

**FINANCIAL AID**

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**COMPLETION**

**PLAYBOOK**



## TABLE OF CONTENTS

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|                               |    |
|-------------------------------|----|
| Introduction.....             | 4  |
| Top Ten: Quick Start .....    | 6  |
| Foundational Practices .....  | 7  |
| CASE STUDY Number ONE .....   | 12 |
| CASE STUDY Number TWO.....    | 16 |
| CASE STUDY Number THREE ..... | 19 |
| CASE STUDY Number FOUR .....  | 22 |
| CASE STUDY Number FIVE .....  | 26 |
| CASE STUDY Number SIX .....   | 30 |
| CASE STUDY Number SEVEN.....  | 33 |
| CASE STUDY Number EIGHT ..... | 37 |
| CASE STUDY Number NINE .....  | 40 |
| CASE STUDY Number TEN.....    | 43 |
| Resources .....               | 47 |

Photo Credit: WSAC

**THANK YOU TO THE WASHINGTON STATE LEGISLATURE AND TO WASHINGTON SCHOOL DISTRICTS FOR THEIR FOCUS ON PROVIDING NEEDED SUPPORT TO EMPOWER THE FUTURE OF WASHINGTON YOUTH.**

# Supporting Pathways to the Future Via Financial Aid Completion

## Best Practices Across the State



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# INTRODUCTION

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Financial aid application completion is an indicator of being on-track to obtaining a postsecondary credential and having access to a family-wage job. Like many civil rights issues, not all youth have systemic support for financial aid completion. Put into clear terms, youth and families who are furthest from educational and institutional justice often face systemic barriers when navigating financial aid completion. The opportunity for all youth to have access to a bright future means systemic support for financial aid completion via the three ways a student can apply for financial aid: FAFSA, WASFA, or the apprenticeship financial aid application, is critical. (Note: Because it is so new, this toolkit does not yet contain information on the apprenticeship financial aid application. To find out more, go to: <https://wsac.wa.gov/apprenticeship-program-providers>)

This statement is not a criticism of caring educators and adults who work hard every day to ensure opportunity for all, and definitely not an assignment of cause and effect to the very populations who are furthest from opportunity. Rather, capacity must be built so that **systems and partnerships**, along with extensive resources already developed, can create and enable the environments and supports students need to complete and receive financial aid. Furthermore, despite some of the best financial aid programs in all 50 states, Washington historically has some of the lowest completion rates, particularly among populations who are oppressed.

During the 2020 legislative session, [Senate Bill \(SB\) 6141](#) passed with almost unanimous bipartisan support, in large part because it “recognizes the increasing importance of postsecondary education as a tool for economic resilience and mobility.” (Sec. 1) With this bill, the legislature attempts to remove some of the systemic barriers to college matriculation, especially for students furthest from educational justice and opportunity. SB 6141 requires all districts with a high school to host an annual Financial Aid Advising Day (FAAD) event to provide seniors and their families with relevant information about financial aid and scholarship opportunities and direct support to complete federal and state financial aid applications. The Washington Student Achievement Council (WSAC) was tasked with developing a college financial aid calculator that could be demonstrated at the FAAD as well as providing districts with financial aid training, fliers, and resources to share with families.

Given the need for educators, districts, and families to respond to the COVID-19 Pandemic, the 2019-2020 and 2020-2021 school years required school systems and community organizations to go above and beyond the norm when providing support, and on-going instruction, for students -- including support for financial aid completion. Even with unprecedented creativity and hard work, these were not normal years when it came to

supporting FAFSA/WASFA completions. The return to full-time, in-person instruction in 2021-2022 will provide an opportunity to more fully realize our shared goal of providing targeted support to students and their families who are under-represented in financial aid applicants and who have been historically excluded from higher education opportunities and postsecondary credentials that are pathways to self-sufficiency and career success.

This guidebook was developed through intensive collaboration among regional STEM Networks and their districts, non-profit, higher education, statewide and community partners. It is the product of hard work in different contexts and communities all centered on increasing college access opportunity and removing barriers to degree completion for students furthest from educational justice. The team that created this resource hopes that you will find information and strategies here that are useful in advancing your work in this important arena. Rather than read everything cover to cover, we hope that you'll deeply engage with material that speaks to your work, context, partnerships, and goals. The work to increase financial aid participation continues to move forward -- for all of us. As it does, this resource will continue to evolve to reflect lessons learned through our work -- and better support yours.

# TOP TEN: QUICK START

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## For a quick start you can find...

|  |                           |
|--|---------------------------|
| Resources to support students and families to fill out WASFA                                 | Page 47                   |
| Materials and templates to share with families and use during a Financial Aid Advising Night | Page 47                   |
| Strategies for small, rural school districts   | Pages 16-18, 30-32, 40-42 |
| Strategies for large, urban school districts   | Pages 37-39               |
| Strategies for regions with a diverse mix of districts                                       | Pages 37-39, 43-45        |
| Training partners as new Financial Aid Navigators  | Pages 26-29               |
| Strategies to increase completion and participation in dual-language communities/populations | Pages 25, 33-36           |
| Using data to increase FAFSA/WASFA completion rates  | Pages 12-14               |
| Strategies specific to WASFA completion rates  | Pages 43-45               |
| Leveraging existing relationships and/or community partners                                  | Pages 19-21, 22-25, 40-42 |

Note: The above list is by no means comprehensive. Most case studies in the Playbook contribute best practices and strategies for the interests listed above.

# FOUNDATIONAL PRACTICES

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There are four actions/practices that are critical to ensuring that a school or district makes significant increases in the financial aid completion rates of their students. The following research-based practices are causally linked to higher rates of completion and have been tested and tried by schools and districts in Washington state over the past several years.

## 1. KNOW YOUR DATA

You can't change what you can't measure. Do you know how many students have completed financial aid (both FAFSA and WASFA) applications over the past five years of senior cohorts? Do you know what completion rates look like across demographic lines? Which students are not completing? What is a realistic goal that you could set for increasing your rates of completion over time? The following are resources to help you get started:

- Current School Year **FAFSA** Completion by State, District, and School.
  - Live link: <https://portal.wsac.wa.gov/fafsacompletion/> (Washington Student Achievement Council).
  - Use this data to let you know how your region's individual high schools and districts are doing with FAFSA completion for the current school year/current HS seniors. This data is *updated weekly* throughout the school year starting around mid-October after the FAFSA opens and enough students have completed it to provide aggregated results.
- Current School Year **WASFA** Completion at the School Level.
  - There is no centrally managed data source for WASFA completion by school or district. This is intentional to ensure that student and family information for undocumented individuals is kept completely safe.
  - HOWEVER--a best practice for tracking WASFA completions is to have a building-level \*champion\* (see foundational practice #2) keep a spreadsheet (see foundational practice #4) of all high school seniors with a column for "financial aid document completed." Do NOT list *which* form a student/family completed--just whether they have disclosed to a trusted adult that they have completed one.
- Because it is so new, there is no way to access data on who has completed apprenticeship financial aid application. To find out more about the apprenticeship financial aid process, go to: <https://wsac.wa.gov/apprenticeship-program-providers>.

- **In-depth FAFSA Completion Data.**

- Live Links:

- Overview of all available data and context here: [www.wsac.wa.gov/fafsa-completion](http://www.wsac.wa.gov/fafsa-completion).
- Direct link to more in-depth data by district, school, region, year, etc.: <https://public.tableau.comwww.wsac.wa.gov/fafsa-completion/app/profile/wsac/viz/WAStateFAFSACompletionDashboard/StateFAFSACompletion> (Washington Student Achievement Council).

- Use this data to:

- Tell you which schools and districts have had historically low or historically high FAFSA completion rates so that you can contact them to support them or learn about their work.
- Tell you how your ESD or STEM Network region has done historically with FAFSA completion to help you set a regional goal with your network partners/members/leadership teams or with individual education, employer, and municipal leaders.
- NEW FAFSA completion by demographic (forthcoming): Tell you which populations and demographics of students need more support to complete the FAFSA by district, school, or region (by race, gender, and other forthcoming demographics); this feature will be available sometime in 2021.

## 2. IDENTIFY A CHAMPION

Ideally, it's two champions. One at the building level and one at the district level. Case studies show that the building-level champion is the MOST important for increasing financial aid completion rates.

