More Assistance

Please indicate areas in which you would have liked more assistance. (Bubble all that apply)

- Orientation as a New Student
- Conflict Resolution Skills
- Communication Skills
- Study Skills
- Time Management
- Test Taking Skills
- Job Seeking Skills
- College Application Process
- Financial Aid/Scholarship Process
- Career Options
- Course Selection & Scheduling
- Other (write in)

Please answer the following questions on preparation for your college/career:

VERY WELL  
SOMEWHAT WELL  
NOT WELL

### College Applications

Please mark all that apply

	APPLIED	ACCEPTED	FINAL DECISION
Tarrant County College	○	○	○
University of TX Arlington	○	○	○
Texas Christian University	○	○	○
University of North Texas	○	○	○
University of Texas at Austin	○	○	○
Texas A & M University	○	○	○
Stephen F. Austin University	○	○	○
Prairie View A & M University	○	○	○
Tarleton State University	○	○	○
Weatherford College	○	○	○
Texas Tech University	○	○	○
Texas Women's University	○	○	○
Texas Southern University	○	○	○
Other (write in)	○	○	○
Other (write in)	○	○	○
Other (write in)	○	○	○

- How well prepared were you to plan your high school course selections? ○ ○ ○
- How well prepared are you to meet your college and career goals? ○ ○ ○
- How well prepared were you for the college/technical/vocational school application process? ○ ○ ○
- How well informed are/were you about obtaining financial aid for education after high school (whether or not you plan to go to college)? ○ ○ ○

If you are not planning to pursue further education at this time, what is the primary reason?

- Cannot afford
- Childcare responsibilities
- Don't like school
- Low grades/scores
- Not academically prepared
- Need income for myself
- Need income for others
- Not needed for job
- Military service
- Other

### Parent Education

How far did your parents go in school? Indicate the highest level of education for your mother and father.

- Mother's Education**
  - Less than HS Grad
  - High School Grad
  - Some College
  - College Degree
  - MA Degree or Higher
- Father's Education**
  - Less than HS Grad
  - High School Grad
  - Some College
  - College Degree
  - MA Degree or Higher

### Employment

During your senior year, approximately how many hours per week have you been employed?

- None
- 1 to 5 hours
- 6 to 10 hours
- 11 to 15 hours
- 16 or more hours

What is the ONE thing that you especially want the administration of FWISD to know?

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Quick Tips:

- ★ Log on to the CCD web portal to access important info related to financial aid and other topics: <https://myportal.cccs.edu/jsp/misc/schoolLoginNew.jsp?school=ccd> (See below for log-in info)
- ★ Visit 'Steps to Successful Enrollment at CCD': <http://www.ccd.edu/ccd.nsf/html/WEBB87QPNR-steps+to+get+started+at+CCD>
- ★ Complete the FAFSA and apply for financial aid through CCD if you haven't already (see link below)
- ★ Complete required placement tests in reading, writing, and math, or see if you place out (see below)
- ★ Register for the New Students' Orientation (see link below)

