



# Arizona Innovation Alliance

## Community of Practice Communication & Retention

### *Summary Report*

*Three Universities. One State. Education for All.*



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# About the Community of Practice on Communications and Retention

## History & Background

The strength of our Arizona public universities is highlighted through our best assets - our people. The Community of Practice on Communications and Retention (COP) brought together a network of leaders who are experts in how to use strategic messaging and communication practices to support students. By sharing promising practices, enabling collaboration for innovative approaches to student support, and connecting great minds around big ideas, this COP aimed to increase student retention at each of our institutions.

The COP launched in Summer 2022, with subcommittees kicking off in Spring 2023. The official convening of the COP concluded at the end of Spring 2023, although informal gathering and connections continue across team members.

The COP established three original goals:

- Enable collaborative discourse and sharing of information that could positively impact the student experience at our three institutions.
- Deepen understanding of current practices for university messaging as interventions for retention.
- Share promising practices, technology-based solutions, and analytic tools for personalized engagement.

## COP Subcommittees

After six months of knowledge sharing, COP members surfaced two areas for further exploration and collaboration at the practical level.

1. Messaging for Student Financial Obligations - financial messaging is especially complex due to the critical nature of these communications, the hard to understand terminology, and the emotional charge associated with talking about money. This subcommittee wanted to deepen the shared learnings on how to best support students through messaging in this space.
2. Enrollment Messaging for Continuing Students - traditional communication and retention strategies focus on the first year student. This subcommittee chose to emphasize opportunities for messaging to engage students in their second year and beyond.

The subcommittees established three additional goals:

1. Explore and highlight program innovations among AIA institutions in the areas identified.
2. Create an environment for practical knowledge to be shared.
3. Explore opportunities for collaboration with potential to scale promising practices.

## COP At-A-Glance

### COP & Subcommittee Members

<b>NAME</b>	<b>TITLE</b>	<b>MEMBERSHIP</b>
<b>Christine Salvesen</b>	Assistant Vice Provost, Student Success & Retention Innovation (UAZ)	COP
<b>Jenny Nirh</b>	Director, Collaboration, Communication & Outreach (UAZ)	COP, Continuing Students
<b>Sarah Kyte</b>	Senior Research Scientist, Student Success & Retention Innovation (UAZ)	COP
<b>Wendy Bruun</b>	Assistant Vice President, Student Affairs (NAU)	COP
<b>Cari Wilkins</b>	Director, Enrollment Services, Statewide (NAU)	COP
<b>April Cook</b>	Director, Student Affairs Strategic Initiatives (NAU)	COP
<b>Trevor Ritland</b>	Communications Manager (NAU)	COP, Continuing Students
<b>Crystal Miller</b>	Director, Student Success Innovations (ASU)	COP, Continuing Students
<b>Natalie Goebig</b>	Director, Strategic Communications (ASU)	COP
<b>Andrea Stark</b>	Communications Coordinator (ASU)	Continuing Students
<b>Jennifer Ludwig</b>	Director, Strategic Interventions (UAZ)	Continuing Students
<b>Christe LePeau</b>	Financial Literacy Coordinator (UAZ)	Financial Obligations
<b>Melissa Heinrich</b>	Assistant Vice President, Financial Aid and Scholarship (ASU)	Financial Obligations
<b>Esther Cuellar</b>	Assistant Director, Enrollment Management (NAU)	Financial Obligations
<b>Ty Seibel</b>	Associate Director, Academic Enterprise Communications (ASU)	Financial Obligations
<b>Jackie Henderson</b>	Assistant Director, Communications (NAU)	Financial Obligations

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COP & Subcommittee  
Members

7

COP Sessions

8

Subcommittee Sessions

### Discussions Included

- ▶ Retention & Communication Strategies
- ▶ Operational Structures
- ▶ Current Efforts & Initiatives
- ▶ Assessment Metrics & Results

### Materials Shared

- ▶ ASU Fall 2022 Registration Toolkit
- ▶ ASU Partner Training Resources
- ▶ UAZ University Statements Examples (DACA)
- ▶ UAZ Embedding Messages Guide
- ▶ UAZ Smart Communications Planning Guide
- ▶ UAZ New Student Interest Survey
- ▶ UAZ Retention Communication Playbook
- ▶ NAU Pulse Survey

## Setting the Foundation: Institutional Successes and Challenges

### ARIZONA STATE UNIVERSITY (ASU):

ASU aims to communicate smarter and reduce over-messaging to students by utilizing transparent and consistent communication channels. They take a data-driven approach, using multiple channels for just-in-time interventions with students. Their focus is on utilizing communication channels preferred by students. ASU is currently developing a new communication model to enhance the student experience and support student success goals. They prioritize partnerships with academic and service units to design innovative solutions and establish success metrics for a performance-based model. Sunny, ASU's chatbot, has been successful in providing on-demand support to students, focusing on wellness, academic support, and retention during the pandemic. ASU is also implementing campaigns like wellness check-ins and shout-outs from the academic community to engage students.

