



# In Search of a Match

A Guide for Helping Students Make Informed College Choices

APRIL 2015  
(UPDATED DECEMBER 2016)

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# OVERVIEW

This guide is designed for counselors, teachers, and advisers who work with high school students from low-income families and students who are the first in their families to pursue a college education. It offers strategies for helping these students identify, consider, and enroll in “match” colleges — that is, selective colleges that are a good fit for students based on their academic profiles, financial considerations, and personal needs. Many of the suggestions in this guide are based on insights and lessons learned from the College Match Program, a pilot program that MDRC codeveloped with several partners and implemented in Chicago and New York City to address the problem of “undermatching,” or what happens when capable high school students enroll in colleges for which they are academically overqualified or do not apply to college at all.

The College Match Program placed “near-peer” advisers — trained advisers who are recent college graduates — in low-income high schools, where they delivered crucial information, supported students as they navigated the college and financial aid application process, and helped students and their parents make informed decisions about college selection and enrollment. Over a four-year period, the program served approximately 1,200 students.

Based on encouraging outcomes from the Chicago and New York pilots, this publication distills some of the most important lessons from the College Match Program into a brief, practical guide to help educators explore ways to adopt a “match” approach in their own schools and communities. The key lessons of the College Match Program, which are reflected in this guide, are that students are willing to apply to selective colleges when:

- They learn about the range of options available to them.
- They engage in the planning process early enough to meet college and financial aid deadlines.
- They receive guidance, support, and encouragement at all stages.

Informed by those key lessons, the guide tracks the many steps in the college search, application, and selection process, suggesting ways to incorporate a match focus at each stage: creating a match culture, identifying match colleges, applying to match colleges, assessing the costs of various college options, selecting a college, and enrolling in college. Because many students question their ability to succeed academically or fit in socially at a selective college, and because they may hesitate to enroll even when they receive good advice and encouragement, the guide offers tips and strategies to help students build the confidence they need to pursue the best college education available to them. Each section also suggests tools and resources in the form of websites and printed materials that counselors, advisers, and students can use, as well as case studies to illustrate the experiences of College Match participants throughout the process.

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# PREFACE

**E**ach year, thousands of academically proficient, low-income high school graduates, some of whom are the first in their families to pursue a post-secondary education, enroll in nonselective four-year or two-year colleges, even though they are qualified to attend more selective schools. Many other low-income students who are qualified to enroll in a selective institution forgo college altogether. This “undermatching” represents a real loss of opportunity to students and a major loss of talent for the nation.

Students who attend nonselective four-year and two-year colleges are much less likely to graduate than are similar students who attend selective four-year colleges. In addition, many selective institutions offer generous financial aid to capable low-income students, so some students end up paying more to attend nonselective institutions. For these reasons, efforts are under way nationwide to encourage low-income students to explore a wide range of colleges and to enroll in a college that best meets their abilities, needs, and goals. The College Match Program — which gives these students the opportunity to discover and prepare for a very different future — is one such effort.

From 2010 to 2014, MDRC and a group of partners developed and implemented the College Match Program in Chicago and New York City. The program placed advisers in public high schools, where they helped students and their parents navigate the path to college. While College Match served only a limited number of students and was not rigorously evaluated, it generated results that have interesting implications for the wider field of college advising.

Drawing on the College Match experience, this guide offers practical advice for helping students identify, consider, and enroll in colleges that are a good match for them. For some readers, the strategies presented here may be new and may require substantial changes to existing programs. Other readers may find that they are already implementing many of these strategies; for these practitioners, the guide may offer ideas for fine-tuning existing college advising practices to align them with a “match” mindset. While the guide primarily focuses on high school, many of its strategies can be modified and implemented in other settings, including summer, after-school, or community-based college advising programs.

Although not every school or program has the capacity to implement a comprehensive college matching strategy, this guide honors the work of counselors and advisers in a variety of settings, recognizes the challenges and opportunities they face, and supports their efforts to help low-income and first-generation students reach college, remain enrolled, and graduate.

Gordon L. Berlin  
President, MDRC

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At MDRC, many staff members contributed to the College Match Program and study. Robert Ivry, Fred Doolittle, Rebecca Unterman, and former staff member Saskia Levy Thompson contributed to early program design. Nicholas Sherefkin, Nicholas Commins, and former staff members Kristin Cahill Garcia and Ezra Fishman assisted with program operations and data collection. Mario Flecha and Crystal Robinson assisted with data entry, and Marie-Andree Somers led program outcomes analyses. Ushapriya Narasimhan provided valuable guidance on the development of the database used to monitor program operations, and Sandhya Bandi provided ongoing support managing it. Cammie Brown, Deni Chen, Mifta Chowdhury, Hannah Dalporto, Mercy Emelike, Brittany Henderson, Robert Mesika, Trinel Torian, and Jennifer Uribe participated in

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the panels featuring recent college graduates that were held at the New York City sites to expose students to potential match colleges in the northeastern region. MDRC’s legal, fiscal, and administrative staff — too many to name here — provided indispensable fiscal, management, and administrative support. Fred Doolittle, Robert Ivry, and former staff member Chera Reid provided helpful guidance on program implementation and, along with Gordon Berlin, provided valuable feedback on project expansion. Fred Doolittle, Robert Ivry, John Hutchins, and Michelle Ware reviewed earlier drafts of this guide and provided helpful comments. Alice Tufel edited the guide, and Carolyn Thomas designed and prepared the document for publication.

Perhaps most important, we offer our thanks to the high school students who participated in the research that made this work possible.

The Authors

# Introduction

This guide is designed for counselors, teachers, and advisers who work with high school students from low-income families and with students who are the first in their families to pursue a college education. It builds on two previous MDRC publications — *Make Me a Match: Helping Low-Income and First-Generation Students Make Good College Choices* and *Promoting College Match for Low-Income Students: Lessons for Practitioners*.<sup>1</sup>

The guide offers practical advice for helping students identify, consider, and enroll in “match” colleges — that is, colleges that are a good fit for students based on their academic profiles, financial considerations, and social and personal needs.<sup>2</sup> Many of the suggestions in the guide are based on insights and lessons learned from the College Match Program, a pilot program that MDRC codeveloped with a number of partners and implemented in eight Chicago public schools and, later, in two New York City public schools. It is not intended to be a detailed “user’s manual” for creating and implementing a match program. Instead, the guide tracks the many steps in the college search, application, and selection process, suggesting ways to incorporate a match focus into each element of the process.

MDRC recognizes that resources vary across high schools and not every school or college advising program will be able to implement each strategy described in this guide.<sup>3</sup> (For example, schools in rural settings may confront challenges that are not fully addressed here.) While the guide primarily refers to high school staff and high school settings, many of the same strategies, activities, and tips that appear in the following pages can be modified and implemented in other settings, such as summer, after-school, or community-based college advising programs. In all cases, the goal is to do what you can to build awareness, provide information about match options, and guide students through the application and selection process.

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1. Sherwin (2012); Byndloss and Reid (2013).
  2. In this guide, the term “match” is used broadly to refer to two different elements, sometimes described as “match” and “fit.” “Match” is a college’s academic suitability for a student and “fit” considers whether a college meets the student’s financial, social, and personal needs.
  3. “College advising” in this report (sometimes called “college admissions advising”) refers to advising high school students about identifying, applying to, selecting, and enrolling in college.

## BOX 1

### Key Terms

**UNDERMATCHING:** Occurs when students are academically qualified to attend a more selective college or university than the one they choose.

**MATCH:** Addresses an institution's academic suitability for a student as well as the student's financial, social, and personal needs and preferences (in other words, financial cost of attending college; campus location and size; and academic, social, and cultural opportunities offered). Match typically occurs when a student enrolls in a college with a selectivity level that matches his or her academic qualifications.

**MATCH COLLEGE:** A college where a student's academic credentials fall within the college's range for average first-year students and that meets the student's financial, social, and personal needs and preferences.

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SOURCES: Harris (2014); Smith, Pender, Howell, and Hurqitz (2012).

For some readers of this guide, the strategies presented here may be new and may require substantial changes to existing programs. Other readers may find that they are already implementing many, if not all, of the strategies suggested; for these practitioners, the guide may offer ideas for fine-tuning existing college advising practices to align them with a match mindset.

Box 1 defines three key terms used throughout this guide.

### DEFINING THE PROBLEM: "UNDERMATCHING"

Each year, thousands of academically capable, low-income high school graduates enroll in nonselective four-year colleges or two-year colleges, even though they are qualified for admission to selective four-year colleges. Many other moderate- to high-achieving students forgo college enrollment entirely. Scholars refer to this phenomenon as "undermatching."<sup>4</sup> Box 2 presents a description of the factors that influence undermatching.

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4. Bowen, Chingos, and McPherson (2009); Carnevale and Rose (2003); Hoxby and Avery (2012); Light and Strayer (2013); Roderick, Nagaoka, Coca, and Moeller (2009).



## BOX 2

### Factors That Influence Undermatching

**STUDENT-LEVEL FACTORS:** Student-level factors that influence students' decisions about where and where not to apply to college include information gaps about the application process; lack of familiarity with different types of colleges, including more selective colleges and colleges outside the local area;<sup>\*</sup> limited social networks inside more selective colleges;<sup>†</sup> lack of knowledge about how to finance higher education;<sup>‡</sup> and family responsibilities and concerns about leaving home.

**SECONDARY SCHOOL-LEVEL FACTORS:** Counselors' overwhelming caseloads (of 350 to 1,000 students per counselor in some districts) limit the amount of individualized advising they can provide to students. In addition, counselors often work with students in all grade levels; focus on a range of student-related issues, including college advising; do not receive formal training in college advising; have limited access to college resources; and may have limited social networks inside a wide range of colleges, including the more selective colleges in their region.<sup>§</sup>

**POSTSECONDARY-LEVEL FACTORS:** College recruitment practices that limit recruitment to certain schools, districts, and regions, and the absence of clear information about college affordability and student transfer policies, also contribute to undermatching.<sup>||</sup>

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\* Avery and Turner (2012).

† Radford (2013).

‡ Hahn and Price (2008).

§ Radford (2013); McDonough (2005); Bruce and Bridgeland (2012).

|| Hoxby and Avery (2012).