A champion is an individual who is charged with tracking completion data, delegating roles in tracking students, ensuring that events and time with students are scheduled and implemented, and who is dedicated to learning as much as possible about financial aid completion and processes. At the building level, this can be a school counselor, administrator, teacher, or support staff. Ideally it is someone who has access to student-level information (rosters) and who is allowed/able to delegate and motivate other staff to engage with students to complete their applications. To identify this champion ask yourself, is there a person:



1. Who is willing and able to dedicate time to increasing financial aid completion in your building?
2. Who is willing to learn more about WASFA—in particular unique student filing situations and other financial aid information?
3. Who is willing to delegate, support, and connect with trusted leaders in your school, organization, community?
4. Who is willing to stay on top of the data?
  - a. This means getting and maintaining portal access (see below #3); and
  - b. Tracking student completions: Enacting the overall completion (FAFSA + WASFA) best practices for staying on top of student-level data at the building level (see below #4).

### 3. ACCESS AND USE THE PORTAL

The WSAC FAFSA Completion Portal is a secure website that is administered by the Washington Student Achievement Council (WSAC) that allows high school staff and community-based organization support staff to access student-by-student FAFSA submissions, allows staff to see student application error flags and completions, and enables staff to track down and provide targeted support to individual students to increase their overall FAFSA completion rate. (The Portal does not provide student level completion information regarding the WASFA--see “Know Your Data” section for best practices on WASFA completion handling. It also does not yet provide data on students who have completed a financial aid application to enroll in an apprenticeship. For more information on that process, go to <https://wsac.wa.gov/apprenticeship-program-providers>)

1. Establish if anyone in your building or community already has FAFSA Portal access:
  - a. Live link: <https://wsac.wa.gov/sites/default/files/FAFSA.Portal.Factsheet.pdf>.
  - b. Use this to send to school or district contacts/partners (you can copy/paste the text below) to help them check to see if they have a staff member that uses the portal. If not, find someone to help them set it up at the school building level.
2. Each school or organization must make sure they have a Data Sharing Agreement (DSA) on file with WSAC by emailing: [fafsa@wsac.wa.gov](mailto:fafsa@wsac.wa.gov).
3. If/when a DSA is complete, request access to the portal by emailing the same account above (*you can request DSA status and portal access in the same email!*).

4. Review how to use the portal with this handy YouTube video  
<https://youtu.be/7rndndJdq2w>.

#### 4. TRACK INDIVIDUAL STUDENT COMPLETIONS

Once you have determined your past completion rates, identified a champion, and accessed the WSAC FAFSA Completion Portal, you will have everything you need to individually track (and track down) students' financial aid completion status. This will allow you to prioritize support for key groups of students who may just need a little nudge or support to get their paperwork in.

1. Set the stage: Ensure that all your students know that you want to help them complete *either* the FAFSA or the WASFA. As part of the High School and Beyond Plan graduation requirement to inform all students about the financial aid process, provide the following fliers and links to all students, teachers/advisory staff, school counselors, and anyone else in your building who work with students on thinking about the future. Provide this information *before* students' senior year to ensure that they know they have many options and supports in paying for higher education:
  - a. Encourage all staff to say "FAFSA/WASFA" or "Financial Aid. Defaulting to the term "FAFSA" is alienating and inaccurate. Also ensure that staff know that students can access financial aid for apprenticeships through a program-specific application process. For more information on that process, go to:  
<https://wsac.wa.gov/apprenticeship-program-providers>.
  - b. **AS OF September 2021**, the WASFA information will be moved and you should be able to link to all resources via WSAC's WASFA page:  
<https://wsac.wa.gov/wasfa>.
  - c. **AS OF June 2021**, WASFA information and fliers can be found at:  
<https://wsac.wa.gov/wasfa>.
    - i. Am I eligible for WASFA or FAFSA?: <https://wsac.wa.gov/WASFAelig>.
    - ii. WASFA Flyer (English):  
<https://readysetgrad.wa.gov/sites/default/files/2019.wasfa.flier.print.pdf>.
    - iii. WASFA Flyer (Spanish):  
<https://readysetgrad.wa.gov/sites/default/files/2019-wasfa-flier-print-spanish.pdf>.
    - iv. Step-by-Step Guide to fill out the WASFA (student-friendly/made for students): <https://www.heyyouneedaplan.com/how-to-fill-out-wasfa-step-by-step-guide/>.

- v. How to fill out the WASFA (adult-friendly/made for adults who support students):  
[https://wsac.wa.gov/sites/default/files/2021\\_WASFA\\_updated\\_instructions.pdf](https://wsac.wa.gov/sites/default/files/2021_WASFA_updated_instructions.pdf).
2. Create a spreadsheet in a shareable but secure place that ensures data privacy and confidentiality; include the following information:
  - a. A list of ALL high school seniors' first name and last name.
  - b. Advisory or homeroom teacher (or assigned school counselor).
  - c. If you want to look at completion by race, gender, GPA, ELL status, or other characteristics, load these in if you're able.
  - d. Create a column in the spreadsheet for "completed financial aid."
    - i. DO NOT track whether a student has completed either a FAFSA, a WASFA or an apprenticeship aid form--doing so could compromise student confidentiality, safety, etc.
3. Delegate! Have your champion delegate blocks of students to staff, CBO partners, coaches, and other trusted adults, and have them update the spreadsheet if you're able to keep it in a shared, secured workspace/platform.
4. Verify completion: Provide teachers, coaches, staff, etc. with verification examples:
  - a. Student Aid Report page from the FAFSA or completion page from the WASFA.
  - b. Verification through the WSAC FAFSA Portal for the FAFSA.
  - c. Verification form from apprenticeship sponsor (for more information on that process, go to: <https://wsac.wa.gov/apprenticeship-program-providers>).

# CASE STUDY NUMBER ONE

## Using Data to Support Increased FAFSA/WASFA Completion

Context: This case study details the data journey experienced by the advising team from Eisenhower High School, a large, urban school located in Yakima, WA.

*“As a team, we can say without reservation that our most significant learnings have been related to data. The WSAC FAFSA Completion Portal is helping our advising teams to monitor the completion of the FAFSA and to provide the support families need to complete their application. Our FAFSA/WASFA completion data has helped each of our participating schools determine a strategy that is site-based and protects the rights of our undocumented students and their families.”*

- Advising Challenge advising team leader

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| Yolanda Guzman      | Counselor<br>College Success Foundation<br><a href="https://www.collegesuccessfoundation.org/regions/yakima/">https://www.collegesuccessfoundation.org/regions/yakima/</a> | <a href="mailto:guzman.yolanda@ysd7.org">guzman.yolanda@ysd7.org</a> | 509-969-4325 |
| Gabriel Stotz       | Career and College Readiness<br>Coordinator<br>Eisenhower High School<br><a href="https://www.ysd7.org/eisenhower">https://www.ysd7.org/eisenhower</a>                     | <a href="mailto:stotz.gabriel@ysd7.org">stotz.gabriel@ysd7.org</a>   | 509-573-2870 |

### Partnerships

The South Central Washington STEM Network at ESD 105 leveraged its partnership with Washington STEM to offer high-quality data training and support to advising teams at local high schools. Eisenhower leveraged its partnership with the College Success Foundation to access regional and school-based Financial Aid awareness events and support.

## Approach

In 2018, ESD 105 supported advising teams from the Yakima (Eisenhower and Davis High Schools) and Toppenish School Districts (Toppenish High School) to develop a data-informed plan to increase student success in getting to and through college with a postsecondary credential. The team's data journey was facilitated and supported by a data coach from the College Success Foundation (CSF) and staff from Washington (WA) STEM. The teams used data from the National Student Clearinghouse (NSC), College Scorecard, WSAC, etc. to develop an understanding of their student success baseline and to determine appropriate strategies they felt would effectively increase their students' postsecondary completion success.

Examining data provided from the WSAC FAFSA Completion Portal, the Eisenhower team noticed their 2017-18 FAFSA completion rate was only 49.0%. This was 7% below the state average and 15% below neighboring Davis High School. While this data was sobering, it prompted discussion as to why their completion rate was so low, what was currently being done to support FAFSA completion, and what best practices they could implement to increase the number of students actually completing their FAFSA or WASFA. These discussions by the Eisenhower advising team revealed that, except for the students who were receiving support from the CSF, only the school counselors saw it as their responsibility to encourage students to complete a FAFSA or WASFA. Additionally, because of the incredibly high number of students each school counselor was responsible for, only general information was shared with students regarding FAFSA events, with no coordinated system of support. Drawing best practices from the (CSF), WSAC, National College Attainment Network (NCAN), and coaches provided by an external grant, the Eisenhower team selected strategies they felt would be most appropriate for their school while protecting the rights of their undocumented students and their families.

