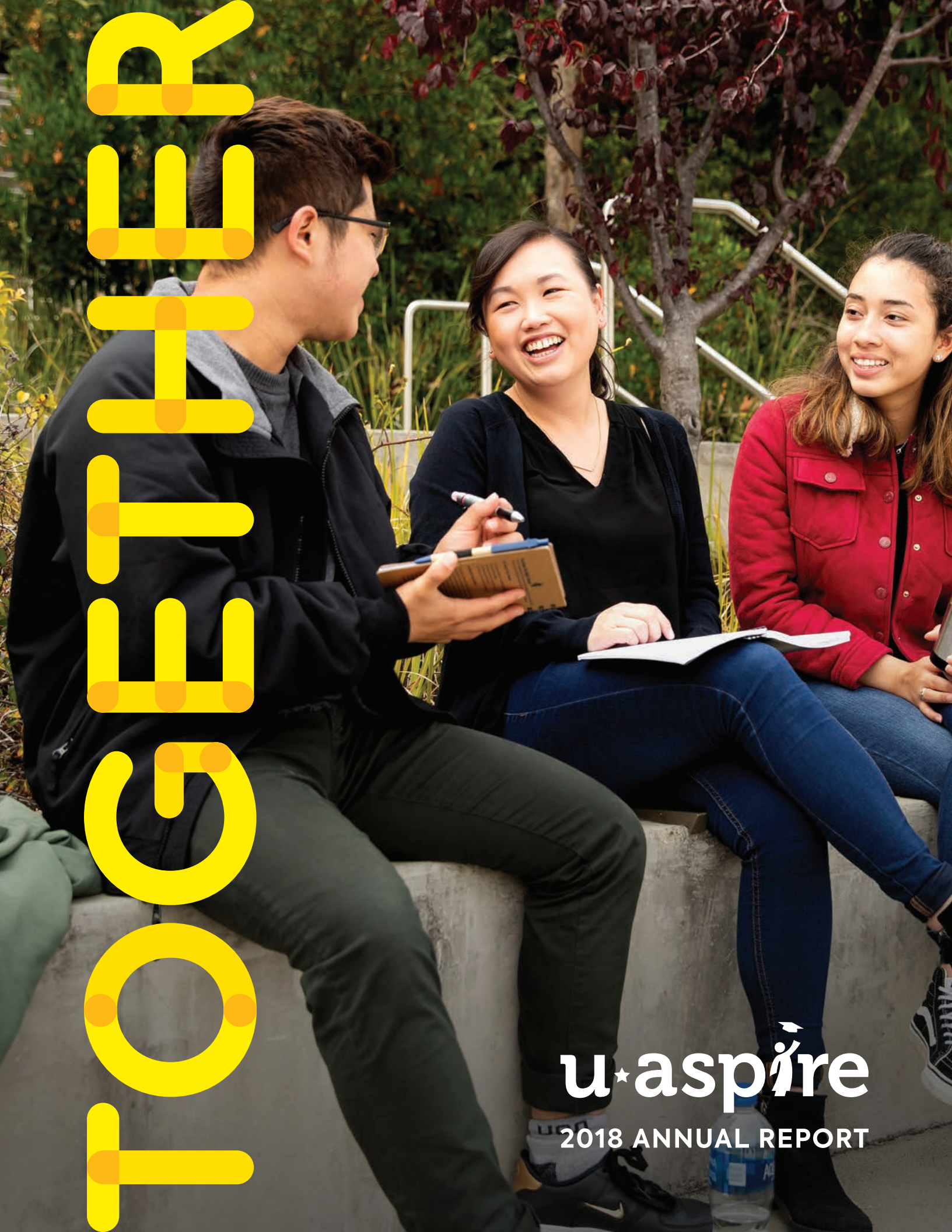


# RESEARCH



u★aspire  
2018 ANNUAL REPORT

**uAspire's mission** is to ensure that all young people have the financial information and resources necessary to find an affordable path to and through college.

Through student advising, counselor training, and policy and systems change, we work to remove the financial barriers to higher education.

We believe a college degree and the economic opportunities it brings should be affordable to all. **Together**, we can reach the day when every student has an equitable opportunity to succeed in life.



**TOGETHER WE  
PREPARE**

“College is the stepping stone to future careers. Business management is my passion and starting my own business in the hospitality industry is my lifetime goal.”

