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

<table>
<thead>
<tr>
<th>SIX QUESTIONS TO ASK ALL COLLEGE-INTENDING STUDENTS DURING THE INITIAL OUTREACH</th>
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<tbody>
<tr>
<td>1. Have you completed the FAFSA?</td>
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<tr>
<td>Reason for asking: Completing the FAFSA is the first step to get financial aid</td>
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<td>2. Have you logged on to your college’s web portal?</td>
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<td>Reason for asking: Most of the info colleges expect you to read and complete will be sent through the portal, not through the mail</td>
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<td>3. Have you received your financial aid award?</td>
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<td>Reason for asking: Some of the aid listed may be loans you will have to pay back</td>
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<td>4. Have you completed required placement tests, or been exempted?</td>
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<td>Reason for asking: Most colleges require students to complete placement tests before they can attend orientation or start in the fall</td>
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<td>5. Have you registered for or attended orientation?</td>
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<td>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</td>
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<td>6. Have you received your tuition bill?</td>
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<td>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</td>
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- 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:
  o 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