

STUDENT
COMMUNICATION

Best Practices for Communicating Enrollment & Financial Aid Requirements

**May Helena Plumb
& Amy Cruz**
Student Success Toolkit
November 2023

About Student Success Toolkits

The Student Success Toolkits from Trellis Strategies provide evidence-based recommendations for colleges and universities to improve student outcomes. The toolkits summarize the latest research in student success and outline practical steps for administrators and practitioners.

About Trellis Strategies

We are a strategic research and consulting firm dedicated to advancing postsecondary education and strengthening the workforce by delivering unparalleled insights into the modern learner experience, from application through graduation. With over 40 years' experience serving higher education institutions and helping students navigate complex processes, we have the knowledge, insight, and experience to help organizations turn their data into action and action into results.

About the Authors

May Helena Plumb is a social scientist with a commitment to accessibility and equity in education. She views research as a key tool to build community and achieve stakeholder goals. May holds an M.A. in Linguistics from The University of Texas at Austin and is currently pursuing a Ph.D. from the same department.

Amy Cruz is a social scientist with experience working on interdisciplinary, mixed-methods projects. Her research interests include community-based research that serves to understand and support access to knowledge and resources. She holds a B.A. in Cultural Anthropology and a B.A. in Gender, Women's and Sexuality Studies, and is currently pursuing a M.A. in Applied Sociology from The University of Maryland Baltimore County.

Recommended Citation

Plumb, M. H., and Cruz, A. (2023). *Best Practices for Communicating Enrollment and Financial Aid Requirements*. Trellis Strategies.



Failure to complete administrative tasks jeopardizes students' enrollment and future persistence.

Aspiring college students face many administrative hurdles before they can access their education—completing placement tests, fulfilling financial aid requirements, setting up a tuition payment plan, and more. Many students struggle to understand and keep track of these processes.¹ Between 10 percent and 20 percent of college-intending high school seniors fail to enroll in the fall, with higher rates of “summer melt” among low-income students and those planning to attend community college.^{2–4} Furthermore, at least 40 percent of undergraduate students do not file a FAFSA application, often because they miss the deadline or incorrectly assume they do not qualify for aid.^{5,6} Filing for FAFSA improves access to higher education and is associated with higher rates of persistence.⁷ In re-engagement surveys run by Trellis Strategies, many stop-out students report confusion about institutional policies, and they point to communication issues with admissions and financial aid offices as a reason they did not return to the university.⁸

Colleges and universities can improve enrollment and FAFSA completion rates—and thus admissions yield and student success—by clearly communicating with students about institutional, state, and federal requirements and deadlines. This toolkit outlines key communication strategies institutions can use to set their students up for success, with a focus on low-cost behavioral nudge campaigns.

Research-backed recommendations



Use text campaigns to notify students of specific, timely tasks



Prioritize personalization, contextualization, and a supportive tone.



Offer two-way interaction for enhanced support.



Consider language reading level and language access for online materials.



Design materials for the “mobile-first” generation.



Use text campaigns to notify students of specific, timely tasks.

Many institutions use email- and text-based notifications to remind their students about key deadlines, as well as to inform them of resources that are available. Such “low-touch nudges” are also common outside of higher education; they are a cheap and relatively simple way to influence consumer behavior.

Text campaigns have been shown to be highly effective for encouraging students to complete pre-matriculation and financial aid tasks, particularly for high-risk students. A text nudge campaign involving a chatbot for admitted students at Georgia State University decreased summer melt by 21 percent.⁹ A similar text campaign at East Carolina University, an institution with a summer melt rate below 10 percent, showed a significant decrease in summer melt among first-generation students.¹⁰ Numerous other studies have also demonstrated increases in enrollment, timeliness of FAFSA filing, and overall persistence as a result of text nudges.^{11–15}

Overall, research on low-touch nudges has found them to be most successful when they related to urgent, well-defined tasks. Such campaigns have the largest impact at community colleges and among students with less-developed college plans. While the magnitude of the impact varies between populations, text campaigns tend to have a very low cost per student served, making them a worthwhile investment for most institutions (see the case studies on page 9 of this toolkit).



**TEXT CAMPAIGNS
TEND TO HAVE A
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KEY PRINCIPLES

- Use nudges to remind students of specific actions they need to take.
- Clearly communicate the consequences of not completing the task.
- Encourage immediate action by timing text messages in line with deadlines.