### NORTHERN ARIZONA UNIVERSITY (NAU):

NAU has formed a Communications Workgroup to coordinate communication efforts among various departments. They are looking at student email journeys and aim to enhance the personalization and data-driven approach of their mobile app. NAU's retention efforts involve the use of the NAU GO mobile app, which incorporates student voice in design and offers first-year resources, positive communications from faculty, and outreach to students of concern. Challenges include resource allocation, reducing repeated communications, inconsistencies in systems across units, and obtaining the necessary data for customization. Priorities include personalized messages, motivating and celebrating student enrollment, re-establishing relationships, refining virtual services, and increasing representation on social media.

### UNIVERSITY OF ARIZONA (UAZ):

UA has an operational structure that involves collaboration between various departments to promote student success, persistence, and degree completion. They employ targeted outreach, emphasize belonging and mindset in their communications, and implement transitional programs such as AZ Launchpad and Wildcat Welcome. UA's success stories include the Gratitude Project and recognition through awards for delivering virtual student services. Their priorities involve engaging campus partners and faculty, ensuring consistent and clear retention communications across the institution, addressing the return-to-campus situation, and coordinating communication efforts through their new MARCOMM structure.

## Challenges Our Institutions Face:

- NAU highlights the challenge of data infrastructure and technology support. The current system may not be robust enough to support communication journeys while maintaining personalized content.
- ASU faces the challenge of maturing their communications to cater to different student populations and frame messages accordingly. The lack of a standardized way to measure student engagement with services indicates a need for an enterprise-wide appointment scheduling system.
- ASU's decentralized model for the academic experience of enrolled students poses challenges in designing a cohesive communication strategy.
- UAZ discussed challenges and growth areas related to their transition to a Salesforce system with marketing. They need to manage multiple communication channels and address decentralized messaging from staff members.
- Across all institutions, there is general fatigue among staff regarding the adoption of new technologies, requiring changes to be implemented thoughtfully.

The universities have made strides in improving student communications by focusing on personalized messages, utilizing data-driven approaches, implementing innovative solutions, and fostering a sense of belonging and support among students. Challenges include resource allocation, system inconsistencies, data availability, and the adoption of new technologies.

## Responses to Institutional Successes and Challenges

After each institution shared their successes and challenges, the group collectively discussed possible ways to approach the challenges, which resulted in four opportunities, outlined below.

### #1: Perhaps we could collaborate on a resource that we could share across our institutions.

This could encompass various components, including inquiries into surveys and research conducted at different academic establishments, implementing a universal texting service and launching a comprehensive student retention survey.

To enhance the depth of research, suggestions have been made to conduct focus groups and interviews with students who may not traditionally engage with surveys, ensuring a more inclusive approach to data collection. The recommendation was made to explore the National Survey of Student Engagement (NSSE) data as an additional valuable tool for informed decision-making. As part of this collaborative effort, there is also a request to access the results of the University of Arizona's texting service analysis, facilitating the sharing of insights and best practices across institutions. All suggestions hold the potential to benefit multiple institutions.

### #2: Explore the retention communications "playbook" idea. Also like to learn more about UAZ's change of major workshops and NAU's CAS message to track intent to enroll in the next term.

The team had interest in exploring the retention communications "playbook" idea, along with UAZ's change of major workshops and NAU's CAS "intent to enroll" message. With the change of major workshop, there was curiosity about how this goes hand in hand with advisors who support students changing their majors. Finally, the participants discussed understanding the efforts by each of the colleges to support students in finding their fit at the university.

### #3: Interested to learn more about what's included in NAU's FYE Digital Care package and how/if it ties into orientation.

Participants were interested in NAU's FYE Digital Care package and its connection to orientation. Specifically, most wanted to see a description of the Adobe Spark page used to introduce students to campus culture. Other components to explore included the care package for different stages of the semester, the use of Google analytics to assess usefulness, and further clarification on those owning and sending email communications.

### #4: How could we capture who a student has connected to "almost like a self-identified accountability buddy" that our retention teams could voice communications from?

