



# **Txt 4 Success!**

Promoting college access and completion using text messaging

# Research review



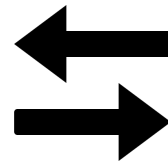
- ✓ **Castleman and Page:** Designing effective interventions to reduce “summer melt”
- ✓ **Castleman and Page:** Applying text messaging to the problem of summer melt (*see uAspire*)
- ✓ **Behavioral economics:** Reducing behavioral barriers and information complexity to help students navigate postsecondary pathways (*see Ideas42.org*)

# Research insights

*In planning for college,  
students and families face...*



**Complex  
information**



**Complicated  
processes**

Source: Castleman (2013)

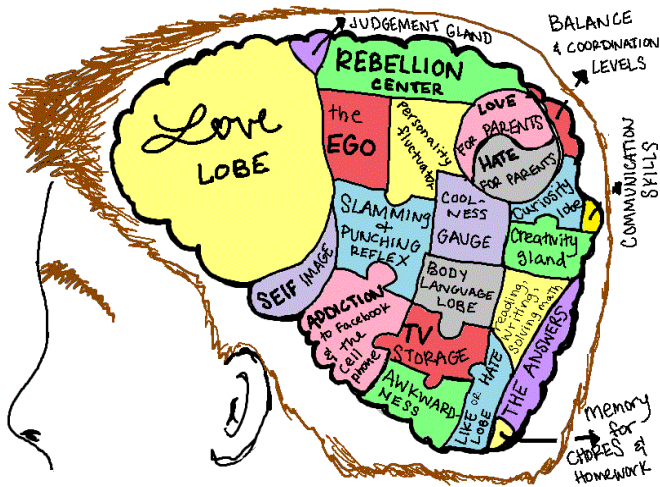


# Research insights

## Key behavioral principles:

- ▣ Limited attention
- 🕒 Planning fallacy
- 👥 Social norms
- 🕒 Identity
- 🏠 Status quo bias

# Key behavioral principles



## Limited attention and planning fallacy

Adolescents are particularly prone to put off hard choices/complex tasks in favor of pleasurable pursuits – and their attention often is divided.

Sources: Castleman (2013); Ideas42 (2014)

# Key behavioral principles

But adults also procrastinate when faced with complexity.

Sources: Castleman (2013); Ideas42 (2014)



# Key behavioral principles



## Status Quo Bias

- ✔ When overwhelmed, people tend to do nothing.
- ✔ “Preset” or default options can create monumental shifts in behavior.
- ✔ “Choice is demotivating.”

Sources: Ideas42 (2014); Iyengar and Lepper (2000); Sivers (2009)



# Key behavioral principles

## Identity and Social Norms

- ✔ Individuals are highly influenced by their perceptions of what's normal for their peers.
- ✔ Individuals are motivated to meet clear expectations that they deem to be standard or usual.
- ✔ The way we view and reflect on our personal identities or roles has a powerful influence over our behaviors.

Sources: Ideas42 (2014); Castleman (2013)

# Key behavioral principles

## Coping with complexity

- ✓ Simplifying strategies
- ✓ Following the crowd
- ✓ Paralysis



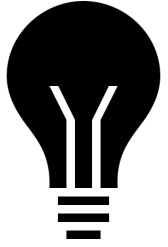
Sources: Ideas42 (2014); Castleman (2013)

# Background

## Policy interventions

- ✔ Simplifying information increases participation in retirement programs and the quality of school and college choices (Beshears et al, 2012; Hastings & Weinstein, 2008; Hoxby & Turner, 2013)
- ✔ Reducing hassles increases completion of federal financial aid applications (Bettinger et al, 2012)
- ✔ Shifting perceptions of social norms increases tax compliance and reduces home energy use (Alcott, 2011; Coleman, 1996)
- ✔ Prompts increase financial savings and flu vaccination rates (Karlan et al, 2010; Stockwell et al, 2012)

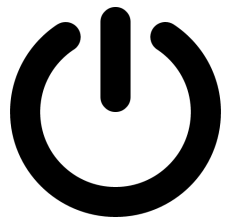
# Background



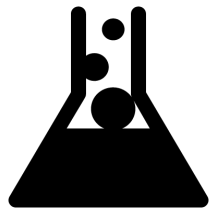
## Castleman and Page:

- ✔ Text messaging can be used to reduce “summer melt”
- ✔ Text messaging has a major cost advantage when compared to other strategies, such as in-person counseling
- ✔ Students who received the intervention continued to persist (*access was not counterproductive to success*)

# West Virginia's project



\$225,000 grant from the Kresge Foundation



Three-year pilot project serving 14 high schools in Year 1 (GEAR UP)

# Primary functions



## Nudge

Urge students to complete college-related tasks



## Align

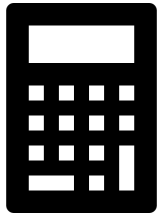
Provide a continuous contact point from high school into college



## Counsel

Provide access to one-on-one counseling with a professional

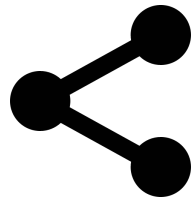
# Project goals



## Financial aid awareness

- ✔ Increase the number of students applying for and utilizing financial aid

# Project goals

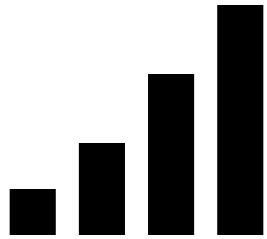


## Campus connections

- ✓ Increase students' use of campus resources
- ✓ Position campus and state-level staff as a continuous source of support
- ✓ Address “summer melt” by guiding students through transitional process



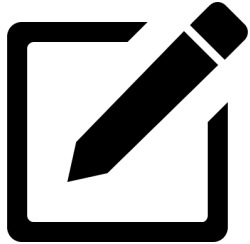
# Project goals



## Capacity building

- ✔ Design a low-cost, high-impact service model allowing colleges and universities to improve access and retention
- ✔ Expand on the body of research surrounding next-generation student supports and engagement

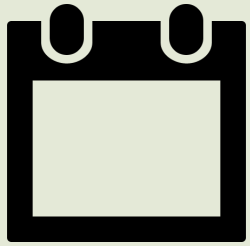
# How it works



## Students opt in

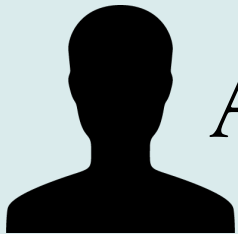
- ✓ College admissions applications
- ✓ Statewide merit-based scholarship application
- ✓ State-level college access web portal
- ✓ Inquiry forms collected at community events and college fairs

# How it works



Students receive *scheduled* messages according to a pre-planned campaign.

Students can text our number *at any time* for help.



A college counselor (*a real person*) responds!

# How it works

## State-level campaign:

- ✔ Messages are relevant to all college-intending students.
- ✔ All students receive messages.

## Example:

*When reviewing your college schedule... Remember '15 to finish.' On average, you have to take 15 credit hours each semester to finish college on time.*

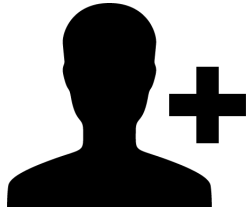
## Campus campaigns:

- ✔ Messages provide information specific to a particular college.
- ✔ Some students receive messages.

## Example:

*Did u know u can register 4 fall classes now? Call 304-792-7098 & ask 4 a campus counselor 2 make an appointment.*

# How it works



Four college partners in Year 1

- ✓ Bluefield State College
- ✓ Concord University
- ✓ Marshall University
- ✓ Southern West Virginia Community and Technical College

# How it works



## Campus-level messaging

At various points in the campaign, students receive texts asking if they've made a college selection...

- ✓ Students who select a partner college are added to the campaign for that particular college.
- ✓ Students who select a non-partner college continue receiving only state-level messaging.
- ✓ Students who do not respond or text back “undecided” continue receiving state-level messaging and are asked again about their college choice later in the campaign.

# HEPC commitments



- ✓ Provide text-messaging platform
- ✓ Provide technical support, training and guidance
- ✓ Coordinate statewide messaging

# Campus commitments



- ✔ Collect and share student data with HEPC (name, cell number, email, high school)
- ✔ Align student supports to provide a single point of contact
- ✔ Commit to following the statewide schedule (with options of 2 custom messages per month)



# Campus commitments



- ✔ Provide staff to check messages daily and within one hour of any outgoing message
- ✔ Assist in the evaluation by providing feedback and limited data

# How it works: on campus



- ✓ Building a campus team
- ✓ Developing a message schedule
- ✓ Setting up data transfers (Southern has automated this process)

# Early outcomes

Since January 2, 2014...