The team felt it was critical they knew which students had submitted a FAFSA/WASFA application and which had not. In addition, they needed to know the status of the application. Was there information missing? Were there errors? To answer these questions, their team lead used the WSAC FAFSA Completion Portal to access timely data on student FAFSA completion at Eisenhower. This individual student data was shared with school counselors, staff, and advisory teachers. Sharing this information helped generate increased staff-to-student communication about financial aid and how it could benefit the student in their postsecondary education. They were able to see who had successfully completed their FAFSA, had not yet completed their application, and which applications had errors that needed to be addressed. The FAFSA Portal showed staff which students to connect with and get them the support needed to successfully complete their application.

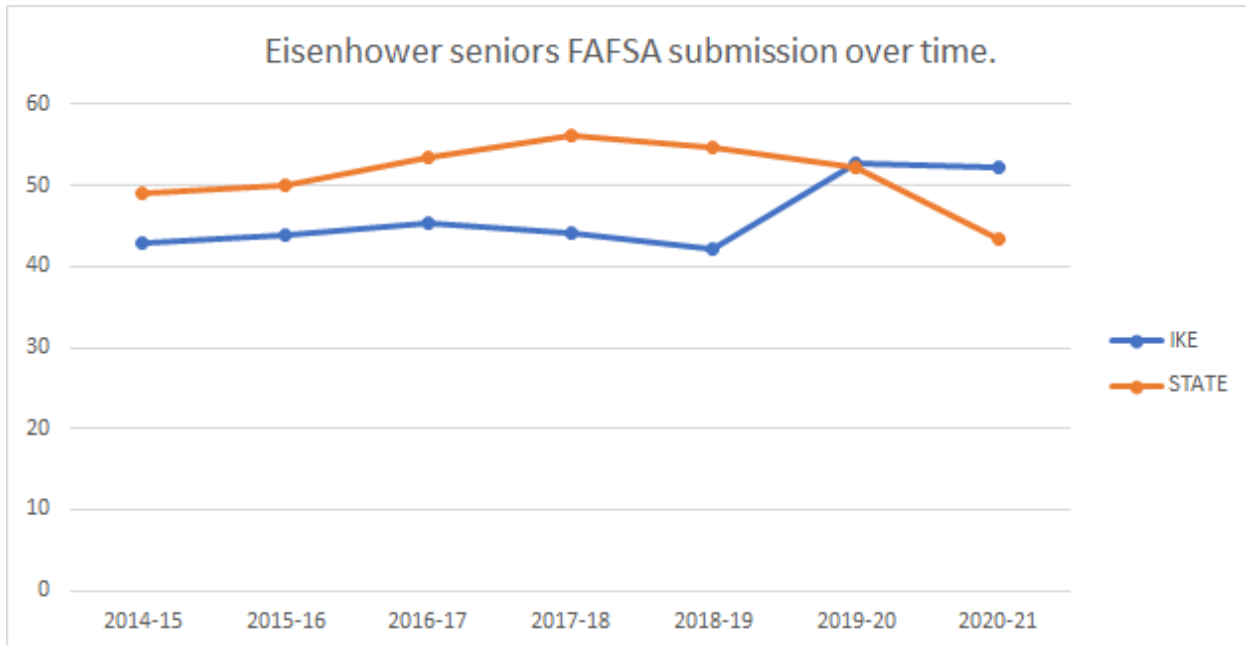
The team selected senior English and Advisory classes as the most effective locations to communicate with students about financial aid. They set out to over-communicate essential information and set the universal expectation that ALL Eisenhower seniors would complete either a FAFSA or WASFA.

This new prioritization getting students to and through a postsecondary credential also led the Yakima School District to fund a Career and College Readiness Coordinator at both Eisenhower and Davis High Schools. Signal Vine, a texting platform, was used to communicate with students and families related to events, deadlines, help sessions, etc. to increase FAFSA completion and to reduce “Summer Melt.”

The team discovered that each Monday morning at 8:00 a.m., the WSAC FAFSA Completion Portal is updated. Their team lead would then update the Eisenhower community regarding FAFSA completion statistics. Students who had errors on their applications were called to the Career Center for support in correcting errors and completing their application. Students who had not yet submitted applications received text messages sharing information about upcoming Financial Aid events and virtual help sessions. College Partners from CWU, EWU, WSU, UW, Heritage University, Perry Tech, Act Six, and WCAN regularly attended these sessions to deliver support related to financial aid, college applications, and scholarship opportunities.

## **Success**

These efforts have paid great dividends for the Eisenhower advising team as evidenced by the tremendous increase in FAFSA Completion rates illustrated below. Eisenhower and WA FAFSA Completion Rates at the end of the month of May 2021:



Once supports were put into place during the 2019-20 school year, Eisenhower saw a 10%+ FAFSA completion increase compared to the previous school year. Completion rates are even higher during the 2020-21 school year, when distance learning had decreased FAFSA completion statewide by 20%. Eisenhower completion rates are currently 10% ahead of the state average with six weeks left in school.

### Lessons Learned

The Eisenhower team continues to learn which student supports are most effective to continually increase financial aid completion rates. Whether classroom instruction is remote or in-person, the team has identified effective strategies to communicate with students and families, including the use of the Signal Vine text message platform. The team recognizes the need to start earlier, to leverage the classes that provide the greatest access to senior students, to over-communicate FAFSA/WASFA related events, and support completion opportunities. Only when these systems of support are fully functional, and connected to existing state and regional supports, will the team’s 70% FAFSA/WASFA completion goal for the class of 2021-22 be achieved.

# CASE STUDY NUMBER TWO

## Supporting Small Rural School Districts to Provide Financial Aid Awareness Events Through a Collaborative Regional Effort

Context: This case study describes how the South Central Washington (SCW) STEM Network partnered with the College Success Foundation (CSF) and the Washington College Access Network (WCAN) to support small, rural school districts in offering Financial Aid awareness events, and increasing FAFSA/WASFA completion.

*“This would be AMAZING! Thank you so much for offering me this opportunity. As the only counselor in a small school, a lot of things can get on my plate and it can get overwhelming for me. I think Financial Aid is such a crucial topic for our students to learn about. I would LOVE to take advantage of this awesome opportunity. Please let me know what the next steps are in co-hosting this event.”*

*- School counselor at a small school district in the ESD 105 region, after being provided with the opportunity to partner with regional stakeholders to co-host Financial Aid awareness events.*

### CONTACTS

Case Study Number 2

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|---------------|---|--|--------------|
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### Partnerships

The SCW STEM Network at ESD 105, CSF and WCAN partnered to support small rural school districts to offer Financial Aid awareness events and to meet the legislatively required provision of a Financial Aid Advising Day from SB 6141, passed in 2020. Additional support was provided by CWU, Heritage U, and the Ready to Rise/Act Six Program.



## Approach

This coalition of cross-sector partners co-hosted 11 regional Financial Aid Advising Day (FAAD) events in Kittitas County, Grant County, Upper Yakima Valley and Lower Yakima Valley. The events were held virtually with school districts in ESD 105 serving as co-sponsors of the events. FAAD events were provided for both English and Spanish speaking students and their families.

Small, rural school districts may have limited staff time to support students and families as it relates to career and college readiness. Oftentimes school counselors in these small districts are so focused on making sure students meet graduation requirements that they have minimal bandwidth to provide support related to Financial Aid and specifically FAFSA/WASFA completion. In this context SB 6141 requires that beginning in the 2020-2021 school year, all school districts in Washington that have a high school must provide a Financial Aid advising day and notification of financial aid opportunities to parents and guardians of all students in the 12th grade annually before December 1st. This requirement adds one more responsibility to that school counselor's already overflowing plate of activities.

In the fall and winter of 2020-2021, seven regional FAAD events were hosted. Students from over 20 local school districts participated in the events and received support from 44 Financial Aid volunteers from the different partner organizations and led by the CSF's Student Financial Services Department. **Students received one-on-one support from a Financial Aid Expert who walked them step by step through their FAFSA or WASFA Application.** High school counselors, who have trusted relationships with students and families, welcomed and provided support during the events.

Four additional events, hosted by a regionally broader coalition from CSF, WCAN and the Spokane STEM Network, were held in February. These FAAD events also empowered and supported students and families to complete their FAFSA/WASFA and address errors. Over 100 students attended the February events and completed their FAFSA/WASFA submission. Volunteers for the February events came from local schools and organizations including YVC, CWU, Heritage U., Ready to Rise/Act Six, CSF-Yakima, SFCC, and EWU. Students who completed their FAFSA or WASFA were entered to win a \$100 Amazon Gift Card. Overall, the events showed powerful support from some amazing partners in the South Central and North East regions of Washington. Plans are being made to host similar events in the future, virtually or in-person.

## Success

Through collaboration, high school seniors and their families from 20 small, rural, school districts in the ESD 105 region received financial aid information and assistance in the fall and winter of the 2020-2021 school year. Student-serving organizations found synergy in

partnering together to deliver Financial Aid advising and support. Due to the commitment of 44 financial aid volunteers from partner organizations, 300+ students and their families received one-on-one support in the completion of a FAFSA or a WASFA application.