Apply	<input type="checkbox"/> Apply online at <a href="https://grails.cccs.edu/onlineApplication/login/auth?school=CCD">https://grails.cccs.edu/onlineApplication/login/auth?school=CCD</a>
Financial aid	<input type="checkbox"/> Complete the FAFSA and send it to CCD <input type="checkbox"/> Apply to the Colorado College Opportunity Fund ( <a href="http://cof.college-assist.org/COFApp/COFApp/Default.aspx">http://cof.college-assist.org/COFApp/COFApp/Default.aspx</a> ) <input type="checkbox"/> Apply for CCD scholarships for 2012-13 school year: <a href="https://www.ccd.edu/ccd.nsf/showform?openview&amp;fid=WEBB88PJG6">https://www.ccd.edu/ccd.nsf/showform?openview&amp;fid=WEBB88PJG6</a> <input type="checkbox"/> To appeal your financial aid award letter: <a href="http://www.ccd.edu/ccd.nsf/html/WEBB87MVL-Satisfactory+Academic+Progress+(SAP)">http://www.ccd.edu/ccd.nsf/html/WEBB87MVL-Satisfactory+Academic+Progress+(SAP)</a>
Testing	<input type="checkbox"/> Check whether, based on your SAT/ACT score, you need to take CCD assessment tests: <a href="http://www.ccd.edu/ccd.nsf/html/WEBB87MQZ6-Transcript+Evaluation+Exemptions">http://www.ccd.edu/ccd.nsf/html/WEBB87MQZ6-Transcript+Evaluation+Exemptions</a> <input type="checkbox"/> Placement tests are done on a walk-in basis in Room 223 at the Auraria campus. For a full schedule: <a href="http://www.ccd.edu/ccd.nsf/html/WEBB87MQZ6-Testing+Center+Schedule">http://www.ccd.edu/ccd.nsf/html/WEBB87MQZ6-Testing+Center+Schedule</a>
Computing	<input type="checkbox"/> If you have not already applied to CCD: create a new account: <a href="https://erpdnsb.cccs.edu/PRODCCD/twbkwbis.P_GenMenu?name=homepage">https://erpdnsb.cccs.edu/PRODCCD/twbkwbis.P_GenMenu?name=homepage</a> <input type="checkbox"/> You can use the same login you created when applying to access the CCD web portal: <a href="https://myportal.cccs.edu/jsp/misc/schoolLoginNew.jsp?school=ccd#">https://myportal.cccs.edu/jsp/misc/schoolLoginNew.jsp?school=ccd#</a> <input type="checkbox"/> If you need to access your user name or password, follow this link:
Housing	<input type="checkbox"/> CCD offers three housing options for students. For more information: <a href="http://www.ccd.edu/ccd.nsf/html/WEBB87QPNR-explore+housing">http://www.ccd.edu/ccd.nsf/html/WEBB87QPNR-explore+housing</a> <input type="checkbox"/> Earlier applicants are given priority in receiving housing.
Term bill	<input type="checkbox"/> Tuition and fees can be paid under the Student Finance Tab of the CCD Connect portal: <a href="https://myportal.cccs.edu/jsp/misc/schoolLoginNew.jsp?school=ccd#">https://myportal.cccs.edu/jsp/misc/schoolLoginNew.jsp?school=ccd#</a> <input type="checkbox"/> Tuition and fees must be paid on or before the payment deadline stated on your registration. For info about tuition payment processes and deadlines: <a href="http://www.ccd.edu/ccd.nsf/html/WEBB87QPNR-Tuition+and+Payment+Information">http://www.ccd.edu/ccd.nsf/html/WEBB87QPNR-Tuition+and+Payment+Information</a> <input type="checkbox"/> Cost of attendance at CCD (includes tuition, books/supplies, room/board): \$10,842 per year
Orientation	<input type="checkbox"/> Sign up for the New Student Orientation. For information on how to register: <a href="https://www.ccd.edu/ccd.nsf/showform?openview&amp;fid=WEBB88PES9">https://www.ccd.edu/ccd.nsf/showform?openview&amp;fid=WEBB88PES9</a> <input type="checkbox"/> All Orientation sessions held at the Auraria campus. The last session takes place on August 15.

Quick Tips:

- ★ Log on to the WISER portal to access important financial aid and other info: <http://wiser.umb.edu> (See below for log-in info)
- ★ Complete FAFSA (school code: 002222) and apply for financial aid at UMB if you haven't already
- ★ Register for Beacon Beginnings Orientation as soon as possible (see info below)