Perhaps counterintuitively, researchers have found that students are most likely to succeed at the most academically demanding institutions that admit them. Students who attend selective four-year colleges are much more likely to graduate than are similar students who attend nonselective four-year and two-year colleges. A combination of factors is likely at work: capable students rise to the challenge of an academically demanding environment and find peers or professors who encourage and support them. In many cases, selective colleges also offer a wider array of mentoring and academic support programs to help students stay on track.<sup>5</sup>

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5. Bowen, Chingos, and McPherson (2009); Carnevale and Rose (2003); Hoxby and Avery (2012); Light and Strayer (2013); Roderick, Nagaoka, Coca, and Moeller (2009).

Undermatching has financial as well as academic implications. For some low-income students, selective colleges can actually be less expensive to attend than nonselective colleges or two-year colleges.<sup>6</sup> Many students are unaware that selective colleges offer need-based and merit-based scholarships or other financial aid that can significantly reduce the cost of attendance.<sup>7</sup>

The undermatching problem is most acute for students who are low-income and the first in their families to pursue a college degree. These students are often less familiar with the variety of college options and have few or no

friends or family members who are college graduates. Many attend large high schools where counselors face daunting student caseloads and lack the time, training, or resources to offer comprehensive college admissions advice.<sup>8</sup>

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***“Our students apply to [colleges that] friends or family members attend and the ones they hear about the most and know.”***

*—Head Counselor, Chicago Public Schools*

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Undermatching represents a real loss of opportunity to students and a major loss of talent for the nation. Recognizing the urgency of the problem, researchers, administrators, and educators are now working together to develop strategies and programs that encourage students to explore colleges that match their goals and needs.

## **THE COLLEGE MATCH PROGRAM OPERATED BY MDRC**

In response to the undermatching issue, MDRC and its partners codeveloped an innovative program model that was launched as a pilot in select Chicago and New York City public schools. The MDRC-operated College Match Program placed “near-peer” advisers — recent college graduates who have experience in college advising, college admissions, financial aid counseling, or student affairs — in high schools that serve low-income students, where they delivered crucial information, supported students as they navigated the college and financial aid application process, and helped students and parents make informed decisions about college enrollment. Participating in training that MDRC developed and coordinated, the College Match advisers worked with school staff, such

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6. Hoxby (2012).

7. Hahn and Price (2008).

8. Radford (2013).

as administrators, counselors, college coaches, and postsecondary specialists. From the fall of 2010 to the summer of 2014, the pilot program served approximately 1,200 students.

College matching matters more for low-income students and those who are the first in their families to attend college than for more affluent young people or those whose parents or siblings attended college, so MDRC's College Match Program focused on a population that has been overlooked by many other initiatives designed to promote success in college: capable low-income students who are prepared for college but who lack information to make informed college choices. The program did not target the highest-performing students, many of whom are aggressively recruited by the country's most elite colleges and universities. Instead, the program served students with a minimum 3.0 grade point average (GPA) who met specific college entrance examination requirements.<sup>9</sup>

These students were academically prepared for college and poised for success at a range of selective colleges. However, many of them were unaware of their college options; many planned to enroll in a two-year community college or did not plan to attend college at all. The College Match Program helped them explore and prepare for a very different future.

## ADOPTING A MATCH MODEL

Based on encouraging outcomes in Chicago and New York City, MDRC has created this guide to help educators explore ways to adopt a match approach in their own schools and communities.

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***“If it wasn’t for [my College Match adviser], I honestly would have had no idea what to do. I am the first in my family to go to college, so this is all new to me.”***  
—Student, College Match Program, Chicago

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9. In Chicago, students were required to have scored a minimum of a 20 (out of a possible 36) on the ACT. In New York City, students were required to meet City University of New York college-readiness standards, which include a score of 75 (out of a possible 100) or above on the New York State English Regents exam (or at least 480 out of 800 on the verbal portion of the SAT) and a score of 80 (out of a possible 100) or above on the Math Regents exam (or at least 480 out of 800 on the math portion of the SAT). While these scores were required for MDRC's pilot program, your criteria may vary slightly.

A key lesson of the College Match Program is that students are willing to apply to more selective colleges when:

- They learn about the range of options available to them.
- They engage in the planning process early enough to meet college and financial aid deadlines.
- They receive guidance, support, and encouragement throughout the process.

However, even when students *apply* to selective colleges, it's another challenge to persuade them to *enroll*. In some cases, the problem is a lack of sufficient financial aid; in other cases, family responsibilities or concerns influence a student's decision. Even with good advice and constant encouragement, many students question their ability to succeed academically or fit in socially at a selective college. Matching is hard work for students and advisers alike — but this guide offers a variety of tips and strategies to make it easier.

## GUIDE OUTLINE

Following this Introduction is an explanation of the match application timeline, which begins in students' junior year of high school. The section that follows the timeline includes detailed advice for each element of the process:

- Creating a Match Culture
- Identifying Match Colleges
- Assessing the Cost of Match Colleges
- Applying to Match Colleges
- Choosing a Match College
- Enrolling in a Match College

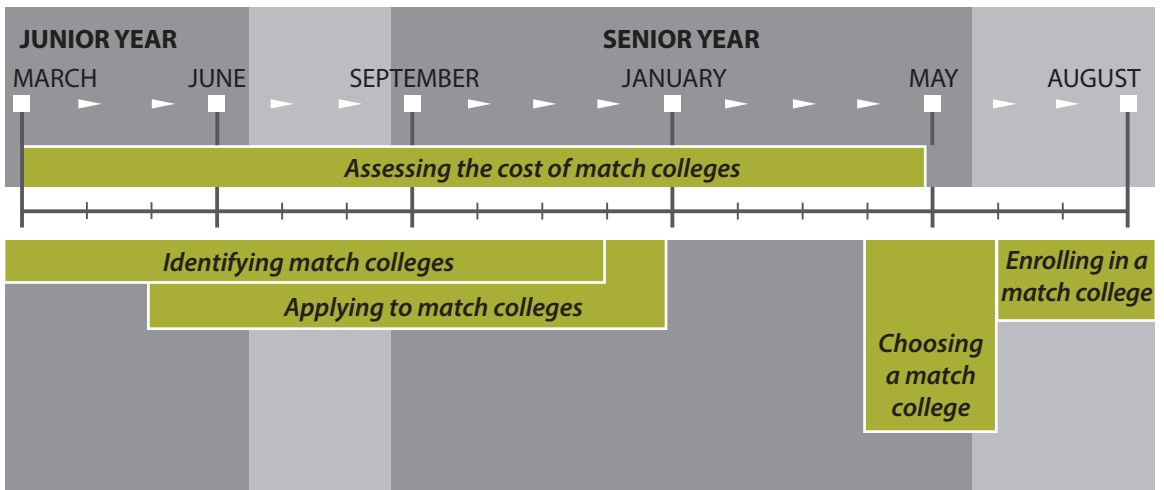
Throughout the guide, case studies are presented that illustrate real-life experiences of students in the College Match Program. Various online tools and resources for advisers and students are provided throughout, and a comprehensive list of all online tools and resources with their websites is provided in the Appendix.

# The Match Application Timeline: Incorporating the Match Approach into College Advising Programs

**B**ased on MDRC’s experiences in the College Match Program, the study team developed a timeline, shown in Figure 1, to help you as you incorporate the match approach into your college advising process. This timeline can be used as a guide to determine where in the process you should be at various times throughout the year and to help you identify where in the college application process specific tasks should be emphasized and prioritized. The timelines provided in each subsequent section of the guide include more detailed overviews of the types of activities that can take place at each stage of the application process.

College application timelines vary. Use this timeline as a general guide.

**FIGURE 1** Match Application Timeline



# Match, Step by Step

In this section, the six stages of the match process are described. At each stage, practical tips are offered to facilitate the process.

## CREATING A MATCH CULTURE

Many of the strategies described in this guide can be implemented by individual counselors and advisers, and MDRC encourages you to use these techniques in your interactions with students. However, even highly effective counselors need the support of colleagues and allies. Building a college-going culture and incorporating a match approach requires collaboration and the investment of a team of people. In order to maximize its impact, partners and stakeholders — including internal school or program staff, external colleagues, students, and students' families — must fully embrace the match strategy.

This section includes suggestions for incorporating the match approach in your school or advising program. Again, MDRC recognizes that this effort may be quite challenging for some practitioners, and subsequent sections of this guide offer smaller, student-centered steps you can take. However, the experience of the College Match Program suggests that it is crucial for those who are involved in the college advising process to understand and influence the larger culture of their school.

### **Start by creating a postsecondary leadership team.**

In order to implement a match approach to advising high school students about college application and enrollment, you will want to draw on the collective knowledge of many people, including those who historically may not have been part of the college advising process but who may play an important role in influencing students' decisions. Ideally, a postsecondary leadership team should include college advisers, professional counseling staff, homeroom teachers, and representatives of other departments in the high school (for example, English, social studies, athletics, and so forth). The team should be willing to share resources, data, and information across divisions and departments to help students reach their college goals.

### **Convene your team.**

The postsecondary leadership team should meet on a regular basis to plan, measure success, and discuss specific cases. If possible, the full team, includ-

ing school or program leadership, should meet monthly to track progress and ensure ongoing communication. A smaller implementation team, made up of members from the full team, including those with direct responsibility for advising students, should meet more often to plan, share information, and troubleshoot.

### **Set key benchmarks.**

It's important for the team to set benchmarks and develop a system to track student outcomes against those benchmarks. Some benchmarks should be match-specific, while more general outcomes are also helpful in determining whether students are on track for college enrollment. Remember to report on benchmarks to the appropriate school leaders and to celebrate successes, even if they are small successes. For example, during daily announcements, you can acknowledge increasing Free Application for Federal Student Aid (FAFSA) completion rates or the number of seniors who have submitted applications to match colleges. (See "Assessing the Cost of Match Colleges," later in this guide, for more information about FAFSA and applying for college financial aid.) Below is a list of sample benchmarks that you can set:

- Total number of college applications per student
- Applications to match colleges per student
- Completed FAFSA applications
- Completed scholarship applications per student
- College acceptances received per student
- Match college acceptances received per student
- Enrollments in college
- Enrollments in match colleges

### **Implement match training for all faculty and staff.**

In order to spread the message, the postsecondary leadership team should offer match presentations during faculty and staff meetings. Training could cover research findings about match and practical explanations of the personalized match approach to college advising. Invite experts on match, college admissions, financial aid policy, and scholarships to lead sessions on these and other relevant topics.