### **Lessons Learned**

Organizations are powerful change agents when they work collaboratively to provide necessary support to students, families, and the small, rural, school districts in which they attend school. By convening partners from student-serving organizations, higher education, and regional school districts, targeted financial aid assistance can be provided to English and Spanish speaking students and their families. Sharing the responsibility for delivering high-quality Financial Aid support builds synergy and allows students and families access to the one-on-one assistance often required to complete a FAFSA or WASFA application.

# CASE STUDY NUMBER THREE

## Leveraging Community Partners: Scaling Best Practices

Context: This case study details the results of leveraging community-based partnerships to increase financial aid filing assistance and further develop a college-going culture in communities furthest from opportunity.

*“With the requirements of the new ESSB 6141, the task of putting on a Financial Aid Advising Day seemed daunting, but the West Sound STEM Network (WSSN) and Washington College Access Network (WCAN) made it easy. WSSN and WCAN representatives were there to support us every step of the way, and in the end, our FAAD event was a success!”*

- Kiley Gard, School Counselor, Port Townsend Highschool.

### CONTACTS

Case Study Number 3

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|--------------------|---|--|--------------|
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### Partnerships

The West Sound STEM Network leveraged its partnerships with Washington Student Achievement Council (WSAC), Graduate Strong, and Washington College Access Network (WCAN) to increase financial aid filing assistance and further develop a college-going culture in communities furthest from opportunity and educational justice.

### Approach

- People - Partnered with WSAC, Graduate Strong, and WCAN to co-host 19 financial aid assistance events throughout the region.

- Process - Financial Aid information was shared at each event followed by group and individual support to families and students to assist with completing the FAFSA/WASFA. Events were held at varied times, including the school day and evenings. All events were facilitated in the virtual environment.

In 2020, the West Sound STEM Network partnered with four rural Washington school districts (Port Townsend, Chimacum, Quilcene, and Quillayute Valley) to host Financial Aid Advising Day events for students. Each district assigned a high school counselor, each of whom has deep knowledge of their district and families, as the event's point of contact and were present during the events.

Port Townsend School District was the lead district for two of the events which allowed Chimacum School District and Quilcene School District to partner simultaneously. Quillayute Valley School District held their own separate event following the same steps and support from the school counselor, WSSN, WCAN, and WSAC. All events were held virtually via Zoom. Port Townsend School District collected the student registrations and communicated with the other districts the ongoing enrollment information.

The West Sound STEM Network leveraged its partnership with Washington Student Achievement Council and the Washington College Access Network to offer a flyer and deliver a presentation at the beginning of each event. The events were communicated and marketed within the schools, on flyers posted in the schools, on school and district webpages, a variety of social media spaces and emails to parents and students. Port Townsend School District added the Financial Aid Advising Day as an assignment for Juniors and Seniors during student's Social Studies classes.

The WCAN facilitator also served as the subject matter expert for the events and provided expertise for student questions and answers. Private chats were utilized if students had confidential questions as well as requests for additional support after the events. The Financial Aid Advising Day events were considered mandatory for the twelfth graders and all were invited to attend. Ongoing follow-up and support was facilitated by school counselors.

Drawing best practices from Graduate Strong and Washington College Access Network (WCAN), West Sound STEM Network participated in the fall 2020 Financial Aid Navigator training. Graduate Strong, in partnership with WCAN, has been engaged in community Navigator outreach since 2019 in Kitsap County to create systemic level change and capacity building for financial aid filing assistance support. Graduate Strong and WCAN train a diverse population of community members interested in supporting a collaborative approach to support financial aid filing assistance and remove barriers that prohibit students from filing. Trained financial aid Navigators supported many of the virtual financial aid filing assistance events. Prior to Covid-19, Navigators supported students and families by providing one-on-one assistance and answering questions at school-based and community events. During the last

year, that support was provided in a virtual environment using breakout rooms and the chat feature. Recruitment of Navigators who speak more than one language provided opportunities for translation during the events. West Sound STEM Network partner Graduate Strong, experienced a high turnout for their bi-lingual financial aid filing event for Spanish-speaking students and their families in February 2021. Financial aid assistance events beyond the Financial Aid Advising Day events continued during 2020-2021.

Leveraging partnerships provided systemic equity with cross-sector outreach throughout the Kitsap and Olympic Peninsula school districts. Multiple events were co-hosted with Washington Student Achievement Council (WSAC) and their 12th Year Campaign Events to assist districts with providing equity-enhancing postsecondary credential transition services to seniors and their families. The events were open statewide and allowed for districts and community groups to co-host. The events provided financial aid filing support to students on multiple dates and times and allowed for extensive outreach in the virtual platform.

### **Success**

Data from the WSAC FAFSA Completion Portal, directly after FAAD events, shows that Port Townsend School District increased their FAFSA filing rate by 18.7 percentage points compared to the statewide rate of 30% as of 1/11/21. Chimacum School District increased their filing rates by 3 percentage points between January 2020 and January 2021--this is noteworthy given the challenges of COVID-related barriers. These districts are organizing a 2021 Financial Aid Advising Day and plan to expand upon successes and lessons learned in 2020. The West Sound STEM Network will co-host this event in partnership with Washington College Access Network.

### **Lessons Learned**

Leveraging partnerships with community-based organizations and expanding best practices throughout the region needs to continue to be supported and expanded upon. Effective strategies were identified, and data reflects that the early outreach and Financial Aid Advising Day events supported an increase in FAFSA completion rates. Data also shows that increased and ongoing efforts will need to be sustained in order to achieve the goals set forth to increase financial aid filing rates in the state of Washington.

A key best practice was the triangulation of support for students that included a community-based organization, school district leadership, and in-class time for financial aid completion.

# CASE STUDY NUMBER FOUR

## Leveraging Trusted Community Partners to Improve Financial Aid (FAFSA/WASFA) Completion Rates in Whatcom and Skagit Counties

Context: This case study describes the partnership between FuturesNW, the NW Washington STEM Network and College Success Foundation to increase postsecondary student enrollment by increasing successful FAFSA/WASFA completion rates.

*“Identifying and leveraging community partners is an essential strategy to improving regional financial aid completion rates. These partnerships are vital to increasing the capacity of our K-12 partners as they develop financial aid advising day activities.”*

- Christina Winstead, Assistant Director for Outreach, College Access and Support, WSAC

### CONTACTS

Case Study Number 4

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Highlighted key Foundational Practices include:

- Developing partnerships, collaboration, and respecting lanes of work: Who is already doing the work, with whom, and with what results?
- Leverage regional and statewide solutions — Experts and leaders have created many solutions, ‘take it, tweak it’ and make them your own.

## Partnerships

Early in the project we received some great advice from a Financial Aid Specialist at Whatcom Community College who advised us “*to seek out trusted players and to use their brands as the face of the work rather than create something new.*” Building on that theme, one of the first things we asked ourselves was ‘what is the footprint of existing state and regional programs in our area?’ Examples include work by Washington Student Achievement Council (WSAC - Gear Up, 12th Year Campaign, College Bound Scholarship, Aim Higher, Ready Set Grad), AVID, FuturesNW, College Success Foundation/WA College Access Network, postsecondary education institutions and NWESD programs. Core partners include:

*FuturesNW:* A non-profit on a mission to level the socio-economic playing field by supporting students from under-served communities to achieve their career and college dreams. They provide resources, mentorship, financial aid literacy training, and advising to succeed in college and beyond.

*NW Washington STEM Network:* Serves as a catalyst for initiatives, leveraging resources and programs through building community to prepare future generations for economic success.

*College Success Foundation-Northwest Coastal:* Through embedded direct-service programs and regional capacity-building, CSF partners with schools, districts, businesses and foundations across the Olympic Peninsula and Northwest region of Washington state to ensure students furthest from educational justice are prepared for and succeed in college and career.

## Approach

The partners worked to create a shared understanding of how existing resources, tools and processes link to completion outcomes, funding direct programming through partner organizations that target family engagement in communities furthest from opportunity, identifying regional best practices and improving the impact of statewide initiatives.

Our intention was to expand the existing relational networks and build trust across stakeholders resulting in open collaboration and a broader network that included resources from outside the area. While initially counter intuitive, serving students outside your region benefits us all and ultimately increases local capacity. FuturesNW intentionally supported work outside to grow statewide capacity; this in turn opened up capacity for WSAC to help with more complicated local cases.