EXAMPLES OF NUDGE TOPICS

- Registration and withdrawal deadlines
- FAFSA and other financial aid deadlines
- Active financial aid and registration holds
- Notices related to Satisfactory Academic Progress
- Outstanding balance on student bill
- First year orientation reminders

For sample calendars of text nudges, see Page et al. “Conditions under which college students can be responsive to text-based nudging”.^{15(pp. 40–50)}



Prioritize personalization, contextualization, and a supportive tone.

Student engagement with a communication campaign relies on their trust and attention. Students may ignore messages from sources they don't recognize; they may become uninterested if they receive messages which don't apply to them. Such challenges have hampered attempts to scale text campaigns to state- or national-wide programs.^{16,17} Admissions and financial aid offices should focus on personalizing their communications, using institutional data to tailor messages to specific student needs. For example, a reminder about the registration deadline should only be sent to students who have not yet registered.

When creating successful text campaigns, administrators should take texting communication norms into account.^{1,18,19} Texts should come from a consistent phone number, and the sender should be obvious. Automated messages should be sent at a time when students are likely to act on them immediately. If a text invites students to respond, it should be sent at a time when advisors are available for support; texting is seen as an instantaneous

form of communication, and students may feel ignored if they don't receive a response promptly from the same advisor each time. If real-time communication is not possible, then clear expectations should be set for when the student might expect a response. Failure to keep pace with these norms will put enrollment professionals at an increasing disadvantage as other businesses—from pharmacies to car repair shops—raise the communication expectations of students.

The tone of student communications is also important. Students respond better to messages that adopt a caring, empathetic tone.^{18,20,21} While students respond well to an informal style which uses campus lingo and exclamation points, messages which use slang and text abbreviations like "u" can come off as forced or out-of-touch. Instead, stay friendly but professional: greet recipients by name, use a conversational tone, and keep the message succinct. For calls to action, students prefer messages that include hyperlinks so they can follow up right away.

Student Preferences for Text Message Communications

Zachary Taylor & Karen Serna,
"DON'T TXT ME L8R, TEXT ME NOW"¹⁸



THE FIRST MESSAGE

Texters want to know why they are receiving messages and who the messages are from.

The first message is critical for engagement: include both the recipient's name and the sender's name, and make it clear what future messages the student should expect.



PERSONALIZATION

Text messages should be tailored to the institution and to the specific student. Every message should be directly relevant to the recipient, and the tone should be friendly and supportive.



FREQUENCY

Students want to receive texts from their institution no more than once per week, with a preference for receiving messages early in the week.

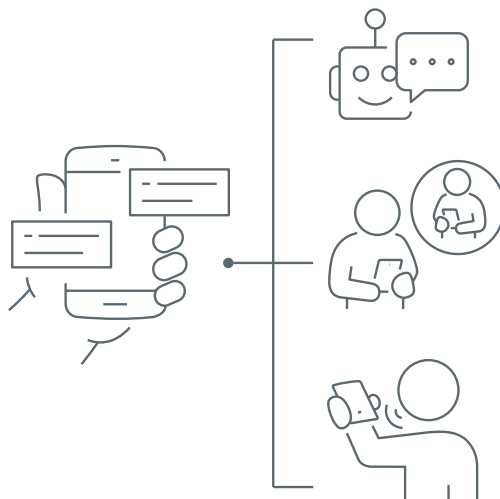


Offer two-way interaction for enhanced support.

Many successful text campaigns include an opportunity for students to respond to the message with questions or to set up an in-person appointment with an advisor from the admissions or financial aid office.^{11,12,14,22} While two-way communication requires a greater investment of time and resources, asking questions allows students to clarify concerns, enables staff members to connect students with more personalized resources, and builds a stronger sense of belonging. For example, in a two-way text campaign for college-intending students in the summer of 2013, over a third of students responded to at least one of the automated text messages. They asked for clarification about their financial aid package, sought confirmation that they had completed requirements, and in some cases set up in-person appointments with admissions staff; many students expressed gratitude for the ease and availability of advisors.¹

While personalized coaching can be very effective, it is also time-consuming. Two-way interaction requires dedicated time from staff, who need to be reasonably well-versed in a wide range of topics from financial aid to registration to extracurriculars. Students are also likely to ask questions outside of regular business hours and expect prompt responses. These issues can be mitigated by using a “chatbot”, a virtual assistant trained on institution-specific data. Such chatbots have shown positive results in a variety of higher education contexts, including increasing admissions yield and FAFSA completion.^{9,10,15,23} Chatbots can effectively answer many of the most common questions, routing only more complicated questions to trained staff. If they are linked to institutional databases, they can increase personalization by tailoring responses to specific students.

