

Getting Students to Day One

A Communications Toolkit for the
California Community Colleges

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About ideas42



ideas42 has a clear mission: to use our unique experience as a non-profit at the forefront of behavioral science to change millions of lives. We create innovative solutions to tough problems in economic mobility, health, education, safety and justice, consumer finance, energy efficiency, and international development. Our approach is based on a deep understanding of human behavior and why people make the decisions they do. Working closely with our partners from government, foundations, NGOs, and companies, we have more than 80 active projects in the United States and around the world.

Visit ideas42.org and follow [@ideas42](https://twitter.com/ideas42) on Twitter to learn more about our work.

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ideas42 would also like to recognize the college staff, faculty, and students all across California who shared their experiences and practices with us for this report.

About this Project

The Student Journey to Success project is driven by a core commitment in the California Community College's *Vision for Success* to "Always design and decide with the student in mind." The project is a joint effort by the Chancellor's Office and the Foundation for California Community Colleges, with funding from College Futures Foundation and the Stupski Foundation to apply the lens of behavioral science and reduce subtle barriers that hinder students' progress through the early phases of matriculation and educational path-choosing. This process informs the design of interventions that help set students on a path to success at the beginning of their college journey.



Introduction

The first day of college: students come to campus, meet new people, and kick off a new phase of their education. But before students get to day one, there are many things that have to happen first. While steps like filling out financial aid forms, attending orientation, or registering for classes may seem easy, research shows that as many as 40% of college-intending students don't end up matriculating at any college.¹ Those seemingly small steps become life-altering hassles.

Behavioral science can help close this gap. In 2018 and 2019, ideas42 worked with the Foundation for California Community Colleges to understand the behavioral barriers that students face in applying to and matriculating at California Community Colleges (CCCs). Through this work, we interviewed over 60 students and staff members across the state, including more than a dozen interviews specifically focused on steps after graduation. By coupling these interviews with the behavioral science literature, we identified principles for communicating with students after they apply to a CCC. The principles fall into three categories:



1 GET ATTENTION: The first challenge in communicating effectively with students is making sure that the message is noticed. Use these tips to help get your message in front of students as effectively as possible.



2 TAILOR THE MESSAGE: Once students see the message, make sure it's as easy to understand as possible. These tips help make messages more understandable and operational for students.



3 MAKE ACTION EASY: It's not enough to say what students should do. We have to make it easy for them to do it. These tips help prompt students to take an action.

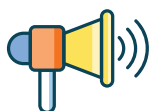
Many of these suggestions are already being implemented across the CCC system. However, in the actual day-to-day of communicating with thousands of students, it can be hard to know what to say or do and to remember the principles of effective, behaviorally informed communication. These evidence-based design principles are meant to serve as a guide to make any communication even better.

¹ Castleman, Benjamin L., and Lindsay C. Page. "A Trickle or a Torrent? Understanding the Extent of Summer Melt Among College-Intending High School Graduates: Summer Melt Among College-Intending Students." *Social Science Quarterly* 95, no. 1 (March 2014): 202–20. <https://doi.org/10.1111/ssqu.12032>.

Design Principles Checklist

Use this checklist to identify areas where you might be able to improve your communication.

The following pages offer more detail and concrete implementation advice for each area of the list.



Get Attention

Will your message break through, so that students see it?

- 1. Align Medium with Content:** Make sure the right message comes in the right format.
- 2. Emphasize Relevance:** Be clear that the message matters for each student who receives it.
- 3. Optimize Timing:** Remind students without pestering them.

(page 5)



Tailor the Message

Is your message easy to understand and credible?

- 1. Use the Right Sender:** Have messages come from someone credible.
- 2. Prioritize Word Choice:** Use plain language wherever possible.
- 3. Make it Personal:** Make individualized help available.
- 4. Use the Right Tone and Voice:** Sound professional but friendly.

(page 9)



Make Action Easy

Does your message prioritize what students have to do?

- 1. Emphasize Deadlines:** Highlight when things need to get done.
- 2. Provide Concrete Steps:** Link to the next step whenever possible.
- 3. Use A Checklist:** Make it very clear what needs to happen next.

(page 14)

What is Behavioral Science?