Participants discussed how personalized outreach has positive results with student engagement and how finding a way to capture student connections and using them for targeted communications could be beneficial. Areas of interest to learn more about included seeing examples of UAZ's student leaders' communications to students, testing the communications' effectiveness from a person the student has connected with, and the use of Salesforce to track communications.

One idea that surfaced was collaborating to create a matrix of who should reach out to students based on their scenarios, that would consider the best point of contact for different situations and the use of peer mentors and advisors. The group shared the desire for advisors to be that connection with students and the need to ensure the right person is helping the student and providing resources. Lastly, the need to address territorial concerns and develop individualized communication approaches for different colleges was shared.

## COP Discussion Topics

Stemming from the first COP conversations, five topics of interest were selected to discuss. Each topic was the focus of conversation for a COP meeting. The five topics of interest were:

**Topic 1: Alignment on the Arizona resident retention challenges and strategies to better support academic success**

**Topic 2: Assessing student communication preferences**

**Topic 3: How do you measure success at your institution? What analytics do you utilize?**

**Topic 4: Creating an inbox to see 80% of the emails that students are receiving.**

**Topic 5: Enrollment messaging for continuing students**

This section outlines the key takeaways from each conversation, along with promising practices and continued challenges on the topic discussed.

### Topic 1: Alignment on the Arizona resident retention challenges and strategies to better support academic success.

The first COP discussion topic meeting set the stage for retention challenges faced by the institutions, with emphasis on the support gap for continuing students. Members ideated how improvements to the priority deadlines process and communications could be improved to positively support retention. We discussed the national trend of students not adequately planning,



completing, and submitting forms, highlighting the associated risk of assuming that funds will always be readily available.

### Highlighted Promising Practices

- Provide increased levels of support for continuing students during the admissions process to understand finances and complete FAFSA and why we need documents we need
- Offer the same priority deadlines to make it less confusing for families with students at multiple institutions. Improvements could include making language similar, simplifying text, and a larger message sent to students and family to communicate a date that is the same for all each year.

### Continued Challenges

- Limited resources for continuing students, which impacts the data analysis and understanding, along with ability to implement engagement strategies

*“We may not be the ones designing the process, but we are responsible for the communications and the impact on retention and outreach efforts.”*

### Topic 2: Assessing student communication preferences

During the second discussion topic, members focused on how developing guidelines to design surveys around students is difficult, and best practices for the design process.

Ideas generated included:

- Testing scenarios to see which has the biggest impact.
- Is there a faculty member or researcher at any of our institutions that can talk about platforms and help us anticipate communication trends?
- What is the data telling us about the students that need more support?

### Topic 3: How do you measure success at your institution? What analytics do you utilize?

The discussion on measuring success at institutions revolved around various metrics and approaches towards understanding students' state of mind and how to connect with them.

### Highlighted Promising Practices

- Benchmarking retention and graduation rates for populations with targeted communications.
- Considering social psychology factors that influence quality of life in communications.
- Utilizing chatbot check-ins to understand students' well-being.
- Adding sense of belonging questions in surveys.
- Switching from individual assistance to gauging the overall climate on campus.

### Continued Challenges

- Managing overlapping questions and information across multiple surveys
- The impact of online learning on survey response rates

#### Topic 4: Creating an inbox to see 80% of the emails that students are receiving.

The conversation focused on consolidating student messaging and tracking student response rates. Sub questions that were explored during the discussion of this topic included, *What are you utilizing to consolidate student messaging to see student response rate? Does anyone use a persona to track emails with students?* Strategies mentioned are outlined below.

##### Highlighted Promising Practices

- Recruiting student employees to assess email volume and quality
- Identify mass email communicators utilizing system reporting and tracking (Salesforce)
- Providing best practices and templates to communicators to improve communications
- Exploring the use of a student persona to send emails
- Visualizing student responses, such as creating an inbox or using low-tech solutions like Excel, to capture themes and opportunities

#### Topic 5: Enrollment messaging for continuing students

The topic of enrollment messaging for continuing students involved discussions on personalized outreach and interventions. Strategies mentioned included sending surveys prior to enrollment and following up based on responses, using various data points to identify students at risk of not continuing enrollment, collaborating with college and success centers for personalized outreach, and considering metrics like financial holds and off-track majors. The importance of summer courses and tracking intent to enroll were also highlighted, along with challenges in data tracking and reporting.

A sub question for this topic included, *How are different student populations specifically messaged to, for enrollment reminders?*

Overall, the discussions emphasized the importance of understanding student well-being, fostering a sense of belonging, and utilizing data-driven approaches to support student success and enrollment.

