

# EXPANDING POSSIBILITIES



u aspire

ANNUAL REPORT  
FISCAL YEAR 2016

# WHY COLLEGE AFFORDABILITY?



WHILE HALF OF ALL STUDENTS FROM HIGH-INCOME FAMILIES EARN A BACHELOR'S DEGREE BY AGE 25, JUST 1 IN 10 STUDENTS FROM LOW-INCOME FAMILIES DO.

BY 2020, NEARLY TWO-THIRDS OF ALL JOBS WILL REQUIRE A COLLEGE EDUCATION.

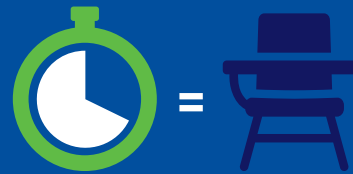


THE AVERAGE CLASS OF 2016 GRADUATE HAS \$37,172 IN STUDENT LOAN DEBT, UP 6% FROM LAST YEAR.

THE MEDIAN COLLEGE-EDUCATED WORKER EARNS 84% MORE THAN THE MEDIAN WORKER WITH ONLY A HIGH SCHOOL EDUCATION.



LOW-INCOME STUDENTS WHO GRADUATE COLLEGE ARE FIVE TIMES MORE LIKELY TO ACHIEVE ECONOMIC MOBILITY THAN NON-COLLEGE GRADUATES.



NATIONALLY, THE STUDENT-TO-SCHOOL COUNSELOR RATIO IS OVER 470:1, LEAVING MANY STUDENTS WITH JUST 20 MINUTES A YEAR WITH A COLLEGE ADVISOR.

**Roughly \$150 billion in financial aid is available each year. The difficult part is accessing it. This is where uAspire comes in.**

Dear Friends,

When I joined uAspire in 2005, we were making a meaningful impact in Boston, showing a glimmer of promise to address the problem of college affordability on a broader, national scale. Over the next decade, driven by the possibility of changing young people's lives nationwide, as we have in Boston since 1985, uAspire strategically expanded the reach and depth of our college affordability expertise and programming. Now, through practice, research, and policy work, we are positioned as the leading national nonprofit addressing the issue of affordability—a barrier for millions of American students pursuing their dream of a college degree, the surest ticket to a meaningful career and economic well-being.



During the 2015-16 school year, uAspire empowered over 400,000 students in 27 states through one-on-one advising, virtual advising, and practitioner training. We leveraged an innovative and cost-effective technology—text messaging—to support tens of thousands of students across the country right on their phones. We also achieved our most successful fundraising year to date, securing more than \$7.5 million in revenue through partnerships with some of the nation's leading philanthropies.

Looking forward, the challenges that lie ahead for uAspire's work are significant and our mission to remove the financial barriers to higher education has never been more important. Our country is in a deeply divided state. Inequity in our economic, justice, and educational systems, and a lack of consensus around how to address core issues, threaten to further divide us as a nation.

In spite of these challenges, I am deeply inspired by the commitment of our staff, board, partners, and supporters to advancing the cause of equal access to opportunity for all. They show how uAspire's collective work addresses educational inequity by making an affordable pathway to college a possibility for all Americans. Moreover, I am profoundly moved by the hopes and dreams of the thousands of courageous, hard-working, and resourceful students we support each and every day, like Geraldine Bogard, whose story we are honored to feature in this report.

As I reflect on the success and expansion of this past year, I am so grateful for the deep dedication and generosity of our collaborators and supporters. Thank you for everything you do to make uAspire stronger—you are transforming the lives of our young people, their communities, and our nation's workforce. Our work is far from done. Your sustained commitment and partnership will be critical as we seek to continue "Expanding Possibilities" for the millions of young people who strive for and deserve the opportunity to earn a postsecondary degree.

