



June 2017 SDP Cohort 7 Fellow: Janell Chery, ImpactTulsa

Impact Story

I. Title

Fueling FAFSA Strategies to Increase Completion Rates in Tulsa

II. Synopsis

The Free Application for Federal Student Aid (FAFSA) is a mysterious yet necessary step to receive financial assistance for students hoping to attend postsecondary institutions after high school. Beginning in late 2015, SDP Agency Fellow Janell Chery joined ImpactTulsa staff in expanding regional awareness of FAFSA by implementing targeted marketing campaigns, hosting hands-on completion labs, and analyzing real-time school-level completion rate data given to high school counselors. As of May, the tentative Tulsa area completion rate increased by 12% within one school year (43% to 55%) when comparing 2016 to 2017 enrolled high school seniors completing the FAFSA; however, the number of actual forms completed increased by 21% (3,324 to 4,015 forms). The final percentages will be calculated when the entire federal FAFSA data is released for June 2017.

III. Project Goal

The goal in Tulsa was to provide practical resources to high schools to increase the numbers of senior students completing the FAFSA by an eight percent target goal. To accomplish this, Janell Chery along with ImpactTulsa staff and community partners such as Stand for Children, the City of Tulsa Mayor GT Bynum's Office, the Tulsa Regional Chamber of Commerce and various local postsecondary institutions conducted outreach and implemented a variety of strategies. Ms. Chery was central in calculating target goals for each high school and measuring bi-weekly completion rates to share with high school counselors within continuous improvement cycles. The efforts were branded as "Get Off Your FAFSA" which had a double meaning as both a call to action for students and to literally send off your FAFSA. Students found the slogan buzzworthy! The design considerations for the "Get Off Your FAFSA" strategies were:

- Message to all students about FAFSA but help with extenuating circumstances separately (e.g., undocumented or emancipated students).
- Dispel FAFSA myths reinforcing that there are no one size fits all financial aid options.
- Connect high schools with local postsecondary institutions financial aid offices, not just admissions.
- Prioritize direct in-person hands-on FAFSA completion support for students and parents rather than just information sharing events.
- Tailor FAFSA strategies to fit each high school's demographics as needed.
- Track real-time completion data (school-level data publicly available while student-level data is limited unless collected by school).



IV. Project Description

By 2025, 77% of Oklahoma jobs will need a credential beyond a high school diploma. The majority of Oklahoma students remain in the state following graduation; therefore, postsecondary credentials will be imperative for students to become self-sufficient adults. Tulsa County students have unique opportunities to attend local community college or technical school and receive up to 100 percent of tuition/fees covered, if they are eligible recent local graduates. Only twenty-five percent of local high school graduates enroll at the community college under the funding program. ImpactTulsa found that there was a disconnect between students' aspirations to attend, the generous availability of local funding, and what students understand is needed to matriculate into higher education.

Tulsa's students and families are not unique in experiencing difficulties in trying to navigate the most important yet vaguest part of the postsecondary process, accessing financial aid. The fundamental step is completing a FAFSA, more often than not millions of unclaimed dollars are left behind. The median income in Tulsa County is \$49,759. Only forty-three percent of Tulsa's 2016 twelfth-grade students completed FAFSA forms compared to fifty-five percent of students nationally. FAFSA is required to verify whether a student qualifies for federal, state, or institutional aid is often a necessary cost-of-entry for low-to middle- income students. According to the National College Access Network, ninety percent of seniors who complete the FAFSA enroll directly in college, versus only fifty-five percent who don't complete the FAFSA.

ImpactTulsa as a collective impact education partnership working closely with fifteen Tulsa area K-12 school districts, local postsecondary institutions, and cross-sectors partners in business, philanthropy, non-profit, and faith-based organizations chose to tackle a low-hanging fruit in the community: use aligned resources to increase FAFSA completion addressing a barrier to postsecondary entry. Beginning in late 2015 with the Class of 2016 graduating class, ImpactTulsa eagerly began brainstorming strategies to provide direct support and Ms. Chery began crafting ways to set target goals and measure completion rates.