Additional efforts to connect with trusted stakeholders operating in the region produced deeper conversation with the Washington College Access Network (WCAN), powered by College Success Foundation. With a bilingual College Bound Regional Officer dedicated to this cause, WCAN/CSF is an active regional trainer and player in financial aid completion supporting 33 school districts across the NWESD in financial aid completion activities, particularly for students who qualify for the College Bound Scholarship. WCAN leverages its close partnership

with WSAC in these programmatic and capacity-building efforts and has statewide coverage with nine officers working to cover the entire state.

## **Success**

FuturesNW's capacity to support families to learn about and complete the Financial Aid Applications was expanded. *"Without the partnership with the NW Washington STEM Network, FuturesNW would not have been able to afford to do From One to Many, Financial Aid, Tuesday and Friday events at the scale they happened at. FuturesNW also did not have as strong of ties in Skagit county and the STEM Network helped connect them to the movers and shakers in the community. Together we were able to achieve big goals for our region and leverage the strengths and resources everyone brought to the table."* -Ashley De Latour, Program Manager, Futures NW

In the Fall of 2020, FuturesNW (in partnership with the Washington Student Achievement Council WSAC) ran regional workshops to assist high school students experiencing financial hardship or low socioeconomic status in completing FAFSA/WASFA applications. Students from 11 districts attended regional events and 1,162 families were served between October-March. Their work used resources from WCAN, WSAC and the American Indian College Fund to provide the most up to date resources possible for students. Following these workshops, they partnered with 16 high schools to correct Financial Aid application errors with students who qualified for the College Bound Scholarship (CBS). This included counselor outreach with students, individual error correction appointments, an error repair night with WSAC and proactive follow up through re-checking the CBS portal for matches.

Expanding student social networks and inviting more people into the classroom to help students, opens doors and creates scaffolded support so that the responsibility does not fall on an individual. Students know that they have a network of people they can access. An example is FAFSA/WASFA error corrections work in Whatcom that includes FuturesNW tracking the status of students FAFSA Applications, sending a note to school counselors and High School and Beyond coordinators to let them know which students have errors along with an offer to schedule a correction session.

*"Sehome High School's partnership with FuturesNW is one of the most beneficial resources we have to provide to our College Bound students. This past year has been especially challenging and FuturesNW has filled gaps that teaching/advising remotely could not. More FAFSA/WASFA help sessions were added than usual and Ashley DeLatour has been available for student meetings to offer encouragement and insight to those struggling with their financial aid application or post-high school plans. The FuturesNW website is loaded with information and virtual events that we have been able to refer our students to for added support. We could not do this without FuturesNW and we are grateful!"* - Martha Zender, Running Start Advisor, High School & Beyond Coordinator, Sehome High School



## Lessons Learned

As an individual you can be a catalyst in your community, look around for what exists:

- Contact your regional WCAN/CSF College Bound Regional Officer or STEM Network or visit WCAN's website for printable College Knowledge and updated Financial Aid materials – [www.wcan.org](http://www.wcan.org).
- Contact WSAC to find out if they are partnering with a Community Based Organization, Higher Education Institution or other school districts and see if you can join in. They are the go-to place for the most up to date information and training on any changes.
- Grow the volunteer base of knowledgeable financial aid navigators through outreach in bilingual communities and partnership work with CBOs serving unique populations of students and families. CSF/WCAN recruited and trained bilingual volunteers to become FAFSA/WASFA navigators that supported events and activities in schools/districts.
- Reach out to peers at nearby school districts to see what they are doing and share practices.

People are willing to share existing resources and materials. This is a great way to build partnerships aligned toward the common goal of supporting all students in your community. Connecting regional efforts is also a powerful multiplier. An example is FuturesNW's offer to provide bilingual teammates who have expertise in college pathways and Financial Aid to deliver programs and provide coaching for the Foundation for Academic Endeavors Summer Parent Academy.

# CASE STUDY NUMBER FIVE

## Co-creating a New Support System: Training Trusted Partners as Financial Aid Navigators

Context: This case study details the development of a new support system, via training financial aid navigators, to build capacity and support to serve populations furthest from opportunity.

*“To ensure equitable on-ramps to obtaining postsecondary education, financial aid completion is critical. Partnerships with trusted leaders of rural communities are key to providing support and a sense of urgency for financial aid completion for all youth.”*

- Dr. Kareen Borders, Executive Director, West Sound STEM Network

### CONTACTS

Case Study Number 5

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### Partnerships

The West Sound STEM Network leveraged its partnerships with Graduate Strong, Washington College Access Network (WCAN), and Peninsula College to begin developing a systemic approach to expand financial aid filing assistance by training volunteers as Financial Aid Navigators.

## Approach

In 2020 the West Sound STEM Network (WSSN) leveraged its partnerships and promising systems already in place and modeled by Graduate Strong in Kitsap County and North Mason. Graduate Strong is one of five networks that make up the larger umbrella initiative, Kitsap Strong. Graduate Strong is a cradle to career network that utilizes a collective impact approach designed to help students develop the capabilities, connections, and the credentials they need to flourish.

Knowing that many of the experiences and learning opportunities that shape a child's life occur outside of the classroom in our communities, the concept of a Financial Aid Navigator was developed in early 2019. The idea generated a training program, in which community partners, already in deep relationship with youth, would build their knowledge about financial aid, more specifically about the process of applying for financial aid, thereby increasing the community's capacity for supporting financial aid application efforts both in and outside of the school. To date, over 30 Navigators have been trained representing school and youth development staff, mentors, service club volunteers, and Teen Services Librarians. The key to this strategy is rooted in the notion that youth develop capabilities (knowledge and skills) through connections with caring, competent, and trusted adults.

In March of 2021, WSSN gathered with leadership from WCAN, Clallam Resilience Project, and Peninsula College to hold conversations around career, college, and well-being to include common barriers pre- and post-pandemic (COVID) in rural communities of Clallam and Jefferson counties. The Clallam Resilience Project is a consortium of over 50 organizations working together to foster resiliency for residents, organizations, community, and systems. To accomplish this vision, they lead “collaborative, community-wide efforts to obtain and provide resources to enhance community well-being.” Their existing network assisted our leadership team in considering the process of and rationale for how to best recruit new Navigators. The team also considered the scope and timeline of the initial April training date, discussed potential partners, mutual objectives, and how to best expand the network of financial navigators.

The team considered some of the current barriers and consistently found the language confusing when discussing college and career. Complexity of language directly corresponds to financial aid application completion and indicator to on-track to obtain postsecondary credential.

During the COVID pandemic, the ongoing geographic isolation and technical barriers were magnified. Transportation was also a concern—with parents working (or if students themselves were working), families may not be able to transport their student to in-person help when available. Technology was a barrier for students without email, access to a personal computer, and stable internet connection. Previous success was often in-person with a trusted and caring

adult. Clallam and Jefferson counties also include many first-generation college students whose families may be unfamiliar with navigating the financial aid assistance process.

*“The idea of collaborating with multiple community leaders (to create a FAFSA/WASFA Navigator training) was a dream. WSSN and WCAN made that dream possible by quickly providing us the support, resources, and connections we needed in order to offer a Navigator Training to our community leaders. We cannot wait to see this collaboration grow into a long-term support system for our community leaders and students. Thank you, WSSN and WCAN, for making this opportunity possible!” - Katie Autrey, Student Recruitment Manager, Peninsula College*

### **Partnerships Built or Leveraged**

WSSN is leveraging its current partnership with WCAN and Graduate Strong to foster a partnership with Clallam Resilience Project and Peninsula College. This will build capacity, expand outreach, break down barriers, and increase financial aid filing assistance support for all students. The team identified “natural” local partners with intersecting goals and approached them with a personal invitation to become trained as volunteer financial aid Navigators and co-create a system to support financial aid filing completion. The invitation articulated how a cohort of financial aid Navigators help break down inequities, build up individuals’ opportunities, and create a fluid layer of county-wide support. It described how volunteer financial aid Navigators will be provided with ongoing support and mentoring, while assisting students and families with focus on those further from educational and institutional justice in Clallam and Jefferson counties.

WSSN with support from Graduate Strong and Peninsula College, will manage a system to track, recruit, and support Navigators. This collaboration will provide ongoing opportunities for Navigators to attend financial aid assistance events, support within their capacity, and allow for them to share ideas, lessons learned, and best practices to increase financial aid filing in Clallam and Jefferson counties.

### **Success**

A positive outcome of rural outreach, reflected by 70% of attendees at the Graduate Strong Financial Aid Navigator training in April of 2021, were from schools, districts, and organizations in Clallam County. 57% of Clallam-based attendees completed the entire 4-hour training. Many of these participants had pre-existing relationships with the Clallam Resilience Project and were personally invited using established, shared language that highlighted the training’s contributions in developing community resilience.