Sincerely,

Bob Giannino  
Chief Executive Officer

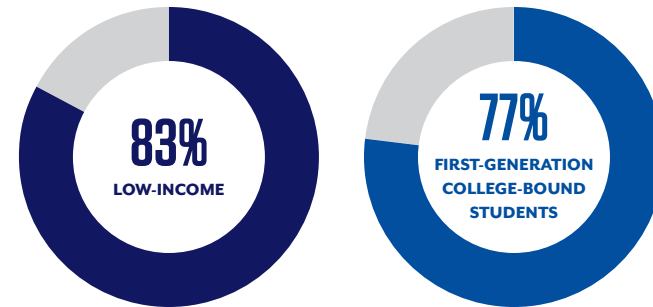


# EXPANDING OUR IMPACT

uAspire delivers a continuum of college affordability advising that supports students where they are in the college process, from 12th grade through college. Through our direct service programming, we proudly served tens of thousands of students during the 2015-2016 school year and they achieved some of the most successful outcomes we've seen to date.

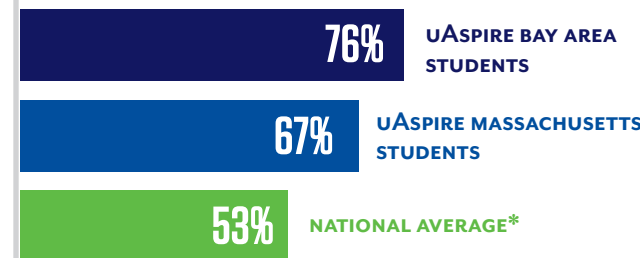
## OUR STUDENTS

uAspire focuses on serving the students who need us most—particularly low-income students and those who will be in the first generation of their family to graduate from college.



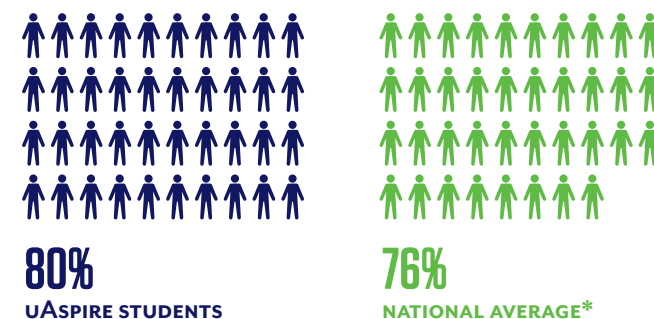
## COLLEGE ENROLLMENT

More uAspire students enroll in college compared to the national average of students from low-income communities.



## COLLEGE PERSISTENCE

When compared to a national data set of students from all income backgrounds, more uAspire students re-enroll for a second year of college.



uAspire is dedicated to data collection and analysis, and assessing the true impact of our work, to continuously improve our programming. Toward that end, we are currently conducting a multi-year randomized control trial with WestEd, an independent research agency, to evaluate the effectiveness of our college affordability advising.

\*National Student Clearinghouse Research Center. (2015). *High School Benchmarks 2015*. Retrieved from <https://nscresearchcenter.org/hsbenchmarks2015/>



“It is such a great feeling to review financial aid awards with students and see the relief on their faces when they realize they can afford to attend college.”

UASPIRE ADVISOR ERIKA DEL ROSARIO WITH HER ADVISEE, JEFFREY NARCISSE, A SENIOR AT SOMERVILLE HIGH SCHOOL IN SOMERVILLE, MA

## Afford: High School Advising Program

Starting in the fall of senior year, college affordability advisors work one-on-one with students in their high schools to identify affordable college options, maximize financial aid, and make informed decisions of where to attend college and how to pay for it. Advisors work in partnership with school counselors who typically lack the training and capacity to focus on affordability. As affordability experts, our advisors fill a critical gap in existing college support services.

Advisors are also critical in ensuring that students successfully enroll in college. Up to 40% of low-income college-accepted students never make it to the first day of class, stymied by tuition sticker shock, confusing paperwork, or a lack of guidance. To help combat this “summer melt,” advisors provide text-messaged reminders and individualized advising to help students complete the tasks—like paying tuition bills, managing loans, and registering for classes—necessary to successfully enroll. This program is effective, low-cost, and scalable. For our Massachusetts students, a third-party evaluation by the Harvard Graduate School of Education has shown this summer work to increase enrollment by 3 to 14 percentage points.

uAspire provides our Afford program for free to underserved students in high-need communities in Massachusetts and California.