Behavioral science is the study of how people make decisions and act within a complex and textured world where details matter. It draws from decades of research in the social sciences to create a more realistic framework for understanding people. The standard approach to predicting human behavior suggests that we consider all available information, weigh the pros and cons of each option, make the best choice, and then act on it. The behavioral approach shows us something different. We make decisions with imperfect information and do not always choose what's best for us. Seemingly small and inconsequential details undermine our intentions to act. Behavioral science has been used across a variety of fields to realign policies, programs, and products with how we really behave, improving outcomes for millions of people worldwide.

A Note on Testing

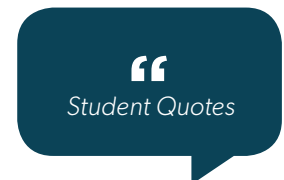
What works in one context doesn't always work elsewhere; that's why experimenting and evaluating is a core part of behavioral science. For many of these suggestions, we've offered a way to approach communication. But you should try out what works for your department and your school. Use these guidelines as a starting point, but also adapt them and learn what works. Some good ways to test are:

- 1. User test with students:** Got a good idea for a way to communicate but not sure that it will land? Mocking up a quick copy and showing it to students for feedback can really help. Even getting some quick and informal opinions can identify areas for improvement and help you see things more clearly through a student lens.
- 2. Run A/B tests:** An A/B test compares differences in outcomes between groups who got different versions of a communication. Because A/B tests use randomization, they are a rigorous way to learn what works. For free tools to help you run your own A/B tests visit abtesting.ideas42.org.

A Note on Quotes

Throughout this guide we've used quotes from both staff and students to illustrate our suggestions. These quotes were taken from our interviews at colleges across California. Of course, no one quote can speak for the experiences of all students. Because of this we've used quotes that illustrate broader trends from those conversations and from our observations, and we've integrated relevant evidence from behavioral science wherever possible.

As part of our interview process, we showed sample communications and asked for student responses and feedback, and many quotes refer to these example communications to make a broader point about best practices in general. While we've done our best to include exact quotes wherever possible, some quotes have been slightly paraphrased or edited for clarity.





»» 1. GET ATTENTION

The first challenge in effective behavioral communication is to ensure that communication actually occurs. Sending students an email or a text doesn't necessarily mean that the message was received; if they don't see it, read it, or feel it's relevant to them, an opportunity to connect is lost.

To create communications that get the attention of students, consider:

- 1 What is the best way to send the message?**
(Align Medium with Content)
- 2 How can you make the message most relevant to each student?**
(Emphasize Relevance)
- 3 How frequently should you send the message and reminders?**
(Optimize Timing)



Align Medium with Content

GET ATTENTION

It is important to communicate with students in ways that they are likely to see, and that make sense for how they receive and process information. **To maximize the impact of your efforts, recognize and take advantage of the strengths of each communication medium and use them strategically to meet students where they are.**

What is the Evidence?

From the CCC System: While the students we interviewed had different habits and preferences, there were a few things that the CCC students agreed upon:

- ▶ Students agreed that **email is a more formal and professional medium**, and the one that they expect the bulk of their important communications from the school to arrive through.
- ▶ Several students also mentioned that complex topics such as financial aid would be better communicated via email.
- ▶ Students felt **texts would be best suited for quick reminders** about deadlines or events, and should not be too long or contain too much information.

From the Behavioral Literature:

There is strong evidence that information sent through either text or email can increase the likelihood of students taking action. In partnership with Arizona State University, ideas42 developed a set of behaviorally informed email communications designed to nudge students to renew their FAFSA by the school’s priority deadline. Just 18% of families who received the standard communications renewed by that date, but those receiving the new emails aimed at reducing behavioral barriers to action were 72% more likely to file by the priority deadline.²

How to do it:

1 Use emails to communicate important or in-depth information:

When the contents of the communication is meant to explain to, or inform the student of, an important action they must take with multiple steps and/or hyperlinked information, that information is best communicated using email. For example, an email is ideal for sharing instructions for how to complete financial aid.

2 Use texts for reminders and quick discrete actions:

The instant nature of text messages makes them best suited for short communications about timely subject matters. Texts can cut through other noise to get students attention and their short length makes them perfect for conveying quick messages or easy actions that student should take (See [Provide Concrete Steps](#)), at the time they should take them (See [Optimize Timing](#)). Text messages are also likely to get faster responses from students in the case where a response is desired. So, to remind students to sign up for a financial aid workshop that same day, text message is the best medium.

3 Use channels in complementary ways:

For complicated tasks with longer time horizons, it may be suitable to leverage a combination of emails, texts and other channels to help students take action. For example, send an initial FAFSA email with detailed instructions and follow up with text message reminders containing hyperlinks.