Apply	<input type="checkbox"/> Application deadline already passed.
Financial aid	<input type="checkbox"/> Complete FAFSA and submit to UMB. <input type="checkbox"/> Submit documentation of residency for in-state tuition. <input type="checkbox"/> For more info: <a href="http://www.umb.edu/students/financial_aid/">http://www.umb.edu/students/financial_aid/</a>
Testing	<input type="checkbox"/> Students are required to complete college placement tests in reading, writing, and mathematics. Testing will take place at Beacon Beginnings Orientation (see below under "Orientation.") <input type="checkbox"/> For more info: <a href="http://www.umb.edu/orientation/">http://www.umb.edu/orientation/</a>
Computing	<input type="checkbox"/> Log into the WISER portal using your email address, password and student ID at <a href="http://wiser.umb.edu">http://wiser.umb.edu</a> . <input type="checkbox"/> Your email username is mailed to you. The initial password for your email address is as follows: first letter of your last name (uppercase) + second letter of your last name (lowercase) + your date of birth as eight numbers (MMDDYYYY). More info: <a href="http://www.umb.edu/it/getting_services/email/logging_on_for_the_first_time/">http://www.umb.edu/it/getting_services/email/logging_on_for_the_first_time/</a> <input type="checkbox"/> If you misplace your ID or have trouble logging in, contact the IT Service Desk at 617-287-5220
Housing	<input type="checkbox"/> UMB has no on-campus housing, but offers a number of resources to help you find housing in Boston. More info: <a href="http://www.umb.edu/life_on_campus/housing/">http://www.umb.edu/life_on_campus/housing/</a>
Term bill	<input type="checkbox"/> Bill payment dates vary by course registration. Most common due date for fall 2012 tuition is <b>August 15<sup>th</sup></b> . <input type="checkbox"/> You may pay check, cash, money order or cashier's check. UMB offers an interest free in-house monthly tuition payment plan. More info: <a href="http://www.umb.edu/bursar/payment_information/">http://www.umb.edu/bursar/payment_information/</a> <input type="checkbox"/> <b>You may be able to waive UMB's health insurance in favor of your current insurance, potentially saving you hundreds of dollars.</b> For more info: <a href="http://www.umb.edu/healthservices/insurance/health_insurance_waivers/">http://www.umb.edu/healthservices/insurance/health_insurance_waivers/</a> <input type="checkbox"/> Cost of attendance at UMB (tuition, fees, transportation, books): \$15,027
Orientation and registration	<input type="checkbox"/> Attendance required at Beacon Beginnings. Register as soon as possible: <a href="http://www.umb.edu/orientation/">http://www.umb.edu/orientation/</a> . Must sign-in to see available orientation dates. <input type="checkbox"/> Placement tests, advising meetings, and course registration all happen during orientation.

## Nine steps to making your college plans a reality!

There are important steps that need to be completed over the summer for you to be able to enroll in the fall. The tasks listed below are common to most colleges, but you should check your acceptance materials or contact your college to see if there are other tasks specific to your college. To find out how to complete any of the tasks below at your college, call your admissions office or try a Google search for each task. For instance, if you are attending the University of New Mexico and want to appeal your financial aid, Google "University of New Mexico financial aid appeal."