##### Highlighted Promising Practices

- Using various data points to identify students at risk
- Collaborating with college and success centers for personalized outreach

## Exploring Focus Areas: Subcommittee Discussions

### Subcommittee A: Enrollment Messaging for Continuing Students

#### Topic 1: The continued enrollment messaging approach as more students take breaks

In this discussion, participants discussed various aspects of their communication strategies and approaches to enrollment. Recommendations included incorporating financial aid preparation into the registration campaign to address potential roadblocks, sequencing communications from the registrar's office and financial aid to address any enrollment holds, deploying custom outreach based on the term (i.e. tracking fall-to-spring enrollment numbers as an indicator of overall enrollment trends and having a plan for follow-up communications), and educating students and providing resources to help them overcome the challenging experience of navigating enrollment holds.

Overall, the discussion revolved around the need for comprehensive and targeted communication strategies, long-term planning, pre-enrollment education, addressing financial aid concerns, and supporting students through enrollment processes and beyond, especially in light of the COVID-19 pandemic.

### *Highlighted Promising Practices*

- The ASU Registration toolkit is a resource used to streamline and enhance the enrollment process for students. It includes various components such as a spreadsheet with links and a calendar of communications, visual elements like photos and branding, social media graphics, campaign overviews, and briefs detailing target audiences and campaign length.
  - The toolkit utilizes proactive communication strategies, personalized email messaging based on registration holds, digital signage, social media outreach, and external ads on platforms like TikTok and Google.
  - There is a dedicated Advisor Portal Campaigns section that provides advisors and success coaches with templates and resources to guide conversations with students, particularly those on probation or facing challenges.
  - The toolkit is primarily used by staff and advisors at ASU to support students throughout the registration process and improve efficiency.
- University 101, a course at UAZ that helps students explore big questions with assignments specific to exploring general education courses before enrollment opens for the next semester.
- ASU's pre-enrollment education, utilizing student-produced TikTok videos to educate first-year students on enrolling and planning by teaching them before enrollment opens

### *Continued Challenges*

- Balancing a unified voice with targeted messaging across institutions, there is variance in who leads communications. College partners desire more transparency and ownership but are unable to handle the associated workload. There is a constant need for collaboration between central communication teams and distributed communication teams.
- Post-COVID hardships, where students face increased vulnerability and challenges, with colleges becoming more aware of these challenges.

## **Topic 2: Measuring efficacy of re-enrollment messaging approaches. Faculty message and its impact on persistence**

This discussion centered on the importance of personalization and connecting with students on an individual level. Individuals mentioned successes of automated systems and using surveys to determine when students are more likely to respond to communications. Another topic discussed was the impact of faculty messages on student persistence. All emphasized the importance of providing accessible feedback and considering timelines, such as grade submission, in messaging academically ineligible students. Also mentioned was the use of feedback reports and efforts to change faculty mindsets to consider outside factors affecting students.

### *Highlighted Promising Practices*

- SMS texting outreach, UAZ sent warning intercept messages to students who had yet to enroll, resulting in a 28% response rate, while ASU sees success with Sunny, in reaching students at the right time and providing them with the right resources.

- Strengthening the faculty-student affairs relationship, to amplify messages and ensure faculty are aware of re-enrollment timelines, is a strategy used successfully at NAU. UA shared their efforts in providing early academic feedback to students, helping faculty understand the impact of their words on students' experiences.

### *Continued Challenges*

- Incorporating texts when students share their preference for emails and critical messages and those are generating better response rates

### **Topic 3: How to identify, engage with, and support “at risk” students with low likelihood to re-enroll.**

This discussion highlighted the importance of tracking non-enrollment, identifying at-risk students early, and addressing both academic and non-academic barriers to support student success. The group focused on utilizing data, personalized messaging, when and how to identify at-risk students, and fostering a sense of belonging to improve student outcomes.

### *Tracking non-enrollment in Salesforce and other tools*

- NAU uses predictive scores through CIVITAS and looks at persistence scores around mid-season. By examining previous approaches, mentoring programs, targeted outreach at midterms, and connecting students with resources, and connecting it to what happens in the marketing cloud, NAU aims to share communications data and insights on what students gravitate towards.

### *Timing to identify at-risk students*

- UAZ identifies at-risk students early on through mechanisms like admissions and orientation processes. They encourage participation in early academic warning systems and have custom messaging and follow-up with students. They also utilize weekly surveys and college pulses to track student progress and well-being.