“ ... With reminders I get them through text. Important stuff, I get through email. -Student

“ If it’s something small like a reminder of an orientation than a text message would be better than a full on email. But if it’s more important like for a FAFSA or I’m missing something I would rather get an email. -Student

“ I prefer email - I check my email all the time. That’s the main communication from the college, so students will be checking it way more. I expect important communications to come through email. Reminders I imagine will come through text. -Student

² Increasing FAFSA Applications: Making College More Affordable.” December, 2015: ideas42. Accessed March 21, 2019. <http://www.ideas42.org/wp-content/uploads/2015/12/FAFSA-Brief.pdf>



Emphasize Relevance

GET ATTENTION

The journey to matriculation isn't the same for every student. Some students will need reminders about registration, but not about FAFSA and vice versa. **Behaviorally informed communications will reduce the potential clutter by focusing only on the steps that an individual student still has to do.**

What is the Evidence?

From the CCC System: Throughout our interviews,

- ▶ Staff highlighted the need to communicate with **specificity and relevancy**.
- ▶ Staff point out that students **can get many different emails based on their initial application**, so making sure that they are relevant can help cut through the noise.

From the Behavioral Literature:

- ▶ There is strong evidence **that communications that are relevant are more likely to prompt action** than those that are not.

In one recent ideas42 project, we redesigned an email inviting students to test into the Gifted and Talented program in their school district. One element of the redesign involved reframing the email with relevancy in mind, replacing the initial "if your child will be entering Kindergarten and you are interested in testing" statement with language that made it clear the email was meant for a particular student.

- ▶ Our redesigned email increased the number of students who registered for the Gifted and Talented test **by over 6%**.³

“
When a student applies, they could get 7 emails triggered from their application. Those are confusing. -Staff

“
We don't want it to be generic; we want to connect students with supports they need. We don't want to leave it on them to do a thing if we know they qualify for a service and would benefit from it. -Staff

How to do it:

1 Customize the communications: As much as possible, only send communications to students when they are relevant to their particular situations.

2 Don't start with "if": Make it clear right from the start of your communication that it's relevant to students. Often, even targeted communications can appear irrelevant if they start with qualifying statements.

3 Use the data: Knowing what a particular student has left to do is the first step towards messaging them about it in a relevant way. Trying to bridge gaps between siloed data can help make it easier to send relevant messages.

³ Anthony Barrows et al., "Behavioral Design Teams: A Model for Integrating Behavioral Design in City Government" (ideas42, April 2018): 27.



Optimize Timing

GET ATTENTION

Knowing that their students are constantly flooded with various types of communications, announcements, and reminders, colleges often balance the need for frequent reminders with the desire not to over-communicate. **A behavioral perspective can help colleges send the right number of communications at the right time, so that students meet deadlines on their way to matriculation.**

What is the Evidence?

From the CCC System:

- ▶ While the students we interviewed had varied preferences, they generally wanted to be told of **specific tasks as soon as they are available**, and **reminded with increasing frequency as deadlines approach**.
- ▶ Also, students indicated that there are some particularly good times to reach out, but this was also driven by individual preference (see quotes at right).

From the Behavioral Literature:

While directly testing different messaging frequencies has not been a part of any college-matriculation projects to our knowledge, a general frequency of messaging every five days has been used successfully in summer melt interventions.⁴

“

For financial aid, [I want a reminder] when it starts, Whenever the first day that the application is available. Once we get closer to the date, probably a month from the deadline then once a week after that if I haven't done it already. -Student

“

I check [my email] twice a day, once in the morning and once in the evening. I try to check every day, there are days like Sunday when I don't but usually twice a day. -Student

“

Usually I check my phone in the morning. If I wake up to [a text reminder] that would be good. -Student

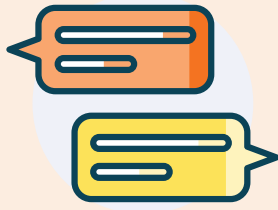
How to do it:

1 Understand the flow of other communications: There's a lot to do before starting college, but we also don't want to bombard students with messaging. Understanding where your communication fits in with others can help ensure it's received and read. Making a communications plan at the college-level can make sure that the volume is reasonable overall.

2 Pick up the pace over time: Messaging students about tasks roughly once a week is a good baseline, and then communicating more frequently as deadlines approach can help students stay on track.