**TIP:** There may be organizations in your community that can provide professional development on the topic of match for no cost or very low cost, so don't be afraid to ask. To start, consult your school district office or the local chapter of the National College Access Network (NCAN) for referrals.

### **Build a college office.**

Create a dedicated space in the school where students can meet with their advisers and peers to discuss and explore college options. The college office should be visible and open to students before, during, and after school and should be an inviting, inspiring, and vibrant space. The office should be equipped with the technology and resources that students need to explore a range of colleges. Most important, the college office should convey a message that promotes college-going for all students, not just for the highest achievers.

### **Develop relationships with external partners.**

Identify partner organizations that can complement the postsecondary leadership team's efforts. Many types of organizations can support the college application process, including national organizations (such as the College Board or National

College Access Network), state agencies, and local nonprofit organizations (such as scholarship providers). The postsecondary leadership team should ensure that these organizations feel welcome in the school and receive the support they need. Before inviting outside partners into the school, the team should meet with them to explain the school's or program's college-going

goals and the ways in which partners can help achieve them. The leadership team should also work with outside partners to develop clear responsibilities and expectations for the team members, as well as systems to measure results.

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***“[The] biggest challenge but most important thing is developing relationships. Not just professional relationships, but cooperative relationships.”***

*—College Match adviser, Chicago*

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## **Online Tools and Resources for Creating a Match Culture**

- College Board and the National Office for School Counselor Advocacy's (NOSCA) Principal-Counselor Toolkit
- National Association for College Admission Counseling (NACAC)
- National College Access Network (NCAN)



## CASE STUDY 1

### Teamwork in Action

For two years Gloria worked as the College Match adviser in a selective public high school. Treated as a member of the school's counseling team, Gloria communicated daily with her counseling colleagues and twice per week attended the counseling department's meetings, where weekly goals, achievements, and plans were discussed. During each meeting, Gloria reported on her successes assisting juniors and seniors in the match application process and identified areas in which she needed the team's support. For example, when students were unresponsive to her requests to meet, Gloria shared the list of those students with the high school counseling staff. Through the counseling team and the principal's proactive outreach efforts, the informal "grapevine" led students to her office door. Reflecting on the power of teamwork, regular communication, and proactive outreach, Gloria recalls, "[Students would] be here within hours" informing her that "[the principal] told me you're looking for me."

During her second year, Gloria had several opportunities to work closely with the school's college counselor. Gloria helped codevelop a college application curriculum for juniors. She was invited to colead a College Colloquium, where she demonstrated for seniors how to use net price calculators and a financial aid award comparison tool that she had developed. Gloria also worked with the school's college counselor to codesign a bulletin board display, called "Oh, the Places You Will Go!" featuring individual photos of members of the senior class and the colleges where they intended to enroll in the fall. Well received by students and staff alike, the bulletin board display reinforced the counseling team's and the high school's focus on college-going and celebrated the students' college decisions, many of which included intentions to enroll in a match college.

*NOTE: A pseudonym is used above to protect the adviser's identity. See the Epilogue on page 41 to learn about the outcome of this case.*

## IDENTIFYING MATCH COLLEGES

The college exploration process can be daunting for all students, and it can be especially challenging for low-income students and those who are the first in their families to apply to college. Helping those students to identify potential match colleges is a multistage process that should begin early — by junior year of high school, at the latest. Well before students apply to college, they should begin to explore their own interests, ambitions, strengths, and goals. To support them, you should look for ways to develop candid and trusting relationships with students — relationships that encourage them to ask difficult questions, make thoughtful choices, and act on those choices.

Figure 2 lays out the stages of the suggested timeline for identifying match colleges, beginning in March or April of junior year and extending through November of senior year.

### **Start by deepening your own knowledge of potential match colleges.**

Low-income and first-generation college-bound students may be unaware of the different college selectivity tiers, and some may assume that all colleges offer the same kinds of resources and opportunities. Since over half of the students in the United States attend colleges within a 100 mile radius of

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***“Our students don’t always make informed decisions about [college]...but obviously you can’t attend a school you didn’t have on your list.”***

*—Principal, Chicago Public Schools*

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home — and most enroll within 500 miles of home — you should get to know the institutions in your region and the key factors that distinguish them from each other.<sup>10</sup> While doing your research, be sure to focus on each institution’s retention and graduation rates — in particular, the rates for underrepresented students, which can vary widely within each selectivity tier.

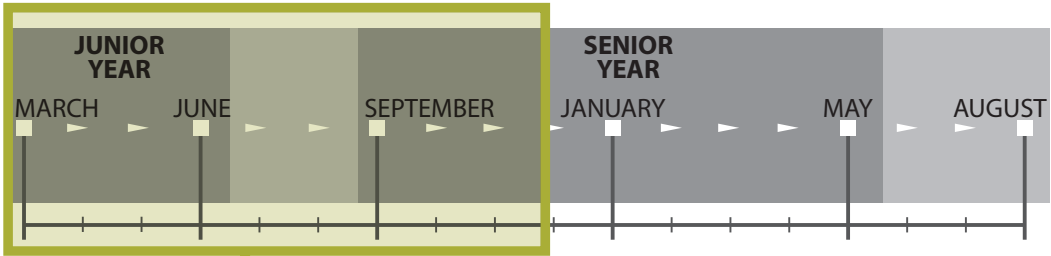
Supplement your knowledge of specific colleges by building relationships with college admissions representatives who can provide useful information that is not available on the college’s website or in other materials.

**Tip:** Barron’s *Profile of American Colleges* offers information on selectivity ratings, while the U.S. Department of Education’s *College Navigator* website provides more detailed information on institutions of higher learning.

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10. Eagan, Lozano, Hurtado, and Case (2013). This information is up-to-date as of fall 2013.

**FIGURE 2** Timeline: Identifying Match Colleges



<b>JUNIOR YEAR</b>	MARCH– MAY	Students attend college fairs and begin to think about their best match college.
▼ ▼	JUNE– AUGUST	Students do independent research on colleges and visit colleges that interest them.
<b>SENIOR YEAR</b>	SEPTEMBER– NOVEMBER	Students visit colleges that interest them. Students meet with counselor or adviser to discuss their potential match colleges and refine their lists in light of possible changes in interests, academic profile, or personal or financial situations.

**Develop a “Match List” with factors that are important to your students.**

A Match List, described in Box 3, can be a useful tool to help students identify their college options based on a set of variables or data points of interest to them. In your Match List, identify some key points of potential interest to your students, including each college’s setting, location, size, percentage of Pell Grant recipients, racial and ethnic diversity, number of students enrolled from your high school or district, campus-based and community-based supports for first-generation college-bound and low-income students, and retention and graduation rates for academic majors of interest. Be sure to consider other

### BOX 3

## Sample Match List

The Match List can be a useful tool to help students identify their college options based on a set of variables or data points of interest to them. Some information that a Match List might contain includes:

- Barron's college selectivity ratings
- Admission rates
- Four-year and six-year graduation rates, by race
- Distance from city/town
- Percentage of students receiving Pell Grants
- Entrance requirements
- Retention rates
- Percentage of students attending from local school district
- Setting (for example, rural, urban)
- Graduation rates

The Match List can be customized for students who meet specific admissions criteria. For example, a list can be designed for students who have a minimum 3.0 grade point average and a minimum score of a 20 on the ACT, and who prefer to attend college within the Great Lakes Region. Multiple lists can be created for colleges or programs that serve students across a wide academic continuum. The goal is to develop a list that reflects match criteria for the students being served by a specific school or program.

See the Appendix for links to a sample Match List and accompanying Users Guide, which is an excerpt from the Match List used by the College Match Program in New York City. The list of match institutions includes colleges and universities in the Northeast ranked from "competitive" to "most competitive" by Barron's annual *Profile of American Colleges*. Barron's selectivity ratings are based on entering students' GPAs, college entrance exam scores, class rank, and the college's application-to-acceptance ratio.

relevant factors, including post-graduation employment outcomes. Developing the Match List is an investment of time that will pay off with continual use.

**Tip:** Create simple spreadsheets to collect and sort students' interests and priorities for postsecondary institutions. You can then customize each student's list by suggesting colleges from the Match List that line up with the student's interests and priorities that you tracked. Box 4 lists suggestions for how to track such student information.

## BOX 4

### Data Tracker Ideas

Keeping track of your interactions with students as well as their academic interests and competitiveness will help you track student progress in the advising process. It will also aid you in finding potential match institutions for your students from the Match List that you created. It's important to take time to log information regularly. Consider tracking the following information:

- Student name
- Current GPA
- Type of colleges in which student is interested
- Number of times you meet with the student
- Highest SAT/ACT scores in math, reading, and writing
- Whether the student has submitted the FAFSA or College Scholarship Service/Financial Aid PROFILE, if necessary
- Colleges to which student applies
- Scholarships to which student applies
- Majors of interest

### **Help students develop their own lists of “safety,” “target,” and “reach” colleges.**

To find the best match, students may need to look beyond the familiar. Start by helping them to understand the categories of “safety,” “target,” and “reach” colleges (described in Box 5) and encouraging them to conduct research on potential match colleges in each category. Ask students what they want to know about a place where they might live for four years. After they answer those questions, encourage them to share their findings in order to expand other students’ knowledge of specific colleges.

**Tip:** Students should explore at least three to five colleges in each category. Remind students that they should only apply to colleges where they have a reasonable chance of admission, except for their strategically selected reach colleges.

### **Offer a variety of college-related events to serve a wide range of student interests and abilities.**

When you sponsor college-related events, be sure to invite a diverse range of institutions in terms of selectivity, geography, and type (public versus private,

## BOX 5

### Safety, Target, and Reach Colleges

**SAFETY COLLEGES:** These are colleges where students have a very good chance of being accepted based on their academic credentials. Safety colleges should include affordable options.

**TARGET COLLEGES:** These are colleges for which the student meets the general admission criteria in academic and social arenas. Admission is likely at these colleges.

**REACH COLLEGES:** These are colleges that students may consider to be their “dream schools.” Based on their academic credentials, students are less likely to be accepted by their reach colleges. This may be because the student’s qualifications fall slightly short of the college’s average, and admission to the college is very competitive.

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SOURCE: The College Board (2014).

liberal arts colleges versus research universities, religiously affiliated versus secular, coeducational versus single-sex colleges, and so on). Encourage students to speak to representatives from those institutions.