William, freshman at San Francisco State University

Dear Friends,

What an incredible year for uAspire! Over 9,900 students worked with our advisors in California and Massachusetts. Across the country, 1,600 counselors received our training to better advise their own students. We partnered with the CollegeBound Initiative to launch our work in New York City and with New America to publish, “Decoding the Cost of College: The Case for Transparent Financial Aid Award Letters.”

And that’s just the beginning! In the coming pages, we honor the tremendous collaboration across uAspire and our partners that makes our work and impact possible.

We’re also celebrating the hiring of our first vice president of equity, Dr. Heather Jenkins, to lead us in creating an even stronger organization that equitably represents the voices of students and families grappling with the issue of college affordability.

**At uAspire we believe college affordability is an issue we must all come together to solve.**

America’s future depends on the strength and diversity of our college graduates. Now more than ever before, we need to ensure that all of our young people can afford to reach their full potential.

Thank you for your support and continued belief in our mission. We look forward to another year of advancing educational and economic opportunity, together.

All the best,



Bob Giannino  
Chief Executive Officer, uAspire



Myiesha (left) with Bob and her uAspire advisor, Angela

## Myiesha

I wanted to go to college because I want to create financial stability for myself and my family. But, my experience with the college application process was very tedious. I am a first-generation student and before I became familiar with uAspire, I had to manage the process alone without help from my parents since they did not know what to do. I had difficulty understanding what I should and should not be doing throughout the process.

One day, a uAspire counselor named Angela introduced herself to my English honors high school class. I met with Angela almost every week, sometimes just to quickly check in about my progress on my college applications. She helped me figure out how to break down the

FAFSA, CSS Profile, and other financial and non-financial details that I needed to understand in order to complete the necessary paperwork.

Many times I became frustrated with the process and wanted to give up, but Angela gave me inspiration to keep going. The experience became much easier with the help of uAspire, and I am eternally grateful.

I’d like to be a cosmetic or reconstructive surgeon. I want to help people who want to change their lives and increase their confidence. I am looking forward to possibly going to graduate or medical school, and making money to provide for those who I love.

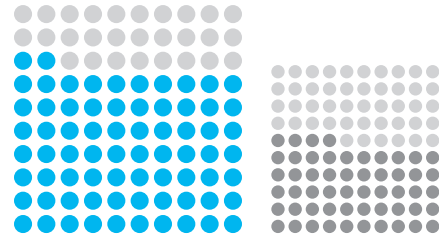
“I want to help people who want to change their lives.”

Myiesha, freshman at UMASS Amherst

TOGETHER WE  
CHANGE

## Enrollment

Started college the fall after high school graduation

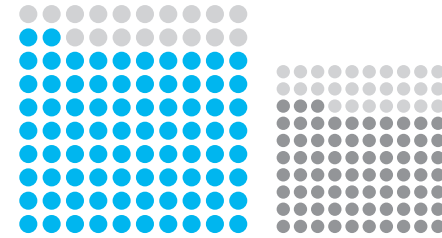


72%  
UASPIRE STUDENTS

54%  
NATIONAL AVERAGE FOR STUDENTS FROM LOW-INCOME HIGH SCHOOLS\*

## Persistence

Still enrolled in college or have graduated



82%  
UASPIRE STUDENTS

73%  
NATIONAL AVERAGE FOR ALL STUDENTS\*\*

\*National Student Clearinghouse Research Center. (2017) High School Benchmarks Report 2017.

\*\*National Student Clearinghouse Research Center. (2018) Snapshot Report 2018.

### AFFORD PROGRAM EVALUATION

Evidence from our multi-year randomized control trial in San Francisco shows that high school seniors who receive uAspire's college affordability advising are better able to navigate the financial aid process and leverage financial aid.

Data shows that they are significantly more likely to report receiving a Pell Grant and a Cal Grant than students who do not meet with a uAspire advisor. Furthermore, uAspire students are more likely to believe that college can be affordable, to report that they were awarded the financial aid they need to afford college, and to know how much they have to pay out of pocket for the first year. The evaluation was funded by the GreenLight Fund, in partnership with the Corporation for National and Community Service Social Innovation Fund and research firm WestEd.



