



CHANGING

THE GAME



Who is uAspire?

We work to ensure that students from low-income families have the financial information and resources they need to find an affordable path to and through college.

College is the most powerful engine for economic mobility. A college graduate is 2.2 times more likely to be employed¹ and will earn 1.8 times more income than a high school graduate.² Yet today only 12 percent of students from low-income families graduate college.³ Even then, they are more likely than their higher income peers to accrue substantial student loan debt that severely limits their economic futures.

We believe all students have the right to the education they need to succeed in life, regardless of their economic background.

To remove the financial barriers to higher education we:

ADVISE

students to navigate the complex process of affording college



TRAIN

school counselors and college access providers to better serve their students



PARTNER

with policymakers to make financial aid systems more effective and equitable



¹ The College Board. (2016) *Education Pays 2016*.
² Bureau of Labor Statistics data for 2015; Published April 5, 2016.
³ The Pell Institute. (2017) *Indicators of Higher Education Equity in the United States*.

Dear Friends,

This past year has further exposed the widening income and education gaps in our country. At uAspire we see the need for college affordability services and awareness as greater than ever before. Soon, two-thirds of all jobs will require a postsecondary education, yet students from low-income families receive only 10 percent of all college degrees awarded.

This must change.

This report shows how we are working to ensure every student has an equitable opportunity to succeed. uAspire is “Changing The Game” by confronting inequities on a national scale to level the playing field for young people from all economic backgrounds.

Since 1985, uAspire has developed a deep understanding of the issue of college affordability and how to best help students navigate this economic minefield. As a leading service provider and voice on the issue, we impact the lives of more than 400,000 students nationwide each year. Aspiring students like Dejah Morales, featured in these pages, who overcame multiple barriers to find a way to afford college.

Because we believe America is strongest when it fields a full team of educated, engaged citizens, we recently announced an ambitious strategic vision to expand our reach to three million students by 2022. Our strategy is rooted in improving the outcomes of our student advising and counselor training, expanding to key markets such as New York City, and launching policy efforts to increase degree completion and decrease student debt.

We believe this new strategy is achievable thanks to supporters like you, those committed to building brighter futures for low-income and first-generation students. Their success—the key to securing America’s prosperity—is made possible by you. Together we can transform the lives of millions of students through our advising and training programs, and by ensuring our higher education systems are equitable and provide opportunity for all.

With gratitude,

Bob Giannino
Chief Executive Officer



WE FOCUS ON SERVING THE STUDENTS WHO NEED US MOST.

77% will be first-generation college graduates

77%

85% are from low-income families (Pell Grant eligible)

85%



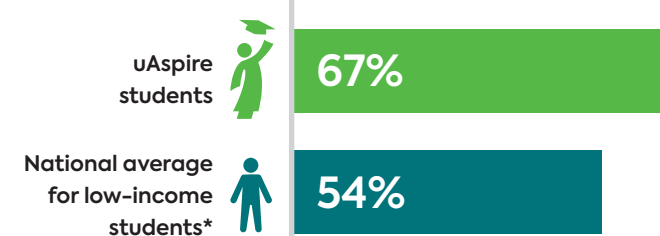
STUDENT DEMOGRAPHICS

- African-American 38%
- Hispanic/Latino 30%
- Asian/Pacific Islander 17%
- White 11%
- Multiracial 2%
- Other 2%

OUR STUDENTS ENROLL AND PERSIST IN COLLEGE AT HIGHER RATES THAN THEIR PEERS.

ENROLLMENT

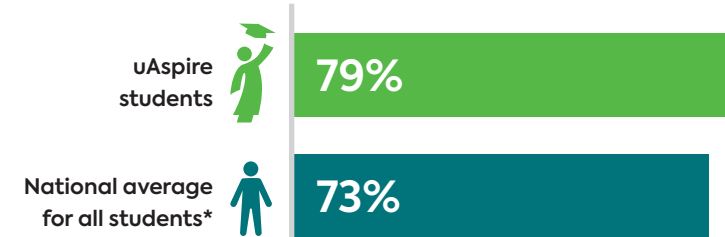
Started college the fall after high school graduation



*National Student Clearinghouse Research Center. (2016) High School Benchmarks Report 2016.

PERSISTENCE

Enrolled in college or have graduated



*National Student Clearinghouse Research Center. (2017) Snapshot Report 2017.



OUR STUDENTS ARE

24%

MORE LIKELY TO ENROLL
IN COLLEGE THAN THEIR
PEERS FROM SIMILAR
HIGH SCHOOLS.