### *Non-academic barriers*

- Factors contributing to student risk include financial difficulties, family emergencies, living/roommate situations, and work schedules.
- Sense of belonging is an ongoing process, and it's important to address different realms of belonging and cultural identity.

### *Highlighted Promising Practices*

- ASU's Coordinated Care Pilot in Fall 2022 aimed to provide a highly personalized communication experience to students through "care coordinators" who directly connected students with resources.
  - Bi-weekly messages were sent to students via ASU's Chatbot, Sunny
  - The pilot targeted a maximum of 2,000 first-time, first-year students identified based on persistence outlook predictions as of week 3 of the semester, indicating they may be at risk of not continuing their studies.
  - The timing of identifying at-risk students right after semester start allowed for early intervention and support. In addition to academic factors, the pilot recognized that non-academic barriers could also contribute to student risk. These barriers included financial difficulties, family emergencies, living or roommate situations, and job/work

- schedules. The pilot aimed to provide support and assistance to students in overcoming these non-academic challenges alongside their academic needs.
- To track and document non-enrollment and any communication escalations, a spreadsheet was used in conjunction with Salesforce. Messages that required assistance from specific units or colleges were escalated in Salesforce for the respective team to handle.
  - Right-timed campaigns focused on belonging and connecting students to resources.
  - Collecting data on student belonging at the beginning and end of the year, matched with identifying students and analyzing data in the moment an intervention is needed.

## Subcommittee B: Refocusing Messaging for Student Financial Obligations

### Topic 1: Best practices for Financial Aid offices in collaborating with campus departments and training others to speak about financial aid and/or financial literacy.

This conversation revolved around providing students with appropriate financial support. Students are in contact with many departments around campus, including inclusion centers, front-facing client service teams, and faculty, to whom they may request financial aid information or support. Each team has varying abilities to support the student based on what is needed and can be equipped with information to guide students when possible.

However, there is a balance between providing and restricting access for privacy and security of student data. Departmental access to student financial aid information is limited. By leveraging campus partnerships and providing appropriate training, the institutions aim to effectively address student needs while adhering to data protection guidelines.

While data sharing with campus departments is approached cautiously to ensure the privacy and security of student financial aid information, the institutions conduct trainings for campus partners to equip them with the necessary information to effectively triage student questions and provide support. These trainings aim to enhance the ability of faculty and staff to work with students in a way that promotes their success.

#### *Highlighted Promising Practices*

- Take a proactive approach to outreach, using Salesforce for escalations and communication with Financial Aid. Use data analysis to target specific student groups and provide resources. Collaborate with departments on entry-level queries and information sharing. Implement communication strategies for at-risk students through a retention team.
- Train offices on addressing basic student queries and hold info sessions to address student concerns and provide outreach strategies. Have dedicated staff members as points of contact between Academic Advising and Financial Aid. Host office hours to meet students where they are comfortable. Prepare department staff to answer common questions by including short articles in department newsletters.
- Utilize internal chat systems for staff to easily contact Financial Aid counselors during academic advising sessions.
- For all, supporting tools and processes were used, including sharing conducting front-end training for staff and including dashboards and a Q&A PowerPoint, and sending Newsletters with policy updates and training references,

- Focusing on student self-service, providing a tutorial to familiarize them with financial aid at the beginning of the semester
- NAU has an active Financial Aid partnership with Office of Indigenous Student Success (OISS), part of which entailed a financial aid roadshow, helping OISS staff lead students through their LOUIE experience and ask basic questions to guide students to self-serve before reaching out to financial aid. Students were emailed with references to prepare, and an outreach campaign was launched to support the effort.

## Topic 2: Financial wellness/literacy workshops and supporting Spanish speaking families through financial aid processes.

Each institution shared efforts related to building financial literacy for their communities and ways that primary Spanish speaking households are supported. Efforts include family and student curriculum programs, training modules, surveying, and ... The institutions recognize the importance of financial readiness and aim to assist students of all ages and stages of their educational journey and are committed to understanding the specific needs of their student populations.

### *Helping Spanish Speaking families understanding financial aid/tuition payment process*

Our institutions are committed to providing accessible and comprehensive support for Spanish-speaking students and their families throughout their admissions and financial aid processes. The Financial Aid teams raise awareness about the unique challenges faced by undocumented students, such as the inability to complete a FAFSA. They collaborate with faculty involved in Hispanic-Serving Institution (HSI) efforts to effectively engage Spanish-speaking families. Additionally, significant improvements have been made to all websites. These efforts demonstrate how our institutions strive to provide an inclusive experience for students and their families.

