

Update on State of Virginia College Access Provider Activity

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### Introduction

In the fall of 2008, the State Council of Higher Education for Virginia (SCHEV) commissioned a research study comparing the college access provider resources in Virginia to the access and academic achievement needs of the state. That study – conducted by researchers from the College of William and Mary and West Carolina University – resulted in the 2009 report entitled *A Statewide Examination of College Access Services and Resources in Virginia (Alleman, Stimpson, & Holly, 2009)*<sup>1</sup>. This multi-faceted research report (1) provided information on the distribution and the types of college access providers across the state, (2) used state and division level data to calculate an index for access need by school division, and (3) collected information from access providers about program activities and areas for additional attention.

In May 2015, SCHEV, in conjunction with Virginia529 released an *Institutional Partnership Opportunity* to conduct a second access study that replicated and expanded the scope of the 2009 report. The goal of this second access study is to understand change in the landscape of college access providers as well as the relationship between college access work and access need in communities across the state. As a continuation of the 2009 study and with a charge from the Senate Finance committee, SCHEV is coordinating the follow up study through an agreement with the Metropolitan Educational Research Consortium (MERC) at Virginia Commonwealth University to conduct the study. This agreement was reached in October of 2015.

As a first step in updating the earlier research, MERC has undertaken an examination designed to elicit the perspectives of key leaders within the Virginia college access field. Two research questions guide this study:

1. What progress has been made in the state in relation to six areas identified in the 2009 report for increased provider activity?
2. What further recommendations emerge for improving statewide coordination, support, information sharing, and data gathering to address the varied needs identified?

Through a set of qualitative interviews (n=7) with state access leaders, we sought insight into these two questions.

This report on our exploratory study begins with an overview of relevant components of the earlier report, *A Statewide Examination of College Access Services and Resources in Virginia* (below referred to simply as the “2009 Access Study”), including a brief discussion of its method and a review of key findings related to increased access provider activity. We then discuss the method we used to identify participants, collect, and analyze data for this report. Finally, we present key findings related to the two research questions above. This will include discussions of each of the six areas for increased provider activity, new changes and trends in college access, and tentative recommendations for future state-level access work.

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<sup>1</sup> Alleman, N. F., Stimpson, R. L., and Holly, L. N. (2009). A statewide examination of college access services and resources in Virginia. Richmond, VA: The State Council of Higher Education for Virginia.

### **Background: 2009 Access Study**

The 2009 Access Study was guided by descriptive questions about the type and distribution of college access providers, as well as evaluative and comparative questions about access need across the state and the challenges of college access work in Virginia. The two research questions (p. iv) from the original study most relevant to this report were:

- How do college access resources and college access needs in Virginia align: where are the areas of unmet need, of challenge, and of success?
- What can we learn about the challenges, obstacles, and victories of current access providers that may help inform and direct support for current and future access provider activities in the Commonwealth?

### **2009 Study Research Method**

The 2009 study involved three phases of data collection and analysis. First, a review and analysis of school division-level data on graduation rates, dropout rates, and measures of low income – especially free and reduced school lunch (FRSL) eligibility – guided the identification of school divisions with the greatest need for college access resources (“high need”), as well those with somewhat lower but still substantial need (“recognized need”). These school divisions are listed on p. vi of the 2009 Access Study.

Second – and more relevant to this report – the study included a state-wide survey of college access organizations that offer services to low-income families, first generation students, and students from underrepresented groups. The online survey was administered to 471 local access providers (excluding school-based providers), and received 125 responses; survey questions covered organizational structure, services offered, and the number and demographic characteristics of students served (p. 11). Organizations contacted for the survey included local access providers affiliated with statewide networks such as the Virginia College Access Network (VCAN), the Virginia Community College System (VCCS) Career Coaches program, and Project Discovery of Virginia; in a snowball sample approach, each organization was asked to provide names of organizations that offered similar services (p. 11). Additional access providers identified by SCHEV or through federal TRIO programs were included as well. A follow-up survey effort with a smaller group of access providers examined budget, expenses, and staffing (p. 12, 68). The third component of the study was a set of 20 qualitative, in-person or telephone interviews. This part of the study was designed to gather more in-depth information on organizations’ training, collaboration, and evaluation activities, as well as their needs (p. 12, 69).

### **Provider Activity Recommendations from the 2009 Study**

Analysis of the survey and interview data from the 2009 research effort led to recommendations for six priority areas in which access providers should increase their activity (pp. vii-viii).

1. ***Increased Early Awareness (Pre-High School) Work.*** Access providers were urged to begin encouraging positive college dispositions through programs and services aimed at much younger children, beginning as early as kindergarten.
2. ***Increased Focus on Computer Skills Training.*** Access providers were encouraged to increase computer skills training for students with the

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- understanding that expectations for computer literacy at the post-secondary level had increased.
3. ***Increased Focus on Preparation for College Entrance Exams.*** Access providers were encouraged to increase their attention to preparing students for success on college entrance exams (i.e., ACT and SAT).
  4. ***Increased Financial Literacy Work.*** Access providers were encouraged to offer more information sessions, workshops, and programs for students and parents on financial aid literacy and debt management.
  5. ***Increased Parental Engagement Work.*** Access providers were encouraged to emphasize strategies to increase parental participation and support throughout the college preparation process.
  6. ***Increased Focus on Post-secondary Transition and College Success.*** The study suggested that providers not only work to increase student *access* to post secondary, but also increase their activity to help students manage the transition and ensure their *success* once in post-secondary settings.