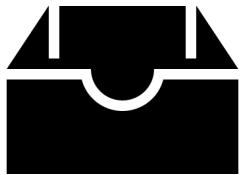


1,002 opt-ins

- ✔ More than half of all eligible students signed up.
- ✔ Eight percent have since stopped messaging (opted out).

# Early outcomes

Since January 2, 2014...



1,600+ student responses

- ✓ Questions about processes  
Ex: When is the deadline to apply for WV financial aid?
- ✓ Requests for guidance  
Ex: I can't decide on a college... Help!

# Early outcomes

Since January 2, 2014...



320 students...

- ✓ Have responded indicating their college choice
- ✓ Have been sorted into a campaign group within the system

# Early outcomes

Hi! It's Jess w/ GEARUP. Did u know WV 4year colleges require either the ACT or SAT? Need to take the ACT? Reg. by Jan 10 for the Feb test <http://bit.ly/1bUHmOs>

📱 ← 01/08/2014 07:02PM EST

Thanks so much !!! I tottaly forgot about registering!

🚩 01/09/2014 02:54PM EST 📱 →

# Early outcomes

finding . also i went to fill out.my fasva and it saod it costs \$88?

01/02/2014 08:35PM EST →

Ok - definitely sign up for those emails cause we send tons of scholarships in them. The FAFSA is free - there r scam websites that charge. Go here: [fafsa.gov](http://fafsa.gov)

Sender: [jkennedy@hepc.wvnet.edu](mailto:jkennedy@hepc.wvnet.edu) ← 01/02/2014 08:43PM EST

ahhh thabk u so muxb i almost gave them my creditcard XD

01/02/2014 08:45PM EST →

No problem!

Sender: [jkennedy@hepc.wvnet.edu](mailto:jkennedy@hepc.wvnet.edu) ← 01/02/2014 08:51PM EST

# Early outcomes

Well I haven't applied to a college. I'm unsure what I need.

03/06/2014 09:35AM EST 📱 →

Ok - we'd be happy to help Would it be ok if I have a GU counselor (Elizabeth) call you? When would be a good time to call?

Sender: jkennedy@hepc.wvnet.edu 📱 ← 03/06/2014 10:33AM EST

4:30 or so.

03/06/2014 11:03AM EST 📱 →

Ok - Elizabeth is going to give you a call on your cell then!

Sender: jkennedy@hepc.wvnet.edu 📱 ← 03/06/2014 11:18AM EST



# Early outcomes

I need my FAFSA done too.

03/08/2014 06:04PM EST →

Sarah, you are in luck. RVHS is having a FAFSA workshop today from 9:00-6:00PM. I just asked Mrs. Vandyke to let you know about it before school let out.

Sender: mgattuso@hepc.wvnet.edu ← 03/11/2014 02:21PM EDT

Please let us know if you were unable to attend today's FAFSA workshop and still need help.

Sender: mgattuso@hepc.wvnet.edu ← 03/11/2014 02:23PM EDT

I'm not at school today, but I can go down there before 6:00.

03/11/2014 02:23PM EDT →

Great! The link below will let you know what items to take with you.  
[https://secure.cfw.com/Financial\\_Aid\\_Planning/College\\_Goal\\_Sunday/What\\_to\\_Bring.aspx](https://secure.cfw.com/Financial_Aid_Planning/College_Goal_Sunday/What_to_Bring.aspx)

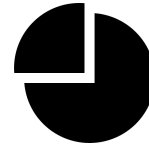
Sender: mgattuso@hepc.wvnet.edu ← 03/11/2014 02:27PM EDT

Thank you!

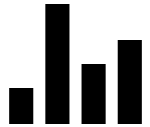
# In the works



Counseling guide  
and service training



Refined audience  
segmenting



Detailed in-platform  
analytics



“How to” toolkit

# Contact



Jessica Kennedy

Assistant Director of Communications

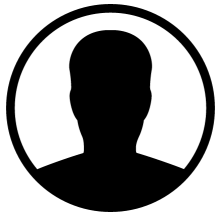
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