5,394  
HIGH SCHOOL STUDENTS ADVISED

15,796  
ADVISING SESSIONS

3,663  
COLLEGE-INTENDING STUDENTS TEXTED

280  
AFFORDABILITY WORKSHOPS GIVEN TO 7,112 STUDENTS





## UASPIRE MASSACHUSETTS AFFORD PROGRAM HIGHLIGHTS

*Boston, Cambridge, Fall River, Lawrence, Somerville, and Springfield*

uAspire Massachusetts completed its first year as one of five organizations selected by the State Street Foundation for their Boston Workforce Investment Network (Boston WINs) supporting youth from high school to a career. As part of receiving a \$3.5 million investment over four years, uAspire is significantly increasing its reach to Boston students so that they can attain the education needed to enter the workforce.

With funding from the Chirag Family Foundation and Malden Public Schools, uAspire launched our program in Malden in fall 2016.

uAspire Massachusetts successfully piloted text messaging as a supplement to in-person advising during the academic year. Texting allowed us to achieve greater efficiencies by increasing student preparedness for meetings and was expanded to all advising in fall 2016.

**4,209 STUDENTS ADVISED**

**56 HIGH SCHOOLS**



## Succeed: Postsecondary Advising Program

Only 9% of low-income students who enroll in college actually earn a degree and finances are the number one reason they drop out.\* Through our Succeed program, uAspire aims to provide students with the financial information and guidance they need to stay in college and complete their degree. Via our innovative texting platform and in-person advising, advisors supported 3,125 students in 2015-2016 with financial aid renewal and managing college costs.

In 2016-2017, Succeed advisors will support over 4,100 Boston high school graduates. With support from the MetLife Foundation, we will also begin developing innovative programming for the unique needs of an underserved population—“stopped-out students” who have un-enrolled in college.

**A randomized control research study by the Harvard Graduate School of Education showed that Succeed texting led to a 25% increase in persistence among community college students.**

\* The Pell Institute and PennAHEAD. (2015). *Indicators of Higher Education Equity in the United States*. Washington, DC: The Pell Institute.



### SCALING OUR REACH AND IMPACT WITH TEXT MESSAGING

Text messaging allows us to reach students where they are, which is increasingly on their phones. It's easy, with no software for students to install. It's efficient, increasing advisor bandwidth while costing 5 to 10 percent of other interventions. It's also personal, allowing advisors to send out customized reminders and students to respond and start a conversation with a live uAspire advisor.



## UASPIRE BAY AREA AFFORD PROGRAM HIGHLIGHTS

*San Francisco, Oakland, and Hayward*

uAspire came to the Bay Area in 2013 thanks to a seed investment from the GreenLight Fund. Over our first two years, uAspire provided one-on-one college affordability advising to more than 2,000 Bay Area 12th graders. In the 2016-17 program year, we will serve up to 700 additional students through these exciting new partnerships:

Google.org committed \$1 million to Spark\*SF Public Schools to fund the launch of uAspire Bay Area's joint work with the San Francisco Unified School District (SFUSD) on the city's My Brother's and Sister's Keeper initiative. To increase affordable pathways to college for San Francisco's small African American student population, we are providing dedicated college affordability advising to all 250 African American 12th graders in SFUSD.

The University of California has launched a state-wide partnership with uAspire Bay Area to provide our advising to up to 450 high school students participating in the UC President's Pre-College Scholars program. Together, we aim to increase access for underrepresented students to our state's public four-year colleges.

**1,185 STUDENTS ADVISED**

**11 HIGH SCHOOLS**

**“ uAspire’s expert support allows our students and their families to get immediate answers to important questions around college costs and financial aid, helping to fulfill our program’s aim to boost college-going rates for these stellar students.”**

**DR. YVETTE GULLATT, VICE PROVOST FOR DIVERSITY AND ENGAGEMENT, UNIVERSITY OF CALIFORNIA OFFICE OF THE PRESIDENT**



**“ I strive to be a steady presence for my advisees—pushing them when they need to be pushed, encouraging them, and recognizing that I am often the only adult in their lives giving them hope for a brighter future.”**

**UASPIRE ADVISOR RICH ALBERT WITH HIS ADVISEE, DESTINE DEMOSTHENE, A SENIOR AT CITY ON A HILL CIRCUIT STREET IN ROXBURY, MA**



# EXPANDING OUR EXPERTISE

## Virtual Advising Center

In April 2015, uAspire launched an all-virtual advising model in partnership with the College Board, the Harvard Graduate School of Education, and Signal Vine. As part of a randomized controlled trial study, made possible by funding from the Institute of Education Sciences, uAspire's virtual advisors connected with 31,486 students in 15 states via text messaging.