## Lessons Learned

- Relationships matter, especially in rural areas.
- It is important to listen to what stakeholders need (not go in “to fix”); seek partnerships to collaborate problem-solving and co-create change; don’t make assumptions that what worked in one community will work in another.
- Make sure to do a landscape analysis and survey which organizations are already trusted community partners and engaged in systemic change.
- Partner with trusted community leaders and partners within the populations you hope to serve. Co-create rather support.

# CASE STUDY NUMBER SIX

## Partnering for Financial Aid Completion in the Thurston County Region

Context: Our partnership was developed within the five-county region of the Capital Region ESD (CRESD) 113 and included Thurston, Lewis, Mason, Grays Harbor, and Pacific counties. Financial aid outreach and support was focused on rural and remote families and those furthest from opportunity.

| CONTACTS            |  |  |  |              |
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| Case Study Number 6 |  |  |  |              |
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| Dr. Lorie Thompson  | Network Director<br>CRESD 113                          |  | <a href="mailto:lthompson@esd113.org">lthompson@esd113.org</a>   | 360-464-6718 |

### Partnerships built or leveraged

A stronger partnership between the CRESD 113 and Grays Harbor College (GHC) was developed. Community-based career counselors, and K-12/Skills Center CTE Directors were leveraged along with K-12 school counselors and special services staff, community-based organizations, and higher education partners at SPSCC and Centralia College.

### Approach

In conversations with the local colleges, the awareness of need for farther-reaching outreach became evident. GHC and CRESD 113 decided to partner around increasing efforts to reach

students without access to consistent career and college advising and those furthest from opportunity.

CRESO 113 sent out weekly financial aid updates and resources to student-centered partners: K-12 CTE directors, school counselors and teachers, transition (SPED and 504) committees, youth-focused community leaders (Pac Mtn. WDC, Community Youth Services, Equus Case Managers. etc.), and out-of-school youth-focused agencies. CRESO 113 and GHC held two CRESO 113-sponsored family financial aid events--which included a Spanish interpreter and were ADA compliant. An additional three events were held in April, May, and June as FAFSA/WASFA completion events. At all these events, students and families received needed information about the financial aid process and direct support with completing financial aid applications.

### **Process**

Promotion of the events occurred via LinkedIn, Twitter and Facebook, along with digital flyers sent to partner organizations via email. CRESO 113 posted events on their event webpage and in their *Regional Alliance for Youth (RALLY)* newsletter. GHC promoted the event via updates in their digital newsletter, on social media channels, and via ½ page physical flyers that were forwarded to schools for student distribution. Due to COVID guidelines, tools were digital in nature. Zoom was used as the delivery platform and allowed for registration and attendance tracking and follow-up.

### **Success**

Those who attended the events expressed gratitude for an opportunity to ask questions and obtain assistance in a casual and open platform. The GHC team directed attendees to opportunities for further assistance and follow-up. Students attending were served regardless of whether or not they were currently enrolled or wanted to enroll in GHC in the future. Our event team believed this allowed for more inclusivity.

Things Other Schools Can Try:

- WSAC FAFSA Completion Portal
- WCAN website
- WFAA website
- Otter (texting tool)
- Studentaid.gov
- Individual college financial aid office or website
- Regional Educational Opportunity Center or similar organizations
- Offer language interpreters and ADA compliance in all financial aid events

## Lessons Learned

- High Schools: FAFSA/WASFA completion rates for high school seniors appear to not be inclusive of all students (non-traditional, furthest from opportunity, ELA, SPED, not thriving in K12 traditional classroom environments, etc.)
- Collaboration between K12 and higher education around financial aid completion increases the comfort level of families to engage in conversations and as a result increases financial aid completion.
- More work is needed to promote financial aid completion in rural and remote areas in Washington State.



# CASE STUDY NUMBER SEVEN

## ¿Sabes como pagar por tu colegio? - Identifying New Channels for Community Conversation About Financial Aid

Context: This case study describes the partnership between the Apple STEM Network and the Promotoras de Salud of Quincy. The Apple STEM Network engaged the Promotoras de Salud to learn about the unique barriers, questions and information that might be most helpful to Latinx families in North Central Washington. Together, we hosted a public forum in Spanish for families across the region, amplifying these local leaders' voices across the region.

*"If we are really aimed at making financial aid a tool that is equitably accessible, then It is imperative to build partnerships that we can learn from, and leverage culturally proficient approaches, by amplifying first-hand stories that share relevant, real, and personalized information."*

- Dr. Sue Kane, Apple STEM Network Director

### CONTACTS

Case Study Number 7

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|                                  | NCW Libraries   |  |              |

## Highlighted key foundational practices

- Reflecting first on the regional demographics to better understand the racial, socioeconomic, lifestyle and cultural aspects of the community.
- Collaboratively engaging in strategies that identify and utilize natural channels of communication and information dissemination.
- Prioritizing cultural proficiency in outreach, engagement and support. There are unique barriers that are not addressed by language translation alone.

## Partnerships

- Quincy Community Health / Promotoras de Salud - Mary Jo Ybarra rallied volunteers from the Promotoras de Salud - a trusted network of Latinx community ambassadors across Grant County.
- NCW Tech Alliance (formerly GWATA) - Local nonprofit and regional co-lead for the Apple STEM Network. NCW Tech provides STEM, Technology and Entrepreneurship programs and direct services for business and individuals across the region.
- NCW Libraries - with 30 library branches across the region, NCW Libraries provides a number of community programs and services.
- North Central Educational Services District's Family and Student Engagement Specialist, Gaby Fernandez provides support to migrant families across the region.
- Wenatchee Valley College - Equity and Inclusion Coordinator, Marichuy Alvízar provides services and support for students across the region.

## Approach

The Apple STEM Network engaged the Promotoras de Salud, a volunteer network of trusted community leaders who have been identified by their local neighbors, congregation, or community groups as a trusted conduit of information and wisdom. Promotoras are gathered quarterly for briefings with Quincy Community Health. Briefings can include many topics, including public health and community needs. Each volunteer then disseminates the information to their respective personal and professional networks.

The Apple STEM Network gathered Latinx outreach representatives from Wenatchee Valley College, NCW Tech, NCW Libraries, and the Promotoras de Salud to learn about the unique barriers, questions and information that might be most helpful to Latinx families in North Central Washington. In conversations about the financial aid application process, we learned that there were challenges, practices, and barriers that uniquely impact the migrant Latinx families and students across the North Central Washington Region.

Together, we decided to host a public forum in Spanish for families across the region, amplifying voices and experiences from those in the migrant communities who have had success, personally, as a parent of a student, or with planning or applying for financial aid.

Latinx Outreach specialists from NCESD, NCW Tech, NCW Libraries and Wenatchee Valley College worked together to identify individuals and families who were willing to share their stories and experiences with others. It was important to the community that the experiences shared included family perspectives as well as college students. The event was promoted in Spanish across the region across all of the collaborator social media, in local media print, as well as over La Pera radio.

The event was moderated by Dr. Ruben Reyes, a Quincy High School and University of Washington Dental School graduate. Wenatchee Valley College Equity & Inclusion Coordinator, Marichuy Alvariz delivered an overview presentation on FAFSA/WASFA specifically for the Latinx community. After this presentation, panelists shared their personal stories about the financial aid process and words of wisdom for others.

Panelists included:

- Nora Medina, Computer Science Major, (current student) University of Washington, Quincy High School graduate
- Alpire Family - Daniel and Ruth (parents) and Jairo Alpire (student) - Walla Walla University and Wenatchee High School graduate
- Fragga Family - Antonio and Fabiola (parents) and Daniela Fragga (current student) Wenatchee High School Senior
- Lisbeth Rivera (current student) Psychology major, Wenatchee Valley College, Wenatchee High School Graduate

## Success

Through collaboration and community partnership, migrant families in North Central Washington shared their experiences and provided information to others to expand student engagement in the financial aid process. The virtual panel event was viewed live by 58 individuals and shared through social media 28 times with 2000+ views.

View resources developed here:

- How To Setup a FAFSA ID (Spanish)  
<https://www.youtube.com/watch?app=desktop&v=-0x28OAt74I>
- How To Set Up A FAFSA ID (English)  
<https://www.youtube.com/watch?app=desktop&v=CdmgNeulAPs>
- ¿Sabes como pagar por tu colegio?  
<https://www.youtube.com/watch?app=desktop&v=8W9PLU9Sqcchttps%3A%2F%2Fwww.youtube.com%2Fwatch%3Fv%3D8W9PLU9Sqcc>

- Washington State Commission on Hispanic Affairs  
<https://www.cha.wa.gov/news/2021/3/10/fafsawasfa-informational-webinar-in-spanish-students-bring-your-parents-or-guardians-for-a-chance-to-win-100nbsp>

## Lessons Learned

The most significant lesson learned from this experience is that cultural practices and beliefs are inherently tied to student practices and engagement in the financial aid process. In engaging and listening to the first-hand accounts of these families we were able to amplify culturally appropriate context and perspectives to support families in the financial aid process.

