Postsecondary Advising:

Characteristics and Conditions for Expanding Access

June 2020

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Introduction

A college education dramatically increases the likelihood of employment and income. This is true for elite colleges, other four-year institutions, and community colleges. But many young people, especially those furthest from opportunity and from the most underserved communities, are not accessing these postsecondary opportunities or realizing these benefits. To disrupt this inequity, we must better support students to identify, pursue, and complete a postsecondary pathway that improves their life trajectory.

Quality postsecondary advising — equipping students to identify and evaluate their full set of postsecondary options and to select and successfully pursue the best option for them — **is one critical lever for closing the degree divide.**

However, postsecondary advising has only recently emerged as a priority and expectation of K-12 systems. As a result, few districts today are providing systemic, equitable, and high-quality advising that meets the needs of all students. **To significantly expand advising access, districts and their college access organization (CAO) partners must significantly shift how they approach their work.**

This report, informed by more than 60 discussions with districts, CAOs, and funders, **describes key aspects of the current advising landscape, outlines six conditions that must be in place to expand advising, and identifies concrete actions that districts, CAOs, and funders can each take toward that goal of providing quality advising that meets the needs of all students**.

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District Advising Systems

Postsecondary advising is a critical support that can help close the degree divide

The purpose of **postsecondary advising** is to **equip students with the knowledge, skills, and supports** needed to identify and evaluate their full set of **postsecondary options** and **to select and successfully pursue the best option** for them.

Advising typically focuses on knowledge, skills, and supports in the areas of:

Academic foundations
- Understanding academic requirements of college
- Completing early college credit/dual enrollment
- Preparing for the SAT/ACT

Noncognitive skills and mindsets
- Strengthening noncognitive skills essential to postsecondary success
- Developing a college-going mindset and sense of belonging

Financial
- Completing the FAFSA
- Developing a plan for paying for college
- Applying for grants, scholarships, and loans

Application and selection
- Exploring college options that are a good match and fit
- Completing and submitting strong applications
- Selecting and enrolling in the best fit option

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To meet the needs of all students, districts must develop postsecondary advising systems that have five characteristics

Equitable
Advising supports are <u>tiered</u> and <u>differentiated</u> such that all students receive supports that <u>meet their specific needs</u>

High-quality
<u>Well-trained</u> advisers provide information and assistance to students using resources, curricula, tools, and delivery models that have been <u>demonstrated to be effective</u>

Measurable
Advising meaningfully contributes to and accelerates student progress toward <u>measurable postsecondary outcomes</u>

Aligned to college and career
Supports enable the exploration of <u>multiple pathways</u> to achieving postsecondary success, including a range of <u>college and career options</u>

Financially sustainable
The ongoing costs of delivering supports are <u>primarily covered by public revenue</u> and are not dependent on philanthropy

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Today, district efforts to implement quality advising systems exist along a continuum from Absent to Exemplary

Postsecondary Advising Approach

	Absent	Ad Hoc	Systemic	Exemplary
Equitable	The district does not provide any type of postsecondary advising supports	Some schools/students receive supports (potentially multiple); others receive none	All schools and students receive similar supports	All schools and students receive similar baseline supports; targeted supports also provided based on student/school need
High-quality	n/a	Training, tools, and curricula mostly depend on a CAO partner (or partners); quality varies widely	All advisors — districts and CAO partner(s) — receive training and use codified curricula and tools	All advisors regularly receive training; all curricula and tools are vetted and are of high quality
Measurable	n/a	Some outcome data tracked, often by CAO partners, but not systemically managed by district	Student and school-level outcomes tracked by district, as is completion of important milestones (e.g., FAFSA completion)	District uses a continuous improvement process to analyze and respond to student and school outcome and milestone data
Aligned to college and career	n/a	Advising typically focuses primarily on four-year colleges	Advising typically focuses primarily on four-year colleges; may include information on local two-year options	Advising explores multiple pathways, including military, technical certificates, and two- and four-year options
Financially sustainable	n/a	Almost all the cost to deliver supports is covered philanthropically	Public revenues cover some/most of the cost of delivering supports	Public revenues cover all the cost of baseline and targeted supports

Many districts are still early in their efforts to implement advising systems that meet these characteristics

Over the past 10-15 years, as expectations for postsecondary advising have grown:

Absent → **Ad Hoc** → **Systemic** → **Exemplary**

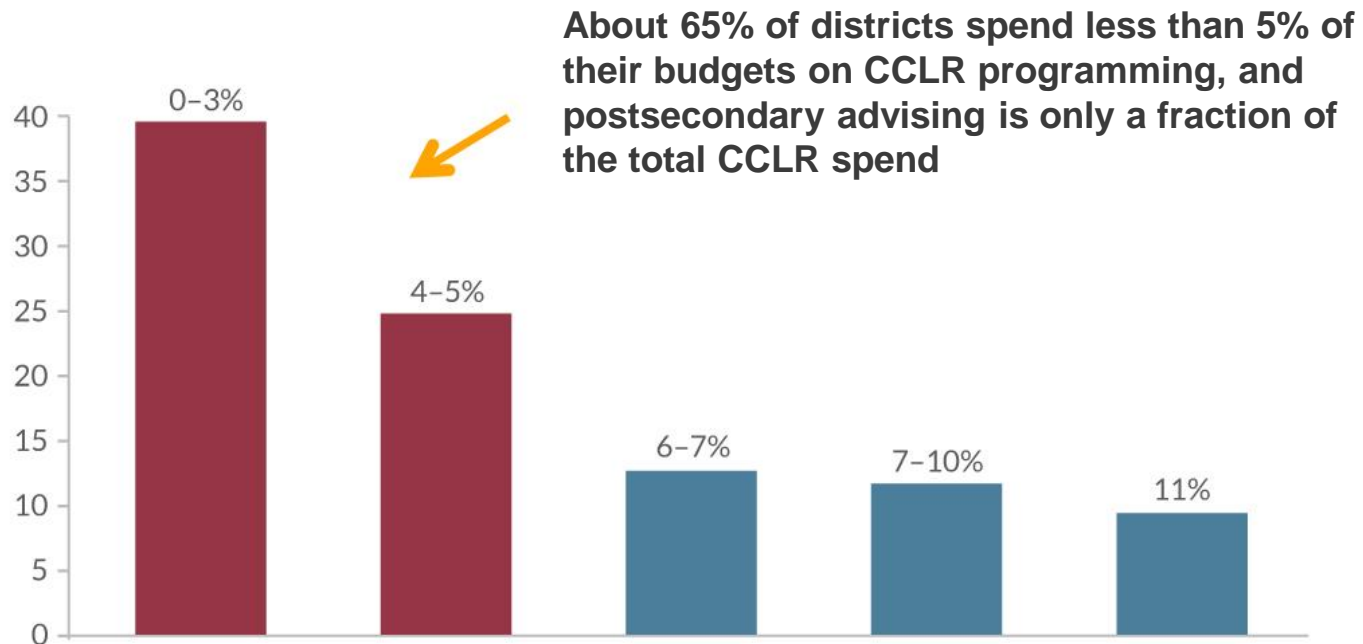|		
Many districts have begun some advising work, moving from Absent to Ad Hoc approaches	**Some early movers** have invested more in district planning and coordination, moving from Ad Hoc to Systemic approaches	**A few leaders** are beginning to implement elements of exemplary systems, with work left to do (e.g., Atlanta Public Schools, DC Public Schools)

Progress implementing quality postsecondary advising systems is limited in part due to constrained district spending

Percentage of districts responding to the question "What percentage of your district spend is on College, Career, and Life Readiness (CCLR) personnel or programming?"

About 65% of districts spend less than 5% of their budgets on CCLR programming, and postsecondary advising is only a fraction of the total CCLR spend

Most districts also lack adequate human resources — particularly counselors — needed to provide quality advising to students

The average student-to-counselor ratio is 482 to 1 — nearly double the 250-to-1 ratio recommended by the American School Counselor Association

Excerpts from "The Troubling Student-to-Counselor Ratio That Doesn't Add Up"
Education Week | August 14, 2018 | By Alanna Fuschillo

The impact — or lack thereof — that school counselors have on students is easiest to understand in the high school context, where **students face an increasingly dizzying array of choices about what comes next after high school**.

There are more types of colleges with more specialties than ever before. For students looking for something other than the four-year college track, apprenticeships are gaining prominence once again. According to some, credential-based or technical-skill-focused modules are the new ticket to the middle class.

But even if high school students settle on a traditional college path, more questions follow: If they choose college, what kind of college — community or four-year? Is there a scholarship for that? And does anybody know how to fill out a FAFSA?

