



Davidson College



SUPPORTING STUDENTS TO FIND THEIR MATCH

A playbook for College &
Career Match.

A Note for Partners

We're so excited you're here and partners in College & Career Match!

As we developed this playbook, we've tried to think about how to share the KIPP approach in a way that recognizes your needs and context may be different. We've tried to showcase both the questions we anticipate you might ask and how we've answered those questions at KIPP. We'd love your feedback on how we're doing and what more you might need. [Email Kaycee Brock](mailto:kaycee.brock@kipp.org) with ideas.

Throughout the playbook, you'll see links to resources housed on KIPP Share, our network's knowledge sharing site.

Before clicking links in the playbook, we recommend that you log in to KIPP Share using these credentials:

Site: <http://www.kippshare.org>

Login: ktcguest@kipp.org

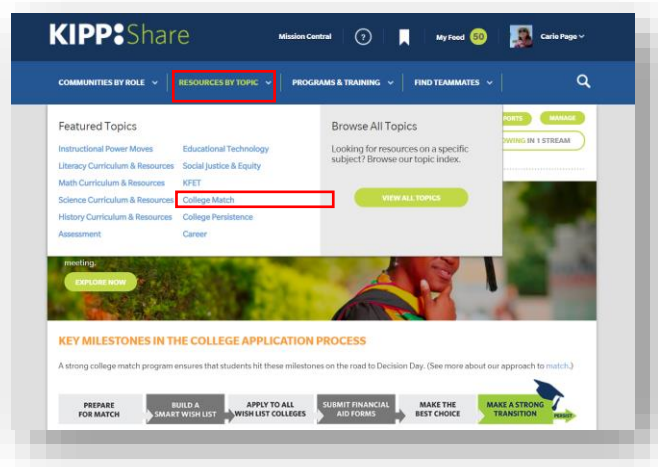
Password: To&Through2020

Passwords are case sensitive so pay special attention to capitalizations and punctuation.



Once logged in, any link that you click from the Playbook should automatically open on KIPP

Share. If you would like to explore other College Match resources, click "Resources by Topic" in the main navigation bar and select "College Match."



If you have any issues access the site or the password does not seem to be working, you can reach out to: helpdesk@kipp.org. Happy exploring!



NAVIGATE

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INTRODUCTION

Let's take a moment before we dig in to imagine.

Think of a high school junior currently walking your hallways. Let's envision where they might be three years from now. It's their sophomore year of college and you've set up time to meet for a cup of coffee on a campus visit. In text messages before you arrive, they tell you they can't wait to talk about the internship they've secured for the summer.

As you sit and sip your coffee, it's clear this student is flourishing. Their voice rises as they talk about the classes they are taking this semester. They can't get over the professor who shares stories from their pre-academic career and offers to make some introductions to their colleagues in the field. They've joined a fraternity where the other members already feel like family.

Now, let's bring it back to the present day and the first time this student sits down to talk about college and their career ambitions. As their partner in the process, how do you ensure you're supporting them to create the future they want and imagine? How do you help them find a post-secondary option where they will flourish? And take the best step forward to a meaningful career?

One answer, we think, is College & Career Match.



So, what's College & Career Match?

College & Career Match is both a methodology and an approach to college and career counseling that's student-centered and data-driven. The big idea is to employ a rigorous, research-based approach to counseling that will ensure students arrive at Decision Day with a diverse set of post-secondary options that reflect their interests, career ambitions and academic needs while giving them the best chance of graduating on time.

There are three big ideas underneath our College & Career Match strategy:



Match in Action. Learn more about the what, how and impact of College & Career Match from KIPP staff, students and families.

- 1. Where a student goes to college or to attain their post-secondary credential matters – a lot.** Our results and research tell us that the higher the graduation rate, the more likely our students are to complete their college degree. And we also know from alumni that aspects of fit, including sense of belonging and financial fit, impact a student's likelihood to persist. For students who choose Career Technical Education (CTE) programs, we know quality of program, especially student persistence supports and connection to industry or jobs is critical to success.
- 2. Process is priority.** Experts recommend students apply to a diverse portfolio of schools (tailored to their individual academic profiles and aligned to their career and personal interests) to increase both their choices and their chance of college success. And as students move throughout the process, exploration of college and career options, reflection on their post-secondary goals and partnership with their families is critical. By working with students and families to apply to a quality list of colleges and successfully complete the financial aid process, we can ensure students put themselves in the best place to achieve their post-secondary goals.
- 3. Match works.** We've seen the power of this approach in action. KIPP students who follow our recommended strategy of applying to 6+ target and reach schools (based on their individual academic profiles) matriculate to colleges with higher historic graduation rates for Black and Latino students than peers at similar academic performance levels who apply to fewer target and reach schools. And this is true for students at all levels of academic performance.

Why this playbook?

Now that we're all-in on the mission, the question is how? This playbook captures our latest and best thinking - refined through years of trial, iteration and collaboration - around what it looks like to actually execute a robust College & Career Match strategy month-over-month. We've developed this playbook to answer the question, "So how do I actually do this?"



The resources, guidance and ideas inside have been collectively built, refined and tried by members of the KIPP and charter community from coast to coast.

How to navigate this playbook



School, Regional
or District Leaders

Start with a section designed especially for College & Career Match leaders. It outlines the role of a Match leader along with resources for setting goals and monitoring progress. Use subsequent sections (designed for college and career counselors) to better understand where your team is focused each month.



College and/or
Career Counselors

The playbook is organized into “phases” that mimic the college application process and reflect our belief that an early start matters. Based on your school, region or district’s capacity, you may need to adjust the actual “months” we’ve suggested but the general flow of the process will likely remain the same.

A note about timing...

At the time of writing, the college decision season was upended by the COVID-19 pandemic. Much is still uncertain about how timing, dates and the college application process may unfold. The dates presented in this workbook are presented as guides for a typical application season. Counseling teams may need to adjust to reflect current realities.

Wait! There's more!
Print a special “year-at-a-glance” calendar
that breaks down major activities at every
phase of the Match process.



YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH

	Months	Counselor Priorities	Student to Dos	Events to Plan
JUNIOR YEAR	September-December	<ul style="list-style-type: none"> College and career exploration 	<ul style="list-style-type: none"> Complete career assessment Explore college options 	
	January-March	<ul style="list-style-type: none"> Building and iterating on Smart Wish Lists Promoting and summer programs and visits 	<ul style="list-style-type: none"> Draft Smart Wish List Explore Early Decision options Apply to summer programs 	<ul style="list-style-type: none"> Family event: Intro to the college Process
	April-May	<ul style="list-style-type: none"> Iterating on Smart Wish Lists Identifying and supporting Early Decision applicants 	<ul style="list-style-type: none"> Finalize junior wish list Complete FAFSA4caster Commit to Early Decision application (if applicable) 	<ul style="list-style-type: none"> Family meetings: Reviewing wish lists and completing FAFSA4caster
	June-August	<ul style="list-style-type: none"> Iterating on Smart Wish Lists 	<ul style="list-style-type: none"> Attend summer programs Visit college options Work on Early Decision applications (if applicable) 	<ul style="list-style-type: none"> Student workshop: College Applications
SENIOR YEAR	September	<ul style="list-style-type: none"> Finalizing Smart Wish Lists 	<ul style="list-style-type: none"> Finalize senior wish list 	<ul style="list-style-type: none"> Family meetings: Review and lock wish lists
	October	<ul style="list-style-type: none"> Supporting college applications Financial Aid/FAFSA 	<ul style="list-style-type: none"> Complete FAFSA and additional financial aid forms, including CSS profile, as applicable 	<ul style="list-style-type: none"> Student and family workshops: FAFSA/Financial Aid
	November	<ul style="list-style-type: none"> Supporting college applications Financial Aid/FAFSA 	<ul style="list-style-type: none"> Complete college applications 	<ul style="list-style-type: none"> Student workshop: College Applications
	December	<ul style="list-style-type: none"> Supporting college applications Financial Aid/FAFSA 	<ul style="list-style-type: none"> Complete college applications 	
	January-February	<ul style="list-style-type: none"> Catch up on financial aid and applications 		
	March-April	<ul style="list-style-type: none"> Supporting strong decisions Setting students up for a strong transition 		<ul style="list-style-type: none"> Family meetings: Decisions Student workshop: Transition to College
	May	<ul style="list-style-type: none"> Supporting strong decisions Setting students up for a strong transition 	<ul style="list-style-type: none"> Confirm final plans and pay college deposits 	<ul style="list-style-type: none"> Celebration: College Signing Day/ College Commitment Ceremony
	June-August	<ul style="list-style-type: none"> Setting students up for a strong transition 	<ul style="list-style-type: none"> Complete college matriculation tasks 	



0. FOR LEADERS

As a College & Career Match Leader, you have a unique and critical role to play in driving your school, region or district's success in College & Career Match. An effective Match leader is one part cheerleader (investing your team in the what and why of Match and celebrating successes), one part visionary (setting goals and expectations) and one part active problem solver (using data to identify how and when to lean in).

We've learned that our strong Match leaders make the time to:



Be a leader for equity. Creating a College Match program that's as equitable and transformational as it is data-driven requires commitment at every level. Invest in personal and team-based professional development to understand and create common definitions for equity. Regularly review policies, procedures and practices to identify and disrupt inequitable systems. Disaggregate data regularly to ask the question: are we serving all students to the best of our ability?

A Note on Timing



At the time of publishing, the COVID-19 pandemic was impacting schools and the college admissions process in unprecedented – and rapidly shifting – ways.

What follows are recommendations based on a traditional calendar and you may have to shift for local context. This time is a good reminder of the importance of both empathy and flexibility as you work with your team.



Get to know College & Career Match. Match is built on supporting students' post-secondary success. It's both a methodology and an approach to college and career counseling that's student-centered and data-driven. [Learn more here.](#)



[Set your team up for success.](#) Advocate for and support the systems and tools needed to execute a robust College & Career strategy.



[Set expectations and goals.](#) Use data to set targeted and realistic expectations for your counseling team.



Monitor progress. Where we focus matters. That's why we recommend teams set aside time each month to host a "Monthly Match Meeting" to review current progress and problem solve challenges. (See [recommended data to review and questions to ask, by month, at the end of this section.](#))



[Build an understanding of and relationships in your community.](#) Take time to understand the local college and career landscape. This includes: identifying local high-quality college and career partnership options for students; understanding state and district requirements for college, career and the military; and building ongoing partnerships with high-quality post-secondary programs.



Celebrate success. Regularly rally and promote your team's wins.

Key strategies in focus



Setting Your Team Up for Success

We believe that College & Career Match is a blend of "art" and "science." That's why counseling teams need a combination of ongoing training and professional development mixed with tools for tracking and data visualization. We recommend teams invest in setting a solid foundation for the work by:



- ☐ Naming a College & Career Match leader with the authority and budget to set goals, monitor progress, identify technology solutions and make ongoing decisions. This likely includes a leader and champion at the district or regional level and a school-level Director of College Counseling.
- ☐ Identifying and supporting a student data information system to store and track college application data. (For example, Naviance or Salesforce.)
- ☐ Identifying and supporting an annual student career assessment. (e.g. YouScience)
- ☐ Identifying and supporting a college exploration tool. (e.g. Overgrad.)
- ☐ Ensuring sufficient and ongoing technical support for data systems and reporting.
- ☐ Creating regular, monthly time to meet as a team to monitor progress and problem solve sticky challenges. We recommend:
 - Monthly meetings of the district counseling leadership team
 - Monthly meetings of school-based college counseling teams
- ☐ Committing regular time and budget to support professional development on College & Career Match and college counseling.
- ☐ Ensuring there is strong partnership and regular communication between regional/district match leaders and school leaders to ensure alignment between expectations, schedules and policies.



Setting Goals and Expectations

As a College & Career Match Leader, you have a critical role to play in setting and tracking progress toward goals. Setting realistic - yet rigorous - goals for your team is a way to communicate clear expectations and problem solve potential challenges as they arise.

DEFINE:	HOW KIPP DEFINES IT: *	WHAT TO ASK:
Goal for Estimated College Completion (ECC) <i>(We calculate ECC for a cohort of students as the average of Under-Represented Minority Graduation Rates in which a class has enrolled.)</i>	<ul style="list-style-type: none"> • Each KIPP region sets their own ECC targets based on local context. • As a network, we have a five-year goal to increase ECC to 50% for KIPP high school students. 	<ul style="list-style-type: none"> • Historically, what percentage of our seniors have matriculated to college? • What is the historical underrepresented minority (URM) graduation rate for the colleges they matriculate to?