3 Consider the time of day: Some times of day are better to take action; it's hard to attend to a personal task during the work day, for example. Because student schedules are diverse and volatile, there isn't one right answer for when to send a message. Using what you know about your context and particular demographics can help you hone in on the best strategy.

⁴ Benjamin L Castleman and Lindsay C Page, "Summer Nudging: Can Personalized Text Messages and Peer Mentor Outreach Increase College Going among Low-Income High School Graduates?," *Journal of Economic Behavior & Organization* 115 (2015): 144-60.



»» 2. TAILOR THE MESSAGE

Once you have gained the attention of your students, you'll want to ensure that they read and understand the information that is being provided to them.

To help increase the likelihood of that happening, craft your message in a way that carefully considers:

- 1 Who should the message come from?**
(Use the Right Sender)
- 2 What words align best with what you're trying to say and do students understand them?** (Prioritize Word Choice)
- 3 Can you make it feel like it's coming from a supportive, caring person?** (Make it Personal)
- 4 What tone should the message strike to inspire action?**
(Use the Right Tone and Voice)



Use the Right Sender

Students notice the nuances of a sender. Getting a message from the college as a whole is very different than getting a message from a peer or professor, for instance. Different senders have different areas of expertise and levels of credibility with students. Being thoughtful about who the message is coming from can increase students' chances of taking the next step. **Successful communications take into consideration who students think has the most credibility to send a message.**

What is the Evidence?

From the CCC System:

- ▶ Students indicated that they are most interested in hearing from staff members, and specifically from counselors, when the message is about academics or registration.
- ▶ However, many students would rather hear from their peers about the transition to college and the experience of being a student.

From the Behavioral Literature:

In the behavioral literature around persuasion there are many examples of ways in which people rely on the expertise of the messenger to help them make smart decisions. In cases where the expert is also seen to be impartial, and not providing a biased opinion, our assessments of the sender and the information they provide are more positive.⁵

How to do it:

1 Consider expertise: Before deciding who your message should come from, think about who your students would view as an expert on that subject. When the communication is about coursework or transferring, you might send it from an academic counselor, when related to the personal experience of being a student or on-campus activities, try sending it from a peer.

2 Use a real person: When possible, send emails from an individual; students react positively to direct outreach from a live person who might serve as a contact moving forward.

“

I would ask [a counselor] about the next step that comes after applying and what classes I would need to take my first year... I would probably ask how it is at the college [to a student]. -Student

“

A counselor would be able to answer many more questions than a student. They can answer about technical details - how the credits work, what classes I need to take . . . To a student I would ask about more social aspects - clubs etc. Counselors don't give information from the perspective of someone going through classes and a student could give more details and experience based information about what it's really like. -Student

⁵ Cialdini, Robert B., and Noah J. Goldstein. "The Science and Practice of Persuasion." *The Cornell Hotel and Restaurant Administration Quarterly* 43, no. 2 (2002): 40-50. <http://www.sciencedirect.com/science/article/pii/S0010880402800301>.



Prioritize Word Choice

In academia, there are many commonly used words and phrases that make sense to those in the field. Words are sometimes so commonly used that we think they are familiar to everyone. However, many new students may not understand what even seemingly simple phrases like “academic term” or “non-credit” mean, leading to confusion. When a student cannot easily understand a message, they may just ignore it. **Behaviorally informed communications are simply written and do not have jargon.**

What is the Evidence?

From the CCC System: When we interviewed students about their application and matriculation experiences at their individual CCCs:

- ▶ Many students mentioned being **unclear about some of the words or terms that they came across.**
- ▶ Many staff members had also encountered students who didn’t understand college-related jargon.

From the Behavioral Literature:

- ▶ Removing jargon from communications often leads to greater understanding and more positive ratings from readers and receivers.
- ▶ One series of experiments showed that overly complex vocabulary and hard-to-read fonts decreased both understanding of the contents and the reader’s assessment of the intelligence level of the author.⁶

“
I don’t think they understand the definition of total family income or what’s considered family size - is it just in your household, or are there multiple families in your house? I can’t think of 5 people that I’ve helped who have understood what household meant.
-Staff

“
The residency check could maybe be more clear about what it means. People might think it means residency at college, like residency; other people might think residency of this country. -Student

How to do it:

1 Avoid jargon: To prevent frustration and the creation of further hurdles to matriculation, avoid potentially confusing terminology where possible and clearly explain the meaning of jargon words and phrases where they cannot be eliminated.

