

## Sample Initial Outreach Checklist

### Key objectives for the Initial Outreach:

- Make initial contact with student and schedule an in-person meeting

### Prior to outreach:

- Check caseload spreadsheet and high school exit survey for student's reported college plans and background information \_\_\_\_\_
- If intended college is a "popular institution," review briefing document prior to call \_\_\_\_\_

### During outreach to student:

- Describe the reason for the outreach: \_\_\_\_\_
  - Students sometimes graduate high school without deciding on their next steps. They often need help over the summer to develop a postsecondary plan.
  - Other students who have clear postsecondary plans sometimes encounter unexpected obstacles. We want to help address these issues
  - We want to remind students of important summer tasks at their intended institution (*or give generic reminders if intended institution not provided*)
- Let the student know there are a few questions you're asking of all students to get a sense of where they are in the college-planning process. There are no right or wrong answers; their responses will help you best support them over the summer \_\_\_\_\_  
**NOTE:** These questions may not be relevant for a student not-intending to go to college

### **SIX QUESTIONS TO ASK ALL COLLEGE-INTENDING STUDENTS DURING THE INITIAL OUTREACH**

**1. Have you completed the FAFSA?**

*Reason for asking:* Completing the FAFSA is the first step to get financial aid

**2. Have you logged on to your college's web portal?**

*Reason for asking:* Most of the info colleges expect you to read and complete will be sent through the portal, not through the mail

**3. Have you received your financial aid award?**

*Reason for asking:* Some of the aid listed may be loans you will have to pay back

**4. Have you completed required placement tests, or been exempted?**

*Reason for asking:* Most colleges require students to complete placement tests before they can attend orientation or start in the fall

**5. Have you registered for or attended orientation?**

*Reason for asking:* Most college require students to attend an orientation, where you will learn more about the college and often meet with your advisor

**6. Have you received your tuition bill?**

*Reason for asking:* Students often have questions about the charges on their tuition bills, and there may be expenses that you can waive and not have to pay

- Invite student to schedule an in-person meeting to discuss any of these issues, or other Challenges that may have arisen so far during the summer \_\_\_\_\_

### If student says yes to a meeting:

- Plan where and when to meet \_\_\_\_\_
- Tell student to bring the following documents to the meeting: \_\_\_\_\_
  - Log-in information for their college's web portal \_\_\_\_\_
  - Student Aid Report, financial aid award letter, and tuition bill \_\_\_\_\_
  - Any other documents they have received from their intended college \_\_\_\_\_
- Confirm student's contact information \_\_\_\_\_
- Schedule a reminder text to go to the student the day before the meeting \_\_\_\_\_

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**If student says no to a meeting:**

If you are on the phone with the student:

- Ask if the student has time to do the Assessment meeting now. If not, ask if it would be easier to schedule a time to talk on the phone than to meet in person \_\_\_\_\_

If you are messaging with the student/the student does not have time to talk now:

- Ask if it would be easier to schedule a time to talk on the phone than meet in person \_\_\_\_\_
- Ask if student feels on track for college plans in the fall \_\_\_\_\_
- Ask if the student has: completed the FAFSA; applied for financial aid; logged on to the web portal at her intended college \_\_\_\_\_
- Ask if the student has any questions she'd like to discuss while messaging \_\_\_\_\_
- Provide contact information so student is able to follow-up \_\_\_\_\_
- Indicate that you will check in later in the summer to see how things are going \_\_\_\_\_
- Confirm student's contact information \_\_\_\_\_

**At the end of the outreach:**

- Remind students of specific deadlines coming up at her intended institution \_\_\_\_\_

**After call:**

- Log the student contact. **Note:** you DO NOT need to log the contact if you left a voicemail or sent a message that was not returned \_\_\_\_\_

SAMPLE