DEJAH MORALES

STUDENT SPOTLIGHT

“She had me pretty young,” Dejah, who has six siblings, says of her mother, “and now she’s getting her associate degree. I’m pretty proud of her and seeing her do something different encouraged me to go to school too and be something better.”

A recent graduate of Fenway High School in Boston and a freshman at Framingham State University, Dejah and her mom will be the firsts in their family to graduate college.

“I grew up with both parents pushing me and encouraging me, and always there to support me through everything that I’ve been through. Now this is like, ‘Hey, thank you to you guys, I’m doing something bigger.’”

Like many of the students at her high school, where nearly 75 percent of their families are at or below the federal poverty line, the biggest barrier Dejah faced getting to college was financial. When she needed help with the FAFSA, she connected with Katelyn, the uAspire advisor at her high school.

“Katelyn was a very big help,” says Dejah. “She would always email me like, ‘Hey do you want to set up an appointment? Did you get the chance to look over this? Did you do this?’”

After celebrating her acceptances in the spring, they worked together to review Dejah’s financial aid award letters. “Katelyn made a chart to see the difference between each school and how much I’d be paying. She was also the one pushing me to do a lot of scholarships. She did more than I expected from someone, so I appreciated that.”

Over the summer after graduation, Dejah recalls, “I didn’t know that certain paperwork and certain questions needed to get done at a certain time, so when I got billed what I had to pay for tuition, I was like, what are all these numbers?” She turned to her summer uAspire advisor, Simone, on her phone for text support.

“It’s very helpful. Whenever something pops up in my head that I forgot to do or I have a question, I’ll just shoot her a text and she’ll always respond with an answer. Even if I’m not texting her, she’ll always text me. She was always there



Dejah (left) with her advisor, Katelyn, at uAspire’s Last Dollar Scholarship luncheon on July 20, 2017.

to help, which was useful and met my needs because everything has been kind of confusing starting this new process.”

Whenever something pops up in my head that I forgot to do or I have a question, I’ll just shoot her a text and she’ll always respond with an answer.

Determined and resourceful, Dejah pushed herself through this complicated process of financing college to achieve more than her peers, and she can continue to count on uAspire’s text advising support throughout her first two years at Framingham State.

Dejah, who wants to be a nutritionist, says, “I want to be able to tell someone my story, ‘I got to experience college, and these are the many things I got to do.’ And then going off and starting my career, being able to say, ‘I’m helping others because I went to school and learned something that I’m passionate about.’”

I’m just ready to grow as this young adult and go through this new journey and see what comes from there.”

A GAME-CHANGING SOLUTION

College Affordability Advisors are experts, advocates, educators, problem-solvers, and coaches. They offer hope and encouragement as they support students to navigate systems that, despite a mission to the contrary, often hinder their success. Advisors' dedication to this hard work is matched by the commitment of our exceptional students. They continue to aspire, confront seemingly insurmountable challenges, and persevere. The stakes are high and the odds may be stacked against them, but together our advisors and students rise to the challenge.



2016-17 Program Reach + Highlights

BAY AREA

1,711
HIGH SCHOOL STUDENTS



Launched text advising to **485 11th graders** through the University of California (UC) President's Pre-College Scholars Initiative in partnership with 3 UC campuses. In 2017-18, we will serve over **1,000 12th graders** near 8 UC campuses.

As our contribution to San Francisco's My Brother's and Sister's Keeper Initiative, launched dedicated advising for **230 African American 12th graders in 16 public high schools**.

"Google.org is excited to partner with uAspire because they're a proven, evidence-based model that we know works for young people."

JUSTIN STEELE, PRINCIPAL, GOOGLE.ORG

With support from The James Irvine Foundation, launching uAspire's Succeed advising program for **500 college freshmen** in 2018-19.

MASSACHUSETTS

3,547
HIGH SCHOOL STUDENTS



3,828
COLLEGE STUDENTS

Collaboration with our State Street Boston WINs partners in **30 Boston high schools** led to 22% more FAFSAs submitted and 29% more award letters reviewed over last year.

Succeed program enhancements allowed each advisor to serve **3 times as many students** as last year.

NATIONAL VIRTUAL ADVISING

The second year of our collaborative text advising program with the College Board reached **15,000 high school seniors in 8 states**. We supported these students along critical college affordability milestones from October 2016 through September 2017.



Support When + Where Students Need It

Our Afford and Succeed advising programs support students to maximize financial aid, minimize loan debt, and make informed financial decisions to enroll and persist in the best postsecondary option for them. Students are empowered with the knowledge and skills to face future obstacles and access the financial aid that enables them to complete their degree with a manageable amount of debt.