LEVELS OF TWO-WAY INTERACTION



TEXT SUPPORT FROM CHATBOTS

- Instantaneous responses to most common questions
- Tailored to student demographics
- Possibility to respond in multiple languages

TEXT SUPPORT FROM STAFF MEMBERS

- More detailed answers and troubleshooting for specific concerns
- Creates a personal connection with students

LIVE MEETINGS WITH STAFF MEMBERS

- Extensive support for complex cases
- Strengthens relationships with at-risk students



Consider reading level and language access for online materials.

Many high school seniors read at well below a 12th grade level; however, most higher education policy materials are written at or above a 13th grade reading level.²⁴⁻³⁰ For example, in an analysis of 100 transfer articulation agreements between 2- and 4-year institutions, 69 percent were written at or above a 16th grade reading level.²⁶ Readability scholar Zachary Taylor recommends that institutions aim for an 8th grade reading level when writing admissions materials, avoiding jargon and keeping directions simple and direct.³¹

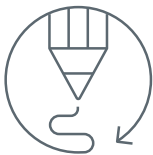
Reading and understanding institutional policies is even more difficult for international students. While international graduate students are enrolled in US institutions at an all-time high, applications declined almost 40 percent, signifying the greatest decline in a decade.^{27,28,30} A 2017 study found that many international students had to rely on peers to understand how to apply and enroll in US institutions, citing a lack of information available on student websites.³² Admissions materials written at a higher level than the average applicant could prevent them from applying altogether; the lack of a standard minimum readability level for students creates an inequitable environment where international students need to consistently play catch up. Furthermore, research has shown that there is a relationship between international student enrollment and institutions communicating minimum TOEFL scores as part of their international undergraduate application instructions.³⁰

Key Suggestions

IMPROVE POLICY READABILITY

-  Interrogate assumptions about international students reading comprehension and understanding of the US admissions process.
-  Clarify and simplify content to the most critical information at the simplest reading level so that it is easy to read and translate.
-  Provide appropriate context in all materials, including spelling out acronyms and explaining procedures.
-  Enable embedded translation tools like Google Translate; consider professional translations into languages which are commonly spoken among the student body.
-  Engage alumni and current students to help gain insight into their experiences with the admissions process.

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However, most higher education policy materials are written at or above a **13TH GRADE LEVEL**



Design materials for the “mobile-first” generation.

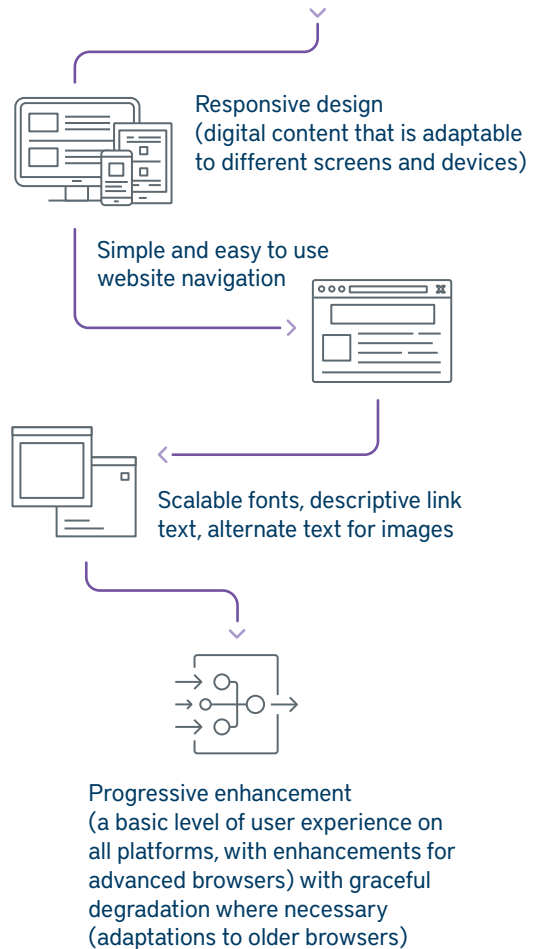
Mobile devices accounted for over 50 percent of global website traffic in 2021. With over 70 percent of higher education students using mobile devices to search for academic related information, creating mobile-friendly content for all to access is imperative.³³ Institutions can lead the way in mobile accessibility by integrating a mobile-first design: creating responsive, reactive sites which focus on content while keeping the design simple and minimal. This style of development results in faster webpage loading times as well as better search engine rankings, as search engines prioritize webpages that are optimized for mobile devices. Mobile-first design also optimizes multimedia content and provides ease of use and clarity for those who use assistive devices. When Harvard University and University of Michigan implemented principles of mobile-first design with their digital content, they saw an increase in engagement, student experience, retention rates, and student satisfaction.³³