Attending college fairs offers great opportunities for students to present themselves to college admissions representatives and to learn more about the colleges. In advance of the fair, be sure that students have a list of colleges that will be represented. Students should customize their own lists based on their interests and the selectivity tiers that are the best matches for them.

It’s also helpful to invite high school alumni who are now college students or graduates to serve on a panel about what to expect in college. Again, the panel should represent a broad range of colleges, and you should encourage students in every selectivity range to meet with someone attending college in that tier.

**Tip:** Ask students to develop specific match-related questions before attending college events as a way to raise their awareness and focus their conversations with institutional representatives.

#### **Explore alternative admissions and special programs at colleges.**

Some highly selective reach colleges have “opportunity programs” that provide academic, social, and financial support for moderate- to high-achieving low-

income students. For some students, these programs can completely change the calculus, making a reach college significantly more affordable and accessible. Similarly, some moderately selective colleges and universities — including many public institutions — have special honors programs (which are more rigorous than the standard curriculum) for high-achieving students, transforming a safety college into a more rigorous match.

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***“A lot of students don’t even apply to certain schools because they are not exposed to them or they just think ‘Oh, I wouldn’t get in’ or ‘I don’t think I would want to go there.’”***

*—Student, College Match Program, New York City*

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### **Promote first-hand exposure to match colleges.**

Encourage students to visit colleges before applying. This is particularly important for low-income and first-generation students who wonder whether they can meet the demands of a more selective college. There are many opportunities for students to “taste” college life, including open houses, fly-in programs (which provide assistance and support that enables students to visit college campuses), and on-campus college tours. In determining whether a college is a good match, students might also find it helpful to attend a summer program on the college campus; many colleges offer summer programs for high school students who are between their junior and senior years.

**Tip:** When students visit colleges, have them fill out an “Evaluating a College” worksheet. (See Online Tools and Resources, on the next page, and the Appendix for a link to an example of such a worksheet.) You can even create a competition and award prizes to students who share the most interesting facts about the colleges they visit.

### **Keep parents informed.**

Parents generally want to be involved in their children’s decision making about college. Most parents are supportive of their children’s college goals and plans, but some parents bring concerns and questions of their own. For example, parents may express concerns about their child attending college away from home. Take the initiative to meet parents and engage them in the process as early as possible. In some cases, group meetings to discuss general college topics will suffice, while in other cases scheduling individual parent meetings will be necessary. (Parent engagement is discussed in more detail in “Assessing the Cost of Match Colleges.”)

### **Engage with external partners.**

Students are influenced by many different adults in their lives, including parents, older siblings, other family members, teachers, athletic coaches, clergy members, employers, and other informal role models and advisers. It's important that students receive a consistent message from a variety of sources. In your collaborations with community-based organizations and your informal contacts with adult role models and advisers, keep checking to ensure that others encourage students to explore a wide range of college options and choose a college that meets their academic, financial, and personal needs.

### **Be prepared to provide emotional support as well as information.**

As a counselor or college adviser, you may need to provide emotional support for students who may not have a great deal of support at home. They may be anxious about the process and uncertain of their options. In addition, some students lack the self-confidence to imagine themselves at selective colleges, let alone apply to and enroll at those colleges. Those students need a champion to encourage them. Be prepared to push students beyond their comfort zone. Encourage students to aim high and to consider a wide range of colleges, including those where they perceive they will be challenged academically.

## **Online Tools and Resources for Identifying Match Colleges**

- Association for Institutional Research, instructions for using College Navigator
- Barron's *Profile of American Colleges*
- College Board, "You Can Go" site for students facing roadblocks on the way to college
- College Greenlight, blog on applying to college
- College Results, data on college retention and graduation rates
- College Scavenger Hunt, guide for researching colleges
- College Simply, tools for the college search
- Harvard University, "Evaluating a College" worksheet for college visits
- I'm First, online community for first-generation college students
- My Majors, tool for college, majors, and career recommendations
- National Center for Education Statistics (NCES), College Navigator college database
- NCES IPEDS Data Center, data on U.S. postsecondary institutions
- U.S. Department of Education College Scorecard, information on colleges' characteristics



## CASE STUDY 2

### Expanding the College List

At her large public high school in New York City, Diana excelled academically. If she attended college, she would be a first-generation college student. However, Diana comes from a single-parent home, where her responsibilities — including taking care of her younger brother, cleaning the apartment, and cooking dinner — often prevented her from starting her homework until late at night. They also prevented her from fully dedicating herself to the extracurricular activities and clubs in which she participated.

Before her senior year, Diana had received little guidance on post-graduation plans. She was interested in attending a four-year college with a nursing program, but, like many students, she had formed a specific view of the colleges that were “off limits” for her. Perhaps based on inaccurate information, she was adamant that she would not attend a “no-name college,” a City University of New York (CUNY) college, a college that had the words “Saint” or “Technology” in its name, or a small liberal arts college.

Diana’s College Match adviser assumed responsibility for exposing her to a wider range of colleges. She worked to develop a strong relationship with Diana, getting to know her on a personal level so that she could suggest colleges that would suit Diana’s needs and interests. The adviser quickly learned that there was much more to Diana than her strong transcript.

Based on what she learned through her meetings with Diana and using a Match List, the adviser helped Diana identify colleges that would be a good match for her. Diana began to consider colleges that she had initially rejected, and decided to apply to a wider range of colleges, including Adelphi University, Northeastern University, Boston College, and University of Pennsylvania. After seeing that her SAT scores were close to the averages for some of the most competitive colleges on the Match List, she retook the SATs and increased her score by over 100 points in each section.

*NOTE: A pseudonym is used above to protect the student’s identity. See the Epilogue on page 41 to learn about the outcome of this case.*

## ASSESSING THE COST OF MATCH COLLEGES

Cost is an important factor to consider when helping students choose a match college. Cost — or, sometimes, misperceptions about cost — can also be a barrier that prevents low-income students from enrolling in colleges that otherwise might be a strong match. This section includes strategies and ideas that you can use to help students assess the real cost of different college options and to factor that information into their college choices.

Figure 3 lays out the stages of the suggested timeline for assessing the cost of attending a match college, beginning in March or April of junior year and extending through April of senior year.

### **Start by deepening your own knowledge of the financial aid process.**

In order to effectively advise students and parents, you need a good understanding of the financial aid process, including key terms, documents, and tools. A number of resources are available to help you learn more about financial aid, including the Federal Student Aid and the College Board websites. Below is a checklist of some of the most important elements of the financial aid process.

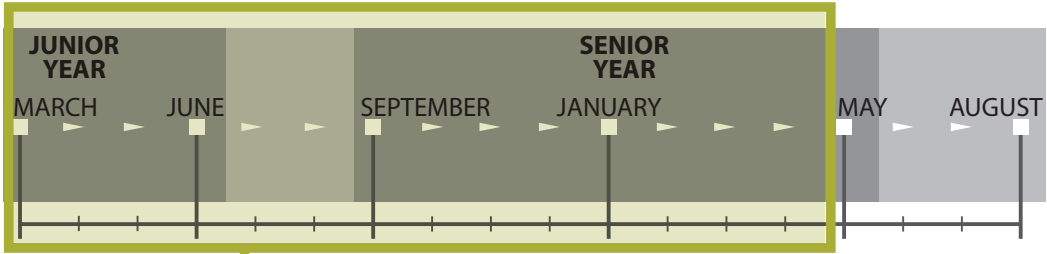
- Free Application for Federal Student Aid (FAFSA)
- College Scholarship Service (CSS)/Financial Aid PROFILE (the “PROFILE”)
- Opportunity programs
- Scholarship opportunities
- Federal and private student loans

Box 6 describes the FAFSA and the PROFILE in more detail.

### **Encourage students and parents to start thinking early about financial aid.**

It’s important to begin the conversation about financial aid with students at the first stage of college exploration. Too many students and families wait until the end of the process, after students have received their college acceptance and financial aid award letters, to start thinking about how they will finance their college education. Instead, help students understand that the net cost — or the cost of attending one year of college after all aid is factored in — is a crucial element in assessing a potential match. Students should begin to consider specific financial issues when they put together their list of prospective colleges and submit applications.

**FIGURE 3** Timeline: Assessing the Cost of Match Colleges



<b>JUNIOR YEAR</b>	MARCH–APRIL	Counselor or adviser holds a Financial Aid workshop/parent night.
	MAY–JUNE	Students compile tax information (in preparation for FAFSA).
<b>SENIOR YEAR</b>	OCTOBER	Early October: FAFSA opens; counselor or adviser encourages all students to submit.  Counselor or adviser holds Financial Aid workshops to help students submit the FAFSA and CSS/Financial Aid PROFILE (if applicable).
	NOVEMBER–DECEMBER	Counselor or adviser: <ul style="list-style-type: none"> <li>▪ Sets deadline for submitting FAFSA and CSS/Financial Aid PROFILE (if applicable).</li> <li>▪ Holds Financial Aid workshops to help students submit the FAFSA and CSS/Financial Aid PROFILE.</li> </ul>
	MARCH–APRIL	Counselor or adviser holds Student Loan/Debt workshops.

## BOX 6

### The FAFSA and CSS/Financial Aid PROFILE

**THE FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA):** An application for federal student aid, including Pell Grants and federal student loans. Many states and colleges also use FAFSA data to determine eligibility for state and college aid. Students who are eligible to apply for FAFSA include U.S. citizens, permanent residents (green-card holders), refugees, and other immigrants admitted for humanitarian purposes (for example, parolees, victims of human trafficking, and Cuban-Haitian entrants).

**THE COLLEGE SCHOLARSHIP SERVICE (CSS)/FINANCIAL AID PROFILE (THE “PROFILE”):** A profile that some colleges require applicants to complete and submit to be considered for institutional grants.

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SOURCES: Federal Student Aid (2014); College Board (2014b).

It’s just as important for parents to understand the cost of college as it is for students. Expect families to experience “sticker shock” when reviewing college costs. In many cases, you can reassure parents that the real net cost of many colleges is significantly lower than the “list price.” Helping parents understand this fact increases the chance that they will encourage their children to apply to and attend a match college.

**Tip:** Introduce students and parents to net price calculators to calculate the cost of attending a specific college. You can point students to net price calculators on individual college websites and on the College Board’s website ([www.collegeboard.org](http://www.collegeboard.org)).