**Note for our district and non-KIPP partners: This column is designed to offer a window into the way we approach Match at KIPP. You may need to adjust based on where your schools are in their Match journey, their caseloads or other local context. Use the “What to Ask” section to help you define your own goals.*

DEFINE:	HOW KIPP DEFINES IT:	WHAT TO ASK:
Deadline for SMART Wish List completion	<ul style="list-style-type: none"> May 31 for juniors. September 30 for seniors. 	<ul style="list-style-type: none"> How many students can we realistically engage and by when? What deadline will set students up to submit quality applications to <i>all</i> the schools on their wish list?
Criterion for wish lists	<ul style="list-style-type: none"> For most academic profiles, 9 schools with at least 6 likely +, target and reach schools. 	<ul style="list-style-type: none"> What does it mean for our students to build a <i>smart</i> wish list that provides multiple strong academic options? What will we use to evaluate those wish lists to ensure they reflect students’ needs and fit factors? What is the % distribution of our students across academic segments within each of our high schools? How might expectations look different for different academic profiles? (Profiles below 2.0/16, ~2.0-3.0, 3.0+?)
Deadline for application submission to all wish list colleges	<ul style="list-style-type: none"> November 30 	<ul style="list-style-type: none"> How do we ensure applications are submitted early while balancing enough time to build quality applications? How might we set students up for success with deadlines for recommendations or personal statements?
Target for Early Action and Early Decision applications.	<ul style="list-style-type: none"> Varies by school and cohort. 	
Deadline for FAFSA completion	<ul style="list-style-type: none"> January 31 	<ul style="list-style-type: none"> What will we need to do to support families in gathering materials and documents for FAFSA? What feels like a realistic deadline that balances those activities with the right timing to ensure our students get access to the most aid?



Matriculation targets	<ul style="list-style-type: none"> Varies by school and cohort. 	<ul style="list-style-type: none"> Based on our juniors' academic profiles, what's a realistic yet rigorous target for BA matriculation? AA? CTE? Military?
DEFINE:	HOW KIPP DEFINES IT:	WHAT TO ASK:
Deadline for college decisions	<ul style="list-style-type: none"> May 31 	<ul style="list-style-type: none"> When do we anticipate most decision letters will arrive this year? When will students be expected to accept?



Building Relationships in Your Community

Being a strong College & Career partner and advocate for students means knowing the local landscape. The more you know, the better prepared you'll be to identify and advocate for schools that you know have a track record of supporting students to and through graduation. As a Match leader, take time to:

- ☐ Visit and research colleges in your local area. Probe for:
 - ☐ What is their Underrepresented Minority (URP) graduation rate?
 - ☐ How well do they meet financial aid needs? (Bookmark this list of colleges that claim to meet full financial need.)
 - ☐ What programs exist to support student persistence?
 - ☐ What have our graduates told us about their experience and sense of belonging on campus?
- ☐ Identify local high-quality career partnership options for students.
- ☐ Research and understand the state and district requirements for college, career and the military.
- ☐ Build partnerships with strong college and post-secondary options.
- ☐ Highlight strong fit options. One of the first steps in the College & Career Match process is to support students to create a "Smart Wish List." In short, a wish list is a template for where students will apply to college and other post-secondary programs. It's *smart* if it's balanced across factors like academic fit, career alignment and financial fit. Create "[starter wish lists](#)" that introduce students to colleges or programs with a strong track



record.

How to use this playbook

We've written and designed the rest of this playbook as a guide for college counselors doing the work of College & Career Match every day. As a Match leader, use subsequent sections to:



- ☐ Better understand where your team is focused each month.
- ☐ Ask questions about typical milestones and goals.
- ☐ Offer suggestions for strategies to try or resources to build on.

Wait! There's more!

Print a special "year-at-a-glance" calendar with leaders that breaks down important tasks, data to track and questions to ask throughout the year.







YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH LEADERS

	Students should...	Adults should...	Data to track...	Questions to ask...	Trainings to lead...
Strong Start August-September	<p>Seniors:</p> <ul style="list-style-type: none"> Finalize wish lists Complete Early Decision applications (Some students, GPA 3.25+) <p>Juniors:</p> <ul style="list-style-type: none"> Understand College & Career Match Explore careers and take career assessment (YouScience) 	<p>Leaders:</p> <ul style="list-style-type: none"> Lead PD session introducing College & Career Match Progress monitor goals; progress monitor quality of wish lists Lead Match meetings <p>College counselors:</p> <ul style="list-style-type: none"> Ensure quality senior lists by 9/30 Introduce juniors to Match, lead juniors through taking career assessment (YouScience) 	<ul style="list-style-type: none"> Junior Wish List Completion: 5/31 Senior Wish List Completion: 9/30 	<ul style="list-style-type: none"> What's going well? What should we celebrate and who should we shout out? What is the % distribution of our students across academic segments within each of our high schools? What is our progress to goal (wish lists and Estimated College Completion (ECC) and differentiated strategies supporting those goals for the individual segments (profiles below 2.0/16, ~2.0-3.0, 3.0+)?) Is there a plan in place to revise wish lists based on new ACT and SAT scores? How are counselors and high school staff working together to support students in reaching their wish list goals? (Eg, coordinating on student action steps) What is our Early Decision process for supporting quality applications? Most ED deadlines are <u>11/1</u>. (ED is a recommended option for students 3.5/21+) How will we work with students and families to complete financial aid once FAFSA opens on 10/1? What more support do we need? 	<ul style="list-style-type: none"> Intro to College Match (August)





YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH LEADERS

	Students should...	Adults should...	Data to track...	Questions to ask...	Trainings to lead...
Accelerate October- January	<p>Seniors:</p> <ul style="list-style-type: none">• Submit college applications• Apply Early Decision and Early Action (Some students, GPA 3.25+)• Apply to CTE pathways (Some students) <p>Juniors:</p> <ul style="list-style-type: none">• Reflect on career assessments (YouScience)• Start college research on Overgrad	<p>Leaders:</p> <ul style="list-style-type: none">• Lead PD session on strong, quality applications• Progress monitor goals; progress monitor quality of applications• Lead Match meetings <p>College counselors:</p> <ul style="list-style-type: none">• Ensure quality senior applications by 11/30 (Early Decision and Early Action applicants will have earlier deadlines, beginning 11/1)• Support juniors in reflecting on career assessments and starting	<ul style="list-style-type: none">• College Applications: 11/30• Early Action and Early Decision Applications: 11/30• Financial Aid: 1/31	<ul style="list-style-type: none">• What's going well? What should we celebrate and who should we shout out?• What is the % distribution of our students across academic segments within each of our high schools? What is our progress to goal (KPIs and ECC) and differentiated strategies supporting those goals for the individual segments (profiles below 2.0/16, ~2.0-3.0, 3.0+?)• How are we executing differentiated strategies for students with different application requirements (eg; long apps for students applying to the most competitive colleges, and apps to post-secondary certification options)?• How are counselors and high school staff working together to support students to build quality applications?• quality Early Decisions applications? Most ED deadlines are <u>11/1</u>. (ED is a recommended option for students 3.5/21+)• How are counselors partnering with HS staff to support financial aid completion, especially for challenging cases and families that have not yet submitted?	<ul style="list-style-type: none">• How to Support the Application Phase (October)





YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH LEADERS

<p>Strong Transition February-May</p>	<p>Seniors:</p> <ul style="list-style-type: none"> Collect decisions and compare award letters; make draft budget with debt amount Make post-secondary decision Complete matriculation steps Attend Pennant/Commitment Ceremony, Graduation If applicable, meet with college persistence advisor <p>Juniors:</p> <ul style="list-style-type: none"> Draft and refine college and career wish lists Request college recommendations from junior teachers Complete financial aid forecaster and share taxes with counselor Complete Early Decision research and application (Some students) 	<p>Leaders:</p> <ul style="list-style-type: none"> Lead PD session on writing recommendations and supporting senior decisions Create and monitor Senior Decisions tracker Progress monitor goals for decisions, Estimated College Completion (ECC), pre-college benchmarks, junior wish lists Support strong transitions Lead Match meetings <p>College counselors:</p> <ul style="list-style-type: none"> Support seniors in making strong decision based on fit (career aligned/financial fit, high grad rate, personal/family preference), input progress into Senior Decisions tracker 	<ul style="list-style-type: none"> Senior Decisions-Planned Matriculation: 5/15 Expected Estimated College Completion (ECC) Senior Pre-College Benchmarks: 6/30 Junior Wish Lists: 5/31 	<ul style="list-style-type: none"> What's going well? What should we celebrate and who should we shout out? How are counselors partnering with HS staff to support the remaining students who have not submitted financial aid? How are we launching Match to Juniors, including inviting Juniors 3.5+ to consider Early Decision, working with teachers to draft personal statements in English Class, meeting with families to prepare for financial aid and wish lists? What successes and challenges are our teams experiencing with the Junior Early Start process, including gathering Early Decision candidates to discuss ED, meeting with families to prepare them for the process, and starting wish list drafts. How is the high school partnering with KTC to support, and are there any additional resources needed? What % of our Senior class has made decisions (Decision Day is May 1st!)? What is our 	<ul style="list-style-type: none"> Teacher Recommendations for Juniors (January) How to Support the Decision and Strong Transition Process (February or March)
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YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH LEADERS

	<ul style="list-style-type: none">• Apply to summer programs (Some students)	<ul style="list-style-type: none">• Collaborate with college persistence advisors to support strong transition, including completion of pre-college benchmarks• Support juniors in drafting quality wish list in Overgrad		<p>preliminary Estimated College Completion and % of students with a post-secondary plan? How can counselors and HS staff partner to support decisions?</p> <ul style="list-style-type: none">• Where are we on junior wish lists relative to goal?• When will teams meet to reflect on the year and set bottoms-up goals for next year?• What interventions are we planning for this summer to mitigate summer melt? How will we use pre-college benchmark data to inform our work?• Where are we relative to goal on pre-college benchmarks?	
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YEAR-AT-A-GLANCE

COLLEGE & CAREER MATCH LEADERS

	Students should...	Adults should...	Data to track...	Questions to ask...
Launch June- July	<p>Graduating Seniors:</p> <ul style="list-style-type: none">• Complete matriculation steps• Attend Pennant/Commitment Ceremony, Graduation <p>Juniors/Rising Seniors:</p> <ul style="list-style-type: none">• Attend Early Decision cohort visits to colleges (Some students)• Work on Early Decision applications• Attend family meetings	<p>Leaders:</p> <ul style="list-style-type: none">• Set annual goals• Continue to support strong transition• Manage rising senior support: college visits, applications, family meetings (if these did not happen in spring) <p>Counselors:</p> <ul style="list-style-type: none">• Continue to support strong transition, including completion of pre-college benchmarks• Participate in goal setting• Support rising seniors in visiting colleges and drafting Early Decision applications• Hold family meetings	<ul style="list-style-type: none">• Senior Pre-College Benchmarks: 6/30• Preliminary: College matriculation, Estimated College Completion (ECC)	<ul style="list-style-type: none">• What's going well? What should we celebrate and who should we shout out?• When will KTC and HS teams meet to reflect on the year and set bottoms-up goals?• How are we working with Early Decision candidates over the summer to visit campus and start applications?• What is our preliminary Estimated College Completion and % of students with a post-secondary plan?• Are there any students and families our team could support in making a final decision?• Where are we relative to goal on pre-college benchmarks?





1. BUILD SMART WISH LISTS

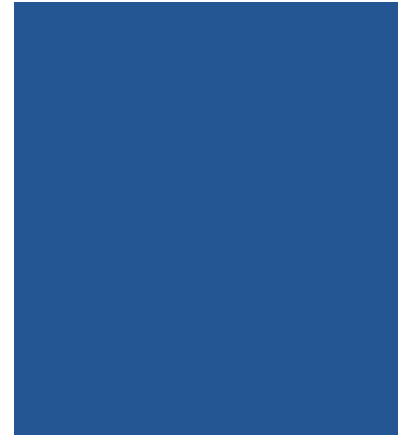
Smart Wish Lists combine the art and science of the college and career process. Put simply, a wish list is the blueprint for where a student will apply to college. A *smart* list balances all the factors that we know matter to long-term persistence and sense of belonging - career alignment, financial fit, family support, academic fit and the things that individual students value in their post-secondary experience and community (e.g. campus size, geography, student life). A *smart* list will also include enough strong academic options to give students real choices. At KIPP, that means most students make a list of at least nine schools, with at least six schools that are likely+, target and reach.