The conversations began when the students were high school juniors, and continued through the summer after their high school graduation. Over these 18 months, advisors aimed to provide students with a safe and welcoming place to share their challenges, while giving them precise steps to take to successfully enroll at an affordable college. Their ability to build rapport and trust through a faceless technology was critical to having the robust advising conversations that emerged.

*Their ability to build rapport and trust through a faceless technology was critical to having the robust advising conversations that emerged.*

We learned that for many young people receiving our texts, ours was the only resource students could rely on for guidance with the college-going process. For those students, whose families and school counselors may not have the experience, knowledge, or skills to help them navigate the complex financial aid and college selection process, uAspire was there to help, on their phones, in real time.

The study concluded in the fall of 2016, and we look forward to the research findings available in 2017. The early results are promising. Of the 31,486 students who received outbound text messages, approximately 65% actively texted with their uAspire advisor, and only 12% opted out of the program.

With a grant from the AT&T Foundation, uAspire is exploring ways to expand and grow our virtual advising work. This year, the College Board is partnering with uAspire again and our Virtual Advising Center will provide support to approximately 15,000 students nationwide during the 2016-2017 school year.

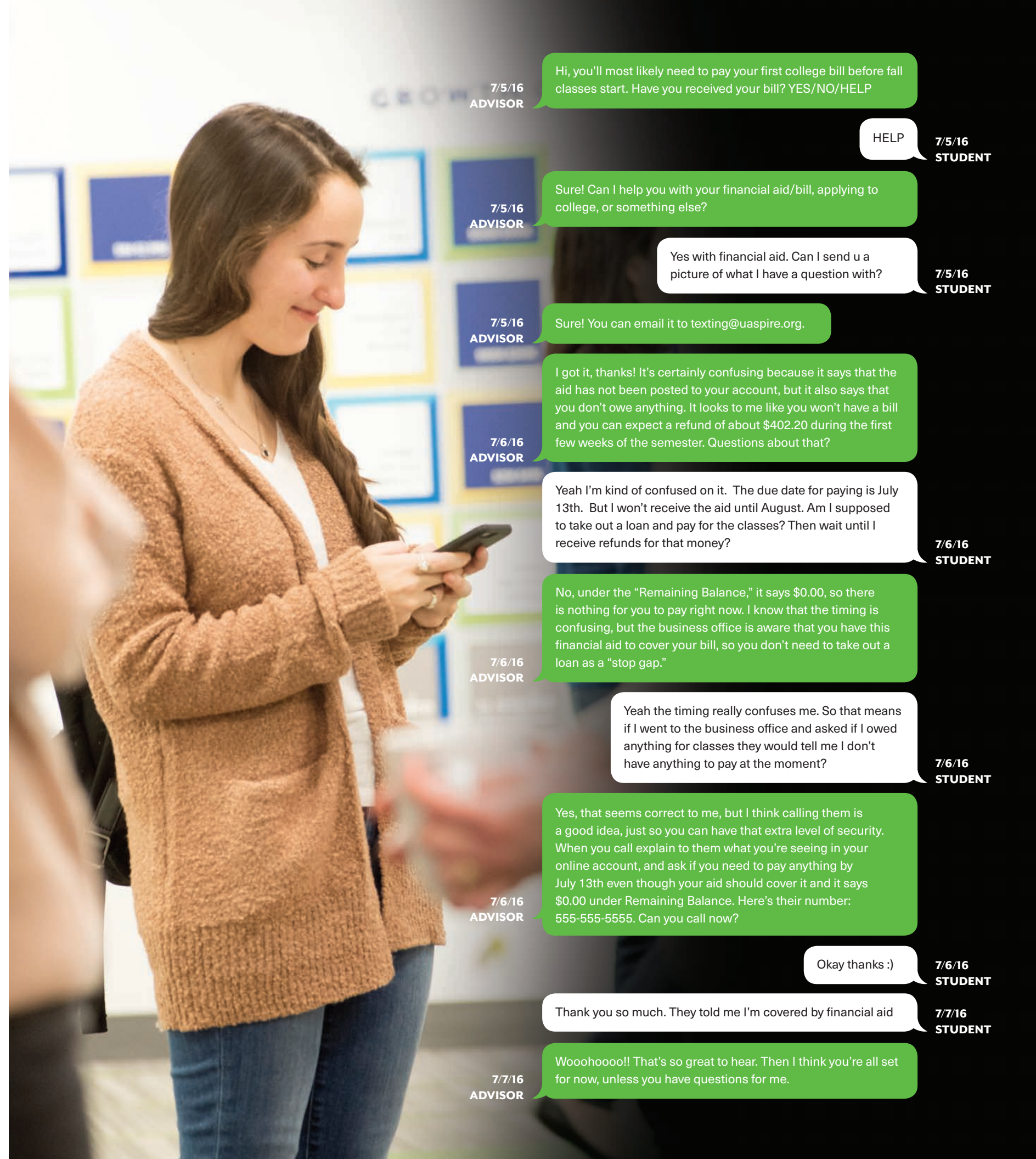
31,000  
STUDENTS

15  
STATES

65%  
ENGAGEMENT RATE

12%  
OPT-OUT RATE

1 MILLION+  
OUTBOUND TEXT MESSAGES



7/5/16  
ADVISOR

Hi, you'll most likely need to pay your first college bill before fall classes start. Have you received your bill? YES/NO/HELP

HELP

7/5/16  
STUDENT

7/5/16  
ADVISOR

Sure! Can I help you with your financial aid/bill, applying to college, or something else?

Yes with financial aid. Can I send u a picture of what I have a question with?

7/5/16  
STUDENT

7/5/16  
ADVISOR

Sure! You can email it to [texting@uaspire.org](mailto:texting@uaspire.org).

7/6/16  
ADVISOR