These six recommendations are a focus of this report. Below, in the findings section, access providers' perspectives on each recommendation will be discussed.

### **Research Method**

Below is a brief outline of the method used to address the research questions guiding this report, including the selection of participants, data collection strategies, and data analysis. A more detailed description of the method can be found in Appendix A.

#### **Participant Selection**

To produce a list of potential interviewees, SCHEV and Virginia529 collaborated to identify key leaders involved at different college access providers, and at umbrella organizations that help to coordinate provider activities in Virginia. This led to a list of nine potential participants. From this pool of nine, seven participants responded. Table 1 provides information about each the participants, including a brief description from online materials of the role their organizations play in the Virginia college access community.<sup>2</sup>

#### **Data Collection**

An interview protocol (see Appendix A) was developed that asked participants to (1) provide a description of their role and organization, (2) provide perspectives on each of the six 2009 recommendations for increased provider activity, and (3) reflect on current challenges and emerging trends in college access work in Virginia. Phone interviews were conducted over a three-day period (October 26-28, 2015), with each lasting from 20 to 50 minutes. Interviews were digitally recorded.

#### **Data Analysis**

Data from the interviews were analyzed using thematic analysis. Matrices were created around key themes (e.g., financial literacy, early awareness, emerging trends, etc.) that included key quotes and aligned codes. Research memos were written for each theme that organized and synthesized key themes into an organized narrative. The researchers developed a set of tentative recommendations through a reflection on the key findings.

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<sup>2</sup> *Note on study limitations:* By design, we interviewed experts who work at organizations central to efforts aimed at increasing college access for low-income and underserved families; we also sought out individuals who had spent a considerable part of their careers in the field and were thus likely to be knowledgeable both about changes since 2009 and about the current college access environment in Virginia. Further, we attempted to include providers working in several different geographic areas of Virginia. Thus, we attempted to include individuals whose collective experience would authentically reflect experiences of others in the field. Nevertheless, from a methodological perspective it is important to note that the study is not designed to produce generalizations about the access community as a whole. Our goal for this study was more exploratory: to gather preliminary data through which we can begin to identify possible areas of change, emerging trends, and new challenges that can be investigated more systematically through a full program of research geared toward replicating and updating the earlier study. The findings and recommendations should be read with this in mind.

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**Table 1. Study Participants**

Name, Role and Organization	Description
<b>Betsy Heggie</b> , CEO, Great Aspirations Scholarship Program (GRASP)	GRASP’s goal is to ensure that every student has an equal opportunity for continuing education after high school, regardless of financial or social circumstances. GRASP’s unique niche is helping students secure the resources to make their future plans a reality.
<b>Bonnie Sutton</b> , President and CEO, ACCESS College Foundation	The goal of the ACCESS College Foundation is to ensure that their students are able to make informed decisions about postsecondary education and to provide academic, financial, and personal support while in college. ACCESS uses a collaboration of both financial and advisory resources to help students realize their dream of becoming a college graduate.
<b>Jeffrey North</b> , CEO, Project Discovery of Virginia, Inc.	Project Discovery is a post-secondary access program currently offered through 24 partner agencies throughout Virginia in grades 4 to 12. Project Discovery encourages students to stay in and graduate high school and provides resources and tools for students to successfully make the transition to post-secondary education.
<b>Scott Kemp</b> , Director, High School Career Coach Program, Virginia Community College System (VCCS)	Virginia Community Colleges High School Career Coaches are community college employees who are based in local high schools to help high school students define their career aspirations and to recognize community college and other postsecondary programs, including apprenticeships and workforce training, that can help students achieve their educational and financial goals. The fundamental objectives of the VCCS High School Career Coaches Program are to empower students to make informed decisions about their career and educational plans and to prepare students for success in postsecondary education and training.
<b>Paula Crow</b> , Director, Outreach and Financial Literacy, Educational Credit Management Corporation (ECMC)	ECMC Group is a nonprofit corporation with a mission to help students recognize and realize their potential by investing in, creating and providing innovative education solutions that support schools and improve student educational outcomes.
<b>Judith “Tessie” Wilson</b> , Chairman of the Board, College Access Fairfax	College Access Fairfax is committed to helping Fairfax County Public School students with the daunting and complex task of acquiring financial aid for post-secondary education.
<b>Barry Simmons</b> , 2014-16 President, Virginia College Access Network <sup>a</sup>	VirginiaCAN is a network of college access providers across Virginia. Member organizations share a common goal – to enhance post-secondary education access and attainment for residents of Virginia.

<sup>a</sup> In addition to his role at VCAN, Simmons is also current president of Project Discovery of Virginia and is on the College Board’s College Scholarship Service (CSS) National Council. He is also a past president of the Virginia Association of Student Financial Aid Administrators (VASFAA), and he served as the 2009-10 National Chair for the National Association of Student Financial Aid Administrators (NASFAA). Finally, he served on the Advisory Committee for the 2009 Access Study.