A Note on Timing

At the time of publishing, the COVID-19 pandemic was impacting schools and the college admissions process in unprecedented – and rapidly shifting – ways. It reminds of us two things: first, relationships matter. Checking in with students, families and their needs are paramount even as admissions deadlines approach. These moments remind us that college counseling is just as much about empathy and relationship building as deadlines and data.

Second, deadlines may have to shift as we learn more about this application season. What follows are recommendations based on a traditional college calendar and KIPP experience. You may need to adjust to local context.



Building a Smart Wish List is often a process of regular exploration and iteration, guided by counselors but driven by individual student needs.

What does success look like?

Depending on your caseload and local context, specific goals and dates may look different. With your team, you should define:



What a “SMART Wish List” looks like. At KIPP, most students make a list of 9 schools with at least 6 likely +, target and reach. These goals may differ based on academic profile. Students check their list according to the following aspects of fit:

- ✓ Career alignment: Does my options have my anticipated major(s) or a path to my desired career?
- ✓ Financial Fit: Do I have options that I am confident will provide me sufficient financial aid?
- ✓ Academic fit: Do I have options that are strong fits for my academic profile? Do I have a balanced list of likely+, target, and reach schools?
- ✓ Success fit: Do my options have strong graduation rates and supports to ensure I complete?
- ✓ Personal fit: Do my options reflect my desired post-secondary experience and community?
- ✓ Family fit: Are my parents supportive of my options?



Deadlines for SMART Wish List completion. KIPP recommends all juniors complete a draft wish list by the end of their junior year, about May 31st. Seniors should refine their wish list by September 30th so on October 1 they can move into financial aid and post-secondary applications.

What tools should I use?

Power Tools

With students...

To manage your own work and team...



<p>To create and iterate on wish lists:</p> <ul style="list-style-type: none"> 🔗 Recommended search tool: Overgrad (Student Match Tool) 🔗 Student Quality Wish List Review Worksheet <p>To prepare for financial aid and understand financial fit:</p> <ul style="list-style-type: none"> 🔗 FAFSA4caster 	<p>To track wish list completions:</p> <ul style="list-style-type: none"> 🔗 Counselor Match Tool (for KIPP) 🔗 OverGrad (Student Match Tool with counselor log in) <p>To provide feedback on wish lists:</p> <ul style="list-style-type: none"> 🔗 Quality Wish List Counselor Feedback Tool <p>To coach students considering Career & Technical Education Pathways (CTE):</p> <ul style="list-style-type: none"> 🔗 CTE Pathways Playbook
Additional Tools	
With students...	To manage your own work and team...
<p>To explore potential careers:</p> <ul style="list-style-type: none"> 🔗 You Science Career Assessment 🔗 You Science Letter to Families 🔗 You Science Results Student Facing Powerpoint 🔗 Student digital worksheet for You Science Results and Wish List Options 🔗 You Science Career Defense Project <p>To create and iterate on wish lists:</p> <ul style="list-style-type: none"> 🔗 Recommended search tool: Overgrad (Student Match Tool) 🔗 Supplemental research tools: <ul style="list-style-type: none"> ○ College Scorecard, test optional colleges, list of Early Decisions Colleges 🔗 Student Quality Wish List Review Worksheet <p>To prepare for financial aid:</p> <ul style="list-style-type: none"> 🔗 FAFSA4caster 	<p>To support career exploration:</p> <ul style="list-style-type: none"> 🔗 Introduction to You Science Training Powerpoint <p>To provide feedback on wish lists:</p> <ul style="list-style-type: none"> 🔗 Quality Wish List Counselor Feedback Tool 🔗 Starter Wish List Template

Step-by-Step



CRITICAL STEP: Support students to draft, refine and finalize a Smart Wish List.



- ☐ Outline recommended college and career options for students by academic profile. Use graduation and admissions data - as well as feedback from students - to determine which colleges support students well, and recommend these options to students to explore at the start of the process.
- ☐ Introduce students to their wish list search tool (at KIPP, we use Overgrad) and make sure you have the counselor log in set up.
- ☐ Support students in using financial aid, career, college priority and fit factors to draft wish lists.
- ☐ Review first draft of wish lists for quality fit factors; meet with students/or families to provide feedback
- ☐ Support students in refining Smart Wish List using: ACT/SAT scores, GPA, college priorities, career interests and Expected Financial Contribution (EFC). Vet for balance across college options.
- ☐ Ensure students share wish lists with parents for feedback and complete a Wish List Defense Project to share with peers and teachers.
- ☐ Ensure every junior finalizes an initial Smart Wish List that meets key criteria. (Recommended by May 31.)



CRITICAL STEP: Support ACT and SAT registration and completion.

- ☐ Connect students to ACT and SAT prep resources. (For example, the free online [ACT Academy](#).)
- ☐ Support ACT/SAT registration and hold ACT/SAT support event. (Pre-breakfast, pep rally)
- ☐ Support students in taking the ACT and/or SAT at least two times. (Research shows students do best taking the tests three times.)



CRITICAL STEP: Ensure every student completes the FAFSAForecaster and collects critical financial aid documents.

- ☐ Hold family meeting to complete FAFSA4caster and review draft wish list.
- ☐ Use FAFSA4caster results (anticipated Expected Family Contribution) to refine wish lists for financial fit.
- ☐ Collect student documents needed to complete FAFSA in a safe storage area to use for financial aid submission in fall of senior year.



CRITICAL STEP: Help students draft and prepare for personal statements.

- ☐ Determine when students will complete personal statements:
 - In English class
 - At a writing retreat
 - Independently w/ support of faculty/advisors
- ☐ Establish an online storage space for personal statement drafts.
- ☐ Ensure students have plans to solicit and incorporate feedback from teachers and peers.
- ☐ Verify that student drafts are completed by recommended date.