Without knowing their options, students inadvertently may miss out on the best path forward or simply make no choice at all.

Students fortunate enough to have engaged parents or other trusted adults in their lives to help them navigate their school years may not be harmed by a lack of in-school supports. Not every student needs the same level of attention. However, as is too often the case when it comes to school resources, the students who most need assistance often attend schools with the fewest supports. **For low-income students or those who are the first in their families to attend college, the availability of good counseling can determine if they understand their options and are prepared to make informed choices.**

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In response to resource and capacity constraints, districts tend to focus on lower-intensity, baseline supports for students

Given constrained financial and human resources, **most districts are focused on providing lower-intensity, baseline advising supports to all high school students**.

Examples: Whole class presentations on key concepts, drop-in centers located in high schools

Districts have looked to — and continue to look to — College Access Organizations (CAO) to provide higher-intensity supports targeted to specific students/student groups. In addition to expertise and "arms and legs" support, these CAOs typically deliver supports to students more cheaply than it would cost the district to deliver them (this is due to the support CAOs get from philanthropy; see next section for more detail).

DC Public Schools (DCPS) is making progress toward building an exemplary advising system

DISTRICT OF COLUMBIA PUBLIC SCHOOLS

Between 2013 and 2018, DCPS went from only 41% of its high school graduates enrolling in college to 55%. How was the district able to cross the threshold to help more than half of graduates enroll in college, and what can other districts learn from the strategies it implemented?

DCPS brought in a leader, Kaya Henderson, who was deeply invested in the **Case for Change**

Henderson dedicated a central team to college and career readiness, enabling DCPS to take a more active role in crafting a **Vision** for postsecondary advising

Central team emphasized **Data** and deeply understanding student needs; later began providing monthly dashboards to school leaders and added a data specialist to the central team

Piloted a new school-based "college coordinator" role with the aim of **Coordinating** school-based efforts (e.g., counselors, CAO offerings) to ensure coverage and efficiency

Leveraged a combination of **Resources** — general funds, federal grants, and philanthropy — with successful efforts increasingly moving on to the district's budget (vs. grants)

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College Access Organizations (CAOs)

CAOs have played an important role catalyzing district progress and advancing the field

Sample Organizations

In the past 10-15 years, a large number of **local and multi-region CAOs** have **directly supported students** through advising programs that **often target a specific profile of students or that focus on one element of student need** (e.g., FAFSA completion). The best of these programs have **demonstrated the impact** quality advising can have on accessing postsecondary opportunities.

Through this direct service role, these CAOs have played an important role defining for the field the **core concepts and activities** that students need to "know and do" to pursue postsecondary paths.
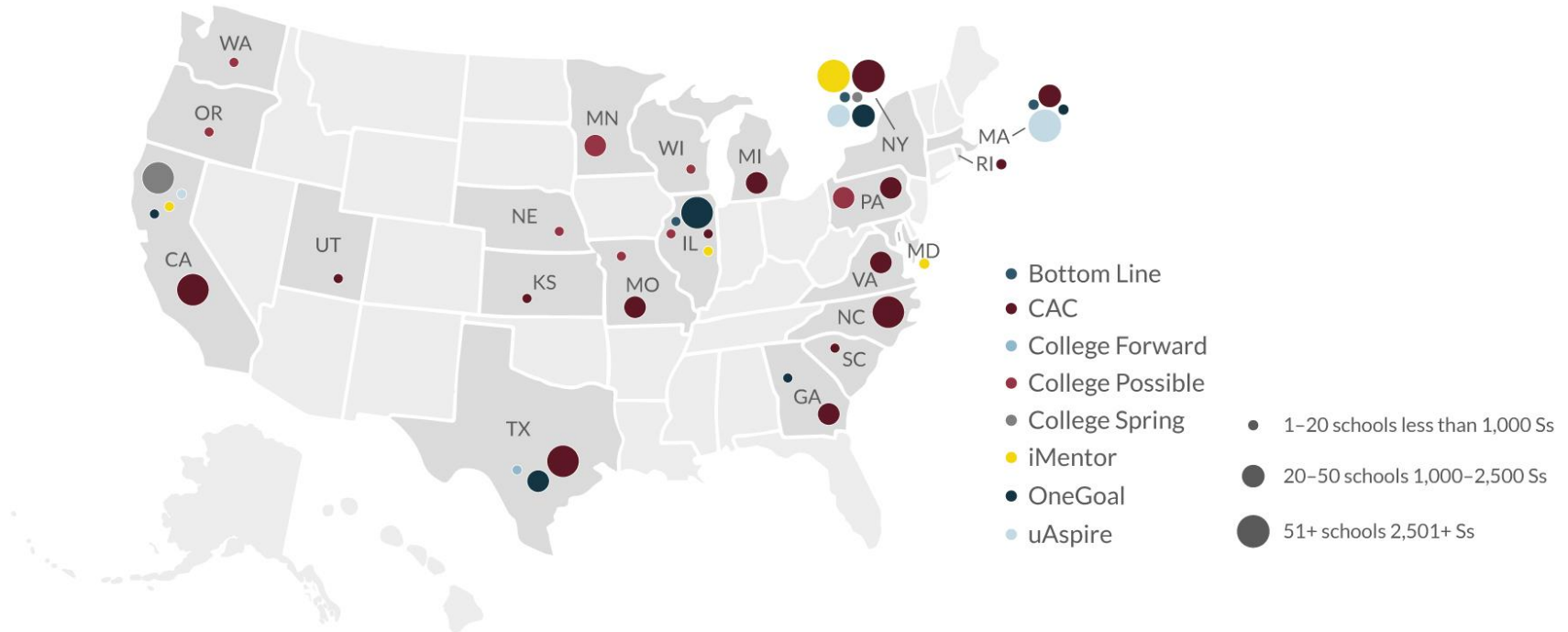
> *Examples: College affordability concepts (e.g., how to think about debt), FAFSA completion*

These CAOs have also been instrumental in the development of **models/practices/tools** that are now being adopted by more districts nationally.

> *Examples: Peer, near-peer, and mentor advising models; match and fit practices*

The largest CAOs are concentrated in mostly large, urban markets and collectively reach only a fraction of all students

Number of schools and students served by select multi-region CAOs

Legend:
- Bottom Line
- CAC
- College Forward
- College Possible
- College Spring
- iMentor
- OneGoal
- uAspire

- 1–20 schools less than 1,000 Ss
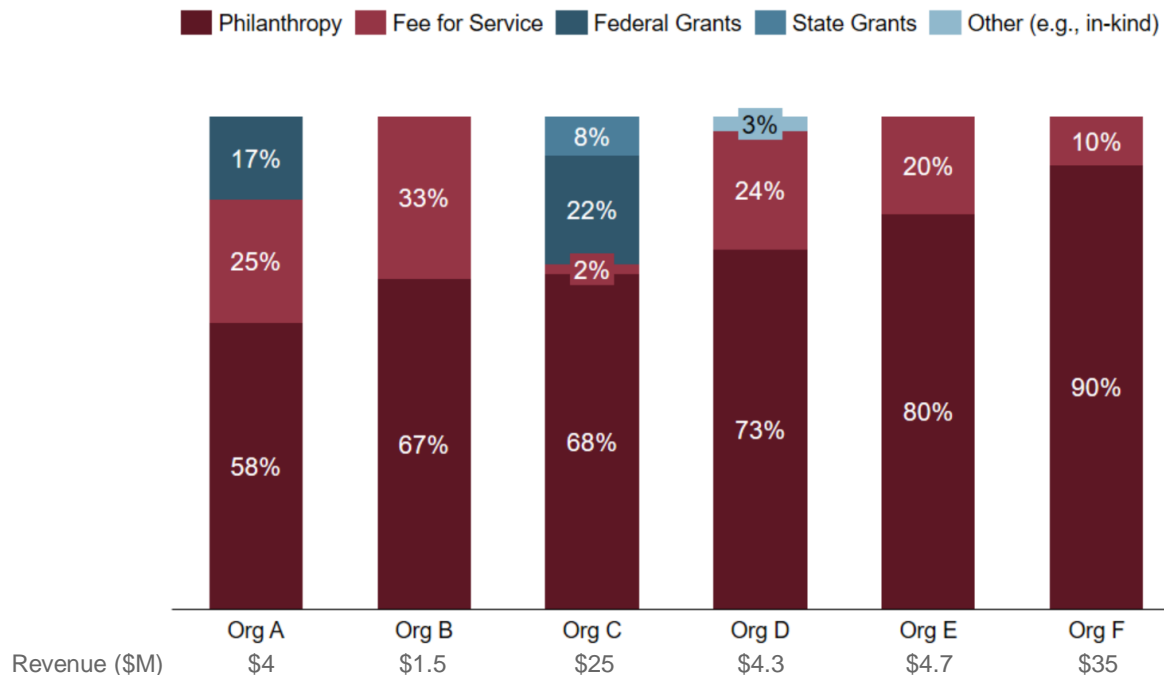- 20–50 schools 1,000–2,500 Ss
- 51+ schools 2,501+ Ss

Multi-region CAOs are primarily concentrated in large cities like Atlanta; Boston; Chicago; Los Angeles; San Francisco; New York City; Washington, D.C. **Local college access providers also serve many students.**

However, the combined **reach of these programs does not fully meet the needs of all students**. The result is **significant coverage gaps** (defined as students not receiving the supports they need to succeed) **across K-12 systems and within systems**.