## Findings

Findings are presented in two parts. The first part describes progress and changes within each of the six domains identified by the 2009 Access Study as areas for increased provider activity. Each of these sections begins by presenting evidence and recommendations from the 2009 Access Study, outlines current provider activity, and identifies possible future directions and/or challenges for provider work.

The second part, titled “Other Changes and Trends,” covers themes that were not a focus of the 2009 study, but that seem to represent important concerns or challenges in 2015. Two of these themes – technology and constancy/shifts in populations served – were the subject of direct questions during interviews. The other two themes – program evaluation and data needs, and coordination and collaboration – were not asked about directly, but emerged frequently in the course of the discussions.

### Progress on Recommended Areas for Increased Provider Activity

#### *Increased Early Awareness (Pre-High School) Work*

##### *Evidence from 2009*

The 2009 report recommended that Virginia access providers increase their work encouraging positive college dispositions through programs and services aimed at much younger children, beginning as early as kindergarten (p. vii). This recommendation was based on the study’s finding that while almost all access providers in the 2009 study targeted their services to high school juniors and/or seniors, only 16% said they concentrated on younger students as well. Yet as the report noted, both college aspirations and the qualifications needed to realize those aspirations are developed at well before the 11<sup>th</sup> and 12<sup>th</sup> grade years.

##### *Current provider activity*

In speaking with Virginia access leaders for this report, all informants endorsed efforts to begin college awareness efforts before high school, and most were involved at least to some extent with middle school students, even if this was a minor part of their programming. One interviewee reported that her organization’s early awareness work was under way prior to the 2009 report, while two reported that their initiatives had been undertaken more recently; one informant noted that he has seen new experimental work on early awareness. Even providers who did not focus on middle school students – whether because of lack of resources or because doing so was beyond the scope of the organization’s mission – strongly emphasized the importance of working with these younger students.

Providers active in the middle school space described some exciting initiatives. One reported on a sponsorship arrangement between her organization and two middle schools. The sponsorship includes a college access program in which access professionals “take over the social studies class” to get students thinking about their interests, what they want to do when they grow up, and what the possibilities are. Provider staff begin conversations with students so that they understand that federal aid, loans, and other forms of assistance are available to help defray the costs of education. At the end of the



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program, they give a presentation to parents, to ensure that they receive the information as well. In our informant's words, "We love the middle school space. We very much think that's where it needs to start. High school is sometimes too late."

Another provider with a well-established early awareness program described the thrust of middle school work in similar terms: sending the message that "college is possible," familiarizing students with the different options, and encouraging them to begin thinking about their futures at an earlier point. Both she and one other informant underscored the importance of early awareness by emphasizing the role of middle school curriculum selection in maximizing educational opportunities later on.

One provider had developed a middle school program in response to comments received at presentations geared to families of high schoolers. Parents at these sessions often said they wished they had had more information about financing a post-secondary education when their children were younger. The now-established middle school program is administered in partnership with Virginia529, and despite an initially slow start, presentations enjoy solid attendance. Still, the provider has met with little success in encouraging those who attend to establish 529 plans – in spite of a drawing at each presentation for a \$100 donation to any family's existing or new account.

### *Future directions*

Initiatives like these point to a possible increase in middle school activity by access providers. Nevertheless, several interviewees felt more work was required; one referred to her organization's middle school program as college access "lite," and talked about the need to make it "a more robust program as well, where we're not just showing up there once a month to talk about something, but where we're really interacting with students one-on-one." Moreover, even these efforts fall somewhat short of the 2009 report's recommendation to engage with students as early as kindergarten. Lack of funding was noted as the main factor preventing providers from developing or expanding efforts to target middle school or younger students.

### ***Increased Focus on Computer Skills Training***

#### *Evidence from 2009*

The 2009 report noted that while computer skills are a critical competency necessary for post-secondary success, training by Virginia access providers was offered at about half the rate at which other important competencies (such as study skills, critical thinking, and time management) were supported. The report suggested that this was putting many students at a "critical disadvantage" in college (p. vii).

#### *Current provider activity*

The access professionals we spoke with agreed that computer skills were extremely important for students to acquire, but only two providers incorporated any computer skills work into programs. In one case, the provider indicated that students might occasionally do some computer work with staff members; in the other, the informant indicated that the program's switch from paper applications to online applications, which occurred in 2009, had provided an opportunity for students to learn how to fill out online

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applications “and pick up basic computer skills.” Thus, neither of the two providers offered training in any formal sense.

Several providers felt that computer skills were an area outside their purview – whether because most of their work centered on personal relationships established through face-to-face meetings, or because it was something school divisions or others were better positioned to address; two of our informants mentioned school initiatives to provide every student with a laptop or tablet.

At the same time, in talking about the financial aid process, virtually all providers mentioned the need to complete forms online, and several referred to the difficulties of doing so when parents or students lack access to computers – in which case they may also lack skills. As one informant noted, “It is a bit of a problem that the FAFSA can only be done electronically now, except for extreme circumstances.”

### *Future directions*

One access professional noted that anecdotal evidence on the need for computer skills training is mixed: some evidence suggests that students are able to absorb such skills either on their own or through training from other sources, but other evidence points to “computer deserts” in Virginia where opportunities to acquire basic skills may be entirely absent. He called for research to examine students’ actual skill levels and the training available to them as they move into post-secondary education, in order to determine whether the preparation they receive is meeting students’ needs.