2 Use simple, clear language: Use simple words in place of more complex ones, aiming for a 6th grade reading level. You can use a downloadable tool like [Hemingway](#) or the reading level tool inside Microsoft Word to help ensure that your communications will be easily understood by people of varying ages and English reading abilities. Aiming for simple means that everyone will be able to understand the message more clearly.

3 Use universal language: Ensure that you are using consistent terms across communications to avoid student confusion.

⁶ Oppenheimer, D. M. (2006). Consequences of erudite vernacular utilized irrespective of necessity: Problems with using long words needlessly. *Applied Cognitive Psychology*, 20(2), 139-156. <http://www.ucd.ie/artspgs/semantics/ConsequencesErudite.pdf>



Make it Personal

TAILOR THE MESSAGE

Messages need to be relevant (See [Emphasize Relevance](#)) but they also need to be personal. **Your email or text will be most impactful when it communicates not only the right information, and also conveys a sense of support and responsiveness to students' individual needs.**

What is the Evidence?

From the CCC System: In our user tests:

- ▶ **Students responded more positively to messages that came directly from a real and specific person rather than the CCC System or from a chat bot.**
- ▶ Personal messages made them feel comfortable and as if the content was tailored just for them.
- ▶ Students thought that text messages with the opportunity for response (two-way texting) was the most effective medium for getting reliable, personalized information quickly.
- ▶ When probed specifically about their thoughts around chatbots, students acknowledged that a bot might have valid information but they perceived the technology to be unable to provide specific answers to their individual questions or concerns, the way a real person can.

From the Behavioral Literature:

Research shows that adding a human touch to communications can help people follow through on their intentions to take action. One experiment by the Behavioral Insights Team and the UK court service sought to increase the payment of court fines, by sending people text message reminders. They found that a **personalized text message that included the person's first name at the start, was especially effective in increasing the average payment of fines.**⁷

How to do it:

1 Provide a direct contact: Whenever possible, send messages from a real person. Students feel welcomed by the school and more comfortable asking questions when they can connect with a live person in a personalized way.

2 Use first names: Address students by name at the start of the message and sign texts, emails or other types of communications with the name of a person that can serve as a contact going forward.

3 Be responsive: Be responsive to students' questions with individualized information whenever possible. If you use two-way texting to directly message students, keep in mind their expectation of a quick reply. Where that may not be a viable option, another medium might be preferable (See [Medium](#)).

“
I think the [message] from a counselor is really personal. This other one is more from a system - I think it would work but, it's the same for every student. But the others are personalized.
-Student

“
[Responding to an automated message] They would know a lot but it wouldn't be so individual.
-Student

“
You can't really ask questions to AI. They'd direct you to a website, but I need someone to tell me what to do.
-Student

“
I like the two-way because there is a response. I feel like texting would get you more of an immediate response.
-Student

⁷Haynes, Laura C., Donald P. Green, Rory Gallagher, Peter John, and David J. Torgerson. 2013. "Collection of Delinquent Fines: An Adaptive Randomized Trial to Assess the Effectiveness of Alternative Text Messages." *Journal of Policy Analysis and Management* 32 (4): 718-730.



Use the Right Tone and Voice

Students don't just see the words on a page and the message; they notice how an email or text is written. It is important to consider both the tone and the voice in your messages, and how they work together to create student's impression of the communication and inspire important next steps. **Carefully crafting tone and voice for your target group of students could increase the likelihood that they will take the actions necessary to fully enroll in school.**

What is the Evidence?

From the CCC System, regarding Tone:

- ▶ When given a set of 3 messages, all with financial aid related content but with differing tones, students often preferred those with a friendlier tone.
- ▶ But, while many liked messages with a friendly tone, they believed that a slightly harsher, more serious tone would be more likely to spur them into action.

From the Behavioral Literature:

One classic study from the business psychology literature shows us the importance of carefully crafting the right tone for your communications. By altering just 3% of the words in a written communication, on a spectrum that the experimenters considered "flexible" to "strict", they found that college students' positive or negative appraisals of the sender changed drastically.

Using a "strict" tone caused people to feel measurably more negative about the company and to perceive the organizational environment as less desirable.⁸

How to do it:

1 Keep it friendly: Use a friendly, professional tone to introduce people or departments and to communicate to students that they are welcomed at your college; that the relationship between a student and the school is a valuable one that the school takes seriously. This is most likely to lead to a positive result.