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Most CAOs — local and multi-region — are heavily dependent on philanthropy for sustaining their operations

Revenue distribution for sample of college access organizations

Legend: Philanthropy · Fee for Service · Federal Grants · State Grants · Other (e.g., in-kind)

	Org A $4	Org B $1.5	Org C $25	Org D $4.3	Org E $4.7	Org F $35
State Grants / Other	17%		8%	3%		
Federal Grants			22%			
Fee for Service	25%	33%	2%	24%	20%	10%
Philanthropy	58%	67%	68%	73%	80%	90%

Revenue ($M)

Philanthropic revenue is the major source of revenue for all six organizations, ranging from 58% to 90%.

Fee-for-service revenue — mostly from districts — ranges from 10% to 33%.

Public grants are the third-largest source of income, accounting for up to 30% of one organization's budget.

CAOs, already heavily reliant on philanthropy, are facing challenging headwinds

Themes	What we heard	
Heavy reliance/restrictions on limited revenue streams ...	*"Typically we have two sources — **fundraising and fee-for-service revenue**."* —CAO leader	*"There **aren't enough local funds** to hire additional counselors."* —District leader
... often necessitates trade-offs within districts ...	*"Funding is a worry from year to year. It's always about whether it makes more sense to **add a counselor or a library specialist or a nurse**."* —District leader	*"**Districts don't talk to us about trade-offs, but schools do.** They may say we can fund another counselor, another program, or your college access organization."* —CAO leader
... and ongoing concerns about the future of some ecosystem-level funding ...	*"In California, we have the local control and accountability plan (LCAP), which is supposed to give the **local school board [the power to make] general funding decisions**. But local boards might **not be connected to current/best practices** [in advising]."* —CAO intermediary	*"We're wrestling with the reality that **[our funder] may step back**. We might be able to **offset costs with 20-25% fee for service**, but we're still dependent [on philanthropy]."* —CAO leader engaged in a citywide initiative
... which has influenced district and CAO exploration of other revenue sources	*"To get additional funding I have to start looking. So we looked at **Title IV** — I manage those funds in the district and **I made sure we could pay personnel from there**."* —District leader	*"Historically, we have had a lot of philanthropic funding for our program. We are **increasingly receiving funding from states**."* —CAO leader

Beyond financial sustainability and scale barriers, CAOs must address data and fragmentation challenges to realize full potential

Overall, there is a **lack of rigorous data on the effectiveness and outcomes of CAOs**; there is also a lack of "apples to apples" comparisons across programs. This makes it difficult to direct investment to the most efficient providers.

Many larger urban markets are **highly fragmented** with multiple providers of various size and effectiveness, many offering overlapping supports. **The result is constrained resources are often not allocated efficiently:** Some students receive redundant supports while others receive none, and districts invest valuable time and energy coordinating across partners.

CAOs are innovating sustainable ways to deliver more systemic advising supports

Virtual/remote delivery

College Advising Corps has partnered with College Point—an innovative virtual advising approach focused on reducing under-matching among high-achieving, low- to moderate-income students, and serves over 12,000 students nationally. Other CAO partners include Matriculate, College Possible and ScholarMatch.

Model provider

iMentor partners with the Big Brothers Big Sisters network, providing them with technology, curriculum, training resources, and ongoing consulting on implementation of the model.

Lower-cost staff/peers

PeerForward's model is grounded in training high school juniors and seniors to drive schoolwide campaigns on key college actions. As strong peer influencers, they help build and sustain a college-going culture throughout their high schools.
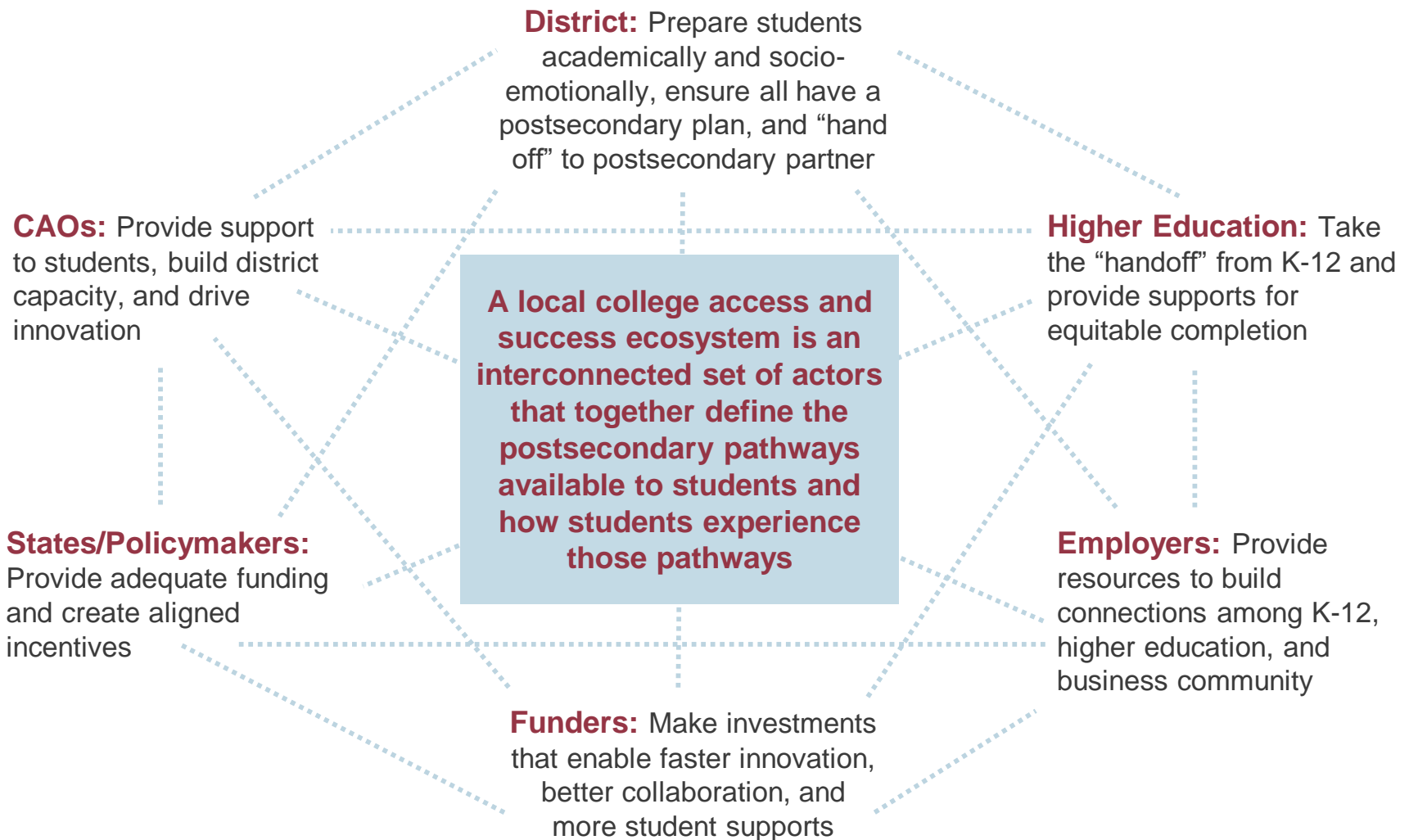
Train the trainer