AFFORD

11TH + 12TH GRADE

Students meet with their advisor in their high school or use texting to find a way to afford college.

- ★ Identify affordable college options
- ★ Complete financial aid applications including FAFSA, CSS Profile, California Dream Act
- ★ Identify scholarship opportunities
- ★ Review financial aid award letters



SUMMER

Via text, students receive personalized guidance to understand and complete the tasks necessary to successfully enroll in college in the fall.

- ★ Pay first-term tuition bill
- ★ Manage loans
- ★ Register for classes
- ★ Access on-campus resources



SUCCEED

YEAR 1 + 2 OF COLLEGE

Students are supported through text advising to persist through their first years of college while gaining knowledge and skills to afford to finish.

- ★ Renew FAFSA
- ★ Know GPA and credit progress to degree completion
- ★ Have plan to pay college bills
- ★ Know current and overall debt amounts

TRAINING THE GAME CHANGERS



Our College Affordability Training is professional development with the power to impact countless students year after year.

We train the school counselors and college access providers to whom students turn for help with financing college. Together, we are dramatically expanding opportunity, achievement, and success for all students.

40

SCHOOL DISTRICT +
NONPROFIT PARTNERS IN

26

STATES INCLUDING

- ★ Achievement First Public Charter Schools
- ★ Broward County Public Schools
- ★ College Advising Corps
- ★ College Track
- ★ Denver Public Schools
- ★ Houston Independent School District
- ★ iMentor
- ★ KIPP Foundation
- ★ Uncommon Schools

“I work with homeless, DACA, and students in foster care. This has encouraged me that I can help this population.”

ACHIEVE ATLANTA TRAINING PARTICIPANT

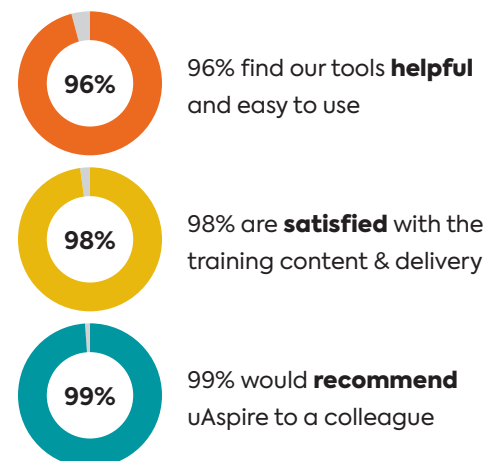
TRAINED

2,805

PRACTITIONERS

These game changers play a pivotal role in helping students obtain a higher education, but they often lack the knowledge to guide students through complex financial aid systems. We share our expertise and tools so they can effectively support their students every step of the way.

WHAT THEY SAY ABOUT US



CONDUCTED

26

WEBINARS +

49

IN-PERSON COURSES ON

- ★ College affordability planning
- ★ FAFSA completion
- ★ Financial aid award letter review

“uAspire has given our dedicated professionals the knowledge and skills to deliver exceptional financial aid counseling to our low-income first-generation students.