### ***Increased Focus on Preparation for College Entrance Exams (i.e., SAT, ACT)***

#### *Evidence from 2009*

Standardized test preparation was another area the 2009 report identified as deserving of greater attention by providers. The report noted that, although nearly all students experience some apprehension about taking standardized tests, fewer than half of the providers surveyed offered any test preparation assistance (p. vii).

#### *Current provider activity*

Only one of our informants indicated that his organization does systematic work in this area. Limited provider resources, the availability of free, online tools (Khan Academy was identified as a particularly helpful resource), and the fact that some school divisions now incorporate test preparation into the curriculum, were all cited by informants as reasons why they did not do more in this area. One provider indicated that, although her organization had provided test preparation services for many years, the combination of these three considerations had led them to discontinue that part of the program in the last five years. Another provider suggested that college admissions offices seemed to recognize that not all students may have had opportunities for test preparation and to take students’ level of disadvantage into consideration when interpreting test scores.

#### *Future directions*

Still, the access professionals we spoke with recognized the importance of preparation for standardized tests. One interviewee called on test preparation companies to offer free scholarships for their courses. Another pointed out that, although an increasing number of

institutions of higher education have dropped standardized tests as a requirement, the need for test preparation is likely to remain at least in the near term – particularly for students in school divisions that do not offer a solid test preparation curriculum. Furthermore, the 2009 report noted the “trepidation” occasioned by standardized tests. Thus, the purpose of test preparation work is twofold: first, to ensure that students will be adequately prepared for the tests they must take, and second, to allay fears that can themselves create barriers to access. Access providers might review students’ needs for both practice and reassurance in evaluating decisions to provide or eliminate test preparation services.

### ***Increased Financial Literacy Work***

#### *Evidence from 2009*

Although a large percentage of providers surveyed in 2009 offered information on scholarships and other forms of financial assistance, there appeared to be too little emphasis on helping parents and students understand the details of the financial aid process – that is, on developing financial literacy where the aid process is concerned (p. vii). Only 29% of the surveyed organizations said they focused on financial aid literacy, while 25% indicated that such financial literacy was *not* part of the services they offered (p. 53). The report called on access providers to offer information sessions, workshops, and programs on financial aid literacy and debt management, encouraging them to partner with banks and other entities that could provide expertise and up-to-date information. (In addition, the report pointed out that a coordinating body could contribute efficiently to providers’ ability to offer such services, by developing or expanding financial aid literacy training for access providers across Virginia [p. 53].)

#### *Current provider activity*

Without exception, the informants we spoke with saw financial literacy as a priority. In some cases, programs that had emphasized financial literacy prior to 2009 continued to do so at high levels; in other cases, efforts to address financial literacy had been added or increased since 2009. As one interviewee said, financial literacy has “really become part of the conversation now....there is so much out there that’s going on in the world of financial education that it’s tough to summarize...and it’s definitely not going away. The need for it becomes greater and greater.” Several providers clearly regarded financial literacy as the central focus of their college access work; one interviewee noted that “our emphasis is less on the importance of a college education and more about how to fund it. Pretty much anyone who comes to our seminars has already decided they want their kids to go to college.”

Two of our informants emphasized that the financial literacy education offered by college access providers is specific to the financial aid process and should be understood as distinct from the more general financial literacy education students now receive. Since 2011-2012, Virginia public high school students have been required to complete financial literacy coursework in order to graduate. Such courses teach general principles of economics and personal finance, but providers emphasized that they do not prepare students to deal with the complexities of the college financial aid process or the implications of the education-related debt they may assume. Thus, providers have made

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concerted efforts to help students and families “understand the ins and outs of financing a higher education.”

For most providers, that means, in part, offering assistance with the multi-stage process of applying for financial aid. One provider offers new online “net price calculators” like College Abacus and Pell Abacus, which help families to break down the “sticker price” and understand what their contribution is likely to be. Such tools are important for giving parents a realistic sense of costs, so that they do not simply assume that they will not be able to afford college. Providers also work to familiarize families with forms like the CSS Profile and the FAFSA, and often help them to complete the forms correctly and on time. Some providers offer FAFSA completion clinics and make computers available to help families with the online forms. (Since the forms usually need to be completed every year, providers’ commitment to students and families does not end once college begins, but continues throughout the college years.) One interviewee mentioned Super-FAFSA Project Virginia, a collaboration between ECMC and SCHEV that offers hands-on, one-on-one assistance with FAFSA completion at high schools and colleges around Virginia. Providers also work to bring scholarships and advantageous loans to families’ attention. Finally, providers often help students and families interpret the award letters they receive from colleges. Too often, one informant said, students may simply skim award letters without absorbing the details and implications of the packages offered. In addition, students and families need the help comparing offers they may receive from different colleges.

Access providers often invest considerable effort in helping students and parents become “informed consumers,” in the words of one informant, who understand cost-effective ways to approach their education. For example, providers may suggest strategies such as beginning at a two-year institution and then completing the degree at a four-year college, to reduce overall costs.