uAspire launched a Training & Technical Assistance product to build capacity in districts to do this work themselves in order to scale impact by leveraging existing school staff to deliver their program.
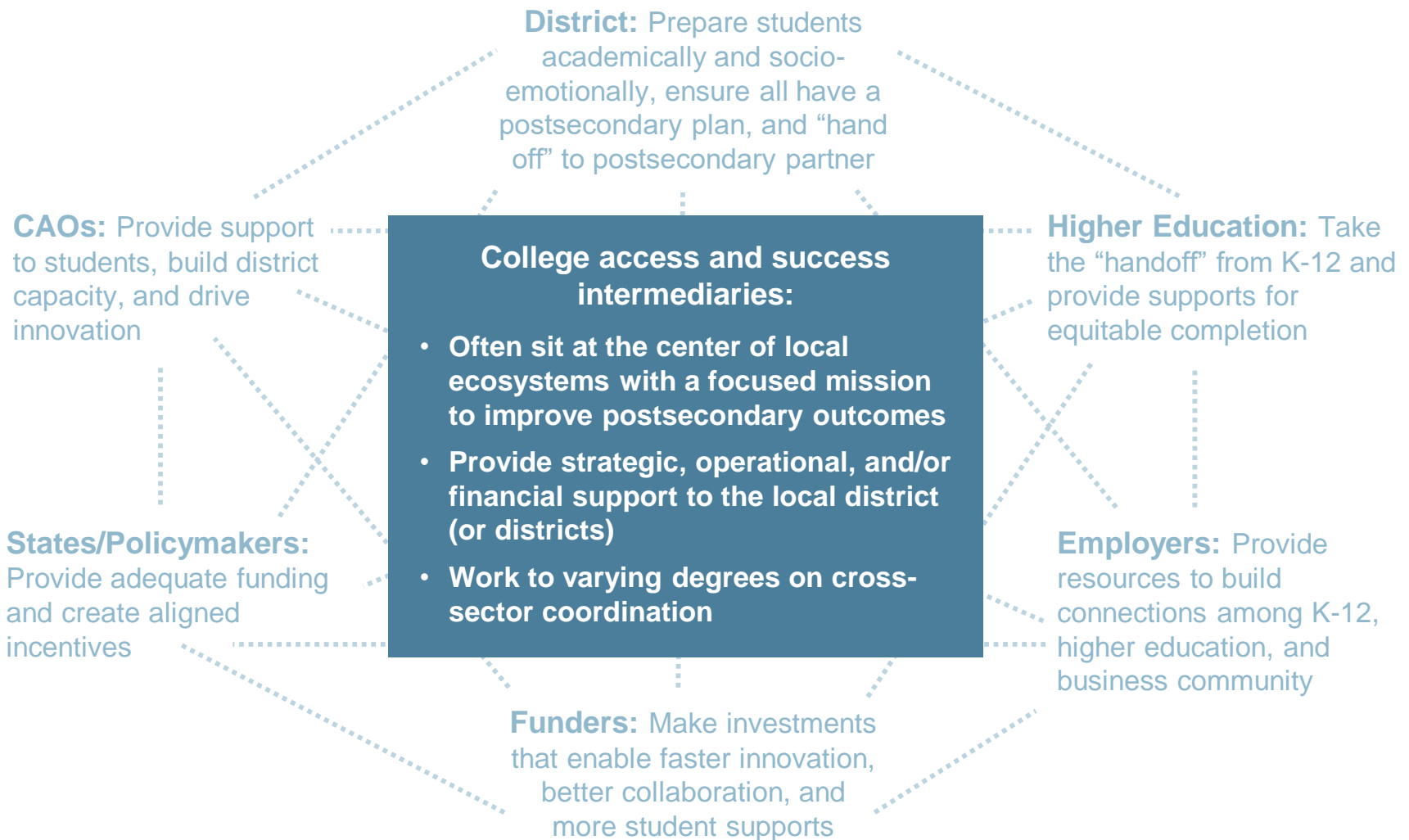
Local Ecosystems and Intermediaries

In practice, districts and their CAO partners design and deliver advising in the context of a local postsecondary ecosystem

District: Prepare students academically and socio-emotionally, ensure all have a postsecondary plan, and "hand off" to postsecondary partner

CAOs: Provide support to students, build district capacity, and drive innovation

Higher Education: Take the "handoff" from K-12 and provide supports for equitable completion

A local college access and success ecosystem is an interconnected set of actors that together define the postsecondary pathways available to students and how students experience those pathways

States/Policymakers: Provide adequate funding and create aligned incentives

Employers: Provide resources to build connections among K-12, higher education, and business community

Funders: Make investments that enable faster innovation, better collaboration, and more student supports

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In some local ecosystems, a college access and success intermediary plays a key partnership role with the district

District: Prepare students academically and socio-emotionally, ensure all have a postsecondary plan, and "hand off" to postsecondary partner

CAOs: Provide support to students, build district capacity, and drive innovation

Higher Education: Take the "handoff" from K-12 and provide supports for equitable completion

College access and success intermediaries:

- **Often sit at the center of local ecosystems with a focused mission to improve postsecondary outcomes**
- **Provide strategic, operational, and/or financial support to the local district (or districts)**
- **Work to varying degrees on cross-sector coordination**

States/Policymakers: Provide adequate funding and create aligned incentives

Employers: Provide resources to build connections among K-12, higher education, and business community

Funders: Make investments that enable faster innovation, better collaboration, and more student supports

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The specific role an intermediary plays depends on the local context

Due to their focused missions on improving postsecondary success, intermediaries can play a valuable role acting as the "torch bearer" for advancing work aligned to that mission; while districts have to balance many competing priorities, intermediaries can help ensure that postsecondary access and success is always an important consideration.

In partnership with the local district(s), intermediaries play a range of roles depending on local needs; roles typically include

- **Vision-setting:** Define and communicate a clear and compelling vision for the future
- **Needs analysis:** Identify and prioritize needs across the ecosystem
- **Data analysis and reporting:** Track, report, and publicize outcomes
- **Partner coordination:** Coordinate across partners to improve effectiveness and efficiency

In some cases, intermediaries also provide direct supports to students, building expertise over time and delivering high-quality supports in a cost-effective manner.

Examples of college access and success intermediaries include Achieve Atlanta, Achieve Minneapolis, and I Know I Can (Columbus, Ohio).

Achieve Atlanta's focus on results-driven cross-sector collaboration is core to its approach and effectiveness

ACHIEVE
ATLANTA

Between 2016 and 2019, the percentage of Atlanta public schools graduates seamlessly enrolling in college increased from 51% to 62%.

Set the Vision

- Set ambitious, achievable goals for the work
- Establish key milestones and metrics aligned to goals
- Measure, track, and report progress toward vision

Assemble Teams that Take Targeted Action

- Identify and contract with key players
- Define clear, bounded roles for all partners aligned to vision
- Hold ourselves and partners mutually accountable

Create Conditions for Effective Collaboration

- Engage a comprehensive, diverse set of stakeholders to encourage collaboration, innovation, and progress
- Collect and share data to inform and catalyze action
- Provide strategic, operational, and financial support to facilitate collaboration across partners

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Six Conditions for Success

Introducing the Six Conditions for Success

Through our research, we identified Six Conditions for Success that must be in place to move along the maturity curve.

Absent	Ad Hoc	Systemic	Exemplary

The following slides outline the Six Conditions and key levers for accelerating progress.

Six Conditions for Success

Case for Change

There is broad support for postsecondary success as a unifying purpose of the core work of K-12

Vision & Milestones

There is a shared district vision for postsecondary outcomes and a strategy to achieve the key milestones that students must reach to successfully navigate postsecondary pathways

Data & Platforms

Data is used to understand student needs — prioritizing milestones and which student needs to address — and to track student outcomes

Supports — Content, Coverage & Delivery

There is an intentional and strategic use of internal and external supports and resources to maximize coverage

Coordination & Continuous Improvement

Partnerships, staffing models, and roles are defined to optimize the provision of services, reducing duplication and ensuring coordination

Resources

Adequate and sustainable financial resources are identified and secured

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There is broad support for postsecondary success as a unifying purpose of the core work of K-12

- Where districts have elevated postsecondary advising as a priority, it is most often because a **district leader** champions the importance of students' postsecondary success; often this is motivated by **past exposure to cultures with high expectations for postsecondary** planning and success.

- District leaders can be compelled, incentivized, or nudged to prioritize postsecondary advising by **policy and accountability measures** (though there is little formal state/federal accountability today).

- **Connections across the broader ecosystem** — K-12 and beyond — can build alignment for the need to invest in postsecondary success.

- A **strong CAO partner or intermediary** can help district leaders build the case for change.

- **Available external funding** can lead districts to invest in and sustain postsecondary advising initiatives.