### *Highlighted Promising Practices*

- Offer tailored programs
  - NAU's "Scholarships A-Z" program, assists undocumented students and families understand tuition and scholarship opportunities.
  - UAZ's "Determining Your Out-of-Pocket Costs" program helps students understand the expenses associated with college
    - Runs April to August and targets admitted students.
    - It focuses on discussing the various costs of attending college, including tuition, housing, meals, and books.
    - The program also considers scholarship requirements and encourages students to estimate their tuition costs.
    - UAZ emphasizes the importance of open communication between parents and students to determine if financial aid is a feasible option.
    - They provide a timeline for recommended actions to guide students through the process.
- ASU's iGrad, utilizing loan entrance and exit counseling modules to provide valuable financial information, and Hey Sunny Newsletter, which covers topics relevant to students' current progress
- Utilizing a Financial Wellness Month survey to gather insights into the information that is most relevant to students.
- The use of Financial Aid-Admissions co-presentations, allowing for a comprehensive and convenient support system.

- Using appropriate verbiage, such as "Determining your Financial Aid Cost," to ensure clear communication with students.
- Partner with Admissions on Spanish-content, such as materials and at events
  - Have presentations available in Spanish to ensure inclusivity (i.e. recruitment)
  - Send bilingual mailers to high schools with higher Spanish-speaking populations
  - Send emails that include a button enabling families to access translated versions of the emails on a separate webpage
  - Provide an option for students to identify themselves as Spanish-speaking in the application process
  - Maintain Instagram accounts in both English and Spanish
  - Offer FAFSA workshops in Spanish and record for on-demand viewing
- Scholarship Universe offers virtual advisors in multiple languages, including Spanish, to provide guidance and support to students.
- Have Spanish-speaking staff members available, including a dedicated phoneline at NAU and counselors available at UAZ, to aid Spanish-speaking students and their families.
- Actively promotes student clubs and organizations that represent the voice of Latinx students, fostering a strong sense of community
- Offer a Spanish web presence, hosted separately (<https://nau.edu/espanol/>) or as a language toggle option, as ASU offers.
- Utilize fluent Spanish speakers to review translations for accuracy - student workers are a great option

### Topic: 3 Partnering with student employment and career teams to tell the ROI story

In this conversation, the participants discussed the mediums they are currently using to measure ROI in their offices. Participants emphasized prioritizing call volume by topic, the importance of workshops, normalizing the use of financial aid, and tracking attendance and outcomes. The participants also mentioned strategies for engaging students at scale, addressing past due balances, coordinating payment plans, and communicating with students regarding registration and housing.

Recent focus on automation and how it can apply to financial aid processes was also discussed, with the focus on remedying the situation for students placed in the wrong residency category. Processes that can be automated include appeals, in-state residency requests for tribes, and communication starting from the student application process to address issues related to non-residency status.

#### *Highlighted Promising Practices*

- Assess ROI using career analysis, data on students' employment outcomes, average salaries, and borrowing patterns.
- Engage students at scale where possible, using monthly workshops, social media outreach, and partnerships with tuition assistance programs.
- Distribute a resource document on financial aid options for students with outstanding balances.
- Conduct targeted outreach for students with balances using call campaigns
- Implement sentiment analysis through Marketing Cloud and Qualtrics to gauge student feelings about using loans to pay their balances.
- Use interactive surveys to gather information on student interests and progress in processes like FAFSA and determine appropriate actions.

- Implement journeys in Marketing Cloud, where students receive targeted emails based on their current stage.
- Collaborate with admissions to ensure timely messaging and outreach to current students, track call data, and identify themes.

### *Continued Challenges*

- Promoting programs and responsible borrowing.
- Supporting students facing financial struggles when financial options are limited.
- Lagging financial literacy and understanding of financial wellness.
- Acknowledgement that more personnel are needed to extract valuable insights from the collected data.
- Salesforce email automation challenging for financial aid communications.

## Topic 4: Communications strategies to eliminate duplicate efforts and mixed messaging for students and how we're helping students self-serve using AI and digital tools.