TOGETHER WE  
SUCCEEDED

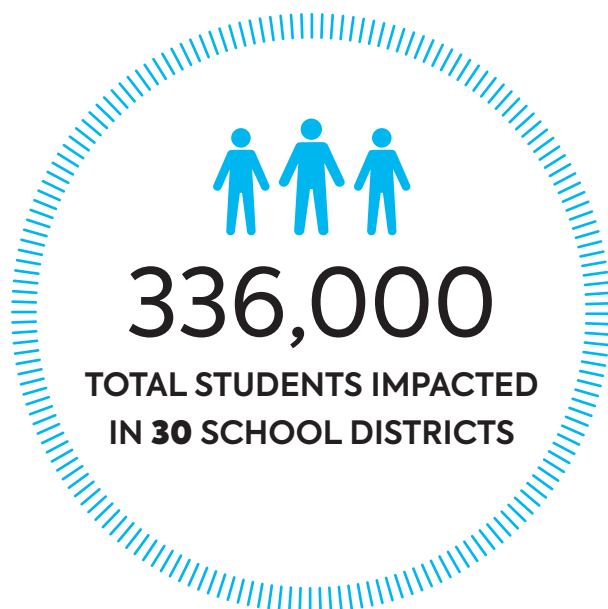
“Going to college means that I am smart, special and that I do have the power and control to create my own legacy.”

In our 33-year history, our priority has always been to establish meaningful relationships in the communities where we work. uAspire advises students in Massachusetts and the Bay Area of California to find an affordable pathway to a college degree. In addition, we provide training to school counselors and program staff across the country so they can do the same with their students. Together, these programs impacted over 345,000 students last year.



## Training

Through our professional development courses, school and program staff build their knowledge of the financial aid process and college affordability to better serve their students.



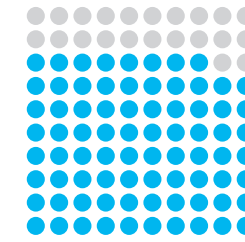
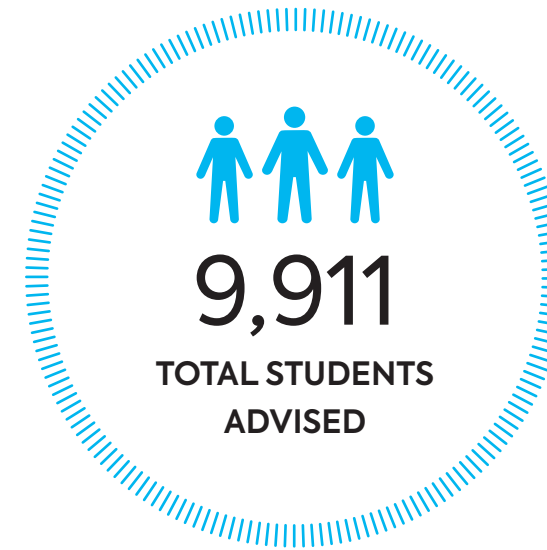
 1,680  
PROFESSIONALS TRAINED

 20  
STATES

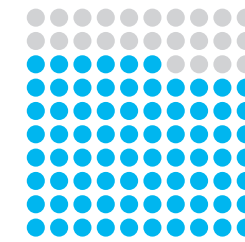
uAspire conducted  
 25  
IN-PERSON WORKSHOPS

 59  
WEBINARS

## Advising



78%  
ARE FROM LOW-INCOME FAMILIES  
(PELL GRANT ELIGIBLE)



76%  
WILL BE FIRST-GENERATION  
COLLEGE GRADUATES

### HIGH SCHOOL: AFFORD PROGRAM

2,214  
BAY AREA  
STUDENTS



3,426  
MASSACHUSETTS  
STUDENTS



From the fall of their senior year through the summer after graduation, students work with their advisor in their school or over text to obtain financial aid, find an affordable college option, and successfully enroll.



uAspire students are 33% more likely TO ENROLL IN COLLEGE THAN THEIR PEERS FROM SIMILAR HIGH SCHOOLS

### COLLEGE: SUCCEED PROGRAM

4,271  
POSTSECONDARY  
STUDENTS



During the first two years of college, students are supported through text advising to continue to access financial aid and overcome financial barriers to persist and ultimately complete their degree with a manageable amount of debt.

**THE PROBLEM: AWARD LETTER TRANSPARENCY**

Students and families often decide where to go to college—one of their biggest financial investments—based on confusing, incomplete, and even misleading information provided in financial aid offers. For decades, we’ve sat alongside students reviewing “award letters” that use different formats and obscure terminology, omit costs, and fail to calculate the net price. This lack of transparency is a barrier for students from low-income families to getting their degree, putting them at risk of dropping out if their out-of-pocket costs are greater than anticipated.