I got it, thanks! It's certainly confusing because it says that the aid has not been posted to your account, but it also says that you don't owe anything. It looks to me like you won't have a bill and you can expect a refund of about \$402.20 during the first few weeks of the semester. Questions about that?

Yeah I'm kind of confused on it. The due date for paying is July 13th. But I won't receive the aid until August. Am I supposed to take out a loan and pay for the classes? Then wait until I receive refunds for that money?

7/6/16  
STUDENT

7/6/16  
ADVISOR

No, under the "Remaining Balance," it says \$0.00, so there is nothing for you to pay right now. I know that the timing is confusing, but the business office is aware that you have this financial aid to cover your bill, so you don't need to take out a loan as a "stop gap."

Yeah the timing really confuses me. So that means if I went to the business office and asked if I owed anything for classes they would tell me I don't have anything to pay at the moment?

7/6/16  
STUDENT

7/6/16  
ADVISOR

Yes, that seems correct to me, but I think calling them is a good idea, just so you can have that extra level of security. When you call explain to them what you're seeing in your online account, and ask if you need to pay anything by July 13th even though your aid should cover it and it says \$0.00 under Remaining Balance. Here's their number: 555-555-5555. Can you call now?

Okay thanks :)

7/6/16  
STUDENT

Thank you so much. They told me I'm covered by financial aid

7/7/16  
STUDENT

7/7/16  
ADVISOR

Wooohoooo!! That's so great to hear. Then I think you're all set for now, unless you have questions for me.

# EXPANDING OUR REACH

## Training & Technical Assistance

As the national leader addressing the college affordability crisis, uAspire trains and supports frontline college access providers and counselors to remove the financial barriers to higher education.

The Training & Technical Assistance program leverages uAspire’s 30 years of expertise to build practitioners’ knowledge, skills, and confidence with financial aid so they can make college more affordable for their students. Our training delivery options accommodate all levels of professional development—from webinars to in-person workshops to customized staff training with data collection and analysis.