2 Communicate urgency: Use a serious tone to communicate urgency when something is particularly important or needs to be done quickly. Use tactics like bolded text, capitalized words, and phrases such as "urgent" to help make this clear. Couple this with a deadline (See [Emphasize Deadlines](#)) and provide a link or other clear instruction about what to do next (See [Provide Concrete Steps](#)). Be careful not to be overly formal or distant. Students should still feel comfortable interacting with the school and asking questions. Serious should not become impersonal.

“
I like a friendly tone, but the harsh one would make me act faster. -Student

“
It seemed more friendly and gave important information like the deadline and emphasizes how late applications won't be accepted. I just gravitate toward this one. -Student

“
I would prefer the harsher one. As a teenager, most of us brush things off. When we hear something aggressively, we tend to listen. -Student

“
Even though it's a little rude it would make me want to submit it faster. It would be more likely to make me go and do it. -Student

⁸ Raymond W. Kulhavy and Neil H. Schwartz, "Tone of Communication and Climate Perceptions," *The Journal of Business Communication*, 18, no. 3 (October 1, 1980): 17-24



»» 3. MAKE ACTION EASY

Communicating with students during the matriculation process isn't just about delivering information; it's also about making sure that students can complete the steps necessary to matriculate. Behaviorally informed communications can help make these action steps easier for students, so that they keep moving along the path to success.

To do this, consider:

- 1 Can you highlight when an item is due?**
(Emphasize Deadlines)
- 2 Are steps easy to follow up on?**
(Provide Concrete Steps)
- 3 Can you put items in a format that emphasizes what to do next?**
(Use A Checklist)



Emphasize Deadlines

MAKE ACTION EASY

Between applying to and matriculating at a CCC, there are many steps that students need to complete concurrently. Many of these steps are fairly open-ended in terms of their timeline. For instance, Financial Aid forms can be completed far before enrollment, or right before the start of the semester. However, there are eventual deadlines for these tasks: if students don't complete their enrollment steps before the start of the semester they're unlikely to be able to start classes and succeed. **Behaviorally-informed communications will emphasize deadlines whenever possible, giving students concrete timelines on which to take action.**

What is the Evidence?

From the CCC System: Many staff members emphasized the challenges of determining deadlines for matriculation steps, but **students indicated that keeping track of when things were due was central to their success.**

From the Behavioral Literature:

There is clear and direct evidence that deadlines help people get things done. In one study, students on a college campus were given a set of proofreading tasks to finish over the course of the semester. Students were assigned to three groups randomly. In one group, students were given evenly spaced deadlines for completion. In another, students set their own deadlines. In the last group, students had only one final deadline at the end of the semester.

- ▶ Not only did the students with evenly spaced deadlines complete the task at higher rates, they also did a better job at catching errors in the text.⁹

“

A lack of deadlines makes for a lack of urgency and students are just waiting for someone to direct them as to what to do. Students take action around gating moments, like a hold on their account. So the question is, how do you create the structure while keeping it open?
-Staff

“

I had to stay very focused on deadlines and communicate with my family to make sure they did everything. -Student

How to do it:

1 Break deadlines down: Not every task in the matriculation pathway has a clear deadline, but they do all need to get done (usually by the start of the semester). Creating smaller, more frequent target dates, even if they are suggestions or internal deadlines, can help break down the complex timelines, and clarify what students should be doing when.

2 Make deadlines salient: All too often important deadlines are buried in a dense email. Make sure that your communication around deadlines is clear and salient. Using large text and placing information about deadlines at the top of a communication can help make sure students catch it easily.

⁹ Dan Ariely and Klaus Wertenbroch, "Procrastination, Deadlines, and Performance: Self-Control by Precommitment," *Psychological Science* 13, no. 3 (2002): 219-224.



Provide Concrete Steps

MAKE ACTION EASY

Many steps in the matriculation process involve small but crucial details: offices are only open at certain times, website navigation can be complex, and phone numbers can be hard to track down. Behaviorally-informed communications will help students bridge these potential gaps by giving them the details they need to succeed. **Making a step concrete means thinking through what a student would need to know and do in order to be successful, and then putting that information at the fingertips of students.**

What is the Evidence?

From the CCC System: In our interviews with students we showed them several versions of a communication around financial aid.