#### **Offer advice to parents when it’s most convenient for them.**

It is helpful to invite parents to the college office for in-person conversations about financial aid issues. At the same time, you should recognize that parents may have work or family demands that prevent them from scheduling meetings at designated times. Consider holding meetings at different times of the day to accommodate parents’ schedules. Be sure to provide an interpreter for

## BOX 7

### Topics for Financial Aid 101 and Student Loan/Debt Workshops

#### Financial Aid 101 Workshop

- The cost of attending college
- What are the FAFSA and CSS/Financial Aid PROFILE?
- What type of state aid is available?
- When do the applications open?
- What documents are needed to apply?
- When are the applications due?
- Scholarship and essay-writing support

#### Student Loan/Debt Workshop

- Distinguishing federal from private loans
- Understanding interest rates
- The loan application process
- Ways to reduce debt and loan amounts
- Payment options

parents who do not speak English. In addition, use phone, e-mail, and postal mail communications when in-person meetings aren't possible.

#### **Organize programs and activities focused on financial aid and affording college.**

Consider holding a "Financial Aid 101" workshop by March or April of junior year. Then consider holding a financial aid review session in fall of senior year as well as a Student Loan/Debt workshop in March or April for students and parents. For more details, see Box 7.

#### **Help students complete their FAFSA and PROFILE, if applicable.**

Financial aid based on students' FAFSA and PROFILE (where applicable) can help make match colleges much more affordable. All students need to complete the FAFSA, and some colleges also require that students submit the PROFILE.

In their junior year, students should begin to collect documents needed to complete the FAFSA. Provide students with a worksheet that lists all the required financial documents. Because some colleges set priority deadlines, it's best to collect financial information sooner rather than later. This financial

information is also necessary to determine student eligibility for opportunity programs and application fee waivers — and will influence the creation of students’ individual Match Lists.

In September of students’ senior year, remind students and parents about upcoming financial aid deadlines by sending a letter or e-mail emphasizing the importance of completing all the steps in the financial aid application process.

**Tip:** Encourage students to begin filling out the FAFSA as soon as it’s available in early October. Set a submission deadline for your students of late October or early November. In addition, make students aware of official “financial aid priority deadlines” set by different institutions.

After the FAFSA opening date, hold financial aid workshops where students can drop in for help filling out either the FAFSA or PROFILE. These workshops can be held after school or during specified periods during the school day (such as during homeroom or advisory periods, during English class, and so on).

**Tip:** Set a goal of 100 percent FAFSA submission for all your students and offer incentives for students to submit their applications. For example, offer prizes to students who complete their FAFSA first or enter all students who submit a FAFSA in a raffle to win a prize.

### **Partner with others to support FAFSA and PROFILE completion.**

If your team lacks the training or resources to help all students complete the FAFSA or PROFILE, consider inviting staff from an external organization with expertise in financial aid to assist your students with this crucial step in the application process. Alternatively, refer your students to external organizations or district supports for assistance. (For example, the Illinois Student Assistance Commission, or ISAC, works with the Chicago school district to provide this type of support.)

### **Provide ongoing advice to students after they submit their financial aid forms.**

Once students submit their FAFSA and PROFILE, if required, follow up with them to make sure they take all necessary steps to receive aid. Students may have to make revisions to their PROFILE or verify their information.

### **Encourage students to submit scholarship applications.**

Sometimes a modest scholarship is all it takes to allow a student to enroll in a match college. Once students have investigated potential scholarships, encourage them to apply for scholarships and grants early in the application process. Many scholarship providers consider applications and make award decisions before students choose the colleges they want to attend, so students should apply for scholarships before they're admitted.

**Tip:** Explore scholarship opportunities with local scholarship providers that can help close the financial aid gap for students.

### **Help students advocate for a better financial aid package.**

Many students don't realize that they can contact a college that admits them in order to discuss the college's offer letter and financial aid package. Suggest that students call the admissions office to discuss their financial aid offer. As an adviser, you can also provide coaching and support before or during the call. (See "Applying to Match Colleges" for further discussion of the application process.)

## **Online Tools and Resources for Assessing the Cost of Match Colleges**

- College Board, Big Future College Cost Calculator
- College Board, Expected Family Contribution (EFC) calculator
- College Greenlight, list of colleges that give strong financial aid
- FAFSA
- FAFSA Changes (effective October 1, 2016)
- FAFSA on the Web worksheet
- Federal Student Aid information sheet
- Finaid.org, list of "no-loan" colleges
- Student Loan calculators
- USA.gov, "Financing Your Education," information and resources

## CASE STUDY 3

### Cost as a Barrier to College

Marisol, a top-performing student at her public high school in Chicago, was admitted to several colleges and was awarded merit scholarships based on her strong academic record. However, Marisol comes from a low-income family, and even with the scholarships she received, her out-of-pocket costs still exceeded what her family could afford to contribute to her education. Further complicating her situation, Marisol was not a U.S. citizen and did not qualify for federal financial aid.

Marisol's College Match adviser worked with her to help her identify colleges that would meet both her academic and financial needs. Marisol applied to the honors program at a local university; she was admitted to the program but did not receive the full tuition scholarship she was hoping for. (For information on college scholarships, see "Applying to Match Colleges," on pages 27 to 32.) She continued to apply for other scholarships, but her immigration status proved to be a barrier for many scholarship programs. At times she felt defeated, but with encouragement from her adviser, she persisted.

Marisol confronted many additional challenges. For example, one state college refused to issue her an award letter because she did not qualify for federal student aid. Despite calling the college several times, she never received an official award letter. The adviser called several other institutions to vouch for Marisol, gaining some additional institutional funds, but tuition costs remained too high.

Marisol and her College Match adviser determined that she would not be able to attend a four-year college, despite her academic qualifications. Marisol enrolled in a two-year college in the hope of transferring to a four-year college.

*NOTE: A pseudonym is used above to protect the student's identity. See the Epilogue on page 41 to learn about the outcome of this case.*



## APPLYING TO MATCH COLLEGES

As students move from the college exploration and cost assessment phases to the application phase, it's important to help them understand and follow the rules of the college application process. This phase includes requirements that students can't ignore and deadlines that they can't miss. As they comply with these rules, they should keep the idea of matching in mind. At each step of the application process, students should be asking, "What colleges might be a good match for me?"

Figure 4 lays out the stages of the suggested timeline for taking college entrance exams and applying to match colleges, beginning in May or June of junior year and extending through December of senior year.

### **Encourage students to take college entrance exams early.**

For many students, college entrance examinations (like the SAT and ACT) are among the most intimidating elements of the college application process. You should encourage students to take college entrance examinations starting in their junior year and to retest in senior year, as needed, to gain more confidence and improve their scores. Make sure that students are aware of standardized test fee waivers and free test preparation programs.

In addition, make sure students are aware of colleges where entrance exams are either optional or where such exam scores are deemphasized in the application review process.

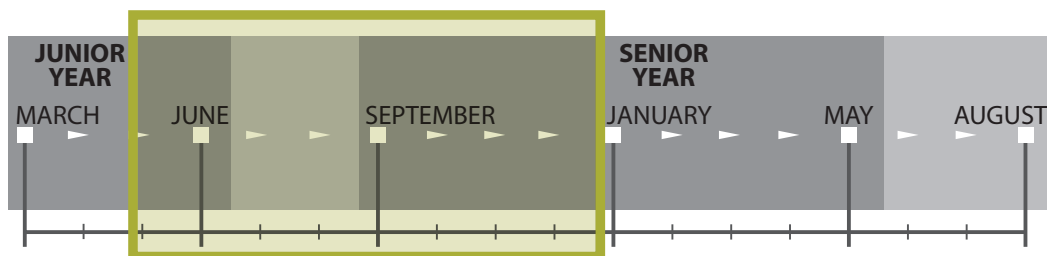
**Tip:** Ask teachers to announce upcoming exam dates and post college exam dates and application procedures in various locations — on bulletin boards, in the school's newsletter or newspaper, or on the school's social media sites.

### **Make students aware of college application deadlines and help them meet those deadlines.**

In the spring of junior year, advertise fall college application deadlines and orient students to the application process. Encourage students to use the summer before their senior year to begin speaking with their parents about the process and the types of documentation they will need to complete college applications.

Help students understand that college and scholarship deadlines are fixed and some colleges set early fall deadlines. Particularly at selective colleges, students who miss deadlines are often excluded from consideration. When advising

**FIGURE 4** Timeline: Applying to Match Colleges



<b>JUNIOR YEAR</b>	MAY–JUNE	<p>Students prepare, register, and sit for required college entrance exams.</p> <p>Students begin writing college and scholarship application essays (and continue to work on them over the summer).</p>
<b>SENIOR YEAR</b>	SEPTEMBER–DECEMBER	<p>Counselor or adviser holds College Information Sessions for families.</p> <p>Students prepare, register, and sit for required college entrance examinations.</p> <p>Counselor or adviser:</p> <ul style="list-style-type: none"> <li>▪ Helps students create and finalize a list of match colleges</li> <li>▪ Encourages students to attend college fairs and visit colleges</li> <li>▪ Assists students in assembling college and scholarship applications</li> <li>▪ Tracks college application submissions, assesses for outstanding items, and develops a plan for helping students complete applications</li> </ul>

students on the application process, you cannot overstate the importance of knowing and meeting deadlines.

**Help students write strong college and scholarship application essays.**

Many students need assistance writing clear and compelling essays. In junior year, encourage English and other subject teachers to develop classroom activi-

ties and assignments that help students outline, draft, and finalize essays for college and scholarship applications. Writing college and scholarship essays does not need to be two separate processes; assist students in developing an effective strategy for using college essay content when applying for scholarships. This approach will make students' essay-writing workload less burdensome and less daunting. Additionally, help students understand the importance of telling their personal stories, including the ways they have overcome adversity.

**Tip:** Embed college and scholarship essay writing into the English class curriculum, or ask teachers to lead college and scholarship essay-writing workshops during or after school. Assign students essay-writing activities to be completed during the summer months between their junior and senior years.

### **Encourage students to investigate scholarship opportunities.**

Students should spend time researching scholarships and assessing their eligibility and competitiveness for different scholarship programs. They should begin this process as early as possible. In addition to scholarships offered by colleges themselves, many community foundations, civic organizations, and other nonprofit organizations offer modest to generous scholarships to thousands of students each year that help to narrow or close the financial gap.