- 1. CONTACT A SCHOOL COUNSELOR IF YOU NEED HELP OVER THE SUMMER!** Counselors will be working this summer to help you with any challenges that arise. On your city's web page within the SCOPE 2012 site, you can find the email address for the counselor(s) helping graduates from your high school.
- 2. Log on to your college's personalized web site:** Most colleges now provide a website, named something like my.collegename.edu, where you can check your financial aid status and other important deadlines.
  - Your username and password were probably sent with your acceptance packet or in a separate letter/email. If you can't find your username and password, contact your school's admissions office.
- 3. Check the status of your financial aid:**
  - Complete the FAFSA and apply for aid if you haven't already.
  - Check your most recent award letter and your personalized web site to see whether there are additional steps you need to take to apply for aid.
  - If you are considering an appeal, contact your financial aid office to ask how to appeal.
- 4. Register for your college's orientation:** Many colleges now hold required summer orientations for all first-year students.
  - Register ASAP, since many colleges hold their orientations early in summer.
  - Check what documents you are required to bring with you to orientation.
- 5. Check whether you need to complete placement testing before the start of the semester or before orientation:** Colleges often require placement tests in math, reading, and writing. Some colleges do these tests at Orientation; others require you to do the tests online or on campus beforehand.
- 6. Complete any housing forms,** if your college offers housing: Most colleges require you to pay a housing deposit and complete a housing form in order to be eligible for on-campus housing. Some colleges have limited housing, so do this ASAP.
- 7. Check when term bills are issued and when they are due:** Talk with your counselor about how to pay whatever balance is left after your financial aid award. You can also talk with your counselor and your parents about the possibility of setting up a tuition payment plan.
- 8. Check your college's policy around health insurance:** Colleges have different rules for which students are required to have health insurance, and whether students are automatically enrolled in the college's student health insurance plan.
  - Check your college's requirements ASAP, since the college health insurance can be costly.
  - If you already have qualifying insurance, you may be able to apply for a health insurance waiver.
- 9. Submit other required paperwork and documentation:**
  - Your college will expect to receive proof of your high school completion. Submit your final high school transcript and an official indication of your graduation to your college's admissions office.
  - Especially if you're expecting to live on campus, your school's health services will require evidence of your immunizations. Submit immunization records to health services.

**Sample Initial Outreach Checklist**

**Key objectives for the Initial Outreach:**

- Make initial contact with student and schedule an in-person meeting \_\_\_\_\_

**Prior to outreach:**

- Check caseload spreadsheet and high school exit survey for student’s reported college plans and background information \_\_\_\_\_
- If intended college is a “popular institution,” review briefing document prior to call \_\_\_\_\_

**During outreach to student:**

- Describe the reason for the outreach: \_\_\_\_\_
  - Students sometimes graduate high school without deciding on their next steps. They often need help over the summer to develop a postsecondary plan. \_\_\_\_\_
  - Other students who have clear postsecondary plans sometimes encounter unexpected obstacles. We want to help address these issues \_\_\_\_\_
  - We want to remind students of important summer tasks at their intended institution (or give generic reminders if intended institution not provided) \_\_\_\_\_
- Let the student know there are a few questions you’re asking of all students to get a sense of where they are in the college-planning process. There are no right or wrong answers; their responses will help you best support them over the summer \_\_\_\_\_  
**NOTE:** These questions may not be relevant for a student not-intending to go to college

**SIX QUESTIONS TO ASK ALL COLLEGE-INTENDING STUDENTS DURING THE INITIAL OUTREACH**

- 1. Have you completed the FAFSA?**  
*Reason for asking:* Completing the FAFSA is the first step to get financial aid
- 2. Have you logged on to your college’s web portal?**  
*Reason for asking:* Most of the info colleges expect you to read and complete will be sent through the portal, not through the mail
- 3. Have you received your financial aid award?**  
*Reason for asking:* Some of the aid listed may be loans you will have to pay back
- 4. Have you completed required placement tests, or been exempted?**  
*Reason for asking:* Most colleges require students to complete placement tests before they can attend orientation or start in the fall
- 5. Have you registered for or attended orientation?**  
*Reason for asking:* Most college require students to attend an orientation, where you will learn more about the college and often meet with your advisor
- 6. Have you received your tuition bill?**  
*Reason for asking:* Students often have questions about the charges on their tuition bills, and there may be expenses that you can waive and not have to pay

- Invite student to schedule an in-person meeting to discuss any of these issues, or other Challenges that may have arisen so far during the summer \_\_\_\_\_

**If student says yes to a meeting:**

- Plan where and when to meet \_\_\_\_\_
- Tell student to bring the following documents to the meeting: \_\_\_\_\_
  - Log-in information for their college’s web portal \_\_\_\_\_
  - Student Aid Report, financial aid award letter, and tuition bill \_\_\_\_\_
  - Any other documents they have received from their intended college \_\_\_\_\_
- Confirm student’s contact information \_\_\_\_\_
- Schedule a reminder text to go to the student the day before the meeting \_\_\_\_\_