*Our training delivery options accommodate all levels of professional development—from webinars to in-person workshops to customized staff training with data collection and analysis.*

This year, uAspire trained over 2,100 college access professionals who reach over 350,000 students nationwide. We partnered with 12 public school districts, charter management and community-based organizations serving students in need to deliver content and support services to their staff. Of the students served by these partners, 91% qualify for free or reduced price lunch.

In 2016-2017, we have 16 partners in 27 states from New York to California, including Broward County Public Schools, Houston Independent School District, KIPP Foundation, and College Track. Our continued focus will be on how to most effectively “share what we know” to better enable practitioners around the country to serve their students.

This nationally-scaled model is only three years old, and we’re excited to see how we can expand its systemic impact to dramatically increase affordable pathways to college for young people. With support from the Michael and Susan Dell Foundation, the Kresge Foundation, ECMC Foundation, the Edwin Gould Foundation, and Lumina Foundation, uAspire continues to explore new geographies, content, and platforms for our training work.

**2,150**  
PRACTITIONERS TRAINED

**359,500**  
STUDENTS REACHED

*The T&TA team conducted:*

**52**  
WEBINARS

**30**  
IN-PERSON TRAININGS

*Of the practitioners trained:*

**96%**  
ARE VERY OR EXTREMELY SATISFIED WITH THE TRAINING CONTENT

**94%**  
ARE VERY OR EXTREMELY SATISFIED WITH THE TRAINING DELIVERY

**98%**  
FIND OUR TOOLS HELPFUL AND EASY TO USE

**100%**  
WOULD RECOMMEND UASPIRE TO A COLLEAGUE

“

At the Michael & Susan Dell Foundation, we support organizations that work to increase the numbers of low-income students who are ready for, enrolling in, and graduating from a four-year college. Our investment in building uAspire’s Training & Technical Assistance program ensures guidance counselors and practitioners have the tools and resources they need to help more students complete a degree.”

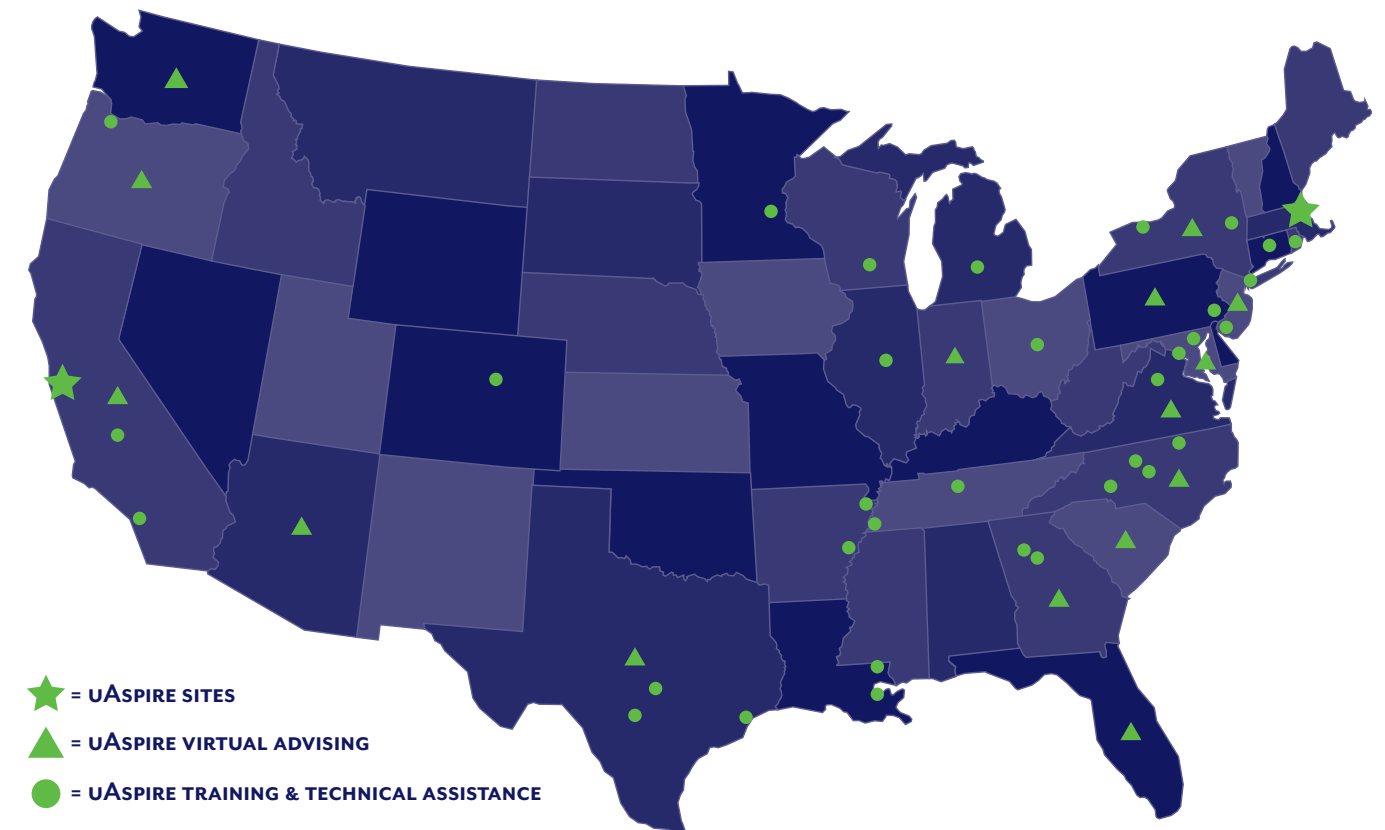
TODD PENNER, PORTFOLIO DIRECTOR, COLLEGE PREPARATION & COMPLETION, MICHAEL AND SUSAN DELL FOUNDATION