Policy measures are an important external force that can catalyze adoption of the Case for Change

Policy Measure	Examples	Description
Statewide Initiatives	**School counseling/ coaching programs**	**Statewide programmatic initiatives** to improve the quality of college advising and to expand access to counselors in schools
	Online tools and resources	**Online repositories of support resources** and trainings for students, families, educators, and counselors
	Nudging text systems	**Text-based systems to "nudge" students** who were accepted to college to complete enrollment documents, take placement tests, and apply for financial aid in effort to reduce "summer melt"
Accountability Policies	**Graduation requirements**	**High school graduation requirements that prepare students for college** (e.g., completing the FAFSA, developing an academic and post-graduation plan, taking the ACT or SAT)
	Financial literacy requirements	Legislation **requiring that students receive financial literacy information**
	Postsecondary measures in statewide accountability systems	**Measures of postsecondary access and success in ESSA statewide accountability plans** or school performance frameworks
Transparency Measures	**State report cards**	ESSA requires states to **include college enrollment data** "for the cohort of students that enroll in programs of postsecondary education in the first academic year that begins after the students' graduation"

A majority of states publicly report on college access metrics, but few hold districts and schools accountable

46 states have a **college and career readiness measure** that tracks how well schools prepare students for life after high school

30 states issue **public reports** on college enrollment rates and/or FAFSA at the district or school level but **do not include the reports in their accountability measures**
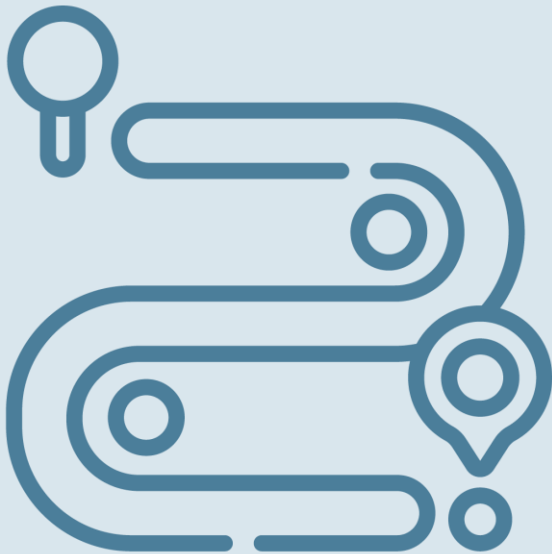
7 states include college enrollment rates and/or FAFSA in graduation requirements or school performance accountability measures

6 states issue public reports on FAFSA completion rates

- Starting with a **clear and specific vision** allows districts to focus proactively on aligned strategies; today, few districts have such a vision.

- Committing to **specific standards and indicators** for students' postsecondary advising promotes alignment of effort within districts.

- Today, CAOs and/or intermediaries are driving and defining the **core activities and concepts** that students need to "know and do" to pursue postsecondary paths.

- Longer-term, **greater awareness and field-level alignment is needed around a comprehensive set of postsecondary milestones, standards, and indicators**; understanding the full scope of supports that *could* be provided will enable districts to pinpoint which supports are most critical to achieve the district's stated postsecondary vision and goals.

Field- and district-level milestones need to be comprehensive and inclusive of both standards *and* indicators

Milestones

identify actions students should complete

Many successful CAOs and intermediaries have identified important milestones that a student must accomplish, including:

- College entrance exam preparation/completion
- College visits
- Application to at least three colleges
- FAFSA completion
- Financial plan development

Standards

reflect what students need to know

Arizona's College Access Network has developed seven **college access standards** for student success:

- Awareness/Aspirations
- Social, Emotional, & Cultural Learning
- Academics (College Entrance Exams)
- Support Systems
- College Knowledge
- Financial Literacy
- Persistence/Completion

Indicators

help monitor progress toward an identified goal

Leading advocacy organizations, like NCAN, have recommended a set of **research-based indicators** to help programs assess progress toward access and success goals:

- Academic (College Entrance Exams)
- Admissions
- Financial Aid
- Core Demographic
- Pre-Enrollment/Enrollment
- Persistence/Completion

Data is used to understand and prioritize student needs and to track student outcomes

- **Robust data platforms** can help districts collect, integrate, and track student-level data, including longitudinal data that can be analyzed by student or aggregated by subgroups.

- Building a **strong data culture** can help align activities and incentivize action; districts can build a strong data culture by establishing practices/cadences for reporting data and investing in staff capacity to use data effectively.

- **Leveraging data to inform decisions and measure impact** on postsecondary outcomes requires that data be integrated into school and district goal-setting, progress monitoring, prioritization/differentiation of student needs, and assessment of program efficacy.

- At a field level, there is a need for **comparative evaluation of postsecondary advising programs' efficacy** and return on investment.

In California, an effort to consolidate transcript data on a single platform demonstrates the power of aligned data systems

In California, the **data flow from K-12 systems to public university systems** is not seamless and has **adversely impacted students**. A lack of standardization in data entry practices for course requirements led to data validation and analysis challenges. Additionally, there was little ability for different data systems to easily exchange and use student information. Often, **students bore the burden** of these inefficiencies.

Key Strategies and Successes:
- **California College Guidance Initiative (CCGI)** was formed to address **standardization and interoperability pain points** across entities and to streamline application processes for students and the guidance staff who support them.
- **Platform** combines college- and career-planning tools for students with **actionable reports for K-12 educators** and data to inform key decisions in postsecondary.
- **Program was 75% philanthropically funded and is now 90% publicly funded.**
- Increase in district adoption of the tool and potential **decrease in costs** as a result of **newly automated processes** and operational efficiencies as the work scales up**.**
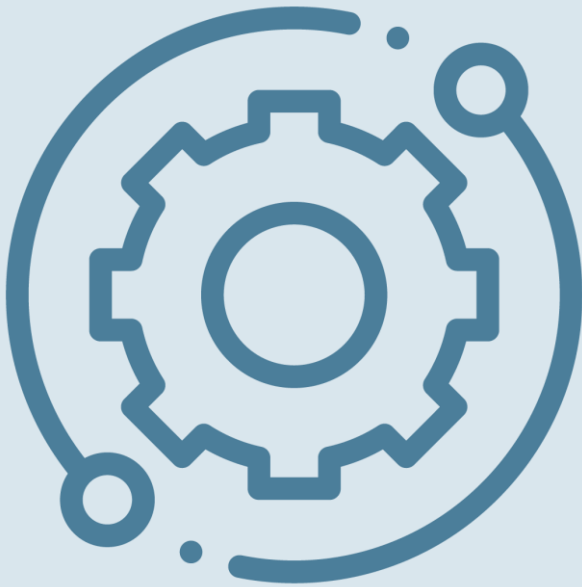
- Districts must first determine the **roles and responsibilities of existing human resources** (e.g., school counselors) and how best to deploy staff to advance the district's postsecondary goals.

- External organizations can **provide curriculum, tools, and implementation support/training** that increase the efficacy of existing postsecondary efforts.

- **Differentiated and tiered student-facing resources** help target interventions, allowing districts to be more efficient in meeting a diverse range of student needs.

- Districts can selectively partner with CAOs to provide **specialized support or meet student needs** the district is less well positioned to serve.

Some districts are making incremental investments to increase HS counseling teams and expand advising capacity overall

In **Cincinnati Public Schools**, the district has embarked upon a plan to add school counselors to high schools; reversing a trend to outsource postsecondary advising support that started more than 25 years ago. Over the past three years, **26 new HS counselors were hired** which represented a **$3M incremental increase in salary and fringe costs.** The district funded this increase with additional revenues from increased student enrollment. The ongoing costs for the additional counselors will remain at ~$3M/year, roughly $115K per person per year.

Broward County, recognizing the need for more counseling resources, asked residents for a **small increase in the property tax rate** (~$0.32) in order to hire additional counseling staff. The district hired **25 new counselors**, with the incremental increase in general funds. With the passage of the local tax, the **student : counselor ratios effectively dropped from 491:1 to 453:1**. They also modified the high school schedules to provide each student with a **90 min personalization period weekly** that can be used for college and career readiness. As a result, **teachers have less instructional periods** and now serve as a trusted advisor to a set of students during this weekly period; further reinforcing a positive postsecondary culture in schools.

In **La Joya ISD**, the school counseling director actively advocated to the district for **more counselors to address high ratios**. Once approved and funded, this office created a professional role - **college transition specialist** - whose primary responsibility is college and career advising. The office used **Title IV-college readiness funds** primarily because personnel is an **allowable expense in the grant** regulations. Of the 6 new positions funded through Title IV, three were dedicated to the these college focused professionals in the high schools. This was **an additional investment of $250K** because the counseling staff who assumed these roles had longer tenure in the district.