**Sample Initial Outreach Checklist**

**If student says no to a meeting:**

*If you are on the phone with the student:*

- Ask if the student has time to do the Assessment meeting now. If not, ask if it would be easier to schedule a time to talk on the phone than to meet in person \_\_\_\_\_

*If you are messaging with the student/the student does not have time to talk now:*

- Ask if it would be easier to schedule a time to talk on the phone than meet in person \_\_\_\_\_
- Ask if student feels on track for college plans in the fall \_\_\_\_\_
- Ask if the student has: completed the FAFSA; applied for financial aid; logged on to the web portal at her intended college \_\_\_\_\_
- Ask if the student has any questions she’d like to discuss while messaging \_\_\_\_\_
- Provide contact information so student is able to follow-up \_\_\_\_\_
- Indicate that you will check in later in the summer to see how things are going \_\_\_\_\_
- Confirm student’s contact information \_\_\_\_\_

**At the end of the outreach:**

- Remind students of specific deadlines coming up at her intended institution \_\_\_\_\_

**After call:**

- Log the student contact. **Note:** you DO NOT need to log the contact if you left a voicemail or sent a message that was not returned \_\_\_\_\_

### Sample Assessment Meeting Checklist

#### Key objectives for the Assessment meetings:

- Assess how the student is feeling about her college plans.
- Take note of any potential barriers to the student's college enrollment.
- Review the latest status of the students' financial aid, highlighting possible appeals or additional loans the student will need to consider.
- Discuss additional costs the student may face, or may be able to waive (e.g. the college's health insurance).
- Review key summer tasks deadlines for the student's intended institution.

#### To do before the meeting:

- Review information from the caseload spreadsheet and high school exit survey about student's postsecondary plans and school-year performance \_\_\_\_\_
- Review important summer tasks at student's intended institution. \_\_\_\_\_
  - Pull up briefing document if student is attending a "popular" institution, or generic guidelines for students attending other institutions \_\_\_\_\_
- Check whether student has completed the FAFSA \_\_\_\_\_

#### Assess how the student is feeling about her college plans:

- Begin meeting with open-ended question to assess how student feels about her college plans \_\_\_\_\_
- Take note of any issues the student raises \_\_\_\_\_
- Ask additional probing questions to get at other issues the student may face \_\_\_\_\_

#### \*\*\*COMPLETE THE INTAKE FORM WITH THE STUDENT\*\*\* \_\_\_\_\_

#### Guidelines for the financial aid award letter discussion with student

- *Helpful resources: college briefing documents; Financial Aid Award Letter calculator; Guidelines to the financial aid appeal*
- Log on to student's my.college.edu page, if student brought login info. **If the student did not bring log-in info, use guidelines on briefing document to help student get the log-in info during the meeting** \_\_\_\_\_
- Help student complete FAFSA, or fix errors, if student has not already done so \_\_\_\_\_
- Review student's latest financial aid award letter compared to the cost of attendance \_\_\_\_\_
  - Cost of Attendance information is provided in the briefing documents for the popular colleges. If the student is attending a different institution, try googling the college's name and "cost of attendance."
  - Enter the cost of attendance and award letter information into the Award Letter Calculator
  - Discuss with students what they will receive in grant aid, what they are expected to borrow, and what they will have to come up with out of pocket or from supplemental loans
  - Visit <http://www.direct.ed.gov/RepayCalc/dlentry1.html> to help students to identify what they can expect to pay in monthly payments after they leave college for the loans they assume. Note for students that these are monthly payment amounts for **one year** of college.
- Discuss with student whether to appeal her financial aid award letter. See guidelines in the "Guidelines to the financial aid appeal" document \_\_\_\_\_
- Remind students that college may deduct additional scholarship money they receive from their existing grant aid. They should call their financial aid office to ask their college's policy on this. \_\_\_\_\_
- **If the student appears to face a gap between her financial aid (including federal/state loans) and the total cost of attendance:** \_\_\_\_\_
  - Ask whether the student and her family have a plan to address this gap
  - Refer student to [www.studentloans.gov](http://www.studentloans.gov) where he can explore loan options, including a Direct PLUS loan her parents may be able to take out.
    - Students will need their social security # and FAFSA pin to access this website.
    - Students whose parents are denied for a PLUS loan may qualify for an additional \$4,000 in unsubsidized Stafford loans.
  - **Note:** Students may ask about taking out a private loan themselves, rather than having their parents take out a loan. This usually requires finding a co-signor, and often the loan has a very high interest rate, so this is an avenue we'd advise students not to take.