### **Help students secure college application fee waivers.**

Application fee waivers can ease a low-income student's financial burden by reducing or in some cases eliminating financial barriers that accompany the college application process. Some colleges waive application fees for a specific period of time as an inducement for submitting applications early. Others waive fees for online application submissions. In cases where official fee waivers are not available, it's still worthwhile to ask; some colleges waive fees at their own discretion.

### **Use transcript request forms to track college application information.**

Transcript request forms are a helpful way to capture information about the number and type of colleges that students are considering. You can design and

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*"I...procrastinated because I was afraid...I was so stressed out. [My College Match adviser]... calmed me down [and] saved me from missing a whole bunch of deadlines."*

—Student, College Match Program, New York City

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use the forms to assess whether a student has applied to a diverse portfolio of colleges, including safety, target, and reach options within different selectivity tiers.

**Encourage students to use the Common Application form with discretion.**

The “Common Application,” an undergraduate college admission application, allows students to streamline the application process by submitting one application to many different institutions. However, because more than 500 colleges accept the Common Application, students may be tempted to expand their list of college applications to include colleges that are not an appropriate match. Encourage students to submit applications only to colleges that meet their overall match needs.

**Design activities to facilitate the application process.**

It’s always a good idea to bring students together for activities or events that help them complete key steps in the application process. Working together, in one space, students can be motivated to finalize their essays, extracurricular activity lists, art portfolios, or supplementary application questions. Enlist the assistance of faculty and staff to provide support during these events.

**Tip:** In mid-fall of senior year, hold a “College Application Lockdown” event during which students spend an evening reviewing college application checklists and completing outstanding items.

In addition, staff members from some colleges visit high schools to conduct on-site admissions interviews with high-potential students and make immediate decisions about applications. Find out whether the colleges your students are applying to offer on-site admissions interviews.

**Recruit faculty and staff to write letters of recommendation for students.**

Selective colleges require several letters of recommendation, and these letters are a crucial element in the application process. Some students are comfortable asking for letters of recommendation, but others are not. You can help by developing and maintaining a list of students who need recommendation letters and asking faculty or school staff to write them.

**Continue to engage parents.**

As the process moves to the application stage, it’s even more important to keep parents informed and actively involved. You may need to explain the nuts and bolts of the application process and the potential opportunities available

## CASE STUDY 4

### Putting the College List into Action

Lisa was at the top of her class at her public high school in New York City for all four years, and she was very involved in her school community. So it was not surprising that Lisa came to her first meeting with her College Match adviser with a clear vision for her future: she wanted to attend a prestigious college and pursue a degree in biomedical engineering.

While Lisa had assembled a strong list of prospective colleges — including many on the Match List that her adviser used — she lacked critical information about the application process. Her parents wanted her to go to college but knew little about the application process and thus could not help her.

Lisa became a familiar face in the college office, turning to her adviser for help revising and editing her college essays. Her adviser helped her secure fee waivers so that she could retake the SAT and take the ACT and SAT II subject tests to make her application more competitive. The adviser also helped her complete the FAFSA, PROFILE (required by some colleges in order to be considered for an institutional grant), and New York State Tuition Assistance Program (TAP) applications, as well as private scholarship applications.

With her adviser's help, Lisa submitted 17 college applications — including applications to Wellesley College, Barnard College, Rensselaer Polytechnic Institute, Fordham University, and several CUNY and State University of New York (SUNY) colleges — and applied for eight scholarships.

*NOTE: A pseudonym is used above to protect the student's identity. See the Epilogue on page 41 to learn about the outcome of this case.*

to their child on different campuses. In some cases you may need to address parents' apprehension about their child attending college far from home and may need to encourage them to be open-minded about their child's options. It's particularly helpful to speak with parents and students together so that they receive the same information. Encourage parents to contact you via phone, e-mail, or in person when needed.

**Tip:** In order to help parents overcome their anxieties about college, use other parents as resources. Invite a parent of a former high school student who is now in college to speak to parents during a College Information Session.

## Online Tools and Resources for Applying to Match Colleges

- Khan Academy and The College Board, free SAT test prep
- National Center for Fair and Open Testing, identifies colleges that de-emphasize use of college entrance examinations
- Request for Admission Application Fee Waiver

## CHOOSING A MATCH COLLEGE

The match message should not end when students submit their applications. The next step is the most exciting, nerve-wracking, and important time for students: decision time. If students can follow the match strategies outlined in this guide, they should have a good mix of opportunities to consider, and they will need your advice more than ever.

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*“I was really overwhelmed with all the colleges. I had no knowledge about them...and [my College Match adviser] just... made it easy on me. She looked at my interest and...matched it.”*

—Student, College Match Program, New York City

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Figure 5 lays out the stages of the suggested timeline for choosing a match college, from April to May of senior year.

### **Encourage students to wait to hear from all colleges before accepting an admissions offer.**

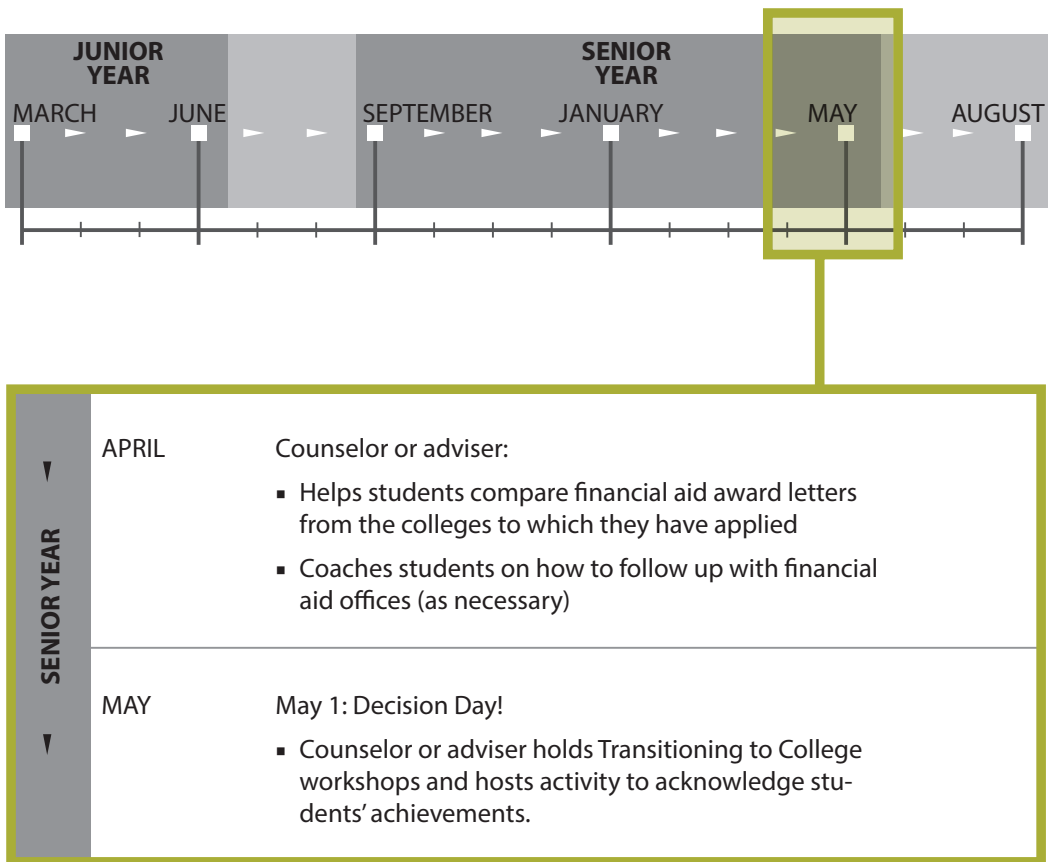
Anxiety about choosing a college may entice students to accept a college offer prematurely, before they have received all college admissions letters. It’s im-

portant for students (who have not been admitted through the early decision process) to compare all choices before making a binding decision that may be costly to reverse. Use May 1 (“National Decision Day”) as a date by which students should indicate which colleges they plan to attend.

### **Advise students to take advantage of on-campus events for prospective and admitted students.**

If students have not had an opportunity to visit the colleges where they have been admitted, you should encourage them to do so. This is the best way to figure out whether a college is a true match. Students may think they want an urban campus but then fall in love with a rural setting, or vice versa. Many times a campus visit can be the deciding factor.

**FIGURE 5** Timeline: Choosing a Match College



**Help students and parents review admissions offers and financial aid award letters.**

Invite parents to come to the college office to discuss financial aid packages. If that is not possible, use e-mail or telephone calls to help answer any questions they have.

To help students and parents accurately determine the cost of attendance, it's best to use a cost calculator. You want students to know the exact out-of-pocket cost for each college so they and their families can make informed decisions.

**Continue to encourage students to research their college options.**

Even after students are admitted, they may have a variety of questions about academic, social, or other college life issues that colleges should help them answer. Encourage students to contact appropriate college staff, faculty, stu-

## CASE STUDY 5

### A Tough Choice: Moving Beyond One's Comfort Zone

When he met with his College Match adviser in October of his senior year, Chad said he already knew where he wanted to go to college. He wanted to attend the same State University of New York (SUNY) public university campus that his brother attended. This institution — among the most competitive of the SUNY campuses — was affordable and not too far from home. With his high GPA and strong SAT scores, Chad felt confident that he would be admitted. However, his adviser recognized that Chad had the potential to enroll at an even more selective college. Using the Match List as a tool, the adviser encouraged him to consider and apply to other colleges instead of limiting himself to just one, so he would have a choice before making up his mind.

In the spring, Chad was admitted to several colleges, including both New York University (NYU), a selective private university on the Match List, and the SUNY campus that his brother attended. Chad received a moderate financial aid package from SUNY, but he would still have to pay about \$5,000 each year to attend. He had to wait longer to receive his financial aid package from NYU. During his wait, Chad became anxious about the cost of attending NYU.

Chad was ready to commit to the SUNY campus before he received his package from NYU. But his adviser reviewed potential tuition costs with him and suggested that he wait to make a decision until he had all of the available information, so he could make a more informed choice. Ultimately, Chad received such a generous financial aid package from NYU that it became clear that it would cost him less to attend NYU than to attend SUNY.

*(continued)*

dents, and support services to make sure they know about the resources that are available on different campuses.

#### **Celebrate student successes.**

After a long, challenging, and stressful year, it's important to celebrate the results. In recognition of National Decision Day, use May 1 to celebrate seniors' college decision making. A schoolwide celebration helps to promote a college-going culture in the school, and younger students will be inspired when they see the accomplishments of the senior class.