CRITICAL STEP: Help students identify and prep potential recommenders.



- ☐ Ensure students complete online “Brag Sheet” and send to recommenders.
- ☐ Hold training for teachers to learn about best practices for letters of recommendation.
- ☐ Determine where letters will be stored.



CRITICAL STEP: Ensure students make plans to explore the colleges on their wish lists.

- ☐ Run student college trips We recommend organizing trips by academic segment. (Note: these can occur in spring or summer.)
- ☐ For Early Decision applicants, ensure students apply to school’s summer programs and/or diversity fly-ins (if available and no or low cost).

Frequently Asked Questions



Q: What if I can’t find enough smart fit options? I’m finding that students with lower academic profiles have less options to build a balanced list.

Wish list options vary by region, and by academic profile within the region. Take time BEFORE the wish list phase to understand with your team- what do ‘best-in-class’ wish lists look like for our region at different academic profiles? Use this information to set goals and work with students.

Q: What if one of my student’s is interested in exploring a career or career training program after high school? How might their wish list and process look different?

Talk with the student about options. Encourage the student to explore both college and non-college options, and spend equal time discussing them as wish list options. Make sure students spend time understanding admissions criteria for CTE programs and for specific roles in the military, including placement test requirements. See the [CTE Pathways Playbook](#) for more ideas and detailed advice.

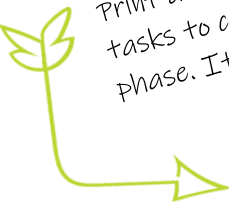
Q: What if a family member strongly disagrees with the colleges on their student’s wish list and is pushing options not aligned to the student’s academic fit?

First, recognize that the point of the family meeting is NOT to convince the family of anything; the point is to partner with families, caregivers and students to align on options that are right for them. Start with active listening. Caregivers are our best partners and they have knowledge and expertise to share. Share the information you have without judgement or agenda so they can explore and understand. Offer to connect family members with other families or schools to learn more or offer to support them in visiting one or more of the options. Support the student in leading the conversation. Finally, don’t force a conclusion to the conversation in one meeting - offer to come back at a later date.





Wait! There's more!
Print and share a student checklist of key tasks to complete in the Smart Wish List phase. It spans junior and senior year!

A green arrow with a small leaf-like shape at its tail, pointing towards the right.



College Search Checklist

Junior & Senior Year

BEFORE THE END OF JUNIOR YEAR	BY SEPTEMBER 30 OF SENIOR YEAR
<ul style="list-style-type: none"> ■ Take a career assessment. ■ Start exploring and having conversations with others about what careers you might be interested in. Research what might be required. ■ Craft and revise a “Smart Wish List” of colleges and post-secondary options you want to pursue and share that list with your family. ■ Take the ACT, SAT or other standardized tests at least once. ■ Complete FAFSAForecaster and collect financial aid documents. Share tax documents with your college counselors. ■ Draft a personal statement and collect feedback from friends, teachers or other adults you trust. ■ Create a “Brag Sheet” and give to potential recommenders. ■ Make plans to visit or virtually explore the colleges and programs on your wish list. This might include attending summer programs. ■ Talk to your counselor about whether or not “Early Decision” or “Early Action” is the right choice for you. If so, start getting those applications ready! 	<p>If you missed it in junior year:</p> <ul style="list-style-type: none"> ■ Complete FAFSAForecaster and collect financial aid documents. Share tax documents with your college counselors ■ Draft a personal statement and get feedback and advice from friends, teachers and other adults you trust. ■ Create a “Brag Sheet” and give to potential recommenders. ■ Make plans to visit or virtually explore the colleges and programs on your wish list, potentially applying for and attending summer programs. <p>All seniors:</p> <ul style="list-style-type: none"> ■ Refine and finalize your “Smart Wish List and share it with your family. ■ Take the ACT, SAT or other standardized tests. (It’s recommended that you take them two or three times.) ■ If applying Early Action or Early Decisions, visit the college and complete your application on time. (Likely by 11/1) ■ Once your wish list is finalized, make a list of all the materials you’ll need to complete your applications.



2. SUBMIT QUALITY APPLICATIONS

In a rigorous College & Career Match process, a wish list creates the blueprint for post-secondary applications. Like any blueprint, it's only the start of the journey and the application process is where the real work starts. As senior year begins, counselors can partner with students to ensure they apply early to all the options on their wish list and submit quality applications that will increase their acceptances down the road.

What does success look like?

Depending on your caseload and local context, specific goals and dates may look different. With your team, you should define:

Deadlines for applications. Many colleges offer “rolling” admissions deadlines but applying on the early end gives students the best chance of securing the most aid possible. Consider a deadline that balances early submission with the time required to submit high-quality applications.

A Note on Timing



At the time of publishing, it was still unclear how the COVID-19 pandemic might impact college application deadlines and requirements.

What follows are recommendations based on a traditional college calendar and KIPP experience. You may need to adjust to local context.



We recommend that, by **November 30**, every senior submits applications to all the programs and colleges on their wish list, and students applying Early Decision or Early Action submit those applications by their November deadlines. (Likely **November 1** or **November 15**.)

What tools should I use?	
Power Tools	
With students...	To manage your own work and team...
<p>To explain and prepare for applications:</p> <ul style="list-style-type: none"> • Applying to College Mini Course (Khan Academy) • Resources for Recommendations • Resources for Personal Statements • Resources on Personal Statements Recommendations, and School Profiles <p>To engage families as a support team:</p> <ul style="list-style-type: none"> • Monthly Questions Families Can Ask in the College Application Process <p>To help students organize their applications:</p> <ul style="list-style-type: none"> • College Application Work Plan 	<p>To organize your work:</p> <ul style="list-style-type: none"> • Counselor Match Tool (A progress monitoring tool KIPP counselors use to track application completion) <p>To support application completion:</p> <ul style="list-style-type: none"> • Fee Waiver Search Tool by College Board • Example Applications Workshop • Example Applications Campaign • Story2 Personal Statement and Common Application Resources

Step-by-Step



CRITICAL STEP: Set up systems to guide the work ahead.