Equally important, providers try to educate students and families about the long-term implications of their financing decisions. One provider cited a strong commitment to “helping students understand what a debt load is going to mean for them when they complete college.” Another stated, “we want [students] to understand how their decisions are going to impact their future choices.” While literacy related to loans and debt burden is clearly a continuing challenge, at least one provider felt that media commentary on levels of student debt was somewhat unfair. Her experience included many examples of students making responsible financing decisions, and she felt that Virginia offered good options for keeping educational debt low.

### *Future directions*

Financial literacy challenges for access providers come from several different angles. One struggle is simply that of ensuring that students and families complete the necessary forms each year. As aid forms and scholarship information have moved online, the technology needs for access providers have increased. One interviewee noted that all her organization’s advisors now have computers, and others referred frequently to reliance on computers and the internet for financial aid work.

Changing requirements for students applying for financial aid represent a second area of challenge. For example, the CSS Profile is now required by many institutions, in addition to the FAFSA – but one interviewee observed that many families are not aware

of that requirement. Several informants also noted upcoming changes to the FAFSA, which will allow families both to file forms earlier and to use prior-year income information on their applications for aid. These changes, as well as efforts to simplify the FAFSA, will bring benefits to students; as one informant said, “it’s going to be great to have one less barrier for students who have complicated issues.” At the same time, the changes are likely to increase access providers’ workload: “the whole simplification effort at the federal level may have the unintended consequence of increasing complexity at the institutional and state level.”

A third challenge for access providers is to stay informed, both about changes to the financial aid process as well as about general economic trends in the commonwealth and the nation as a whole. Providers must expend considerable effort to ensure that they are knowledgeable and in possession of up-to-date information; informants mentioned that they bring in experts from banks, Virginia529, and the Department of Education to give presentations to staff. Several of our informants also said that they work constantly to stay abreast of economic news, to ensure that their services are as responsive as possible to the needs of their target populations.

Fourth, it has been nearly impossible to evaluate the effectiveness of financial literacy training and curriculum since, as one informant noted, “there are so many outside factors that come into play that it’s difficult to tie financial literacy training or curriculum to changed behavior.” She anticipated, however, that some providers who have been collecting data on this issue may soon be able to report results.

Finally, two providers pointed out that for-profit organizations offering assistance with financial aid were a concern – not because they were seen as competitors in a traditional sense, but because they charge families for services that college access organizations offer for free: “. . .when other pay-for-services come along and it’s hard to discern [the difference] – it’s just amazing to me when we find out that a low-income family has somehow begged and borrowed and the family has come together to pay \$399 for something that can be done for free. That concerns me and I think that’s going to be an ongoing issue.”

In sum, all of the access providers we spoke with have either maintained or expanded their financial aid literacy services since 2009. Yet their comments suggest not only that the need for those services is increasing, but also that the financial aid environment is becoming increasingly complex. As one informant observed, in the years ahead, access providers will need to place even greater emphasis on “coming to grips with all the intricacies of financing a higher education.”

### ***Increased Parental Engagement Work***

#### *Evidence from 2009*

Just over one-quarter of providers considered parental outreach a primary focus of their work, though more than half indicated that it was a secondary focus. Still, one-fifth of the providers surveyed did not offer any programs at all for parents (p. viii). The report acknowledged that parents can be a difficult group to reach, especially since many access programs connect directly with students through schools (p. 35). At the same time, the college access literature shows that parental participation and support are important throughout the college preparation process (p. 35). Families of first-generation students

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may be especially in need of support that can enhance their understanding of the value of post-secondary education and help allay fears that college will damage relationships or change students' values (p. 53). Thus, from several perspectives, parental outreach warrants expanded effort by providers and by state agencies.

### *Current provider activity*

Informants regarded parent outreach as an area that continued to be challenging. Several noted seemingly intractable barriers to parent outreach despite intensified efforts, which one provider attributed directly to the 2009 study recommendations. A fundamental difficulty remains the logistical challenge of reaching parents, who may be unable to attend presentations or information sessions because of work schedules, family, or other obligations. Parents may also be uninterested in or unaware of the value of higher education.

Informants reported on a range of strategies – some successful, others less so, still others never implemented because of lack of funding – from providing dinner as an incentive for families to attend presentations, to offering babysitting, to trying to make contact with parents at churches or other institutions, to using a “tricked-out schoolbus” to draw families' attention and eliminate some of the transportation difficulties that can reduce attendance at events. Two informants commented that parents who are the least informed about college are often the hardest to reach. Language sometimes acts as a barrier, so one provider is currently experimenting with sending letters to parents in the students' primary language as shown on school records.

Despite the mixed success of outreach efforts, providers agreed on the need to develop outreach and involve parents in the college access process, because there are so many points at which parents can provide crucial support or, on the other hand, discourage students from pursuing post-secondary education. Informants noted parents' role in fostering college aspirations; parents of first generation students, in particular, may do little to encourage aspirations if they are not aware of available financial aid, or do not understand the “culture of post-high school opportunities.” As one informant commented, “Adolescents look to parents for guidance in career planning, so [our] effort is to help them help their children make good choices.”