### Sample Assessment Meeting Checklist

#### Guidelines for the tuition bill discussion with students

- *Helpful resources: college briefing documents*
- Help the students interpret the charges (e.g. tuition, activity fee) and credits (e.g. financial aid grant) \_\_\_\_\_
- Confirm that all of the financial aid the student is expecting from her award letter is included on the bill \_\_\_\_\_
- Review health insurance costs, if any, and whether the student's college will accept her current insurance. If appropriate, review steps student needs to take to waive school insurance. \_\_\_\_\_
  - Health insurance waiver information is provided in the briefing documents for the popular colleges. If the student is attending a different institution and health insurance is required, try googling the college's name and "health insurance waiver"
- Ask whether the student has signed Master Promissory Notes (MPN) for any federal loans s/he is taking out. If not, direct the student to [www.studentloans.gov](http://www.studentloans.gov) where s/he can complete the MPN(s) online \_\_\_\_\_
  - Students will need their social security # and FAFSA pin to access this website.
- Help students interpret an overall "credit" to their account. For instance, if they have a \$1,000 credit on their account, but have a loan for \$4,000, they would be better off taking a \$3,000 loan. \_\_\_\_\_
- **If the student faces a gap between financial aid (including federal/state loans) and the total cost of attendance:** \_\_\_\_\_
  - Ask whether the student and her family have a plan to address this gap
  - Refer student to [www.studentloans.gov](http://www.studentloans.gov) where she can explore loan options, including a Direct PLUS loan her parents may be able to take out.
    - Student will need her social security # and FAFSA pin to access this website.
  - Discuss tuition payment plan options with student (tuition payments are made on a monthly basis rather than upfront).
    - Tuition payment options, including payment plans, are provided in the briefing documents for the popular colleges. If the student is attending a different institution, try googling the college's name and "tuition payment plan"
  - **Note:** Students may ask about taking out a private loan themselves, rather than having their parents take out a loan. This usually requires finding a co-signor, and often the loan has a very high interest rate, so this is an avenue we'd advise students not to take.

#### Next steps:

- Copy intake form for student, and review next steps from meeting \_\_\_\_\_
- Schedule a follow-up meeting with the student, if needed \_\_\_\_\_
- Remind student how to / when she can reach you \_\_\_\_\_

#### To do after meeting:

- Log the student meeting on the Student Interaction form \_\_\_\_\_
- *If you were able to schedule a follow-up meeting with the student:* Set up a text reminder for the student for the day before the scheduled meeting \_\_\_\_\_
- *If you were not able to schedule a follow-up meeting with the student:* Schedule a time for calling the student in a week or two to check in on how they are doing \_\_\_\_\_

### SAMPLE INTAKE FORM

Student Name: \_\_\_\_\_ Date of initial outreach: \_\_\_\_\_ Peer mentor: \_\_\_\_\_

Phone attempts to reach student (use check marks for each attempt):

Email attempts to reach student (use check marks for each attempt):

Text/social media attempts to reach student (use check marks for each attempt):

Date(s) of actual meeting(s) with student: \_\_\_\_\_

#### Notes from initial outreach conversation

	Yes or No	Notes	Follow Up Action Needed
Has student completed the FAFSA?			
Has student logged on to the college web portal?			
Has student received a financial aid award letter?			
Has student completed or been exempted from placement tests?			
Has student registered for orientation?			
Has student received her tuition bill?			