Here are a few of those insights:

Panelist Mr. Alpire, spoke of the opportunity migrant children have to succeed in this country. He spoke of the importance of taking advantage of these opportunities, mentioning examples like co-host, Dr. Reyes who acquired a considerable loan for his education but is giving back to the community. His perspective highlighted the reluctance of some in his community to take out loans for personal development, but he balanced this concern against the greater good for the community to someone return with the medical skills needed in the rural community.

Mrs. Alpire also encouraged parents to get involved in their children's activities, to be present and to cheer for them in anything they do.

Mr. Fraga, another panelist, shared that FAFSA isn't only for students finishing high school, he cited that his wife Fabiola, returned to college to get a degree so she can be an assistant teacher in Wenatchee SD and FAFSA paid for her classes.

Several panelists had insight and wisdom for DACA students and undocumented families who are considering financial aid to support postsecondary education. One panelist noted that in some cases, a common social security number is used to secure resources for families in need. He remarked that this practice can have negative consequences on a student's eligibility for financial aid and is something that families should consider abstaining from to protect a student's eligibility. This insight was one that had not, to our knowledge, been addressed in prior financial aid resource presentations.

# CASE STUDY NUMBER EIGHT

## Engaging Final Semester Seniors in Financial Aid Completion

Context: Snohomish STEM Network supports Snohomish County students consisting of thirteen K-12 school districts and approximately 120,000 students. We partnered with Everett School District with over 20,000 students to focus on Class of 2021 seniors and financial aid application initiation, progress, and completion.

*“Partnering with community to create increased awareness and access for students and families is an essential approach for getting more of our students and families to successfully begin and complete financial aid applications.”*

- Kelly Shepherd, Principal Sequoia High School, Everett Public Schools

### CONTACTS

Case Study Number 8

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### Drivers

Snohomish County School Districts are drastically diverse in size: ranging from 700 to more than 21,000 students. Demographics: Everett Public Schools alone reflect students with 94 different primary languages with rural to very urban settings. We centered high schools with the greatest difference in trending financial aid completion rates from 2020 to 2021 graduating

classes, in Everett a 10% difference, and leveraging existing and additional resources for financial aid completion including school district and specific high school champions.

### **Key foundational practices**

- Focusing on financial aid completion rates over time in all districts, to identify communities poised to design, engage, and deliver uniquely.
- Reflecting first on the regional demographics to better understand the racial, socioeconomic, lifestyle and cultural aspects of the community.
- Collaboratively engaging in strategies that reach all students, support unique needs and create a sense of partnership in the financial aid completion process.

### **Partnerships built or leveraged**

- College Success Foundation, to best understand data reflected in various school districts and communities and capacity to support various student populations.
- Washington College Access Network, to understand existing work and partnerships
- Everett Public Schools.
- Local business provided discount and another business provided donation resulting in no-cost meals for students and attending parents.

### **Approach**

The Snohomish STEM Network worked in partnership with Everett Public Schools to leverage identify and support the school district to communicate with all class of 2021 seniors including email, direct mail, electronic school district communications, pre-recorded phone calls, personal phone calls and utilization of an electronic or personal scheduling assist to identify specific student/parent supports.

For emails and direct mail, Snohomish STEM provided printing and postage, which were created in multiple languages and sent 8 days prior to the hybrid, in person and simultaneous virtual event held at each of four district high schools, every Wednesday for one month. Pre-recorded phone calls and personal phone calls were made 3-4 days prior to the event and final personal phone calls 1-2 days leading up to the event to secure 15-minute appointments during the event. If scheduling gaps existed, financial aid mentors supported additional time with students and parents to continue making progress.

Each student was identified as: not initiated, initiated but incomplete, complete and flagged for specific support needed within the application including translation services or notes that would maximize mentor time with the student.

When students and parents completed their session, mentors identified next steps, any additional support that would be helpful, and scheduled them with their high school coordinator to meet again. They were provided with an appointment card and a meal.

## Success

To our surprise, the virtual option was the most popular in all four high schools, yet most cumbersome for mentors to provide guidance. We learned providing options to meet students and families in place is essential and can change over time.

At all four events there were students who completed their financial aid application that day! Parents expressed appreciation and excitement about the support they received.

Everett Public Schools will continue to offer this program with in-person and virtual options, screening for support in multiple languages in partnership with CSF, WSAC and district expertise and resources in addition to time spent during the school day to support student financial aid completion.

Things Other Schools Can Try:

- WSAC FAFSA Completion Portal.
- Centering events and communication about events through community partners trusted by unique student/parent populations in addition to school-based strategies.

# CASE STUDY NUMBER NINE

## Building on Existing Wealth(s) of Knowledge to Support Financial Aid (FAFSA/WASFA) Completion in ESD112

Context: ESD112 supports 30 school districts reaching from the Pacific Ocean to the end of the Columbia River Gorge. More than 60% of school districts in ESD112 are rural and sometimes highly isolated, with limited access to resources, information, and direct support for students at risk of not receiving financial aid awareness. In fact, data shows that rural areas in Washington State show a decrease in FAFSA completion by 14% compared to rates last year. This case study documents efforts to asset-map strong approaches to completing FAFSA/WASFA for those students in underserved populations including undocumented, first-generation and low-income students.

*“Bring services to students and families rather than expecting them to find and seek out services.”*

*- Data excerpt from Case Study Number Nine*

### CONTACTS

Case Study Number 9

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### Partnerships built or leveraged

- Postsecondary partners provide a variety of FAFSA/WASFA supports to schools and students: Locally, WSU Vancouver and Clark College have school outreach nights and online support for high school students. WSU Vancouver hosts FAFSA/WASFA training sessions for high school staff and counselors, as well as community members.
- Governmental and community-based organizations: We learned about promising practices for connecting with targeted populations from partners around the state, including FuturesNW in Northwest ESD 189 and WCAN.



- Career and Guidance Counselors from many of our region’s 30 school districts: Our area schools, including staff from LaCenter and Vancouver, shared their FAFSA/WASFA strategies with us. Through these connections, we were able to assess where opportunities for more support exist.

## **Approach**

Career Connect Southwest brought on an Education Policy Intern to lead the research for the region. We used the following questions to help guide our research: What is already happening in our region to support students’ completion of the FAFSA and/or WASFA? Are those supports working for first-generation college students, low-income students, students of color, and undocumented students?

We began by searching school districts’ public-facing websites and social media to learn of the events they had promoted for FAFSA and WASFA support. Through this process, we learned that many of our districts partner with our local postsecondary institutions, including Clark College and WSU Vancouver, to deliver financial aid assistance to their students. From there, we scheduled conversations with career and guidance counselors, postsecondary student services departments, and community-based organizations.

Clark College mentioned their College Goal WA events they host in collaboration with WSU Vancouver, as well as the college and financial aid outreach work with local communities of color. WSU Vancouver told us about their training sessions for high school staff and counselors. They stressed the importance of thoroughly explaining WASFA so that undocumented students are empowered with information and of protecting students and families so they feel safe. Additionally, we talked with career and guidance counselors from LaCenter and Vancouver who discussed the success of one-on-one, individualized support for FAFSA/WASFA applications due to students’ and families’ unique financial situations. They also highlighted that students can often feel more comfortable asking questions when someone is sitting next to them as they complete the application.

Over and over, we heard that there is a need to bring services to students and families rather than expecting them to find and seek out services. This is especially true for first-generation college students, low-income students, students of color, and undocumented students. Furthermore, we heard that it is important to ensure that there are translators and trained staff during FAFSA/WASFA events so that students and families have everything they need to feel confident and empowered to complete their application.

## **Success**

In Fall 2021, we will share the best practices we have encountered throughout this landscape analysis with school districts as well as colleges and organizations we connected with, as well as work with school districts to learn from the successes of their neighboring districts. If our

school partners express interest, we are prepared to host and record a webinar of best practices around FAFSA and WASFA, draft a directory of resources available to Southwest districts, and/or provide hands-on support in implementing new programs at their schools.

#### Things Other Schools Can Try:

- Otterbot: a financial aid texting bot created by WSAC
- Incentivize FAFSA/WASFA completion using raffles, gift cards, etc.
- Collaborating on training and completion events with higher education institutions
- Hosting completion events at locations outside of school buildings (community centers, libraries, etc.).