CAOs bring external expertise and capacity to meet student needs; better outcome evaluation is needed

Services

- Services provided vary widely by CAO provider; services range from **general exposure** in elementary school and middle school to **niche supports** (e.g., SAT prep, financial aid) and/or **wide-ranging supports** (e.g., academic, socio-emotional, and logistical) in high school

- Providers **employ a range of staff depending on their model,** varying from peers to mentors to teachers to professional counselors

- Providers are increasingly offering **training and technical support** to district staff and **access to data platforms** to support the monitoring of advising metrics

- Financial and program pressures have pushed providers to **explore lower-cost innovations** like capacity-building, tech-enabled delivery, and whole school (vs. subgroup) approaches

- In most districts there is **not enough supply of CAOs to meet the need** and **more capacity and coordination is needed** to provide tiered supports

Outcomes

- Many providers have attained successful short term outcomes using **high and low touch supports** and a **variety of student:adult ratios** but **common field-facing metrics are needed** to foster more **"apples to apples" evaluation** of providers

- Generally **multi-region CAOs** have pursued **more quantitative/rigorous evaluations** of their models' impact on student outcomes but **evaluations are often long-term and limited in scale** (e.g., region, N size,)

- Typically, there is **less rigorous evidence on quality/impact of local providers** (i.e. most insights focus on demographics served and application/FAFSA outcomes)

Partnerships, staffing models, and roles are defined to optimize the provision of services

- A coordinating entity can **define the "lanes of ownership"** and be responsible for **communication and optimization of supports** within the district and across the broader ecosystem.

- When districts do bring in external organizations and staff, these efforts should **complement (and not duplicate) existing district resources**.

- Over time, **districts can increasingly "own" the roles of program delivery** and coordination, while **CAOs and intermediaries lead on program innovation and continuous improvement**.

Coordination efforts can be led by the district or an intermediary

Coordination Role	The Work in Practice
Facilitating data collection, analysis, and communication and use to drive decisions	In the **District of Columbia**, the district coordinates activity across schools by sharing a monthly data dashboard with principals and school counselors; the central office performs the data analysis, communicates the findings, orients school leaders around common measures, and facilitates conversations with school staff to use the data to inform program decisions and set goals.
Defining "lanes" of ownership for CAOs and school-based staff	In **Cincinnati Public Schools**, the districts leads coordinating efforts by creating clear role delineation between staff hired by the district and external staff provided by CAOs; the district is developing role frameworks that define who performs which services for which students, and how accountability is shared.
Ensuring students receive appropriate supports and reducing duplication	**Achieve Mpls** plays a coordinating role in **Minneapolis Public Schools**, where it has helped the district ensure a range of support services from CAO providers are aligned to student needs; Achieve Mpls defined several tiers of service depending on student need, identified gaps in student coverage, and provided guidance aimed at reducing the number of students receiving duplicate supports.
Providing professional development	The **Partnership for LA Schools** operates 18 schools within LAUSD, including five high schools; the Partnership coordinates its college advising work centrally and is intentional about building the capacity of school-level staff to implement advising supports. The Partnership provides regular PD to its school-based counselors and also staff from all CAOs who work in its schools to ensure all the people who support advising work are equipped to work toward the same goals.

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Resources: Identify and secure adequate and sustainable financial resources

- Districts have created resources for postsecondary advising by tapping into **general funds and/or reallocating existing staff/roles**.

- Some districts have sought **philanthropic seed funding**, directly or through the help of a public education foundation/intermediary, to support college advising initiatives.

- **Federal funds** beyond Title I and Title IV may also hold promise for districts in search of additional financial resources.

- **Low-cost models**, like AmeriCorps, and/or peer advising can help increase efficiency.

- Districts can **pilot lower-cost models** that CAOs have developed or explored.

Recommendations for the Field

Districts already undertaking advising work should focus on improving effectiveness and sustainability

When the Case for Change already exists, and a K-12 system is already implementing postsecondary advising, the focus should be on making the work more effective and sustainable. At a high level, there are a few strategies that are most critical for driving impact:

Focus on data:
> Districts should define what success looks like and what the indicators are of success (and CAOs and intermediaries can support districts in doing that). Decisions about what advising services to provide should be anchored in data, starting with a coverage map of which students are receiving supports and their outcomes. Systems and platforms to track, report, share, and discuss data are critical to success.

Ensure equitable access:
> Districts that have multiple CAO partners should ensure that services and supports are being delivered efficiently and to the broadest possible set of students. Districts should use coverage maps to assess how equitably supports are being delivered across schools and student groups. Where overlap exists, districts should reallocate resources to meet the needs of underserved students through the most effective option.

Move toward sustainability:
> Districts should push CAO partners to develop multiyear approaches that phase down direct student support over time, ensuring the district builds the capacity needed to own the delivery of core student supports.

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In districts with no advising work underway, the most important first step is to establish the Case for Change

Leadership buy-in and belief in the district's role in postsecondary advising is critical for impact and the long-term sustainability of the work.

If the Case for Change is not established, focus on:

Making the case:
Funders, the business community, CAOs, and any district champions can catalyze a coalition of stakeholders to advocate for increased emphasis on postsecondary advising.

Building ground-up support:
CAOs and/or individual school leaders can pilot models in a few schools to demonstrate to district leadership the impact of the work.

Increasing accountability/transparency:
Funders and the business community can use their collective voice and financial resources to advocate for state accountability and transparency policies that incentivize leaders to focus on postsecondary advising.

The nature of district-CAO partnerships should evolve

Given constrained district budgets, the lack of adequate dedicated state or federal funding for advising, and the limits of philanthropy, **there is a need for district and whole-school models that are more cost-effective than what exists today**.

Increasingly, **districts will need to import the best practices developed by CAOs, deliver those supports through financially sustainable human resource models**, and **play a leadership role in coordinating efforts** within their schools.

The role of CAOs will need to focus more on **(1) leading innovation and development of advising best practices, (2) building district capacity, and (3) more strategically partnering across CAOs to reduce duplication of effort and inefficiency**.

CAOs must lead on innovation, strengthening district capacity, and developing more effective partnerships

Lead on innovation:
CAOs should lead on the design and development of new program models that build on best practice, interact with existing systems and supports, and more seamlessly meet needs across schools and districts; CAOs should also design and pilot school- and district-wide models that lower costs by effectively differentiating supports and tailoring services efficiently.

Build district capacity:
CAOs should provide (and build) expertise with their district and school counterparts to build the capacity of K-12 systems in order to (ultimately) own and implement best practice models; CAOs with proven approaches should provide training, technical assistance, implementation coaching, and other forms of capacity-building to support the capacity of school systems to be the primary provider of postsecondary advising supports.

Strategically partner:
CAOs should build partnerships intentionally and bundle services effectively to help reduce duplication of services, increase coordination across K-12 systems, and streamline costs in order to promote greater sustainability of program resources.

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Funders have an important role to play advancing innovation and leading practice both nationally and locally

Support the development of the next generation of comprehensive models:
> Funders should support CAOs, in partnership with local districts, to pilot innovative new models to support district and student needs in more efficient and effective ways. These pilots could follow a structured, multiyear process to test and improve strategies and share learnings across the field.

Disseminate leading practices and models:
> Organizations across the country are investing in elements of this work and trying to address the challenges in pockets. The field would benefit from increased communication, not only within ecosystems but also across ecosystems to ensure the sharing of best practices and reduction of duplication of efforts.

Support local ecosystems to assess needs and develop aligned plans:
> A needs assessment can help a K-12 system — and its partners — understand strengths and gaps and identify the most critical needs to deepen college advising work. Philanthropy can support the development of needs assessment frameworks and tools that can be used by ecosystem actors in communities across the country. Local funders can also support efforts to convene local actors to complete a needs assessment and to collaboratively plan for how to address gaps and accelerate progress.

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For More Information

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About Bellwether Education Partners

Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

Bellwether envisions a world in which race, ethnicity, and income no longer predict opportunities for students, and the American education system affords all individuals the ability to determine their own path and lead a productive and fulfilling life.

Our work focuses on six service areas: Policy analysis and research; Strategy and growth planning; Organizational effectiveness and efficiency; Implementation support; Educational program evaluation; Academic and program advising.

We believe that the only way to ensure all children have access to a high-quality education is to take a holistic approach by changing field-level policies and perceptions while strengthening and supporting individual organizations. Since many of the challenges organizations face are complex, they require multiple perspectives and areas of expertise.