- ▶ Time and again, **students pointed to links and specific details that would make it easy for them to complete the step as something that is particularly helpful.**

From the Behavioral Literature:

Making complex tasks more concrete is well-supported by a variety of behavioral science projects. One ideas42 project redesigned an email to students at a community college aimed at helping to resolve problems with their registration that could prevent them from receiving financial aid. **Our emails included concrete action steps, each with links, for what they needed to do to solve the problem.**

- ▶ Students who received the behaviorally informed email received significantly higher amounts of aid than those who did not.¹⁰

How to do it:

1 Map the task or process:

Walking through the task or process can help you figure out which details are most crucial. If you're communicating about registration, for example, try going through the registration process yourself and note the areas where a quick link or detail would be helpful. Ask yourself: what steps are involved? What information do I need to do this and when? Note that accessing information—like retrieving an account number—is often a “step” in the process.

2 Put yourself in a student's shoes:

Most students going through the matriculation process are new to campus. Small details, like the location of the student center or where to find a link to a portal, may seem obvious but can be real barriers to action for new students.

3 Make information concrete and easy to access:

Once you have the concrete steps, put the information necessary to achieve those steps in an easy-to-access place for students so they can get it at the right time. Leverage the Checklist format (See [Use A Checklist](#)). Even seemingly minor hassles like clicking to a new page or digging up an old pamphlet to find an address can derail students' best intentions for taking a next step.

“

I like [this] email. This is very professional. It made it easy for me, it had links to direct me to the sites I needed.

-Student

“

I like [this] email because it lays out everything, gives the dates, basically says everything laid out in that email. . . . [It] gives everything that the reader needs to know. It gives an area where you can click to sign up so that one stands out more in that context. -Student

“

'Click here to get started' is helpful. I started on FAFSA but haven't finished it myself and I just want to get it done so maybe this one [would help me right now]. -Student

¹⁰ Alissa Fishbane and Ethan Fletcher, “Nudging for Success: Using Behavioral Science to Improve the Postsecondary Student Journey” (ideas42, June 2016): 27-28.



Use A Checklist

MAKE ACTION EASY

From filling out financial aid forms to registering for classes, it's easy to miss a step when getting ready for college. Losing track of even one item can derail a student, potentially causing them to fall off track entirely. Checklists are a simple behavioral tool that can help make a complex task easier to accomplish. **Using a checklist can help students get organized and get things done, so that everything is in place by the time their classes start.**

What is the Evidence?

From the CCC System:

- ▶ Staff note that information about **next steps can often be unclear**, and students report being confused about the order in which they should complete steps leading up to matriculation.
- ▶ All of this points to a need for checklists to help manage the necessary tasks.

From the Behavioral Literature:

Checklists have been used in many different contexts and fields as diverse as healthcare, aeronautics and manufacturing, **to help people more through complex tasks and to reduce errors.**¹¹

“

Students get a lot of conflicting information about the order in which they have to do things and that actually paralyzes them at points. -Staff

“

[Different colleges] all have this format where you apply, get your ID, have prerequisites, etc., but that's never in the application process, you never know what will happen next. It would be nice to have something after you submit the application that tells you the steps that might happen; it would help students who aren't used to the system. -Student

“

Students don't know what the welcome letter means for them and then what the next steps are. Right now they get a school-level email that mimics the old school printed letter but is now in an email; it needs to be updated for the way information is sent now. -Staff

How to do it:

1 One step at a time: Make sure each item on your checklist is a concrete task that students can achieve. If necessary, break up complex tasks like “Apply for Financial Aid” into simple subtasks like “download your tax return from last year.”

2 Keep it simple: Avoid presenting students with an overly-long laundry list of tasks to complete, which can be discouraging. Consider sending multiple checklists over the course of the process if there are too many steps, or dynamic checklists that show higher level tasks and open up to more detail if the student needs it.

3 Leverage task momentum: With so many tasks to do, it can be hard for some students just to start. Help students feel like they have already made progress by marking one “to do” on the list as “complete.” Even a seemingly-minor item like “logged into account” can encourage students to take a next step.

¹¹ Brigitte M. Hales and Peter J. Pronovost, “The Checklist—a Tool for Error Management and Performance Improvement,” *Journal of Critical Care* 21, no. 3 (September 1, 2006): 231–35, <https://doi.org/10.1016/j.jcrc.2006.06.002>.