“

Our district promotes a college-going culture, but we needed to improve on our efforts toward college affordability. Often that’s the missing puzzle piece—and it’s one of the most critical pieces. uAspire has helped us develop a plan to implement district-wide. We have received outstanding coaching and a wealth of resources to support our staff.”

LISA STOUT, COUNSELOR ON SPECIAL ASSIGNMENT, SAN MARCOS UNIFIED SCHOOL DISTRICT

## uAspire’s National Reach





# EXPANDING OPPORTUNITIES



## Student Reflection GERALDINE BOGARD

Geraldine Bogard, a freshman at Brandeis University, is excited about her future. “I think about it all the time. My main idea is to study education and business. I look forward to my internship. I’m really looking forward to running a nonprofit organization in Haiti,” says the 19 year old.

Three years ago, Geraldine wasn’t sure what to expect. She had just moved from Haiti to New York to live with her father and then to Boston to live with her aunt. She struggled to make the adjustment at TechBoston Academy, “I did not speak any English at all. I was depressed because I failed three of my classes and in Haiti I never failed classes! I’m always on top of my game and that was a big shock for me.”

Geraldine rose to this challenge with an inspiring combination of hard work and determination. She worked tirelessly, seeking out extra help from teachers and teaching herself how to use the library and internet. By her junior year, Geraldine was back on her game, an A student who played on the soccer team, took classes at a nearby community college, and worked at the Boston College dining hall.

“As I am getting in higher classes, I hear about college, I want to go to college, but I don’t know how the process works.” She explains that, “[At home] we don’t really talk about college. I have to be responsible for that, especially since my parents did not go to school in the United States.”

It was only when Kristin, her uAspire advisor, came to her class that Geraldine also began to wonder “how am I going to pay for college?”

“I met with Kristin many times to fill out the financial aid forms. It was not easy. But she was so patient with me. And the fact that she was there for me at school, and I did not have to go somewhere else, was really, really helpful.”

In May, Geraldine and Kristin celebrated her acceptance to Brandeis and four-year scholarship that covers 100% of her tuition and fees. She will have some minimal debt to repay to cover the gap in her room and board costs—and she knows the exact amount. For Geraldine, a college degree promises to change not only her life, but her family’s life too. “I’m glad, not only for myself, but that now I can help my younger sister when she starts this process,” she says.

Inspired by her uAspire advisor, Geraldine is already thinking of ways to pay this help forward in her home country, “There are a lot of opportunities in the United States that we don’t have in Haiti.” Geraldine knows—as we all do—that there are millions of young people like her who have everything they need to succeed if they are just given the chance to fulfill their potential.