### *Highlighted Promising Practices*

- Leverage AI and digital tools that have proven effective
  - Smartsheets for collaboration and Loom Videos for short instructional content.
  - ThankView, a personalized video messaging platform that receives high open rates.
  - Google Docs for internal collaboration
  - Texting for student communication
- Lean into collaboration to reduce mixed messages
  - Synchronize and streamline communications through regular meetings and a shared communications calendar with key internal partners, such as Student Affairs
  - Use touchpoint conversations with call centers to anticipate and address student inquiries based on Financial Aid deadlines and communications
- Integrate financial aid and student accounts information in one place online for easier student navigation
- Increase accessibility by implementing automatic captioning on their digital content
- Make sure print and digital materials are provided in accessible formats
- Use postcards as an alternative to emails in specific programs and rural areas
- Appoint liaisons to service populations, such as a tribal aid liaison

### *Continued Challenges*

- Around the clock support needs, which could be alleviated using a 24/7 virtual assistant for financial aid and Chatbots

## Looking Forward: Opportunities

The COP discussions were productive in sharing a mix of needs and opportunities that cross institutions in the space of communications and retention. Some ideas were addressed, and the best practices shared provide paths by which improvements can be made across all institutions. Additionally, some specific future recommendations were developed that can be pursued.



## Financial Obligations Collaborative Opportunities

1. Connect on communication systems utilized for student outreach, i.e., SMS systems, voicemail drops, Hey Sunny.
2. Improve how we make use of student workers to translate financial aid information to Spanish.
3. Align financial aid services to university HSI efforts including translation of resources, collaborative efforts with multicultural student service departments, and workshops offered in Spanish.
4. Help students to understand borrowing responsibly, finding the balance between taking what you need and being aware of debt.
5. Use of interactive surveys to gauge where students are at in their financial aid journey.

## Continuing Students Collaborative Opportunities

1. Look at improving how fast to engage students that stop out and don't say anything; sooner than waiting several terms to target those students.
2. Improve what we do with data captured on students that stop out and funnel it into a central location.
3. Make data easier for everyone to understand for those that are not power users.
4. Generate accessible academic feedback to students regarding their course progress throughout the term rather than at the end.

## COP Resulting Collaboration

### Scaled Innovation: UAZ's Retention Communication Playbook & NAU's Communication Collaborative

One of our earlier meetings as a COP involved the UA team sharing their Retention Communication Playbook, which creates transparency regarding student communications and reduces duplication in retention and success communications across campus. Our NAU team walked away inspired about how this idea could help us resolve many of the same communications challenges faced here. A collaboration was launched between UA and NAU to continue the conversation, and with funding support from NAU and the AIA, NAU was able to successfully complete a first draft of our very own "Communication Collective."

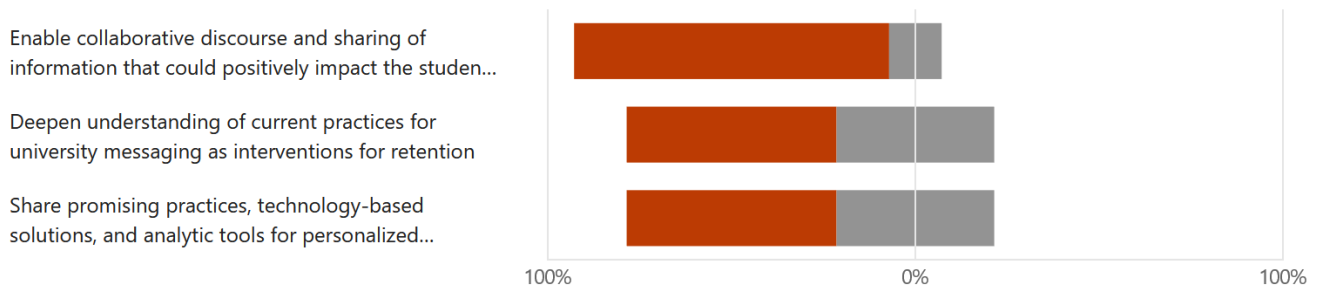
## COP Evaluation

After the conclusion of COP and Subcommittee meetings, a survey was conducted to provide understanding on how the COP benefited participants in their work and to provide feedback that can be used for future efforts. Below are the results. An interactive results summary is available [here](#).