A catalyst for ImpactTulsa's focus in FAFSA was selection as one of six communities to participate in StriveTogether's postsecondary impact and improvement network to test and refine FAFSA completion strategies. StriveTogether is a national network of 70 communities working to improve student outcomes from birth to career. ImpactTulsa is a network member and joined other member cities such as Memphis, Dallas, Seattle, San Antonio, and Portland to launch strategies based on human-centered design, results-based leadership and continuous improvement methods, from December 2015 through July 2016. The professional learning community shared tested strategies and best practices. Ms. Chery also received training in data analytics for tracking FAFSA completion data. In this phase, ImpactTulsa implemented a few strategies consisting of hands-on completion labs in nine high schools, a regional Q&A phone bank with postsecondary financial aid officers, door knocking by Stand for Children Oklahoma parent volunteers, and regional marketing campaigns including web ads and television commercials. By the end of the 2016 school year, there was actually a dip by 52 FAFSA forms



completed compared to the Class of 2015 [see Appendix B, Exhibit 1]. However, bright spots were found in which a few schools slightly increased their rates. ImpactTulsa was energized to course correct for the next year.

The U.S. Department of Education unveiled improvements to the FAFSA process made available for the first-time to Class of 2017 students and returning fliers. Specifically, students could submit their parents' prior-prior-year income tax filing information for 2015 rather than waiting to use 2016 taxes plus a new IRS retrieval tool could automatically populate tax return data (the tool was only available from October to March due to security issues). The submission window was extended to begin in October compared to January providing students with a head start than the students before them. Starting in April 2017, the U.S. Department of Education began counting first-time fliers up to 19 years old when previously capped at 18 years old. Even with these improvements, the issue of low FAFSA awareness and misconceptions remained in Tulsa. Utilizing learnings from the StriveTogether network and increased partner collaborations, ImpactTulsa implemented revised 2016-17 "Get Off Your FAFSA" strategies and touchpoints:

- **Hands-on evening FAFSA completion labs** staffed by local postsecondary financial aid officers and TRIO staff with 307 students and their families receiving real-time assistance in completing online forms on-site at their high school.
- **Regional marketing campaign** with television commercials, school flyers, web ads, in addition to earned media coverage (see Appendix A for examples).
- **FAFSA viral video contest** in which participating high schools produced short videos highlighting the importance of FAFSA created by students, for students. You can search and view videos on the Facebook page called FAFSA February Frenzy.
- **FAFSA February Frenzy competition** was a contest to challenge schools to motivate late-completers to see who could boost their completion the most in four weeks. The Tulsa Regional Chamber of Commerce provided \$500 prizes to two winning schools.
- **Q&A FAFSA phone bank** hosted in partnership with the local KTUL TV station, the City of Tulsa Mayor's Office and the Tulsa Regional Chamber of Commerce consisting of 17 local postsecondary financial aid officers answered a range of FAFSA related questions. Over 200 calls were received within two hours. Seventy-five percent of callers were parents/caregivers and 15% of callers were students themselves.
- **Student advisors** partnered with ImpactTulsa and they created a "counselor playbook" outlining milestones and messaging that resonates with high school students. They plan to host a summer FAFSA summit to unveil the playbook to area counselors. Ms. Chery will present her capstone project. The twenty-five students participate in the Charles and Lynn Schusterman Family Foundation Youth Philanthropy Initiative. The cohort nine members are a diverse group of Tulsa teens focusing on FAFSA to experience what it means to be a grantmaker, change-agent and leader.



V. Findings/Outcome

Below are the tentative findings based on FAFSA completion data through May 2017, once final federal data is released for June, the analysis below will be updated:

