Make the Shift to Virtual Advising

College Advising Corps
NCAN Webinar
September 1, 2020
Presenters

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Agenda

1. Strategy
2. Technology and Communications Platforms
3. Building Student and Family Rapport
4. Caseload Management
5. Outreach and Communication Strategies
6. Curriculum Development
7. Questions and Answers
Goals

● Provide an overview of the content in the CAC Virtual Advising Guide.

● Introduce effective strategies for reaching students virtually.
CAC Partners in Virtual Advising

Bill & Melinda Gates Foundation
Bloomberg Philanthropies
College Board
KC Scholars
Texas Education Agency
College Advising Corps (CAC) works to increase the number of low-income, first-generation, and underrepresented high school students who enter and complete higher education.
College Advising Corps

- In-School
- Virtual
- Hybrid
Part One: Strategy
College Enrollment

Core 1
Welcome Meeting
- Engagement
- Outreach w/in 2 bus. days
- Session w/in 30 days

Core 2
College List Building
- EA/ED
- Apply to 4/+ Accept to 2+ CP
- Enrollment in college

Core 3
Financial Aid
- Enrollment in college
- FAFSA/Financial Aid
- Family Engagement

Core 4
Award Letter
- Enrollment in college
- Family Engagement

Core 5
College Decisions
- Acceptance in college
- Enrollment in college
- Family Engagement

Five Core Meetings
Part Two: Internal Technology & Communication Platforms

Goal: Keep you and your team organized, connected, and prepared to serve students.

EMAIL
DATABASE
SHARED DRIVE
External Technology & Communication Platforms

Goal: Support advisers and students in consistently engaging with each other throughout the application process.
Part Three: Building Student Rapport

Goal: Building a relationship with a student from the beginning increases likelihood for long-term engagement and enhances impact of advising.

- Begin building rapport immediately
- Prioritize Face to Face or Voice to Voice (if student is comfortable)
- Personalize communications
- Make connections through conversation
- Actively listen and use open-ended questions
- Humor, tone, connections
Building Family Rapport

**Goal**: Create a team of support around student by engaging other influential decision-makers in the college process (i.e. parents/guardians)

FAMILY ENGAGEMENT + EXPERT ADVISING = BEST COLLEGE OPTIONS
Adviser Pro Tip

Quiara Shade
CAC CollegePoint Virtual Adviser
Part Four: Caseload Management

Goal: Caseload management is a key practice for effective and efficient advising. Virtual advising is most effective when the use of student data and milestone completion statistics drives advising priorities.
Caseload Management Segments

- High Need: HIGH FREQUENCY PERSONALIZED OUTREACH
- Medium Need: PERSONALIZED OUTREACH
- Low Need: ADVANCED CONTENT GENERAL MESSAGES
Caseload Management: Segment Types

Engagement Level
- High Engagement
- Low Engagement

Milestone Completion
- High Completion
- Low Completion
Caseload Management: Segment Types

- High Engagement High Completion
- Low Engagement High Completion
- High Engagement Low Completion
- Low Engagement Low Completion
Part Five: Outreach and Communication Strategies

Goal: Meet students where they are by leveraging a variety of communication methods and evidence-based practices.

Texting  Newsletters  Social Media  Virtual Events
Texting Best Practices

- Use mass text messages and individual, personalized messages
  - Informational vs. engagement
- Use behaviorally informed content
- Reach out proactively about once per week
- Make a personal connection early
- Keep messages short (<240 characters)
- End with a call to action
- Create virtually inclusive spaces
- Check out the full Virtual Advising Guide and Nudge4 Solutions Lab for more information, examples and best practices
Part Six: Curriculum Development

- Should align with mission statement & include milestones
  - Meetings and interactions guided by curriculum → milestone accomplishment
  - Milestones → mission accomplishment
- Create a system to track completion of curriculum
- College Advising Corps, CollegePoint curriculum structure:
Virtual Advising Guide: College Advising Topics Guide Structure

- Content knowledge
- Best advising practices
- Terminology

- Text examples
- Emails/Newsletters

Advising Topics

- Virtual Advising Tools
- Resource Links
- Best practices

Outreach

- Agendas
- Talking points
- Questions to ask

Resources

Meeting Agendas
Curriculum Example
Core Meeting #3: FAFSA Completion

Time of year approximation: October-December

Objectives:
- Check for understanding of the financial aid process
- Get an understanding of family finances
- Answer questions and address specific concerns about the financial aid process, and
- Share the opportunities that are available for them to explore.
- Complete the FAFSA, CSS Profile, or other aid

Starter resources include:
- Starter questions
- Topics to keep in mind
- Talking points for family engagement
  - Sample communications

Relevant Milestones:
- Family Engagement
- Enrollment in college
- FAFSA or other aid completion
Curriculum Example
Core Meeting Three: FAFSA Completion

Resources

- Financial Aid communication templates
- Mailchimp 1 (CSS & FAFSA)
- Mailchimp 2 (CSS & FAFSA)
- Personalized Scholarship matching sites
- Scholarship browsing site recommendations
- Local scholarships & getting creative with your scholarship search
- Scholarship application & essay organization strategies
- Maximizing gift aid opportunities
- Big Future EFC Calculator: Asks questions that are similar to what is on the CSS profile, which means it may help generally estimate a family’s EFC at a school that requires the CSS Profile.

Infographics

- How to apply for financial aid infographic
- Types of financial aid infographic
- FAFSA Checklist
- Financial Aid timeline for students
- Difference between FAFSA and CSS profile infographic
- FAFSA Dependency Status Infographic
- How to determine the parent of the FAFSA infographic
- Understanding loans infographics:
  - Understanding Federal Loans
  - Understanding Other Loan Types
- Understanding the different types of loans
- Financial fit tools
Core Meeting #3

Mailchimp Newsletter for Family

Financial Aid Awards - Things to Check Out

Hello parents + family members!

Financial aid award letters and packages are words that you’ll hear from me often over the coming weeks. But where do you even find them? Who do you contact at the schools if you have questions about the packages? What are Parent Plus loans and are they the best option? Does my student HAVE to accept their plans before May 1? This email should help you answer those questions (and give you a chance to contact me if you have any additional questions)! Also, I'm happy to meet to talk through the logistics of how aid packages work and how they'll impact your individual student.

Schedule a Meeting

Financial Aid: Need to Knows

Infographic Examples

College Advising Corps COLLEGEPOINT

Infographic Examples

The 4 Basic Types of Financial Aid

1. Grants
   - Federal Pell Grants
   - Federal SEOG Grants
   - State Grants
   - College-specific Grants

2. Scholarships
   - Merit-Based
   - Need-Based

3. Work-Study
   - Federal Work-Study Program
   - Community Work-Study Program

4. Student Loans
   - Direct Subsidized Loans
   - Direct Unsubsidized Loans
   - PLUS Loans

Need money for college?

FAFSA CHECKLIST

- Student and parent tax forms (1040) from two years prior
- Parent's W-2s or 1099 forms
- Any investment records (401k, business if they have more than 100 employees, etc)
- Records of ownership and value of owned property (other than the items they live in)
- SIF or Covered EIA account records
- Bank statements
- Social Security Numbers

College Advising Corps COLLEGEPOINT
Adviser Pro Tip

Nate Cody
CAC CollegePoint Virtual Adviser
Question & Answer
To learn more, please visit us at collegeadvisingcorps.org.