#### Notes from Assessment Meeting

*\*\*\*Begin by logging on to the student's web portal, or if they do not have log-in info, help them get their user name/password. See briefing documents for guidelines on how to retrieve usernames and passwords\*\*\**

*The next two rows indicate important financial-aid related topics to discuss with students during the meeting*

Help student complete/fix FAFSA	N/A		
Help student interpret award letter	N/A		
Identify tuition bill release and due dates	N/A		
Help student interpret tuition bill, including health insurance charges and account credits, if any	N/A		
Discuss tuition payment plan options if the student is facing a financial gap	N/A		

*The following are important tasks students need to complete in order to enroll in the fall. If students have not completed these tasks, refer to the briefing documents for college-specific information on how to complete each task.*

Have you taken any placement exams required by your intended college?	Y	N		
Have you signed up for or attended new student orientation?	Y	N		
Have you scheduled an academic advising meeting/registered for courses?	Y	N		
Will you be living on campus?	Y	N		
If yes, have you submitted all required housing forms?	Y	N		

## Sample Counselor Interaction Log

Student ID # \* \_\_\_\_\_

Student Name \* \_\_\_\_\_

Counselor name \* \_\_\_\_\_

Date of outreach or meeting (mm/dd/yyyy) \* \_\_\_\_\_

\*Required

### 1. What was the result of your outreach?

- Successfully contacted the student
- Left a voicemail or a message with a family member/friend
- No answer; phone number not in service
- Texted the student but did not hear back
- Emailed the student but did not hear back

The questions below pertain to actual meetings with students:

### 2. Who initiated contact? (choose one)

- Counselor
- Graduate
- Graduate's family/guardian
- School staff
- Other: \_\_\_\_\_

### 3. Who participated in the interaction?

- Student
- Parent/guardian
- Other family member
- School staff member
- Mentor/other community member

### 4. How was the graduate successfully contacted? \*

- Phone
- Email
- Text
- Facebook
- Via staff/family member
- Other: \_\_\_\_\_

### 5. What was the result of the contact?

- Graduate did not need any help
- Provided assistance; scheduled a follow-up meeting
- Provided assistance; no follow-up meeting
- Referral to another support service
- Referral to the student's intended college

Other: \_\_\_\_\_

### 6. What assistance did you provide?

- Reviewed financial aid packages/options
- Helped student complete the FAFSA
- Searched for additional funding (scholarships, loans, etc)
- Helped student access their college's web portal
- Completed required paperwork from the college
- Helped the student research and apply to additional colleges
- Connected the student to a staff member at his/her intended college
- Arranged for the student and/or a family member to visit the college
- Connected the student to a social worker or mental health professional
- Provided encouragement or reassurance
- Helped student complete the TAFSA
- Other: \_\_\_\_\_

### 7. What financial aid paperwork did you help the student complete?

- FAFSA
- TAFSA
- Neither - student was not eligible or chose not to complete the FAFSA/TAFSA

### 8. Where did the contact take place?

- At school
- Student's home
- Coffee shop or other public location
- Over email
- Over text
- Facebook chat/messaging
- Other: \_\_\_\_\_

### 9. How much time did you spend interacting with the student?

- Less than 15 minutes
- 15 - 30 minutes
- 30 - 45 minutes
- 45 minutes - one hour
- More than an hour

### 10. Please provide a 1-2 sentence summary of each successful interaction with a student: \*

## Endnotes

<sup>1</sup> Arnold, K., Fleming, S., DeAnda, M., Castleman, B.L., & Wartman, K.L. (2009). The summer flood: The invisible gap among low-income students. *Thought and Action, Fall 2009*: 23–34.

Castleman, B.L., Arnold, K., & Wartman, K.L. (2012). Stemming the tide of summer melt: An experimental study of the effects of post-high school summer intervention on low-income students' college enrollment. *The Journal of Research on Educational Effectiveness, 5*(1): 1–18.