- The “Get Off Your FAFSA” strategies did meet the goal of increasing FAFSA completion rates for the Class of 2017.
- Tulsa area FAFSA forms completed increased by 21% so far from 3,324 forms in 2016 to 4,015 forms in 2017 (see Appendix B.).
- Fifteen percent of 2017 students completed FAFSA in the opening month of October compared to only eight percent of 2016 students in the previous opening month of January (see Appendix B.).
- Tulsa area FAFSA completion rate based on twelfth-grade student enrollment increased by eight percent within one school year (43% to 55%) when comparing Class of 2016 to Class of 2017 seniors (see Appendix B.).
- A sample of 10 Tulsa County treatment high schools completed a slightly higher average of 103 FAFSA forms compared to 10 Oklahoma County treatment high schools with 97 FAFSA forms. There was a non-statistically significant difference in the small sample. Federal FAFSA policy changes likely affected the counterfactual environment easing the completion process for all students (see Appendix C.).
- Interviews with postsecondary financial aid officers, high school counselors and students found that ImpactTulsa helped to elevate FAFSA’s visibility and urgency in the Tulsa area like never before.

ImpactTulsa will build upon the suite of “Get Off Your FAFSA” strategies for the Class of 2018 students. Ideally, Ms. Chery would like to gain access to student-level FAFSA completion data to improve real-time assistance for students as well as match to National Student Clearinghouse records to see how many students enroll, persist, and complete their postsecondary credentials.

VI. Lessons Learned

The main key lessons from the process of creating, testing, and scaling targeted FAFSA strategies in Tulsa County were:

- In addition to gaining buy-in from school district administrators, it is most crucial to get buy-in from high school principals and counselors so they can become the site-based FAFSA champions. It is still a new concept for FAFSA completion to be considered as a significant senior year activity that high school staff need to support. Try to understand that high school counselors have a host of responsibilities from scheduling to addressing behavior and few schools have college & career advisors that singularly focus on postsecondary. Therefore, consider how community partners and postsecondary institutions can push-in supports to high schools.



- Do not make assumptions that high schools are fully connected to postsecondary institutions beyond the admissions office. Often times, prospective students have no upfront interaction with the financial aid office. The FAFSA completion labs allowed high school students to connect with a financial aid officer sometimes at their intended institutions and fostered new relationships for students and their families.
- Families have good intentions but grapple with FAFSA because it deals with sensitive finances. For parents whose children attend public schools, they never had to share detailed financial information until their child is ready to attend postsecondary. Remember, it's a new exchange for them so its understandable that they may be guarded. Parents respond positively to personalized FAFSA support so create environments and events where they can experience "FAFSA fellowship."

VII. Practical Advice

Below are suggestions if you would like to replicate the "Get Off Your FAFSA" strategies:

- Embrace the new FAFSA submission calendar realizing that FAFSA promotion begins in the fall and continues for the entire high school senior school year; it is no longer a spring semester activity. October to December is the new submission sweet spot!
- Identify your "coalition of the willing"- which school districts and high schools in your community would be willing to adopt a new way of working with students and families to increase FAFSA completion. They will become your local influencers to others.
- Begin with the universal premise that all students should attempt to complete a FAFSA form early in their senior year. Postsecondary applications deadlines tend to be later after the optimum FAFSA submission window. Students are often not fully aware of household finances and could risk being unable to receive first come, first serve financial aid they qualify for.

VIII. Questions to Consider

If you are interested in utilizing the "Get Off Your FAFSA" strategies to boost awareness and completion rates, be sure to consider:

- What are the foundational factors hindering FAFSA completion in your community and which strategies/initiatives have been done in the past? How might adapting fresh strategies create a new result?
- Who can you identify as your early adopters among district- and/or school-based staff to implement new FAFSA strategies to act as influencers for others?
- What current and future partnerships to provide sponsorships, in-kind donations, volunteers etc., can you leverage in your community to have cross-sector participation in supporting strategies to increase FAFSA completion?



- How do you plan to use public school-level FAFSA data to share with educators and assist with tracking your initiatives? If you have a need to expand to student-level data, how you can get your state to join the federal FAFSA completion project?

IX. Capstone Project

The capstone project will be featured as an online toolkit resource guide geared for high school academic counselors and career & college advisors with best practices steps for each “Get Off Your FAFSA” strategy. It will include lessons learned in Tulsa and contextual learnings with interview quotes. It will be web-based for easy access and feature downloadable materials that can be customized. The project will be hosted on ImpactTulsa’s website where current FAFSA campaign resources are posted: www.fafsatulsa.com.