CONAN VIERNES, DIRECTOR, UNIVERSITY OF WASHINGTON GEAR UP

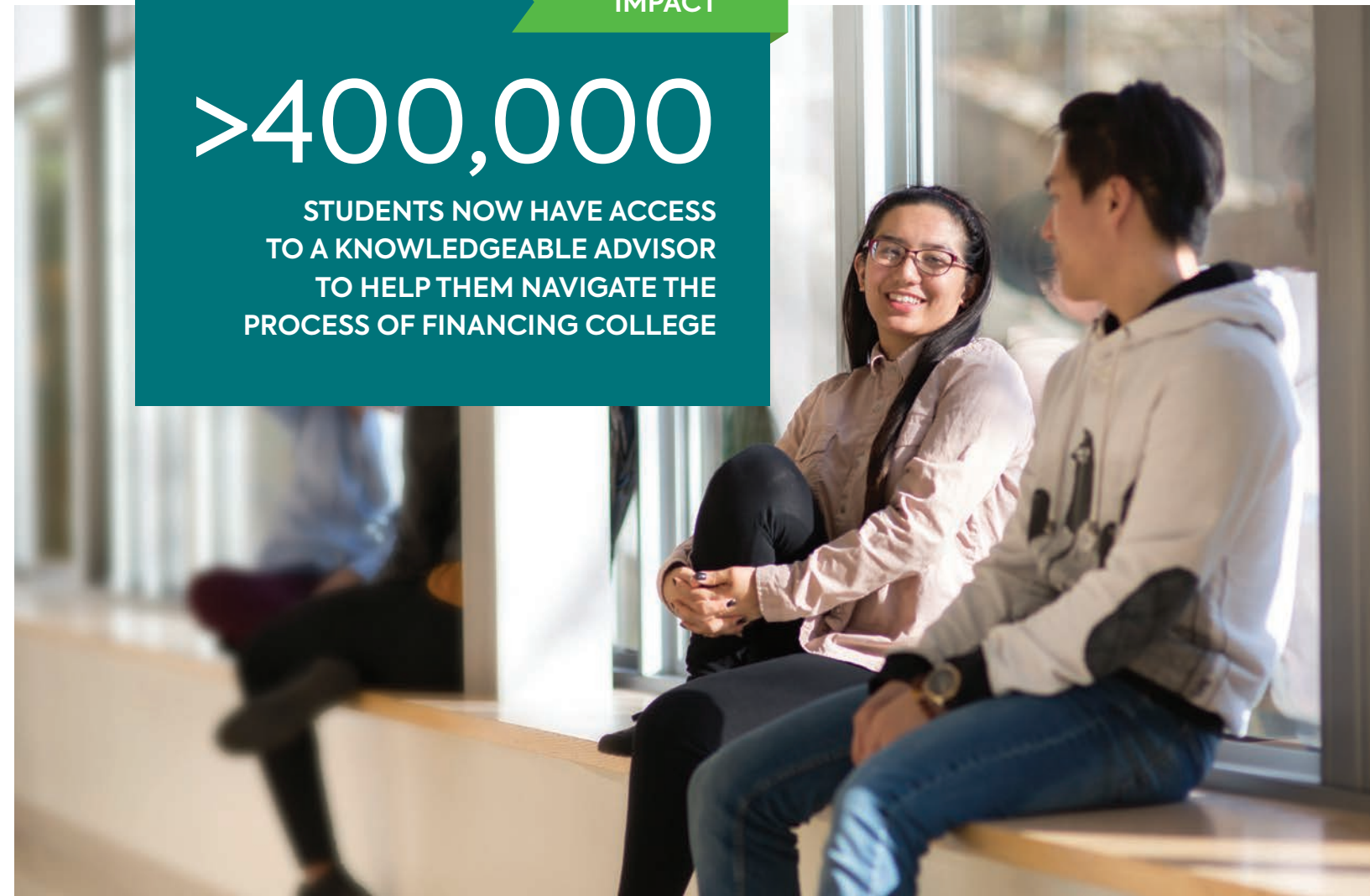
IN JUST ONE YEAR, OUR MAJOR PARTNERS INCREASED THE NUMBER OF STUDENTS WHO



IMPACT

>400,000

STUDENTS NOW HAVE ACCESS TO A KNOWLEDGEABLE ADVISOR TO HELP THEM NAVIGATE THE PROCESS OF FINANCING COLLEGE



LEVELING THE PLAYING FIELD

Introducing the uAspire Policy + Systems Change Team

In 2017, with the support of the Lumina Foundation, uAspire strategically increased the scope and reach of our policy and systems change work to address the financial barriers that keep too many of our nation's young people from graduating college. Here are selected highlights from our inaugural year.



The work of our new policy team, led by Chief Policy Officer Laura Keane, focuses on:

FINANCIAL AID SYSTEM IMPROVEMENT

- ★ Alongside the National College Access Network, discussed a simplified, streamlined FAFSA with the staffs of Senator Bob Casey (PA) and Senator Elizabeth Warren (MA)
- ★ Met with Minority Leader Nancy Pelosi's staff to promote the value and importance of Pell Grants for California's highest-need students
- ★ Presented to congressional staffers on simplifying the burden of verification
- ★ With support from the Barr Foundation, presented key learnings on changes to the FAFSA—earlier filing date and prior year taxes—at four national conferences

AWARD LETTER TRANSPARENCY

We teamed up with Massachusetts Attorney General Maura Healey to launch an online and social media campaign that helps families better understand financial aid packages and college costs. Over 4,600 have accessed the online tools to make an informed college choice, while our educational videos reached an audience of over 20,000.

TRUE COST OF DEGREE COMPLETION

With support from the Metlife Foundation, we convened 35 national leaders to address the growing number of students facing food and housing insecurity, and leaving college because they are unable to make ends meet. Innovative, scalable solutions to reduce their risk of dropping out are shared in our report, *Affording to Finish*.



Joining Forces to Break Down Barriers

We are excited to expand our policy work as a member of these national coalitions:





THANK YOU TO OUR SUPPORTERS

The impact we made together this year was remarkable and set the stage for our future. Thank you for your partnership and generous support. Your investment in our sustainability and expansion is an investment in the boundless potential of our young people. We truly could not do this work without you.