Through our integrated offerings, we provide comprehensive, coherent, and lasting solutions to education's most long-standing and complicated problems.

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Acknowledgments

Thank you to the many individuals who spoke with us about postsecondary advising, including leaders from school districts, college access organizations, state education agencies, and the philanthropic community.

Ralph Aiello, Farhad Asghar, Shelby Marzouk Abell, Jessica Baghian, Blossom Barrett, Erin Bibo, Lauren Bloem, Janice Bloom, Mara Botman, Ken Bradford, Kaycee Brock, Austin Buchan, Steve Colon, Yoon S. Choi, Melissa Connelly, Bill DeBaun, Claire Dennison, Tessa Carmen De Roy, Breanna Galuska, Alesia Gillison, Darren Ginther, Daniel Gohl, Kimberly Hanauer, Danette Howard, Christina Herzog, Nicole Hurd, David Jernigan, Morra Lee Keller, Sara Levy, Gary Linnen, Carol Lopez, Cornelia McCowan, Jim McCorkell, Jermaine Myrie, Amanda Northrup, Mike O'Brien, Amy Parkal, Todd Penner, Eva Pugh, Kayla Ritters Rickels, Karla Robles, Korynn Schooley, Karlo Silbiger, Peter Sloane, Leslie Sorensen, Myriam Tellez, and Wayne Young

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Local Ecosystem Considerations

Three considerations have particular influence on how to expand advising access in a local ecosystem

Consideration		Essential conditions for growing access to quality advising
# and type of CAOs	Many CAOs	CAO collaboration (e.g., offering bundled services), essential to reducing duplication and inefficiency
	Fewer CAOs	District capacity to directly deliver high-quality and equitable supports
Presence of an intermediary or coordinating entity	Intermediary	Strong partnership between the intermediary and district to enable effective collaboration and coordination
	No intermediary	District capacity and ownership to identify needs, coordinate partners, and deliver supports
Degree of centralized district decision-making	Centralized decisions	Central office leadership capacity and expertise needed to design and execute a plan for expanding access to quality advising
	School-level decisions	Accountability/transparency measures to incentivize school leaders to invest in postsecondary advising and build capacity at the school level to implement

Three ecosystem examples show how local conditions inform the highest-potential paths for expanding access to advising

	DISTRICT OF COLUMBIA PUBLIC SCHOOLS	LA JOYA ISD	COLUMBUS CITY SCHOOLS
Ecosystem Conditions	Many CAOs	Few CAOs	Few CAOs
	No Intermediary	No Intermediary	Intermediary
	Centralized Decisions	Centralized Decisions	School-Level Decisions
Path/Progress to Date	• Robust central office sets vision and coordinates data, professional development, and services/coverage across the district • Braided, sustainable funding streams	• District leaders who had adopted the Case for Change were able to leverage state policy to increase postsecondary advising budget/staff	• Deep partnership with an intermediary has led to clear vision/milestones and distinct lanes of ownership between district/intermediary staff • An extensive array of student supports are meeting the needs of most students
Highest-Potential Focus Areas to Expand Access	• Consolidation/greater bundling of services provided by CAOs • Experimentation with low-cost models, innovations in support of sustainability	• Build district capacity to implement advising supports (e.g., with turnkey resources, TA/training, and best-practice sharing) • Build district capacity to coordinate services	• Improve school-level buy-in • Leverage data/transparency to drive alignment of priorities and consistency of implementation across schools • Increase differentiated supports to ensure range of student needs are met

Detailed Recommendations

Recommendations

For CAOs

- **Policy** – Use collective voice to advocate for accountability, transparency policies, and/or funding for improved outcomes

- **Policy** – Seek growth in states that are implementing policies, funding, or accountability measures that incentivize advising

- **CAO/Intermediary partnerships** – Demonstrate effectiveness of college advising models by piloting and evaluating in a few schools and building buy-in for the approach

For Districts

- **Leadership** – Ensure school boards prioritize hiring superintendents who deeply believe college access is part of the role of K-12

- **Funding** – Seek funding for staff at the district and school level to explore and gain exposure to the potential of college advising work

- **Accountability** – Ensure district leaders/school boards incorporate college enrollment and persistence metrics into their accountability frameworks

For Funders

- **Leadership** – Invest in leadership development programs that expose more district leaders to high-expectation cultures for college going

- **Policy** – Fund advocacy to advance (primarily state) policies that drive accountability and results transparency

- **Ecosystem** – Fund a return on investment (ROI) analysis intended for state policymakers

- **Funding** – Help offset cost of launching college advising teams (e.g., director of college advising)

- **Ecosystem** – Convene the ecosystem players to foster conversations that increase focus on the case for change

Vision & Milestones

Recommendations

For CAOs

- **Milestones** – Develop and build awareness of common milestones to drive alignment across ecosystems (e.g., AZ, NCAN Common Measures)

- **Core Activities** – Serve as trusted advisers to districts to help facilitate the articulation of district-specific vision and/or milestones

For Districts

- **Clear Vision** – Define the district's vision and goals for college access

- **Milestones** – Seek out existing frameworks for college advising milestones and collaborate with CAOs, funders, regional CANs, and other districts to enhance and improve on these frameworks

- **Field-Level Alignment** – Collaborate with state and/or regional CANs to drive state-level efforts to set college & career readiness standards

For Funders

- **Milestones** – Support CAOs and districts in developing and aligning around a common set of milestones

- **Field-Level Alignment** – In partnership with CAOs and district grantees, set a consistent bar for success and expectations for which milestones will be measured (e.g., middle school preparedness, college completion, or somewhere in between)

- **Field-Level Alignment** – Promote and disseminate best practices (e.g., FAFSA graduation requirements) to accelerate milestone development

Recommendations

For CAOs

- **Data Platforms** – Leverage existing data systems that operate seamlessly with district data platforms

- **Strong Data Culture** – Provide technical assistance to help district staff use and analyze their data

For Districts

- **Data Platforms** – Adopt or build a data platform that allows for easy collection, analysis, and reporting of data from multiple data sources in service of achieving common milestones

- **Data Platforms** – Integrate state-level longitudinal data sets into district data platforms

- **Strong Data Culture** – Build a culture of data use within the district (e.g., meeting cadence, communications methods)

- **Data-Informed Decisions** – Use disaggregated data to identify district and/or subgroup needs (working with a consultant if necessary)

- **Data-Informed Decisions** – Leverage National Student Clearinghouse StudentTracker to access postsecondary metrics for high school alumni

For Funders

- **Comparative Evaluations** – Fund support for districts to do a robust assessment of student and district outcomes to better understand the current state, identify priorities, seek solutions

- **Data Platforms** – Support development of data infrastructure to track access/success indicators across systems, build connections between actors (like K-12 and higher ed), and identify an entity to be the holder of the data

- **Strong Data Culture** – Fund research & advocacy work that leads to greater data transparency & disaggregation

- **Strong Data Culture** – Encourage the responsible use of technology/predictive analytics to avoid student "tracking" and under-matching

Recommendations

For CAOs

- **Tools & Training** – Design turnkey versions of curriculum that align to advising milestones and develop implementation support resources (e.g., coaching)
- **Differentiated Supports** – Continue to advocate for the resources needed to deliver intensive services
- **Comparative Evaluations** – Provide better outcomes evaluation in order to articulate value add to prospective partners

For Districts

- **Roles & Responsibilities** – Build baseline college advising activities (e.g., presentations, drop-in hours on FAFSA) into existing counselor job descriptions and trainings
- **Tools & Training** – Acquire tools and resources from CAOs to build capacity of existing staff
- **Strategic Partnerships** – Partner with CAOs to address identified needs/ specific gaps in capacity

For Funders

- **Tools & Training** – Provide funding to design, scale, and disseminate turnkey resources aligned to milestones and provide implementation training to districts
- **Differentiated Supports** – Invest in pilots of innovative, lighter-touch approaches (e.g., tech-enabled, remote, lighter touch, lower dosage tailored to student need)
- **Comparative Evaluations** – Encourage and support evaluation of the efficacy of existing advising models

Coordination & Continuous Improvement

Recommendations

For CAOs

- **CAO Innovation** – Continue to innovate on and spread best practices re: coordination models and formal partnerships to improve efficiency

- **CAO Innovation** – Shift away from direct service toward more training/capacity building

- **Minimize Duplication** – Increase communication with other CAOs in an ecosystem to reduce duplication of services and to share best practices