- ☐ Create a system to track student applications and submission status.
- ☐ Identify which students might apply Early Action or Early Decision and adjust your own support and deadlines accordingly.
- ☐ Identify and distribute instructions to students who may be eligible for fee waivers.
- ☐ Train high school staff on supporting strong applications, including their role in writing recommendations and reviewing personal statements.
- ☐ Connect with key high school staff to support the work, including English teachers to support personal statements and special education teachers who can support the application process.
- ☐ Offer students a template for tracking their own work, including critical components of each application to submit.
- ☐ Schedule key opportunities to engage students and families, including workshops and one-on-one conversations.



CRITICAL STEP: Critical Step: Introduce students and families to the application process.



- ☐ Host a summer or fall workshop to introduce key post-secondary vocabulary, the process ahead and strategies for personal statement and recommendation completion.
- ☐ Share resources with families like vocabulary worksheets and questions to ask so they can be active partners in the application process.
- ☐ Prepare and distribute application support materials for students, including application work plans, resources for recommendations and strategies for personal statements.
- ☐ Continue identifying and distributing instructions to students who may be eligible for fee waivers.
- ☐ For students applying to test-optional schools, create recommendations for how to build quality applications without test scores. (For example, creating guidance for and reviewing writing samples.)
- ☐ Track the status of student applications in progress.



CRITICAL STEP: Support students and families to complete quality applications.

- ☐ Continue to track application statuses, leaning in to provide support for students who may be falling behind.
- ☐ Enlist high school staff to offer regular reminders and support for personal statements and recommendations.
- ☐ Host regular checkins with students to check in on applications. Provide feedback on personal statements and application artifacts like writing samples.
- ☐ Host application work sessions. This might happen in a college and career seminar class, advisory, or other academic class, or it could happen after school.

For Students Consider CTE and Military Options

The process of applying to CTE options and preparing for military enlistment requires research, preparation and organization. For CTE programs, the application length, timeline and requirements will vary by organization (ie, community college or standalone program housed in a nonprofit). We recommend applying the same principles that a student might apply to the college application process: research application requirements and timelines; create an application plan; and work with students, counselors, teachers and families to complete applications. For students considering military options, we recommend students research different military careers and corresponding requirements, including scores on the ASVAB test, and develop a preparation plan.

Frequently Asked Questions



Q: With so many students on my caseload, who should I prioritize and when?

Deadlines will likely come sooner for Early Decision and Early Action applicants so consider more intensive outreach to those students in early September and October. (Deadlines are likely November 1.) As you continue to prioritize your caseload, consider: which students have the earlier



applications? Which students may need additional support gathering or reviewing materials? Who else can I enlist to support application review?

Q: I have too many students on my caseload to review every personal statement or recommendation. What can I do?

This is an opportunity to engage a wider circle of application supporters and reviewers. Consider enlisting teachers or other staff to review student statements, offering advice or guidelines for review. If time permits, host a workshop for school staff to emphasize the importance of statements and recommendations along with guidelines for writing and review. You can also use “many-to-one” approaches to nudge all the students on your caseloads: send video tutorials; text reminders; or emails with tips, resources and upcoming deadlines.


Q: What if students are concerned about the financial cost of applying to all options on their wish list?

Start by researching application fee waivers as there may be some already available to your student. If they are not available or your student does not qualify, try supporting the student in calling the admissions office and ask about the process of applying for a fee waiver. If they do not qualify, some colleges will allow counselors to write a letter explaining the need. If no fee waivers are available and your school is unable to fund some application support, we recommend focusing the wish list and applying to as many wish list schools as possible.

Q: What if students choose to apply to schools that are vastly different from those on their wish list?

This is an opportunity for active listening and influence. Consider meeting with the student (and, if possible, their family) to understand why their intentions have changed. Help them re-review their new wish list to ensure it still includes financial and academic fits. The college application process is ultimately about ensuring students and families have the data and information they need to make informed choices while also recognizing that it’s a big decision and one that should be led by student needs and interests.

Wait! There's more!
Print a student-facing checklist to help them track and complete key activities during their application process.





College Application Checklist

Senior Year

AUGUST - SEPTEMBER

- Revisit your wish list and research when applications will be due and what's required.
- Create a workplan for your application process. For each application, note the due date, application link, what's required and create a place to track completion of each application element.
- Identify who can be on your application "team" to draft recommendations. Send them a "brag sheet," along with a deadline to complete. (Set this deadline a few weeks before you plan to submit.)
- Revisit your personal statements, seeking feedback from teachers, family and peers. Update and adjust where necessary.
- Talk to your counselor about requesting "fee waivers" to avoid paying the cost of application fees. Capture requirements in your application work plan.

OCTOBER - NOVEMBER

- Submit necessary fee waivers.
- Send reminders to recommendation writers, emphasizing when you plan to submit your applications.
- Schedule time with your college counselor to review applications before final submission.
- Submit all applications!
- Confirm that colleges received all your application materials



3. PREPARE FOR FINANCIAL AID

Higher education is an investment. The initial price tag can be intimidating, but careful planning, diligent financial aid preparation and scholarship applications can make post-secondary education more affordable. At this phase in the work, counselors play a critical role in ensuring students can become financially fit.

What does success look like?

Depending on your caseload and local context, specific goals and dates may look different. With your team, you should define:

Deadline for FAFSA completion. The federal deadline for FAFSA completion is typically June 30. Applying early, however, can improve students' access to the most aid possible. Consider a deadline that's feasible while ensuring students get the best financial options possible.

We recommend that every senior completes the FAFSA by **January 31**.

A Note on Timing



At the time of publishing, it was still unclear how the COVID-19 pandemic might impact college application and financial aid deadlines.

What follows are recommendations based on a traditional college calendar and KIPP experience. You may need to adjust to local context.