## Case Study 5 (continued)

With only days left to commit to a college, Chad struggled to decide between NYU and the SUNY campus, weighing the advantages of each one. It was a tough choice. Chad was worried about being academically challenged at NYU and he believed that if he enrolled there, he would have to put more effort into his school work than he was used to. Other factors also affected his decision-making process: One of his good friends was planning to enroll at the same SUNY campus, and SUNY offered the major he was interested in (biomedical engineering, versus bimolecular engineering at NYU). At SUNY, he would be able to live in a dorm instead of commuting. But NYU, the more selective college, was offering him a more generous financial aid package — an important factor in determining the best match.

Chad's adviser discussed all of his concerns with him, acknowledging the pros and cons of each college and providing as much information as possible to help Chad make up his mind. Knowing that Chad was worried about the rigor of the academics at NYU, she reminded him that he would not have been accepted if NYU's admissions committee did not think he could handle the academics. Additionally, because Chad didn't know anyone at NYU who could provide him with helpful information, she gave him tips about commuting and put him in contact with two NYU alumni whom she knew, so he could ask them questions about their experiences there and possibly allay his fears. And while she acknowledged the appeal of SUNY, she pointed out that SUNY had limited funds and likely would not be able to offer him additional aid, whereas NYU was offering him an exceptionally strong scholarship package.

Chad recognized that there were benefits and disadvantages to attending both colleges. After weighing the pros and cons of each, he decided to enroll at NYU.

*NOTE: A pseudonym is used above to protect the student's identity. See the Epilogue on page 41 to learn about the outcome of this case.*

**Tip:** Create special settings like a “College Corner” or an “Acceptance Alley” to generate pride in and excitement about the college admissions outcomes.

### **Prepare students for the transition to college.**

Once they've made a decision, students still need support and encouragement. Students who once were excited to leave home may become more worried about the transition as it gets closer. You can help to ease their concerns by educating them about what to expect when they get to college. Activities might include a

series of workshops or presentations by college students who recently graduated from your high school. These activities can help answer questions that students have about college life — everything from academic demands and opportunities to living with roommates and cafeteria food.

## Online Tools and Resources for Choosing a Match College

- College Board, Big Future College Cost Calculator
- Cost and Aid Comparison Sheet

## ENROLLING IN A MATCH COLLEGE

Many students fail to enroll in college even after they have made a formal commitment to attend; nationally, between 10 percent and 40 percent of high school graduates who intend to go to college don't enroll the following fall. Among low-income students, these “summer melt” rates are even higher.<sup>11</sup> You can play a role in preventing summer melt by continuing to advise and support students during the crucial months between high school graduation and the first semester of freshman year.

Figure 6 lays out the stages of the suggested timeline for enrolling in a match college, beginning in June of senior year and extending through the following August, before freshman year begins.

### **Stay in touch with students over the summer.**

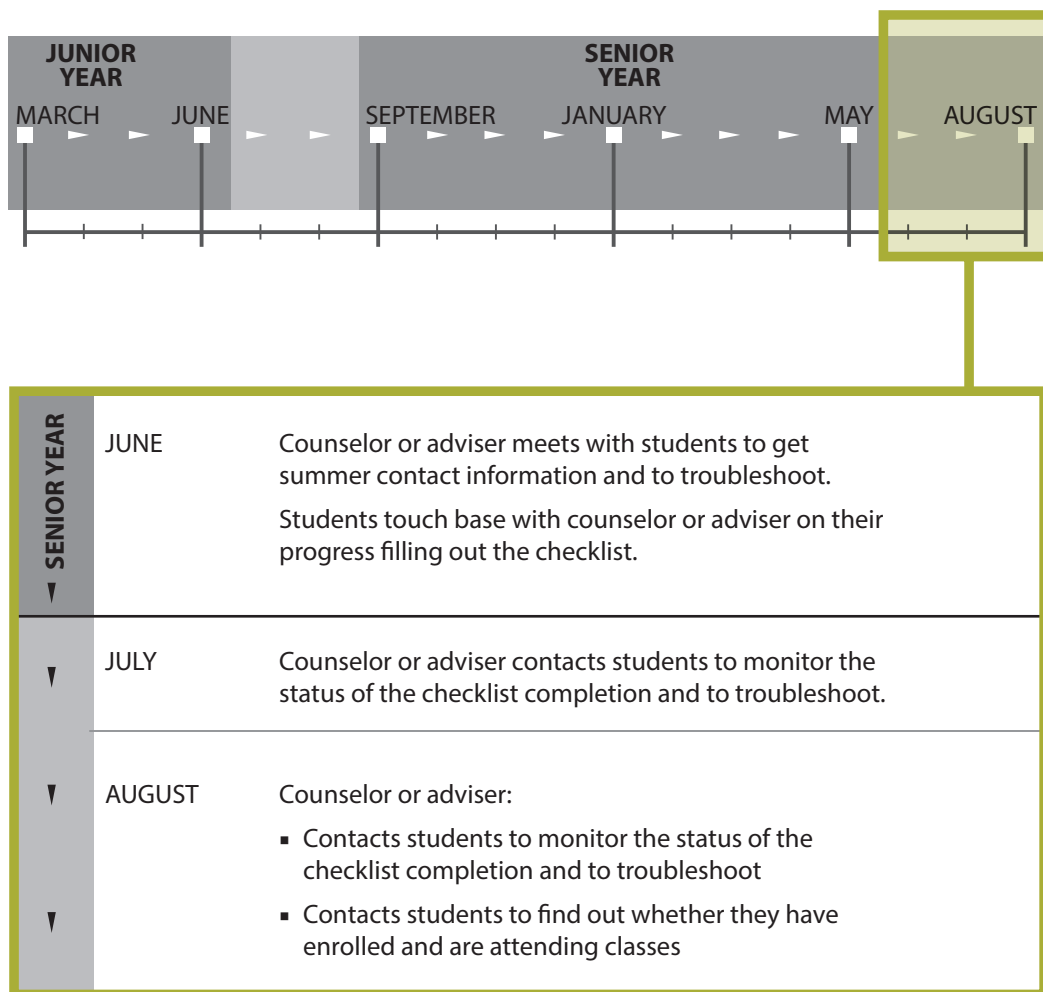
Obtain students' summer contact information and let them know that you're available to help them. The information that the school has on record may no longer be valid during the summer, so you should have a phone number, e-mail address, and home address on file for each student.

Contact students at least two or three times during the summer to confirm that they have completed specific milestones. Ask them if they have submitted college acceptance and registration forms and fees, identified on-campus resources, planned their travel to college (if it's outside the local area), and formulated their plans for winter break. Box 8 provides a checklist of the tasks that college-bound students should complete over the summer following high school graduation.

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11. Castleman, Page, and Snowdon (2013).

**FIGURE 6** Timeline: Enrolling in a Match College



**Tip:** There are various ways to keep in touch with students over the summer. For example, you can use digital platforms to send group texts or e-mails with reminders to your students. If possible, you can also hold an activity such as an “Event in the Park,” where students can have fun, catch up with each other, and update you on their enrollment plans.

**Help students identify key resources on campus.**

Encourage students to create a document with names and phone numbers for each of the following college contacts:

## BOX 8

### Summer Checklist for Students

Before students leave school for the summer break, set certain expectations for them over the summer and stress the importance of deadlines. Below is a checklist of tasks that students typically have to accomplish between their senior year of high school and the beginning of their first semester in college. The list below can be used as a starting point for a conversation with students about their college enrollment progress.

- Accept college admission offer (if not already done).
- Decline any outstanding admissions offers.
- Continue to check e-mail for messages from college for important updates.
- Complete loan counseling.
- If living on campus, complete registration and submit fees.
- If living on campus, develop a plan for traveling to and from the campus during holidays, intersessions, and breaks.
- If living off-campus, develop plan for securing housing and commuting.
- Submit immunization records to the college.
- Submit final high school transcripts.
- Sign up for summer orientation (if applicable).
- Consult the college's "things to bring" list.
- Contact your roommate (if applicable).
- Take appropriate placement exams before classes begin.

- Financial aid office
- Residential life office
- Academic adviser
- Student health service
- Student retention office
- Multicultural affairs office
- Student affairs office

#### **Continue to emphasize "match" when you communicate with students.**

Many factors can erode students' determination to enroll in the college they choose, including issues associated with family, work, relationships, or health.

## CASE STUDY 6

### Support in High School and Beyond

Coming from a low-income family in Chicago, Ana was the first one who planned to go to college, but she did not think she could afford it. But with the support of her College Match adviser, Ana reassessed her options. Her adviser helped her fill out the FAFSA and PROFILE and apply for scholarships. Ana was admitted to the state's flagship public four-year university, the University of Illinois at Urbana-Champaign, and enrolled at almost no cost. According to Ana, "This took away a lot of stress of taking out loans and much more. I was able to focus on my studies."

Ana's adviser continued to contact her during the summer before her freshman year of college. As she did with all her students, the adviser spoke with Ana by phone and answered additional questions about starting college. To help her students stay on track and avoid summer melt, the adviser sent her students a survey with questions about financial aid requirements, preparing for freshman orientation, registering for classes, securing transportation, and completing medical forms. The adviser used a tracker to collect data from these surveys. She also collected and sent final transcripts to students' colleges after they graduated from high school.

Ana continues to keep in touch with her College Match adviser to ask questions about financial aid and other issues. Her adviser also served as a reference to help her obtain an on-campus job. As a first-generation college student, Ana recognizes that her parents cannot answer her questions, so her former College Match adviser has become the person she counts on for help.

*NOTE: A pseudonym is used above to protect the student's identity. See the Epilogue on page 41 to learn about the outcome of this case.*

As they confront these issues, it's important to remind students why they decided to attend their match college in the first place.

#### **Continue to reassure parents.**

With college enrollment nearing, parents may develop last-minute concerns about their child's college plans. If possible, stay in touch with parents to answer their questions and allay their concerns. If parents remain positive, they are more likely to provide support and encouragement that will help their child successfully manage the transition to college.