2016–2017 Program Year Supporters

\$1,000,000+

State Street Foundation, Inc.^{1,3}

\$600,000+

Jonathan and Jeannie Lavine^{1,3}

\$250,000+

Barr Foundation^{1,3}
 The Boston Foundation^{1,3}
 College Board
 GreenLight Fund^{2,3}
 James Irvine Foundation^{2,3}
 Spark*SF Public Schools
 (in conjunction with Google.org)^{2,3}
 University of California Office
 of the President²

\$100,000+

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 ECMC Foundation³
 Samuel Freeman Charitable Trust
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 Peery Foundation^{2,3}

\$50,000+

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 The Charles Hayden Foundation¹

Innovate Foundation²
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\$25,000+

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 The Highland Street Foundation¹

Champion Spotlight: Jeannie & Jonathan Lavine



Economic and educational equity are at the core of Jeannie and Jonathan Lavine's philanthropy. "There is no greater way to improve someone's future than giving them access to postsecondary education," Jonathan says. "We know that intellect is not distributed based on income, neither should education be," adds Jeannie. These beliefs inspired their multimillion-dollar gift to uAspire, a game-changing investment that has helped us achieve higher levels of impact and scale. We are deeply appreciative of the Lavines for their bold leadership that makes college affordable for thousands of students.

¹ uAspire Massachusetts commitment ² uAspire Bay Area commitment ³ multi-year commitment

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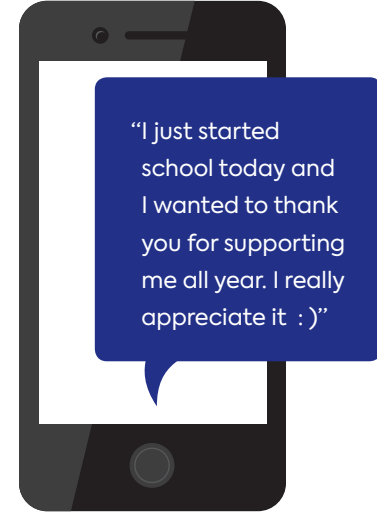
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\$5,000+

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\$2,500+

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\$1,000+

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¹ uAspire Massachusetts commitment ² uAspire Bay Area commitment ³ multi-year commitment

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 List reflects donors who made gifts between July 1, 2016 and June 30, 2017. We regret any omissions or errors.

OUR FINANCIAL REPORT

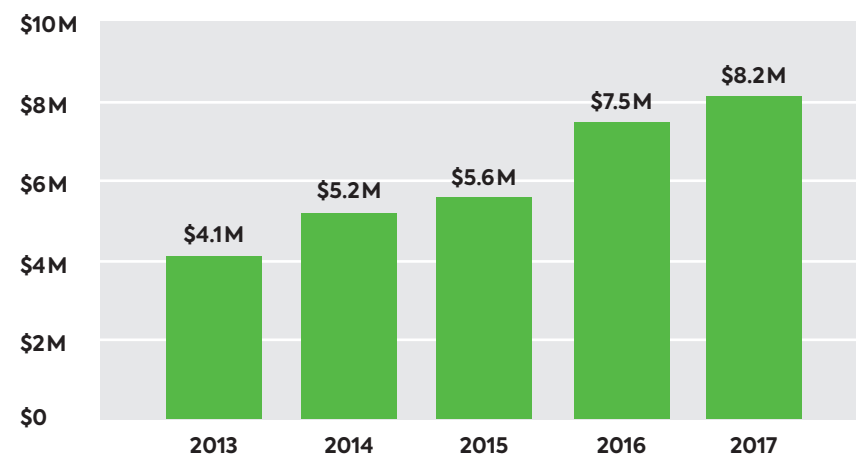
Support and Revenue

	2017	2016
CONTRIBUTIONS	\$5,356,896	\$5,121,593
PROGRAM REVENUE	\$2,259,442	\$2,002,838
OTHER REVENUE AND IN-KIND	\$542,504	\$376,921
TOTAL REVENUES	\$8,158,842	\$7,501,352

Expenses

	2017	2016
PROGRAM SERVICES	\$4,798,817	\$4,438,875
GENERAL ADMINISTRATIVE	\$741,819	\$475,503
FUNDRAISING	\$2,057,693	\$1,754,997
TOTAL EXPENSES	\$7,598,329	\$6,669,375
CHANGE IN NET ASSETS	\$560,513	\$831,977
NET ASSETS AT END OF YEAR	\$2,586,831	\$2,026,318

uAspire Organizational Growth 2013-2017



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