Providers stressed that financial aid education must be included as part of parent outreach: parents need an accurate understanding of the costs of college well before the start of the financial aid process, and once that process begins, family involvement is essential. Parents often need access to a computer (which several providers noted that they make available), as well as assistance in completing the FAFSA, the CSS profile, and other forms that qualify students for aid.

### *Future directions*

Several informants identified parent outreach as a critical priority for the access community: one interviewee said, “I don't think I ever go to any [meeting or conference] where people aren't talking about how important [parent outreach] is.” Another emphasized the importance of parental preparation and involvement to student persistence once in college; he called for focused research on how providers could most effectively reach parents and, more generally, urged the allocation of greater resources to

address what he called the “divide in Virginia in terms of parental literacy on post-high school education, what it takes to get there, and the value of it.”

### ***Increased Focus on Post-secondary Transition and College Success***

#### *Evidence from 2009*

Particularly for first-generation students and those from underrepresented populations, the transition to college can involve challenging “emotional and logistical” adjustments (p. vii). The study found that providers can not only offer students access to college resources, but can also help them to manage the transition and increase their chances of success once in college. When access providers remain involved with students and their families – especially first-generation students – during the college years, those established relationships create a sense of continuity that, in turn, contributes to students’ persistence in college. Thus, the report encouraged access providers to continue their engagement with students and their families during the college years (p. 36, 53).

#### *Current provider activity*

All but one of our access informants indicated that success in post-secondary education was an ongoing priority for their organization. As one informant pointed out, those students who are in greatest need of *access* – first-generation students, low-income students, and those from underrepresented groups – are often the very students for whom persistence and success in post-secondary education can be most challenging, because of limited resources and lack of familiarity with college culture. Such students “may not be on the radar of school personnel; they may need someone to help guide them and help them look at college from a career planning perspective.” Several of our interviewees noted an increased focus on post-secondary success within the college access field during recent years.

One access professional credited the 2009 report with drawing her organization’s attention to the importance of supporting students in college: “We didn’t do that, and funders were interested in it because they had read the study...[and] we did hire people specifically to focus on this.” Another, whose college success program was already in place in 2009, reported that students in that program graduated at rates far higher than the regional or national averages.

Providers differed substantially, however, in their overall approach to supporting student success. One provider saw her organization’s role mainly as one of assisting with financial matters, but otherwise supplementing support and guidance offered by colleges themselves. Hers is an “opt-in” model, where students who want to stay in touch can talk by phone, e-mail, or on social media with a “near peer” staff member. Events such as FAFSA completion evenings and resume workshops are held annually to coincide with winter break, when students are home. At the other extreme, some access professionals follow students much more actively: one provider has staff who travel to local colleges on a monthly basis, focusing especially on campuses with lower retention and graduation rates, which often have less-extensive student success programs of their own: “We’re there helping them with things like time management, when you have a problem with a class, what do you do, how do you connect with a professor, if they have financial aid or other family issues, we try to assist with those...our college success program is trying to

identify and knock down the barriers [students] continue to have once they get to college.” Thus providers employ a range of models that – depending on organizational mission and students’ needs, as well as geographical and institutional factors – offer different levels of support.

#### *Future directions*

Some interviewees pointed to evolving, multidimensional definitions of “success” that extend well beyond success in college. These professionals argued that success should be conceptualized as including not only completion of education, but also a connection to an appropriate job or career and a “satisfactory future.” One provider with the ability to follow program graduates planned to gauge underemployment by examining the degree of correspondence between a graduate’s degree and current field of work. Several providers who adopted this broader perspective on success discussed their work to develop skills important for employment, such as resume writing, interview and communication skills; they also called for more work-based learning and internships. One interviewee, frustrated by the lack of federal grants for vocational training, described her organization’s creative arrangement of “scholarships” with companies who would train students in technical or vocational skills and later, employ them.

Along similar lines, several informants urged a more nuanced understanding of “post-secondary education” that extends well beyond the traditional landscape of two- and four-year institutions. These access providers emphasized that post-secondary education might include certificates or non-school training, instead of or in addition to two- or four-year degrees: “We use the term ‘post-secondary training’ deliberately because there’s [a belief] that you have to go to college to be successful – the traditional path, four years of high school, four years of college. But most people don’t follow the traditional path. How do we figure out what is the next attainable step for a student? How do we make sure that step can be built on for further credentials later?” A “stackable” approach to education may be an effective strategy for success – particularly in times of economic hardship.

Indeed, one informant argued that whether post-secondary education involves a student learning to weld, a student pursuing an engineering degree, or a student majoring in art history, “it’s all career preparation, career readiness, workforce development.” Whatever their field of endeavor, students need support in gaining access to education or training, in persisting in their chosen field, and in connecting successfully to a career.

#### **Other Changes and Trends**

In addition to asking our interviewees about the six areas for increased emphasis identified by 2009 Access Study, we also asked them about possible change in their work due to shifts in their target populations, on the one hand, and technology, on the other. We also invited them to discuss other changes, trends, or challenges that might have affected their work. Two themes came up frequently, on which we report below: program evaluation and data needs, and coordination and collaboration.