## Online Tools and Resources for Enrolling in a Match College

- College Board, Off-to-College Checklist
- NYC Collegeline, “How to Help Rising College Freshmen Complete Their Summer ‘To Do’ List”
- *SDP Summer Melt Handbook: A Guide to Investigating and Responding to Summer Melt*
- *Summer Melt: Supporting Low-Income Students Through the Transition to College* (not available online; see Castleman and Page, 2014)

## Conclusion

**A**s an adviser to low-income and first-generation college-bound high school students, you know how challenging *and* how satisfying this work is. Whether you already incorporate some elements of match into your advising program, or whether the match approach is entirely new to you, MDRC hopes that this guide offers some useful tools and strategies to support your work. Keep in mind that all the sections in this guide work together and build off one another. The experiences of the students in the College Match Program that was piloted in Chicago and New York City suggest that this approach may hold real promise, but the ultimate outcomes depend on the skills of advisers like you — whether college counselors, college coaches, or postsecondary specialists — in high school and community-based college advising programs nationwide. MDRC is committed both to helping students reach colleges where they are likely to succeed and to helping you help them.

## EPILOGUE

### Where Are They Now?

**GLORIA** was hired to be the school's Postsecondary Specialist, where she continues to incorporate match approaches in her postsecondary advising practice. She is considering applying to master's degree programs in the field of school counseling.

**DIANA** was accepted to about two-thirds of the colleges she applied to, including several colleges on the Match List and a handful of out-of-state colleges. Taking into consideration finances, academic programs, and the possibility of living on campus, she ultimately enrolled in the honors program at Adelphi University as a nursing student. After applying for many scholarships, she won two prestigious awards to help her finance college.

**MARISOL** is currently still enrolled in a two-year college but is preparing to transfer to a four-year college. She has not yet decided where she will be transferring or what she will major in.

**LISA** was admitted to nine colleges, including Rensselaer Polytechnic Institute, several CUNY and SUNY colleges, and Fordham University, where she was accepted into the Higher Education Opportunity Program (HEOP), a partnership between the State of New York and independent institutions that provides financial and academic support for economically and educationally disadvantaged students. Lisa's ultimate decision came down to Rensselaer Polytechnic Institute (where she would attend the engineering school) and Fordham University. She enrolled in HEOP at Fordham University, where she was awarded a considerable amount of financial aid. She also won an additional scholarship to help her finance college.

**CHAD** is currently a freshman at NYU Polytechnic School of Engineering.

**ANA** is currently a sophomore at the University of Illinois at Urbana-Champaign, where she is pursuing a double major in Finance and Communications. According to Ana, it was her College Match adviser who gave her direction when she was lost in trying to choose a major.

# APPENDIX



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# **Comprehensive List of Online Tools and Resources**



## CREATING A MATCH CULTURE

### **College Board, Principal-Counselor Toolkit**

<http://nosca.collegeboard.org/research-policies/principal-counselor-toolkit>

### **National Association for College Admission Counseling (NACAC)**

<http://www.nacacnet.org/Pages/default.aspx>

### **National College Access Network (NCAN)**

<http://www.collegeaccess.org>

## IDENTIFYING MATCH COLLEGES

### **Association for Institutional Research, instructions for using College Navigator**

<http://www.airweb.org/EducationAndEvents/IPEDSTraining/Tutorials/Pages/CollegeNavigator.aspx>

### **Barron's *Profile of American Colleges***

<http://www.barronspac.com>

### **College Board, “You Can Go” site for students facing roadblocks on the way to college**

<http://youcango.collegeboard.org>

### **College Greenlight, blog on applying to college**

<http://www.collegegreenlight.com/blog>

### **College Results, data on college retention and graduation rates**

<http://www.collegeresults.org/default.aspx>

### **College Scavenger Hunt, guide for researching colleges**

[http://www.mdrc.org/sites/default/files/img/College\\_Scavenger\\_Hunt.pdf](http://www.mdrc.org/sites/default/files/img/College_Scavenger_Hunt.pdf)

### **College Simply, tools for the college search**

<http://www.collegesimply.com>

### **Harvard University, “Evaluating a College” worksheet for college visits**

[http://www.fas.harvard.edu/~sica/2014materials/23\\_Evaluating\\_a\\_College.doc](http://www.fas.harvard.edu/~sica/2014materials/23_Evaluating_a_College.doc)

### **I'm First, online community for first-generation college students**

<http://www.imfirst.org>

### **Match List (sample) and Users Guide**

[http://www.mdrc.org/sites/default/files/img/nyc\\_match\\_list.pdf](http://www.mdrc.org/sites/default/files/img/nyc_match_list.pdf)

[http://www.mdrc.org/sites/default/files/img/CMP\\_users\\_guide.pdf](http://www.mdrc.org/sites/default/files/img/CMP_users_guide.pdf)

### **My Majors, tool for college, majors, and career recommendations**

<http://www.mymajors.com>

### **National Center for Education Statistics (NCES), “College Navigator” college database**

<http://nces.ed.gov/collegenavigator>

### **NCES IPEDS Data Center, data on U.S. postsecondary institutions**

<http://nces.ed.gov/ipeds/datacenter>

### **U.S. Department of Education, “College Scorecard,” information on colleges’ characteristics**

<http://collegecost.ed.gov/scorecard>

## **ASSESSING THE COST OF MATCH COLLEGES**

### **College Board, Big Future College Cost Calculator**

<https://bigfuture.collegeboard.org/pay-for-college/college-costs/college-costs-calculator>

### **College Board, Expected Family Contribution (EFC) calculator<sup>1</sup>**

<https://bigfuture.collegeboard.org/pay-for-college/paying-your-share/expected-family-contribution-calculator>

### **College Greenlight, list of colleges that give strong financial aid**

<http://www.collegegreenlight.com/blog/colleges-that-meet-100-of-student-financial-need>

### **FAFSA**

<https://studentaid.ed.gov/sa/fafsa>

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1. The EFC is a measure of a student’s and/or family’s ability to contribute toward the cost of college, calculated according to a formula established by federal law. Elements of the formula may include the family’s taxed and untaxed income, assets, and benefits, such as unemployment and Social Security; the size of the family; and the number of family members enrolled in postsecondary education in the given year.

**FAFSA Changes (effective October 1, 2016)**

<https://studentaid.ed.gov/sa/sites/default/files/2017-18-fafsa-updates-students-parents.pdf>

<https://studentaid.ed.gov/sa/about/announcements/fafsa-changes?sa=X&sqi=2&ved=0ahUKEwjzFDHoYDPAhVHdR4KHczvByMQ9QEIDjAA>

**FAFSA on the Web worksheet**

<https://fafsa.ed.gov/help/ffdef44.htm>

**Federal Student Aid information sheet**

<http://www.edpubs.gov/document/en1158p.pdf?ck=92>

**Finaid.org, list of “no-loan” colleges<sup>2</sup>**

<http://www.finaid.org/questions/noloansforlowincome.phtml>

**Student Loan calculators**

<http://www.finaid.org/calculators>

**USA.gov, “Financing Your Education,” information and resources**

<http://www.usa.gov/topics/education-training/education/higher/financing.shtml>

## **APPLYING TO MATCH COLLEGES**

**Khan Academy and The College Board, free SAT test prep**

<https://www.khanacademy.org/sat>

**National Center for Fair and Open Testing**

<http://www.fairtest.org/university/optional>

**Request for Admission Application Fee Waiver**

<http://www.nacacnet.org/studentinfo/feewaiver/Documents/ApplicationFeeWaiver.pdf>

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2. No-loan colleges are those that have instituted policies to make sure that low-income students have no loans in their financial aid packages.

## CHOOSING A MATCH COLLEGE

### College Board, Big Future College Cost Calculator

<https://bigfuture.collegeboard.org/pay-for-college/college-costs/college-costs-calculator>

### Cost and Aid Comparison Sheet

[http://www.mdrc.org/sites/default/files/img/Cost\\_and\\_Aid\\_Comparison\\_Chart.xlsx](http://www.mdrc.org/sites/default/files/img/Cost_and_Aid_Comparison_Chart.xlsx)

## ENROLLING IN A MATCH COLLEGE

### College Board, Off-to-College Checklist

<https://bigfuture.collegeboard.org/get-in/making-a-decision/off-to-college-checklist>

### NYC Collegeline, “How to Help Rising College Freshmen Complete Their Summer ‘To Do’ List”

<http://nyccollegeline.org/resources/a2s-webinar-how-to-help-rising-college-freshmen-complete-their-summer-to-do-list>

### *SDP Summer Melt Handbook: A Guide to Investigating and Responding to Summer Melt*

<http://www.gse.harvard.edu/cepr-resources/files/news-events/sdp-summer-melt-handbook.pdf>

### *Summer Melt: Supporting Low-Income Students Through the Transition to College*<sup>3</sup>

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3. This document is not available online. See Castleman and Page (2014).

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# ABOUT MDRC

**MDRC IS A NONPROFIT, NONPARTISAN SOCIAL AND EDUCATION POLICY RESEARCH ORGANIZATION DEDICATED TO**

learning what works to improve the well-being of low-income people. Through its research and the active communication of its findings, MDRC seeks to enhance the effectiveness of social and education policies and programs.

Founded in 1974 and located in New York City and Oakland, California, MDRC is best known for mounting rigorous, large-scale, real-world tests of new and existing policies and programs. Its projects are a mix of demonstrations (field tests of promising new program approaches) and evaluations of ongoing government and community initiatives. MDRC's staff bring an unusual combination of research and organizational experience to their work, providing expertise on the latest in qualitative and quantitative methods and on program design, development, implementation, and management. MDRC seeks to learn not just whether a program is effective but also how and why the program's effects occur. In addition, it tries to place each project's findings in the broader context of related research — in order to build knowledge about what works across the social and education policy fields. MDRC's findings, lessons, and best practices are proactively shared with a broad audience in the policy and practitioner community as well as with the general public and the media.

Over the years, MDRC has brought its unique approach to an ever-growing range of policy areas and target populations. Once known primarily for evaluations of state welfare-to-work programs, today MDRC is also studying public school reforms, employment programs for ex-offenders and people with disabilities, and programs to help low-income students succeed in college. MDRC's projects are organized into five areas:

- Promoting Family Well-Being and Children's Development
- Improving Public Education
- Raising Academic Achievement and Persistence in College
- Supporting Low-Wage Workers and Communities
- Overcoming Barriers to Employment

Working in almost every state, all of the nation's largest cities, and Canada and the United Kingdom, MDRC conducts its projects in partnership with national, state, and local governments, public school systems, community organizations, and numerous private philanthropies.