» **EXAMPLE COMMUNICATION MOCKUPS**

These mockups are meant to illustrate how the matriculation design principles can work in practice. For each design, we've flagged areas where we've applied one of our principles to help get attention, tailor the message, and make action easy.

These materials aren't meant to be copied verbatim; the steps students go through at your college may be different. Instead, they are meant to show how the design principles can be applied to many different kinds of communication.

Example 1: Welcome email

From: welcome@impactcollege.edu
To: alex.a.student@mail.com
Subject: Welcome to Impact College, Alex!

Dear Alex,

Welcome to Impact College! We have accepted your application, and are looking forward to having you here.

Now that your application is accepted, you will need to complete three steps before starting classes:

1. Log In to Your ImpactPortal: Your ImpactPortal account is how you do almost everything on campus: from registering for classes to checking your financial aid. It only takes 5 minutes to log in, click [here](#) to get it done.

- **Encouraged Deadline:** Do this now.

2. Register for Orientation: At orientation you'll meet with a counselor, learn about registration, and get your student ID. Pick a date [here](#).

- **Encouraged Deadline:** Register within 1 week (Saturday, May 12th)

3. Start your FAFSA: Financial aid can make college much more affordable, you should apply as soon as possible. Click [here](#) to access our Financial Aid tips on FAFSA.

- **Deadline:** You must complete FAFSA by Monday, September 1st to have financial aid available by the start of classes.

There is a whole team of people at Impact College who are here to help you get started. If you have any questions you can reply to this email or call **555-555-1234** between 9am and 6pm and we'll connect you with the right person. We're looking forward to meeting you here on campus.

Warm Regards,

Linda Yu
Dean of Admissions
Impact College

Medium: Uses email to introduce a multi-step process

See page 6

Word Choice: Avoids jargon like "matriculation."

See page 11

Concrete Steps:

Everything has a link

See page 16

Deadlines:

Attaches timelines to all steps

See page 15

Sender: Message comes from a credible person

See page 10

Example 2: Subject-specific email

From: welcome@impactcollege.edu
To: alex.a.student@mail.com
Subject: [Urgent] Alex, your FAFSA Is Late

Dear Alex,

We have NOT received your FAFSA. Don't miss out on the potential for thousands of dollars in financial aid. Submit your FAFSA today.

****Deadline: You must complete FAFSA by Monday, September 1st to have financial aid available by the start of classes.****

Here's how to go get it done:



Retrieve Impact College's College Code: Already complete, it's 11111



Create an FSAID: This ID number allows you to file your FAFSA each year. Click [here](#) to start. If you're returning to college you may already have an FSAID.



Start your FAFSA: Click [here](#) to go to the federal student aid website to get started.

Need help? Many students have questions completing their FAFSA. The Office of Financial Aid is here to help. You can call us at 555-555-1234 to talk to a counselor every day between 9am and 6pm. We also offer on-campus help sessions, click [here](#) to sign up.

Best,

Jennifer Smith
Director of Financial Aid
Impact College

Relevance: Message highlights steps a particular individual needs to do.

See page 7

Tone: Professional, but not impersonal. Communicates urgency.

See page 13

Checklists:

Keeps steps simple and leverages momentum.

See page 17

Sender: This sender is credible given the substance of the message.

See page 10

Example 3: Text messages

These messages illustrate how a sequence of reminders about one topic can vary in urgency, while still remaining personal. In this case the messages are between a student and the Office of Student Life.

Message 1: Initial, Introductory Message

Hi Alex, it's Joe in the Impact College Office of Student Life. Orientation registration is now open. You'll learn all about classes at IC and meet a counselor. Link: shorturl/icolorient

Medium: Uses texts for quick reminders
See page 6

Personal: Highlights that message comes from a real, credible person
See page 12

Message 2: First Reminder Message

Hi Alex, remember to register for orientation. Registration dates are going fast, so get yours quick! Here's the link: shorturl/icolorient. – Joe from OSL

Message 3: Second Reminder Message

Alex, we have NOT seen you at an orientation event. Orientation is mandatory, you MUST attend. Pick a date at shorturl/icolorient – Joe from OSL

Tone: Urgent, but still personal
See page 13

Message 4: Urgent, Final Reminder

Alex, LAST REMINDER! You MUST attend orientation. Pick a date: shorturl/icolorient. Let us know if you need help at 555-555-1234. – Joe from OSL

Timing: Messages should come more quickly as deadline nears
See page 8



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