### 1. How well did the COP meet each of its objectives? (0 point)

[More Details](#)

Well Neutral Not Well



### 2. What initially brought you to the COP? (select all that apply) (0 point)

[More Details](#)

- Wanted to get involved in a tri-... 5
- Colleagues highly recommende... 4
- To fulfill a requirement for a pro... 1
- To increase expertise and knowl... 3
- Other 0



4. How many times did you participate in COP meetings? (0 point)

[More Details](#)

● Less than 3	1
● 4-8	5
● 9 or more	1



5. If you participated in more than 3 COP meetings, what motivated you to come back?

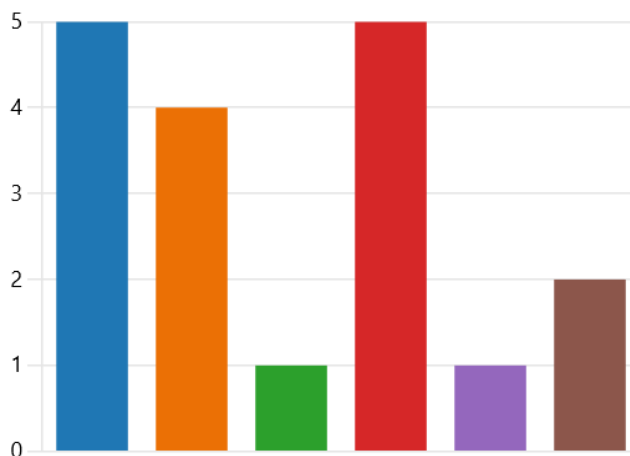
5 Responses

ID ↑	Name	Responses
1	anonymous	Was hoping for more collaborative conversations with the different schools. Enjoyed getting to know the original COP. Marcela has been an amazing colleague. She has been supportive and encouraged us to continue participating in the group. She truly believes in your work and is able to share that passion with others.
2	anonymous	I enjoyed learning about the work colleagues were doing. It was helpful in improving practices and getting new ideas.
3	anonymous	The people - great teams at all universities!
4	anonymous	It was a good group that was easy to have dialogue with.
5	anonymous	conversation and sharing of initiatives.

6. What benefits did you get from participating in the COP? (select all that apply) (0 point)

[More Details](#)

- Increased knowledge of promisi... 5
- Increased ability to apply promi... 4
- Improved understanding of the ... 1
- Participated in a community of ... 5
- Better understanding of my ow... 1
- Received help with resolving or i... 2



Question 6 full options text:

*Increased knowledge of promising practices in communications and retention, Increased ability to apply promising practices in communications and retention in my job, Improved understanding of the student experience, Participated in a community of others interested in communications and retention, Better understanding of my own institution's experiences and application of communications and retention, Received help with resolving or improving upon challenges.*

7. How much has your participation in the COP influenced you to change communications and retention practices at your institution?

[More Details](#)



8. Please share an example of how your participation in the COP influenced you to change communications and retention practices at your institution.

5 Responses

ID ↑	Name	Responses
1	anonymous	Because of UA's playbook we have started creating our own playbook. This will allow us to create a book that the university can follow with practices of retention and communication.
2	anonymous	We were able to implement a survey regarding enrollment plans after we saw what NAU was doing.
3	anonymous	We implemented a reenrollment survey (warning intercept survey) based off of what we learned from NAU!
4	anonymous	Hearing from colleagues at both intuitions presented ideas that I will incorporate in some of our outbound communications.
5	anonymous	providing concise information on scholarships and financial aid

9. Do you have any active initiatives stemming from the COP that you'd like support in seeing through to next steps? If yes, please share more about the initiative and what...

3 Responses

ID ↑	Name	Responses
1	anonymous	Funding for the Graduate Assistant for the playbook. If you need help with PM resources I am happy to share with you all anything that you need.
2	anonymous	Continued development of a communications guidebook for our institution. Need funding for personnel to finalize this work, followed by design and implementation of an adoption/implementation plan.
3	anonymous	training/just in time webinars.

11. Did you participate in one of the COP Subcommittees? (0 point)

[More Details](#)

- Yes, I participated in the Messag... 2
- Yes, I participated in the Enrollm... 2
- No 3



12. Was your experience on the COP Subcommittee better, worse, or the same as your overall COP experience?

[More Details](#)

- Better 1
- Worse 0
- The Same 3



13. What was it about the COP Subcommittee that made the experience different than the original COP?

[More Details](#)

1  
Responses

Latest Responses  
"sharing of information. "

14. In what ways do you feel the COP could be improved overall?

2 Responses

ID ↑	Name	Responses
1	anonymous	You all have started down the road to make changes. I would like to see us spend more time on projects - but the analytics COP is headed in a promising direction.
2	anonymous	Clear purpose and intended outcomes established before the group convenes. Too much time was spent identifying the reason we were coming together vs. sharing, collaborating, and supporting one another's growth.

15. If you were asked to participate in a COP on another topic of interest to you in the future, would you?

[More Details](#)

● YES! Absolutely.	4
● Sure	0
● Maybe	3
● No	0
● Definitely not.	0