“I think about the opportunity that I have been given and how I have programs like uAspire. I did not have anyone else to help me with the financial aid process. It was all Kristin. It was all uAspire.”

# THANK YOU TO OUR DONORS

Your generosity is remarkable. Thank you for your leadership and support.

List reflects donors who made gifts between July 1, 2015 and June 30, 2016. We regret any omissions or errors.

## \$925,000+

State Street Foundation, Inc.\*†

## \$600,000+

Crimson Lion Lavine Family Foundation†

## \$250,000+

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uAspire was honored to be selected by the State Street Foundation to participate in their Boston Workforce Investment Network (Boston WINs), a five-year \$20 million venture philanthropy initiative. Alongside our partners—Bottom Line, Boston Private Industry Council, College Advising Corps, and Year Up—we are working toward the shared goal of preparing more Boston youth for 21st century careers.

Photo: Mike Scannell, SVP & President of the State Street Foundation, with uAspire CEO Bob Giannino

# LAVINE FAMILY CENTER FOR COLLEGE AFFORDABILITY

With the Lavine Family's transformative five-year leadership gift of \$3M, we launched the Lavine Family Center for College Affordability and a multi-year giving challenge to leverage an additional \$4.5M for uAspire's long-term sustainability.

Photo (Right): Jeannie and Jonathan Lavine



The Packard Family  
Laurie and Rocky Pimentel\*\*  
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\* denotes gift to uAspire Massachusetts  
\*\* denotes gift to uAspire Bay Area  
† multi-year uAspire Growth Campaign investor

To view a complete list of all gifts received last year, please visit [uAspire.org/donors2016](http://uAspire.org/donors2016).

# FINANCIALS

For fiscal years ending June 30, 2015 and June 30, 2016

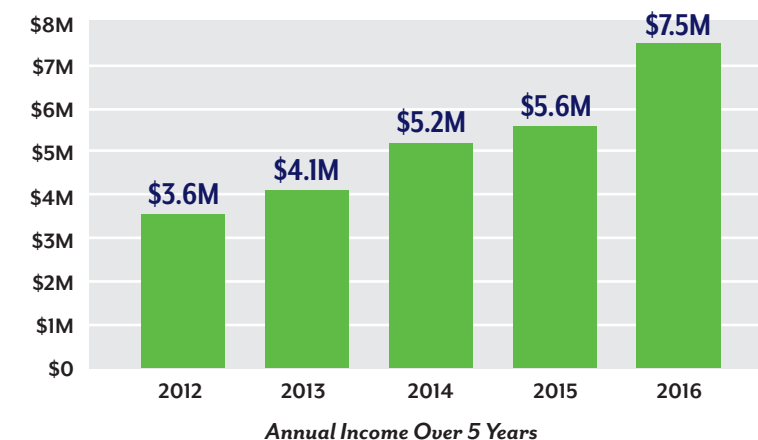
## SUPPORT AND REVENUE

|                           | 2016               | 2015               |
|---------------------------|--------------------|--------------------|
| CONTRIBUTIONS             | \$5,121,352        | \$3,779,746        |
| PROGRAM REVENUE           | \$2,002,838        | \$1,402,507        |
| OTHER REVENUE AND IN-KIND | \$376,921          | \$417,140          |
| <b>TOTAL REVENUES</b>     | <b>\$7,501,111</b> | <b>\$5,599,393</b> |

## EXPENSES

|                           | 2016               | 2015               |
|---------------------------|--------------------|--------------------|
| PROGRAM SERVICES          | \$4,438,354        | \$3,386,285        |
| GENERAL ADMINISTRATIVE    | \$475,503          | \$307,163          |
| FUNDRAISING               | \$1,754,997        | \$1,888,395        |
| <b>TOTAL EXPENSES</b>     | <b>\$6,668,854</b> | <b>\$5,581,843</b> |
| CHANGE IN NET ASSETS      | \$832,257          | \$17,550           |
| NET ASSETS AT END OF YEAR | \$2,026,598        | \$1,194,341        |

### uAspire Organizational Growth 2012–2016





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