Appendix A.

Promotional materials examples:



fafsatulsa.com
FREE COLLEGE MONEY

- SEND YOUR CHILD TO COLLEGE
- FAFSA GETS THEM THERE
- FILLING OUT THE FAFSA IS FREE

Time is running out

Just 55 minutes now means increasing the chances of getting money for college. Fill out the Free Application for Federal Student Aid today.

FAFSA is the passport. Get tutorials and resources at www.fafsatulsa.com

Impact Tulsa

FSA ID WORKSHEET

A Federal Student Aid ID is required for students to complete the FAFSA online. It is also needed for parents of dependent students. **KEEP IN A SAFE PLACE. Go to fsaid.ed.gov**

STEP 1 ENTER AN EMAIL ADDRESS
The email must be unique to each individual. You will not be able to use the same email for you and your parents. **DON'T** use high school emails.

STEP 2 CREATE A USERNAME
Must be between 6-30 characters. Avoid using personal identifiers like your name or birthday.

STEP 3 CREATE A PASSWORD
Must be between 8-30 characters and include 3 of the following: an upper case, lower case, number, or special character. Avoid identifiers.

STEP 4 PROFILE QUESTIONS
1. ENTER YOUR SOCIAL SECURITY NUMBER
2. ENTER YOUR BIRTHDATE
3. ENTER YOUR NAME EXACTLY AS IT IS ON YOUR SOCIAL SECURITY CARD
Social Security mistakes are confirmed within 1-3 days. Errors can cause delays.

STEP 5 CHALLENGE QUESTIONS AND ANSWERS
There are 5 challenge questions and answers. The first two you select from a menu. The 3rd and 4th questions you create yourself. The last is a significant date in your life (not birthdate).

STEP 6 EMAIL VERIFICATION
FSA will send two emails. One will have a code that must be entered to verify your email address. Your FSA ID is ready to use.



fafsatulsa.com
FREE COLLEGE MONEY

Got FAFSA questions? We have answers!

FAFSA Phone Bank
Feb. 28 | 5:00 p.m. - 6:30 p.m.
Call (918) 732-6166

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GOAL MET 100%

90%
80%
70%
60%
50%
40%
30%
20%
10%

FAFSAs COMPLETED

a) Event flyer and FSA ID creation worksheet

b) Regional phone bank flyer

c) School goal tracking poster



Get college money.