#### Lessons Learned

- There is already a wealth of information, training opportunities, and resources for FAFSA and WASFA available to schools. However, there is no central location to access them. Similar to FuturesNW's resource list, it could be beneficial to create a database or hub for all things FAFSA/WASFA.
- WASFA should be advertised just as much as FAFSA so that undocumented students know what their options are. Additionally, high school staff should be trained on WASFA components just as they are trained on FAFSA components.
- Resources and services should be brought to students and families and events should be offered during accessible times to accommodate for working parents and guardians.

# CASE STUDY NUMBER TEN

## Supporting NEWESD 101 Families and Students by Providing Virtual FAFSA/WASFA Completion Event Workshops

Context: This case study describes how the Spokane STEM Network partnered with the College Success Foundation and the Washington College Access Network to support our regional ESD (NEWESD 101) school districts with virtual FAFSA/WASFA completion event workshops. NEWESD 101 contains a variety of school districts ranging from small and rural to large and urban across seven counties: Ferry, Pend Orielle, Stevens, Lincoln, Spokane, Whitman and Adams.

*“The partnership that College Success Foundation has with the Spokane STEM Network has been instrumental to improving our regional financial aid completion rates. Recognizing that by 2030, we strive to see 70% of Spokane and Eastern Washington residents with some form of postsecondary credential attainment, we have worked to thoughtfully engage under-served populations within our communities in the financial aid process; helping them understand all the dollars available through federal and state aid along with scholarship opportunities. Together, we are opening worlds of opportunity within postsecondary education and we know that partnerships like ours, with Spokane STEM, will create a more vibrant future for our students, our economy and our region as a whole.”*

- Shannon Demant, Regional Director, Eastern Washington, College Success Foundation

### CONTACTS

Case Study Number 10

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## Approach

*People:* The Spokane STEM Network, Educational Service District 101 with the College Success Foundation and the Washington College Access Network partnered to support seniors and their families in the school districts of Eastern Washington to offer Financial Aid virtual completion events. Additional support was provided by local high school principals and counselors, community-based organizations, Greater Spokane Inc. (GSI) and Innovia.

*Process:* Scheduled, organized, shared, advertised, and provided ten virtual FAFSA/WASFA completion event workshops at the end of 2020 into early 2021 for families and students across NEWESD 101.

*Tools:* Digital fliers were created and disseminated across districts for each set of workshops, Twitter posts were made and shared, each session was recorded for future reference, and a final video was produced by CSF for use by high schools, community partners and even employers to talk through the steps to complete a FAFSA/WASFA application:

<https://youtu.be/9PdK79PgtVY>.

## Partnerships built or leveraged

The Spokane STEM Network is a strong partner with College Success Foundation (CSF) through their mission of improving educational equity for youth from groups that historically achieve college degrees at lower rates, specifically low-income youth, youth of color, and first-generation students. CSF helps students on their journey of applying to college and then going on to complete a postsecondary degree. This year, we were eager to financially support CSF's ten virtual FAFSA/WASFA completion events held throughout November and December for students and families across NEWESD 101. Research shows that seniors who complete a financial aid application are 84% more likely to enroll in postsecondary education. With increased postsecondary degree attainment, our region can benefit from a stronger talent pipeline, positively contributing to increased economic development for our communities.

The free completion events were marketed throughout the region through CSF's and Spokane STEM's networks including high schools, NEWESD 101, community-based organizations, and Greater Spokane Inc. Each event was led by CSF's Scholarship Services Director, Maria Rebecchi, who has worked in the financial aid industry for over 20 years. She, along with other CSF staff and volunteers, provided the critical support and guidance to each student and family to enable them to complete their financial aid application, unlocking thousands of dollars in federal and state-based support for students' postsecondary education goals.

In addition to the workshops themselves, partnerships were strengthened with local businesses to help them understand why this process/step in an individual's early career journey should matter to them and their workforce development pipeline. Due to these virtual workshops and larger community conversations that were spurred by this work, a local credit

union hosted their own employee FAFSA/WASFA completion workshop in early 2021 to provide a space of support, engagement and connectivity often left untouched by employers.

### **Success**

Through collaboration, more than 130 high school seniors and their families from 55 schools in NEWESD 101 received financial aid information and assistance in the fall and winter of the 2020-2021 school year. Student-serving organizations found synergy in partnering together to deliver financial aid advising and support. Thanks to the commitment of more than 25 community financial aid volunteers from partner organizations, students and their families received one-on-one support in their completion of a FAFSA or WASFA application.

By building greater synergy across our community, a first-time conversation was had with business at the table about why FAFSA/WASFA completion is a crucial piece of economic and workforce development. This effort has opened more doors to engage business and industry in this conversation, offering examples of how they can be an active part of the solution towards completion.

### **Lessons Learned**

The Spokane STEM Network's partnership with College Success Foundation and the Washington College Access Network across NEWESD 101 highlighted a few challenges when building out a strategy around building out FAFSA/WASFA training events for priority populations:

Virtual formats have pros and cons:

- Pro: it has the ability and efficiency to reach more families where they're at with less coordination and guidelines to follow in-person.
- Con: not everyone has reliable internet connection and/or technology to take advantage of these free trainings.

With so many variations of reopening plans being implemented across the 50+ school districts in NEWESD 101 and with a shorter timeline to work with around various holiday and mid-year breaks, we decided not to offer in-person trainings.

We initially planned to mail out postcards to all Juniors and Seniors across NEWESD 101 about the virtual events but decided against this strategy due to the extra costs, coordination, execution, and potential confusion it may have caused for students who had already completed their FAFSA/WASFA before receiving the event postcards. Instead, we relied on flyers that were pushed out to Superintendents, Principals and Counselors through emails and social media channels.

Organizations (both education-based and non-education based) can work collaboratively to provide necessary support to students and families. By convening partners from student-

serving organizations, businesses, higher education, and regional school districts, common challenges were raised and understood by partners who otherwise may not be engaged in the work. Sharing the responsibility for delivering high-quality Financial Aid support builds synergy and allows students and families access to the one-on-one assistance often required to complete a FAFSA or WASFA application.

# Resources

| <u>Name</u>  | <u>Link</u>   | <u>What's there</u>  | <u>Grade level</u> | <u>Audience</u>  |
|--|---|--|--------------------|--|
| 12th Year Campaign                                     | <a href="https://wsac.wa.gov/actionplan">https://wsac.wa.gov/actionplan</a>                   | Resources for Financial Aid Advising Day; videos, activities, and free material ordering | 11-12              | Educator for use with students and families                        |
| Washington Application for State Financial Aid (WASFA) | <a href="http://www.wsac.wa.gov/wasfa">www.wsac.wa.gov/wasfa</a>                              | WASFA application, resources on applying   | 12                 | Students and families  |
| College Bound Scholarship                              | <a href="https://wsac.wa.gov/college-bound">https://wsac.wa.gov/college-bound</a>             | College Bound Scholarship information, resources, templates                              | 7-12               | Educator for use with students and families; students and families |
| GEAR UP Educator site                                  | <a href="https://gearup.wa.gov/resources">https://gearup.wa.gov/resources</a>                 | College readiness, application, financial aid, mentoring, etc., templates                | 7-12               | Educator for use with students and families                        |
| GEAR UP Student site                                   | <a href="https://gearup.wa.gov/students-families">https://gearup.wa.gov/students-families</a> | College readiness  | 7-12               | Students and families  |
| WSAC Plan Your Future Site                             | <a href="https://wsac.wa.gov/actionplan">https://wsac.wa.gov/actionplan</a>                   | Career exploration, college readiness to financial aid                                   | 11-12              | Students and families  |
| WSAC Apply page  | <a href="https://wsac.wa.gov/apply">https://wsac.wa.gov/apply</a>                             | Financial aid information  | 11-12              | Students and families  |
| Washington College Grant                               | <a href="https://wsac.wa.gov/wcgc">https://wsac.wa.gov/wcgc</a>                               | Washington College Grant information   | 11-12              | Educator for use with students and families; students and families |
| Otterbot   | <a href="https://wsac.wa.gov/otterbot">https://wsac.wa.gov/otterbot</a>                       | Otterbot texting service information   | 12                 | Educator for use with students and families; students and families |

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|------------------------|---|------------------------------------|----|--|
| Aim Higher WA Training | <a href="https://wsac.wa.gov/aim-higher-training">https://wsac.wa.gov/aim-higher-training</a> | Financial aid training information |    | Educators  |
| Federal Student Aid    | <a href="https://studentaid.gov/">https://studentaid.gov/</a>                                 | Financial aid information          | 12 | Educator for use with students and families; students and families |