<sup>2</sup> Castleman, B.L., & Page, L.C. (forthcoming). A trickle or a torrent? Understanding the extent of summer “melt” among college-intending high school graduates. *Social Science Quarterly*.

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<sup>4</sup> Source: U.S. Census Bureau. Current Population Survey (CPS). Educational attainment—People 25 Years Old and Over, by Total Money Earnings in 2007, Work Experience in 2007, Age, Race, Hispanic Origin, and Sex. 2008.

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<sup>6</sup> Haveman, R. & Smeeding, T. (2006). The role of higher education in social mobility. *The Future of Children, 16*(2). Princeton, NJ: The Brookings Institution.

<sup>7</sup> Castleman, B.L., Arnold, K., & Wartman, K.L. (2012). Stemming the tide of summer melt: An experimental study of the effects of post-high school summer intervention on low-income students' college enrollment. *The Journal of Research on Educational Effectiveness, 5*(1): 1–18.

<sup>8</sup> The National Student Clearinghouse (NSC) is a nonprofit organization that houses student degree and enrollment information for colleges and universities in the US. More than 3500 colleges and universities participate in the NSC. The NSC matches high school and postsecondary enrollment records based on student name and birthdate information. For more information visit: [www.studentclearinghouse.org](http://www.studentclearinghouse.org).

<sup>9</sup> Castleman, B. L., Page, L. C. & Schooley, K. (2012). The forgotten summer: Does the offer of college counseling the summer after high school mitigate attrition among college-intending low-income high school graduates? Paper presented at the Annual Conference of the Association for Public Policy Analysis and Management.

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<sup>11</sup> Using a lottery to identify students for the intervention can create the opportunity to conduct a randomized controlled trial for evaluating the intervention. This is the “gold standard” of program evaluation and is the most robust way to determine program impact.

<sup>12</sup> For more information, go to <http://www.uaspireusa.org/>.

<sup>13</sup> Castleman, B. L., Page, L. C. & Schooley, K. (2012). The forgotten summer: Does the offer of college counseling the summer after high school mitigate attrition among college-intending low-income high school graduates? Paper presented at the Annual Conference of the Association for Public Policy Analysis and Management.

<sup>14</sup> In order to meet an 80 student target at each school, at two of the six schools the third criterion (accepted to at least one postsecondary institution) was expanded to include students reporting they were still waiting to hear about their acceptance.

<sup>15</sup> The HOPE scholarship is a Georgia lottery-funded program that provides scholarships to academically qualified graduates of Georgia high schools attending in-state postsecondary institutions.



## STRATEGIC DATA PROJECT

### ABOUT THE STRATEGIC DATA PROJECT

Since 2008, SDP has partnered with 56 school districts, charter school networks, state agencies, and nonprofit organizations to bring high-quality research methods and data analysis to bear on strategic management and policy decisions. Our mission is to transform the use of data in education to improve student achievement.

**Part of the Center for Education Policy Research at Harvard University, SDP was formed on two fundamental premises:**

1. Policy and management decisions can directly influence schools’ and teachers’ ability to improve student achievement.
2. Valid and reliable data analysis significantly improves the quality of decision making.

SDP’s theory of action is that if we are able to bring together the right people, assemble the right data, and perform the right analysis, we can help leaders make better decisions—ultimately improving student achievement significantly.

**To make this happen, SDP pursues three strategies:**

1. Building a network of top-notch data strategists who serve as fellows for two years with our partners (e.g., school district, charter management organization, nonprofit, or state education agency).
2. Conducting rigorous diagnostic analyses of teacher effectiveness and college-going success using agency data.
3. Disseminating our tools, methods, and lessons learned to the education sector broadly.

*The project is supported by the Bill & Melinda Gates Foundation.*

**FOR MORE INFORMATION, LINKS TO RESEARCH PAPERS, ACCESS TO THE RESOURCES IN THIS HANDBOOK, AND MORE, VISIT:**

**[www.gse.harvard.edu/sdp/summermelt](http://www.gse.harvard.edu/sdp/summermelt)**





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