CLICK HERE

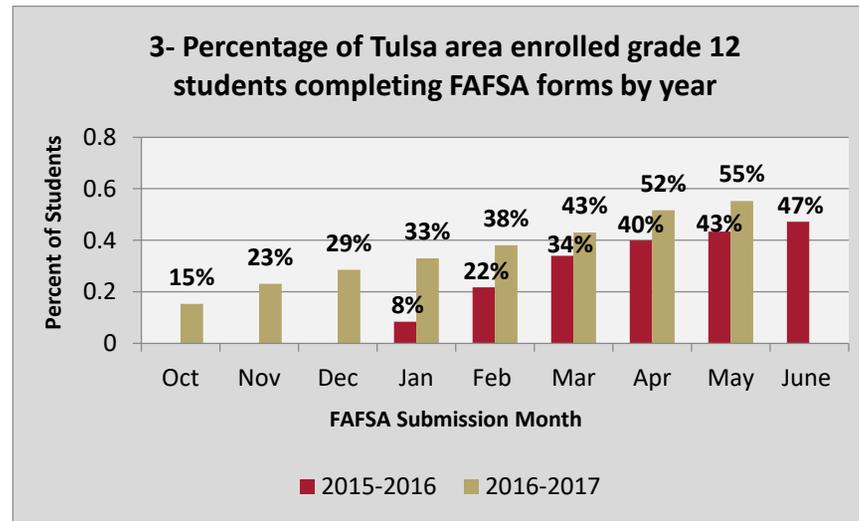
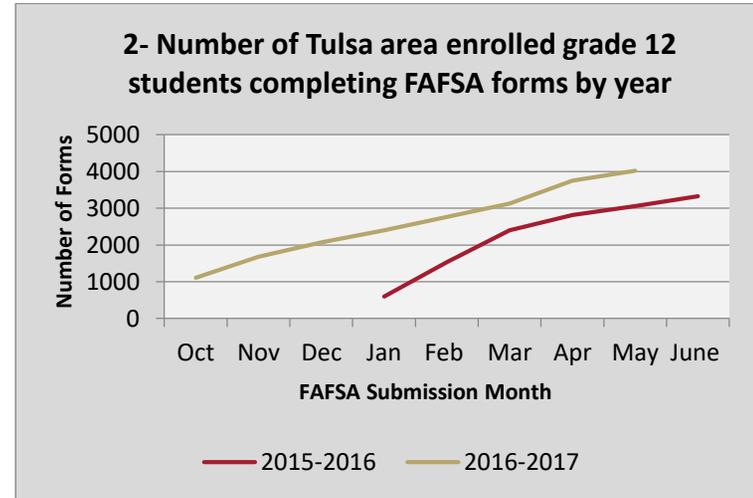
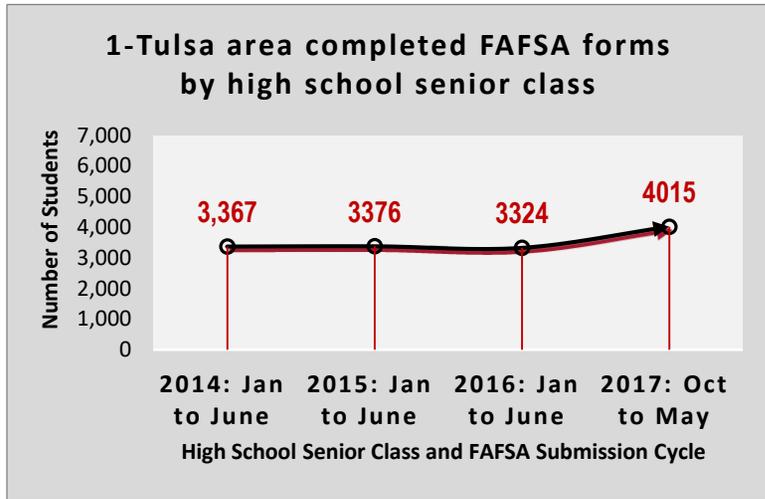
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TULSA REGIONAL CHAMBER

d) Sample web ad banner



Appendix B. [findings will be updated with the addition of June 2017 data]



Appendix C. [findings below may change with the addition of June 2017 data]

A school-level quasi-experimental analysis was conducted to see if there were differences in FAFSA completion between 10 Tulsa County high schools and 10 Oklahoma County high schools that have similar student demographics and academic achievement. While at the 2017 SDP Convening, Janell Chery learned about the online Rapid Cycle Evaluation Coach (RCE), developed by Mathematica Policy Research. It is a tool geared for educators that provides step by step instructions for preparing datasets, matching treatment and comparison groups, and measuring the impact of short-term programs. Ms. Chery plans to showcase this analysis with local educators to illustrate they can conduct sophisticated analyses of their interventions. Here are the findings:

I. Background Characteristics of the Matched Sample

Characteristic	Overall	Treatment	Comparison	Difference	Standardized Difference
Spring 2016 Grade 11 average ACT composite score	18.45	18.5	18.4	0.1	0.035
Class of 2015 High School four-year graduation rate	0.84	0.85	0.83	0.02	0.216
2016-17 percent of economically disadvantaged students	0.56	0.56	0.57	-0.01	-0.03
2016-17 total of enrolled grade 12 students	190.4	193	187.8	5.2	0.04
Number of matched schools	20	10	10	--	--

II. Average Outcomes for the Treatment and Comparison Groups

Matched Sample	Tulsa County Treatment Group Average FAFSA Forms	Oklahoma County Comparison Average FAFSA Forms	Estimated Effect
10 schools	103.4	97.1	1.059

III. Impact Results for the Treatment and Comparison Groups

Outcome	Effect Size	Standard Error	p-value
Complete FAFSA forms as of May 2017	0.016	10.39	0.911