### ***Technology***

Although technology was not an area identified by the 2009 study as requiring greater emphasis, most providers reported some growth or change since 2009, in either the ways or the degree to which they use technology. In the course of our discussions, nearly everyone mentioned the increasing importance of computers and online tools for students, parents, and their own staff, particularly for financial aid; in addition to the online process for federal aid, scholarship applications are generally online. One professional described her organization's partnership with a financial literacy organization, which permitted students to access their extensive services. The same provider actively used online tools such as "net price calculators" to help families arrive at a more accurate understanding of college costs. Another informant mentioned that her organization was considering the possibility of recording their presentations and making them available as webinars. Even those providers who used technology on a relatively low level were well aware of the importance – as well as the challenges – of developing a digital strategy.

### ***New and emerging challenges***

Several of our informants recognized the potential of social media for reaching students, and some were already using Twitter and Facebook to stay in touch with students and keep them informed about events such as FAFSA completion workshops. One mentioned that Facebook offered a way "to put that last-minute scholarship out for [students] so they'll see it." Another provider also used Pinterest and Instagram to reach students. Texting and push notifications were mentioned as worthwhile – though in some cases costly – opportunities under investigation. Most, if not all, of these are new developments that have appeared since 2009.

At the same time, several informants emphasized the crucial importance of personal contacts, particularly for the populations they serve; as one said, "we know that for under-resourced students, in-person conversations are extremely valuable and can be game changers, can make the difference between a student realizing that college is possible, versus thinking, 'No, I can't go.'" Another cited the popularity of printed materials that her organization distributes in large numbers in both English and Spanish – the publication "is a real hit, because as you can imagine, not a lot of organizations are still doing print pieces." Thus, despite their recognition that important aspects of the college access process can and do take place online, providers are also committed to the face-to-face relationships that they regard as the core of their work.

### ***Target Populations***

Most providers indicated that their primary target populations remained the same as in 2009: low-income, under-resourced families, often from underrepresented racial or ethnic groups, and especially first-generation students. Indeed, one provider indicated that that her organization's emphasis on these groups had intensified, with a "decided shift in just the past three years" away from community college sites to high schools where a large percentage of students receive free or reduced price lunches: "We have a clearer focus now than in the past on helping the neediest students, realizing that students with the least amount of resources often struggle the most with FAFSA completion."

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Other interviewees commented on expansion of their populations; one interviewee noted the growing Hispanic population, continuing needs of eastern European immigrants, a potential influx of refugees from the Middle East, and new awareness among providers of the needs of the Appalachian population. Several providers mentioned that their outreach efforts to the Spanish-speaking population had remained at a high level, including offering presentations and materials in Spanish as well as English. As noted also in the section on parent outreach, groups whose primary language is not English can be especially hard to reach.

### *New and emerging challenges*

However, within that general population, there have been some noteworthy changes. Two interviewees said that the economic downturn had resulted in a graying of the populations they serve. Additionally, both the commonwealth and the community college system (as well as some four-year institutions) have focused on students who dropped out after partial progress toward a degree, encouraging them to return for degree completion. Such efforts have also contributed to a grayer population seeking post-secondary education. And older students can be drawn into providers' populations in other ways, too. One provider told the story of a student assisted by his organization, who earned a two-year degree. That student's success led not only the student's mother, but also her grandmother, to return to school for their own degrees.

From the college access provider's perspective, such changes point to a dual challenge of continuing to assist "traditional" students while also meeting the somewhat different needs of older students. The latter are often seeking retraining, may more often take advantage of the guaranteed admission process, and are juggling additional responsibilities and financial burdens that increase the complexity of pursuing further credentials. Particularly for such older students, the concept of "stackable" credentials, discussed above in the section on post-secondary transitions and success, may be especially meaningful and useful.

A second important element noted by two informants is the broadening of the population wishing to take advantage of the services providers offer. One interviewee characterized this as a recent change, which she attributed to escalating tuition costs combined with providers' reputations for providing effective assistance. She noted a "big push from the middle class and some push from the upper middle class...there's been a big growth in requests for our services from the middle class in Virginia." Thus a new challenge for providers is to ensure that their primary efforts emphasize their key target populations but still include as broad a population as possible: "Our work is truly for all Virginians to move forward, with the majority focus on lower income." Similarly, another informant noted that her organization's regional focus means that their "target continues to be first-generation, low-income, underserved students," but "in the process of serving those students, we actually are open and available to serve every student in that school." She continued, "we find that families all along the continuum are needy in different ways...it doesn't mean we are spending the bulk of our time on [students from middle class families], but they certainly have a need for information and we want to be that conduit of information."

Providers have adopted several strategies to meet the needs of a broader population. Two interviewees said that printed materials they produce are widely

distributed to students beyond their target groups. One organization holds large seminars that anyone can attend – a strategy that has the additional advantage of helping to destigmatize the need for assistance, so that “you’re not the poor person walking in the door.” Another informant indicated that some provider services are restricted but others are available to all students: students may not qualify for scholarships or for financial assistance with testing or college application fees, but they can still “benefit from the educational part, the counseling part of our services.”

### ***Program Evaluation and Data Needs***

In the course of our conversations, program evaluation and the need for data emerged as challenges for access providers. Informants frequently indicated that they did not have data that would assist them in evaluating their programs’ effectiveness. One interviewee commented that, “we need to get better at looking at completion rates in college and persistence rates in college. We’ve got a pretty good, robust way of looking at it now, but there’s always room for improvement on that.”