As many colleges and universities are investing custom-built platforms for student engagement, ensuring mobile applications are accessible and user friendly is critical. Applications must be compatible with multiple platforms—allowing more students to access it—but should rely on a single codebase to simplify updates and maintenance. Institutions can begin with pre-made templates, such as AT&T Campus Guide Plus, an open-source platform that allows campuses to choose which features to incorporate into their application. Institutions may also engage with campus members to develop and improve these apps, ensuring that their needs are being met while encouraging engagement. For example, Duke University held a competition for students to develop new application functionalities which could then be incorporated into the official application.³⁴



Over **70%** of higher education students **USE MOBILE DEVICES TO SEARCH FOR ACADEMIC RELATED INFORMATION.**

ELEMENTS OF ACCESSIBLE, MOBILE-FIRST DESIGN



CASE STUDY

A cost comparison of summer melt interventions

Text Message Campaign for High School Seniors

In 2012, researchers collaborated with Dallas Independent School District (TX), uAspire (MA), and Mastery Charter Schools (PA) to implement a texting campaign for senior high school students. The initiative sent students (and their parents) reminders about crucial enrollment and financial aid tasks and encouraged them to respond to the message to be connected with a counselor for one-on-one assistance. The campaign had mixed results across the different regions; however, it increased postsecondary enrollment by 7.1 percentage points ($p < 0.05$) at uAspire's sites in Lawrence and Springfield, MA, and by 2.4 percentage points ($p > 0.1$) at the Dallas ISD site.¹²

Outcome: up to 7 percentage point increase in post-secondary enrollment

Cost: \$7 / student

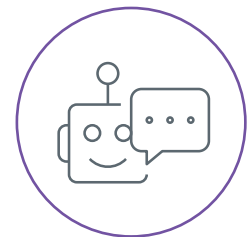


Chatbot Text Message Campaign at Georgia State University

In 2016, Georgia State University reached out to admitted students using a chatbot called Pounce. This two-way text message campaign provided information about pre-enrollment tasks, answered basic questions, and connected students with counselor for more complex questions. The program increased postsecondary enrollment by 1 percentage point overall ($p < 0.1$), and increased GSU enrollment by over 3 percentage points among GSU-committed students ($p < 0.05$), a 21 percent reduction in summer melt.⁹

Outcome: 3.3 percentage point increase in enrollment

Cost: \$15 / student



One-on-One Counseling for High School Seniors

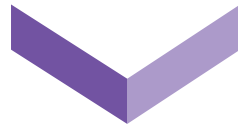
In 2011, researchers collaborated with uAspire (MA) and Fulton County Schools (GA) to offer summer counseling to high school graduates, with the opportunity to meet one-on-one with advisors via phone, e-mail, text, or in person. Counseling increased fall college enrollment by about 3 percentage points, a 20 percent reduction in summer melt; among low-income students, the intervention increased enrollment by 8-12 percentage points. Participation in the initiative before the freshman year also increased sophomore year persistence by 7.8 percentage points.³⁵

Impact: 3 percentage point increase in enrollment

Cost: \$100-200 / student



Where to start?



Make your communications specific, personalized, and accessible.

Institutions can improve student success by clearly communicating policies, procedures, and deadlines, particularly surrounding admissions, enrollment, and financial aid. Students respond best to personalized communication about specific, relevant tasks. Institutions should also consider possible barriers such as reading level, English proficiency, and technology access, aiming to make communications accessible to the whole student population.

While taking the first steps on low-touch nudge campaigns, student communications scholar Ben Castleman suggests three guiding principles:³⁶

“Start with critical junctures.” Times of transition—such as enrollment and registration—are the key times for students (and parents). They have little context for making decisions during these times, but their choices have long-term consequences.

“Prompt active engagement rather than give directions.” Ultimately, only the student can decide what path they will take. Institutions should focus on informing students of relevant policies and deadlines, supporting their students in making active decisions based on their personal situation.

“View nudges as supplements to, not substitutes for, existing educational investments.” While text nudges can be a low-cost way to improve outcomes, student success requires multiple investments from institutions, such as equitable policies, robust student services, and infrastructure to support basic needs insecurity.

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