**OUR SOLUTION**

uAspire **advisors** work with students to understand and compare award letters, and calculate the bottom-line costs so students can make more informed financial decisions that would improve their outcomes.



**1,785**  
STUDENTS REVIEWED  
AWARD LETTERS WITH A  
UASPIRE ADVISOR DURING  
THE 2017-18 SCHOOL YEAR

We significantly scale this advising work by **training** school and program staff to review award letters with their own students.



**268**  
PRACTITIONERS TRAINED ON  
AWARD LETTER REVIEW IN 2018



Chloe, freshman at Northeastern University

“My advisor used a spreadsheet to help me compare my cost of attendance and loans for each school. She helped me understand my aid with great detail.”

“Award letter collection was different at each of our sites. uAspire helped us make sure our students all get the same level of quality. It’s been a powerful experience.”

Nadja Jepsen, Manager of Financial Programs, College Track

Our **policy** team gets to the root of the problem by leveraging research and our experience with students to advocate for changes in government and higher education.

Through a joint research project with think tank New America, we analyzed thousands of award letters to identify their shortcomings and recommend policy solutions in the report, “Decoding the Cost of College.”

IN A SAMPLE OF 515 LETTERS, WE FOUND:



**1/3**  
OMITTED THE TOTAL COST OF ATTENDANCE



**136**  
DIFFERENT TERMS FOR AN UNSUBSIDIZED LOAN—24 DIDN’T USE THE WORD “LOAN”



**70%**  
LUMPED GRANTS AND LOANS TOGETHER, AS IF BOTH ARE FREE

uAspire held a congressional briefing and 13 meetings with congressional offices on the report, which received widespread media coverage including The Atlantic, CNN Money, Forbes, and The Wall Street Journal.

In her testimony before the U.S. Senate Committee on Health, Education, Labor and Pensions on reauthorizing the Higher Education Act, uAspire’s Chief Policy Officer Laura Keane shared our research and made the case for legislation that demands clarity from award letters.

We applaud the response and efforts of federal and state policymakers, national coalitions, and college financial aid administrators who see themselves as part of the solution. **Together, we can improve how financial aid and college costs are communicated to all students.**

“A financial aid office’s award letter is the most important document first-generation, low-income students receive from an institution. Based on uAspire’s research, we completely redesigned our letter, which has been integral in our bringing in the largest class of underrepresented students this fall in our university’s history.”

Tom Biedscheid, Director of the Office of Financial Aid, Colorado State University

“Choosing to attend and pay for college is an investment in one’s future. Millions of students make this decision every year. Yet, just 55% of those who start college, finish. A major reason for this is that college costs aren’t transparent.”

Laura Keane, Chief Policy Officer, uAspire



# Looking to the Future Together

Over the past decade, uAspire has expanded and evolved to meet the changing needs of the young people we serve. With the lessons we've learned thus far, we will continue to look for strategic ways to expand our impact and improve our programs. As outlined in our strategic plan for 2019-2022, here are two initiatives that support our commitment to impact 3 million students over the next four years.

## NEW YORK CITY

In the 2018-19 school year, uAspire will launch our services in New York City in partnership with the [CollegeBound Initiative](#) (CBI), a best-in-class college access and success program of the Student Leadership Network that serves 18,000 students across 34 schools throughout the city. In this first year working together, uAspire will text advise 2,500 CBI students in their first year of postsecondary education and train CBI's team of college counselors. By the 2021-22 school year, we aim to serve a minimum of 10,000 NYC students annually, ranging from high school juniors to second-year college students.

Pairing our one-on-one student advising with counselor training ensures that students have access to high quality guidance where and when they need it—in schools and on their phones. Training strengthens counselors' affordability knowledge and skills, while our advising addresses their capacity challenges due to high caseloads. Over the next four years, we will leverage this scalable service model, bringing on more programmatic partners to increase college enrollment and attainment for students in NYC's low-income communities.

## SUCCEED PROGRAM

[Succeed](#) was launched in Boston in 2013 to support students through the first two years of college, when they are most vulnerable to dropping out. Since that time the program has supported 11,500 postsecondary students to maintain their financial aid, manage tuition bills and loans, and make sure they're on track to graduate. Beginning in the 2018-19 school year, we will bring our Succeed advising to our Bay Area students for the first time. Furthermore, in addition to Boston high school graduates, we will advise graduates of Cambridge and Somerville high schools in Massachusetts. In total, Succeed will impact 5,878 students in 2018-19, a 37 percent increase over this year.