What tools should I use?	
Power Tools	
With students...	To manage your own work and team...
<p>To explain and prepare for financial aid submission:</p> <ul style="list-style-type: none"> • Paying for College Mini Course (Khan Academy) • Federal Student Aid YouTube Channel • Big Future's Pay for College Site • Financial Aid Vocabulary Sheet (English) • Financial Aid Vocabulary Sheet (Spanish) • Overview of College Savings Plans <p>To find financial fit colleges:</p> <ul style="list-style-type: none"> • Net Price Calculator • Colleges That Meet Full Financial Need • Guide for Undocumented Students • College Scorecard <p>To complete FAFSA:</p> <ul style="list-style-type: none"> • FAFSA Checklist and Timeline • FAFSAForecaster Guide • FSA ID One-Pager • CSS Profile One-Pager • Annotated Tax Form • How Download a Tax Transcript <p>To apply for scholarships:</p> <ul style="list-style-type: none"> • College Greenlight Scholarship Search Site • Scholarship Planner • Scholarship Search Tips • Poster with Scholarship Criteria • Resources for Undocumented Students <p>To compare Financial Aid Offers:</p> <ul style="list-style-type: none"> • Appeal Letter Support • Financial Aid Offer Analyzer • Steps to Appeal Financial Aid 	<p>To host trainings with families and students:</p> <ul style="list-style-type: none"> • FAFSA-in-a-Box Workshop • 6 to 16 Curriculum (Developed by KIPP and University of Chicago) <ul style="list-style-type: none"> ◦ True Cost of College ◦ Lifetime Earnings and Career ◦ Scholarships 101 ◦ True Cost Examples ◦ Financial Aid Options ◦ Applying for Financial Aid ◦ Potholes Case Study ◦ My College Savings Plan <p>To address special circumstances:</p> <ul style="list-style-type: none"> • Guide for Undocumented Students • Supporting Students with Special Circumstances • COVID-19 Appeal Letter • Student Script for Appealing Financial Aid



Step-by-Step



CRITICAL STEP: Set up systems for success.

- ☐ Create a FAFSA completion tracker for the students on your caseload.
- ☐ Identify local resources to support families in the financial aid process, such as free local tax prep resources.
- ☐ Train your team (and yourself!) in FAFSA completion and financial aid processes in your state. If your student population includes students without documentation or with DACA, research alternative financial aid support.



CRITICAL STEP: Support juniors to complete FAFSA4Caster.

- ☐ Host a workshop (or workshops) during junior year to introduce key concepts like the cost of college, financial aid options and documents needed to complete financial aid. Consider collecting tax documents at this time to prepare to support your students for FAFSA completion senior year.
- ☐ Create and deliver checklists for juniors to gather the information they'll need to complete FAFSA4Caster.
- ☐ Support juniors to complete FAFSA4Caster, either on their own, in workshops or in one-on-ones.
- ☐ Once FAFSA4Caster is complete, schedule time with each junior on your caseload to review their EFC and cross-examine their wish list. Make adjustments, as necessary, to ensure there are financial fits.
- ☐ Where needed, connect families with local resources for tax completion.



CRITICAL STEP: During senior year, help students and families complete FAFSA and the financial aid process.

- ☐ As a college counseling team, meet regularly to review progress-to-date on FAFSA submission to identify needs and triage support.
- ☐ Host a workshop, office hours or one-on-ones to help students and families complete FAFSA.
- ☐ Help students identify and complete the necessary financial aid steps for the colleges on their wish lists. Some colleges may require additional forms.
- ☐ If students are applying to private colleges, support them to complete the CSS Profile.



CRITICAL STEP: Review and evaluate student aid offers as they arrive.

- ☐ Remind students to submit offer letters for analysis.
- ☐ Support students to review and compare letters, identifying the total anticipated out-of-pocket cost of college and anticipated loan payments after college.
- ☐ If necessary, support students and families to appeal financial aid offers.



Frequently Asked Questions



Q: How can I support families without tax records or recent tax submissions?

Parent tax returns are required unless a student meets independent status. We encourage you to connect with local tax organizations to support families who have not filed taxes as most counselors are not tax law experts. If families have not filed taxes, students have a few options. They can apply for independent status if they meet the requirements. Or, if they don't, the best option may be to work with the family and a local tax expert to file taxes. Tax experts can help families navigate the process and ensure they pay any required penalties or fines.

Q: I have too many students on my caseload to support every FAFSA submission. What can I do?

Start with many-to-one approaches: send out video walkthroughs and tips; visit academic classes; and hold workshops in computer labs. Recruit volunteers like teachers, peer leaders, community organizations, banks and local colleges. Take regular inventory of how many students have not completed the FAFSA and organize your volunteers for one-to-one follow up. Finally, consider using tools like nudge mass texting or email to supplement one-to-ones and group programming.

Q: How can I support students and families if financial aid offers to their top choice colleges are not sufficient for a financial fit?

Meet with the student, family and caregiver to review the financial aid offer and understand their ability to pay. Work with students to submit a financial aid appeal and try calling the admissions and financial aid office to advocate. While waiting for the answer, work with the student to determine the 'next best' financially viable option and encourage the student to explore classes, activities and other experiences they could have at that option.

Wait! There's more!
Print a student-facing checklist to help them track and complete key activities during the financial aid season.



Financial Aid Checklist

Junior & Senior Year

BEFORE THE END OF JUNIOR YEAR

- Create your FSA ID. You'll need this to complete FAFSA. (Visit: fsaid.ed.gov)
- Complete the FAFSA4Caster to get an early estimate of your potential financial aid. (Visit: fafsa.ed.gov/spa/fafsa4c)
- As you build your wish list, review every option to determine if it's a "financial fit." Ensure you include options that are more affordable on your list.
- Begin gathering the documents you'll need to submit FAFSA in the fall:
 - Social Security number (if applicable)
 - Family taxes and earnings from previous year
 - Information on investment, checking and savings accounts
- Begin researching scholarships. Create a simple tracker with scholarship names, links, requirements and submission dates.

DURING SENIOR YEAR:

October - November

- Work with your family to submit FAFSA. You can use the IRS Data Retrieval Tool to populate with tax information. (Visit: fafsa.ed.gov)
- Review your Student Aid Report (arrives a few days after FAFSA submission) to ensure all the information is accurate.
- Continue researching potential scholarships.
- Apply for scholarships as deadlines approach.
- Review the financial aid requirements for every college you plan to apply to. Make plans to submit any additional financial aid forms on time.

January - February

- Complete FAFSA verification, if required.
- Check in with colleges to ensure they have all the information they need for financial aid.

March - May

- Submit financial aid offers to your counselor so you can review together.
- If needed, work with your counselor to submit financial aid offer appeals.
- Analyze each award letter to better understand your out-of-pocket cost and future loan payments.
- Prepare to submit a deposit to your selected college by May 1.