- **Model Variations** – Identify effective model variations that drive greater efficiency and automation (where appropriate)

For Districts

- **District Leads** – Take an active role in determining who will coordinate college advising activities in the district (whether that is a district department or a CAO/intermediary)

- **District Leads** – Provide ongoing professional development for counselors and teachers

- **Coordinating Body** – Ensure that roles and responsibilities of all people/entities providing college advising services are clearly defined

- **Coordinating Body** – Use evaluation to engage in continuous improvement

For Funders

- **Coordinating Body** – Stand up a coordinating body (either within a district or through a third-party organization) to ensure collaboration, communication, and optimization of services

- **Coordinating Body** – Facilitate sharing of what's working across ecosystems

- **Coordinating Body** – Leverage NCAN or state CANs to support coordination and endorse organizations/groups with strong performance

- **Minimize Duplication** – Incentivize exploration of CAO collaborations and/or formal partnerships to improve efficiency and reduce service gaps

Recommendations

For CAOs

- **Resource Allocation** – Provide schools and districts with information about available funding streams, drawing from how CAOs have seen others fund the work
- **Strategic Partnership** – Explore formal partnerships and/or bundle services with other CAOs that reduce overhead and increase efficiency

For Districts

- **Seed Funding** – Work with funders and intermediary organizations in the region to bring in philanthropic funding
- **Government Funding** – Advocate for greater access to state and federal funds available for college advising
- **Resource Allocation** – Align district resources to activities proven to be effective

For Funders

Seed Funding

- Invest seed funding in districts to help catalyze case for change and build internal capacity
- Provide access to more patient capital that empowers CAOs to take risks and fail in order to innovate/learn more quickly
- Create more flexibility in the grant-making process so that CAOs have more agency/opportunity to collaborate on grant terms and/or support alternative funding mechanisms
- Bring together stakeholders to invest in college access in an ecosystem, including IHEs, states, and businesses, through advocacy or other galvanizing efforts
- Understand efficacy of current CAO providers and fund new entrants if no alternative support model exists

What's Working

This section provides snapshots of successful work by districts, CAOs, and partners to establish the Six Conditions.

What's Working

Leadership

In the Ontario-Montclair School District in California (a K-8 district), the **superintendent had prior exposure** to strong postsecondary advising approaches and **decided to make postsecondary access and success a district priority**.

Accountability

In Louisiana, the **state's FAFSA completion graduation requirement drove districts to prioritize FAFSA support**, leading to an increase in completion from 44% in 2013 to 76% in 2018.

"The superintendent didn't have a role in creating [the promise scholarship], but if he wants students to qualify, students need to be prepared. Local stakeholders are all playing together for a common cause. It feels like the community is coming together in service of the students."

—Local CAO Provider

What's Working

Vision-Setting

Broward County's strategic plan articulates its overarching vision, specifies **three strategic goals**, and outlines initiatives (including College and Career & Life Readiness) it will pursue in service of its goals.

Milestones

State Street, a global funder based in Boston, launched **Boston WINs** in 2015. Boston WINs is a **network of five CAOs that provide college and career services** in the community. The WINs network identified three core support services to achieve a **vision of success** and created a shared accountability framework (and data measurement approach) of **11 milestones to track student achievement and the network's progress** toward an overarching vision.

Field-Level Alignment

The **guided pathways approach** advocates for a shift toward **clearly defined program maps** that better support students to explore career and academic options, choose a program of study, and develop a full-educational plan. It has gained traction in many community college systems. To implement this work, community colleges have **revised course sequences and better aligned milestones and learning outcomes** to the success requirements for career-focused fields. This approach of aligning student coursework with career paths is a transferable best practice for postsecondary advising.

What's Working

Culture of Data

The **Partnership for LA Schools**, a specialized school operator in Los Angeles Unified School District, **hired data specialists to support counselors** with data needs; **PD sessions four times per year plus meetings with school teams ensure counselors and CAOs are aligned and have the necessary data** to target and support students.

Measuring Impact

In DC Public Schools, the district **distributes monthly data dashboards that help** school-based counselors and CAOs **target specific students and provide visibility on progress toward key outcomes** like FAFSA completion rates and SAT registration.

> "*The time for deep collaboration and joint action has arrived for college access. We have many proof points — we need to synthesize these proof points and inject that learning into schools' bloodstreams. This will require policy, schools of education, data transparency.*"
>
> —CAO Leader

What's Working

Coverage

Columbus City Schools, a mid-sized urban district, **hired more social workers to address the social-emotional needs** of students, **freeing up counselor time to focus on graduation milestones** and to collaborate with near-peer advisers.

Specialized Supports

CollegeSpring, a test prep provider that works with **low-income students**, partners with schools/districts to **train teachers to deliver college knowledge and SAT prep curriculum** to their entire junior class during the school day. Test prep to this student population is a needed support, one many schools/districts lack the expertise to provide. In addition, they are shifting to a virtual offering that extends into the summer and senior year.

What's Working

Implementation Support

Through partnerships with three urban districts, the **KIPP Foundation provided curriculum, aligned training and tools, and ongoing coaching** to help each district implement a postsecondary advising program. The **district partners adopted the CMO's approach**, tools/resources, and measures of success, and to varying degrees have **sustained implementation** beyond the 18-month program.

Counselor Training

Michigan College Access Network (MCAN) is the **state-level coordinating body for college access** initiatives. Since 2013, MCAN, in partnership with several other entities, has offered a **seven-month-long hybrid training course** for school counselors that provides them with **formal pre-service and in-service training** to better align their work with student outcomes.

What's Working

Intermediary Leads Coordination

Atlanta Public Schools partners with Achieve Atlanta to provide college advising supports in its 17 high schools. Achieve Atlanta brought in two CAO partners — College Advising Corps and OneGoal — to help meet the needs of APS students. **Achieve Atlanta coordinates the partnership between the district and the CAO providers** to ensure that supports are aligned with school-based resources, such as school counselors. Achieve Atlanta has also invested in data systems and analysis capacity and **leveraged philanthropy to pioneer a match and fit tool** to support APS students' college search process.

District Leads Coordination

In St. Paul Public Schools, the district engages an **intermediary to implement postsecondary advising** in its high schools; the intermediary **trains and manages the college advisers, selects and implements the advising curriculum, and collects and shares real-time data.** The district's central office provides overall coordination across multiple partner organizations.

"Who [coordinates] the work isn't the most important question so long as all the stakeholders are at the table. Then, as they break out, everyone is clear on their role in implementation and meeting the needs of the schools and students."

—District Leader

What's Working

General Funds	Federal Funds	Philanthropic Seed Funding
Broward County Public Schools, recognizing the need for more counseling resources, went to the **ballot box and asked residents for a small increase in the property tax rate** (millage) that funds the district to hire the needed counseling staff.	La Joya, in Texas, leveraged **GEAR UP (a federal grant program focused on postsecondary success for low-income students)** to create drop-in advising centers staffed by college transition specialists in its three high schools.	The District of Columbia Public Schools received **grant funding to pilot the "college coordinator" role**, starting in three schools; as the role proved effective, **DCPS expanded it to all high schools and transitioned funding** for the role to its college and career readiness **general budget**.

Needs Assessment Framework

The specific strategies to prioritize in an ecosystem and the sequencing of those depends on the local context

A **Needs Assessment aligned to the Six Conditions for Success** can help a K-12 system — and its partners — understand strengths and gaps and identify the most critical needs to deepen college advising work.

This assessment would **inform system-level decisions about where to focus resources as well as how CAOs and other external actors can best partner** with the district.

A needs assessment should be anchored in essential questions aligned to the Six Conditions for Success

Case for Change

Has district leadership philosophically bought into the importance of postsecondary advising and the key role K-12 needs to play in that work?

Vision & Milestones

Does the district have a clearly stated vision for the postsecondary outcomes of its graduates? Is there a set of milestones the district uses to track progress and identify key areas of focus?

Data & Platforms

Is the district able to collect and analyze relevant data to understand student needs, evaluate program impact, and drive decisions about postsecondary advising programming? Are current data systems and platforms sufficient to facilitate data sharing across stakeholders?

Supports — Content, Coverage & Delivery

Are all students in the district receiving some baseline college advising support (e.g., FAFSA completion, basic match and fit advice)? Are any subsets of students receiving more tailored and targeted support?

Coordination & Continuous Improvement

Is someone (the district or an intermediary organization) playing a coordinator role across providers? Are providers' services overlapping?

Resources

Is the district tapping into available state and federal funding sources? How much of the college advising work is paid for through philanthropy? Is the district using general funds?

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