**2019 will be a big year for uAspire. Join us in making it possible.**



TOGETHER WE ACHIEVE

“I’m looking forward to making my parents and grandparents proud of the sacrifices they made to allow me, as a first-generation college student, to continue having an education.”

Alyson (center), freshman at San Jose State University

# The Power of Partnerships

“We want to make sure the young people in our community have the tools to succeed. To do that we knew how important it was to have good partnerships,” says Chris Barr, head of corporate responsibility and social partnerships at Biogen. “uAspire is that first point of contact. They have been a great partner of ours.”

In June 2018, the Biogen Foundation announced uAspire as one of six key partners of the four-year, \$10 million STAR Initiative to help students from low-income families in Cambridge and Somerville, Massachusetts, gain STEM exposure and successfully transition into postsecondary education.

“We want to level the playing field for these students,” explains Chris. “In a year or two they will be going to college, and we want to make sure they have the infrastructure, the support network and the skill set to be successful.”

With this funding, uAspire will serve more students in these communities, like Isaiah Robinson who worked with his advisor Simone at Cambridge Rindge and Latin School and continues to receive uAspire’s advising in college.

“When I was young, my brother was always on the computer, and he even taught himself how to build a computer,” Isaiah recalls. “That fascinated me. So, my freshman year of high school I wrote an essay to visit Stanford to learn about computer science. The professors there made me think differently about my future.”

Now a freshman at UMASS Boston, Isaiah says, “I am the first in my family to go to a four-year college. Without Simone as my guide the process would have been ten times harder. So many people were telling me to go to a two-year school. Simone didn’t do that. She never pushed me a certain way. I wanted to take the risk and go to a four-year college and uAspire is helping me to do that.”

“We want students to go to college and not get lost. We want them to graduate,” says Chris, a first-generation college graduate himself. “The STAR program is our way of doing that. So, hopefully, four years from now we’ll see some of these young people working here.”

Isaiah (left) and Chris

TOGETHER WE  
EXCEL

# Our Supporters

**Thank you.** Our work would not be possible without your astounding generosity. We’re lucky to have you on our team.

## \$600,000 – \$999,999

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State Street Foundation, Inc.\*

## \$250,000 – \$599,999

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 Phyllis Yale

*This list reflects generous support received  
 between July 1, 2017 and June 30, 2018.  
 We regret any omissions or errors.*



# Honoring Alex

uAspire and the wider college access community lost a brilliant colleague when our chief program officer, Alexandra Chewning, passed away in September 2017. Alex was a passionate student advocate and a pioneer who built our research and evaluation department and created our text advising model. She made a meaningful and far-reaching difference as a researcher on national studies to drive college access and success, such as “summer melt” interventions, virtual advising, and early financial planning.

In her honor, we are launching the Alex Chewning Research Fellowship in the summer of 2019, and establishing a uAspire Day of Service for our staff to support a cause or organization they are passionate about.

Alex’s trailblazing work to confront educational inequity has helped thousands of students and families and set us on a course to impact millions. We will continue Alex’s legacy of compassion, service, and excellence in our daily work to ensure that every student has the opportunity to attend and complete college.

# Financials

## SUPPORT AND REVENUE

	2018	2017	2019 BUDGET
Contributions	\$5,738,315	\$5,356,896	\$8,335,337
Program Revenue	\$1,089,636	\$2,259,442	\$746,131
Other Revenue & In-Kind	\$454,739	\$542,504	\$453,871
<b>Total Revenues</b>	<b>\$7,282,689</b>	<b>\$8,158,842</b>	<b>\$9,535,339</b>

## EXPENSES

	2018	2017	2019 BUDGET
Program Services	\$5,622,605	\$4,798,817	\$5,894,991
General Administrative	\$870,716	\$741,819	\$912,898
Fundraising	\$2,130,940	\$2,057,693	\$2,234,173
<b>Total Expenses</b>	<b>\$8,624,260</b>	<b>\$7,598,329</b>	<b>\$9,042,062</b>
Change in Net Assets	-\$1,341,571	\$560,513	\$493,277
Net Assets at End of Year	\$1,245,260	\$2,586,831	\$1,738,537

Please note that the negative budget variance for FY18 is driven by a delay in over \$1.6M in funding sources to the first half of FY19.

Raven, freshman at City College of San Francisco

TOGETHER WE  
SUPPORT

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TOGETHER

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31 Milk Street, Suite 900  
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**uAspire.org**

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Email **sarahc@uaspire.org**.

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