### ***New and emerging challenges***

The evaluation and data needs outlined by interviewees tended to reflect the specific tasks and strategies employed by individual organizations. Still, several informants mentioned financial aid literacy efforts as an area where data would be helpful. As noted in the discussion above, one informant stressed the challenge of determining whether financial aid literacy programs are influencing behavior. Although she expected some relevant data on this issue to be available soon, it has been up to individual providers to collect it.

Two informants expressed a wish for detailed data on FAFSA completion. One informant felt that Virginia’s decentralized system for administering federal grants created obstacles for providers; she called for a system that would make FAFSA completion data available at the local level. Such data would, for example, allow providers to target students who claimed to have filled out a FAFSA, but had none on file. As she said, “everyone says it’s a great idea, but no one wants to actually do it. It would really enable those of us who are on the ground to be much more effective in what we’re doing.” Another informant thought it would be valuable for SCHEV to have access to school-by-school FAFSA completion rates, noting that at present “it’s really up to the school to figure out where their numbers are. We don’t have access to that data.” Such data would be especially important in helping to shape efforts such as the Super-FAFSA Project.

More generally, another interviewee called for funding for studies that would help providers to “make data-driven decisions.” As an example, he cited the value of data that could help determine how best to encourage compliance with the minimum number of credit hours students at public institutions are required to take in order to receive financial assistance. Other examples previously discussed include the need for research on student computer literacy and on how to reach parents most effectively.

### ***Coordination and Collaboration***

Most interviewees seemed to indicate that connections to and collaboration with other organizations and agencies had increased since 2009. Informants noted that they must

cast a wide net in order to stay on top of information about new regulations, changes in the federal financial aid process, potential scholarships, and national and state-level economic changes that can affect students' educational and employment careers. Thus, access providers rely on expertise from outside organizations (both public and private) and advice from politically-involved board members. Ties to groups like SCHEV, the Department of Education's Office of Federal Student Aid, and Virginia529 appeared to have been strengthened, with informants describing partnerships, collaborative work, and visits by experts. Information-sharing sessions and other forums provide some opportunities for access providers to exchange ideas and learn what others are doing across Virginia and in other states as well.

#### *New and emerging challenges*

At the same time, informants – particularly those whose organizations work throughout the commonwealth – felt that coordination of effort and collaboration *within* Virginia's college access community were growing needs: "One of the biggest challenges in the college access world is knowing what else is being done. SCHEV tries to get everyone working from the same songbook, but it is still somewhat siloed...I strongly believe that together, we're better." One interviewee called for state funding for the Virginia College Access Network (VCAN), a network of access providers, to facilitate such coordination: "VCAN really does a lot of good work and they struggle for resources." One need she described is for maintaining a VCAN website with a centralized calendar and other resources to help access providers coordinate their efforts.

Other interviewees felt that closer ties between access providers and school division administrations would help providers to coordinate and disseminate information more effectively. Likewise, some of the data and evaluation needs described above would both require and promote greater coordination between access providers, federal agencies, and schools.

### **Recommendations**

Below is a list of five recommendations, developed by the researchers after reflecting on ideas and themes that cut across the findings. It should be noted that these recommendations are tentative, in that they are based on an exploratory study with only a small sample of college access leaders in Virginia. Further research with a broader sample would be needed to strengthen these recommendations.

#### ***Recommendation 1: Expand the definition of post-secondary success to include both degree and certificate training options***

Several of the access providers emphasized the importance of expanding the definition of access work beyond college, to include a much broader array of post-secondary options such as 2-year degrees and certificate training programs. This move responds both to student interest and to regional workforce needs. It is important to recognize that the move from "college access" to "post-secondary access" is not merely a rhetorical shift. The access providers suggested that expansion of the definition of access has meaningful implications for the work of access organizations as well as for the structures that support access work.

***Recommendation 2: Establish a balance between expectations of access work and resources***

Of the six areas for increased provider activity identified in the 2009 study, several encouraged access providers to expand the scope of their services into new spaces. For example, the 2009 study encouraged simultaneous movement into the middle school and elementary school (as part of the early awareness campaign), as well as into post-secondary spaces (as part of the effort to support post-secondary transition success of underrepresented students). Although both of these moves makes sense in relation to the experiences of access providers and the access literature, this expectation for increased scope did not generally come with increased resources. From the provider perspective, the danger is that expanding the scope of access work into these new spaces could come at the expense of the quality of core services (e.g., financial aid literacy training). Providers themselves appeared to recognize this: while several described exciting middle school initiatives, there was much less evidence of activity at the elementary school level. With this in mind, the recommendation is that access providers carefully weigh the benefits and risks of expanding programs in new directions.

***Recommendation 3: Enhance structures for coordination and collaboration with other organizations working in the college access space***

College access is a complicated field. For example, within a given school division, there are likely to be multiple access organizations and initiatives operating independently to provide services to underrepresented students. In addition, the study found that efforts by access providers to support computer skills and college entrance exam preparation might create overlap with school-based services. While these two areas were seen as critical to the college access mission, access providers suggested that such needs might be better met through the curriculum efforts of the school divisions. This phenomenon also occurs across different levels of the system. For example, some, but not all, college and universities offer their own college success programs to assist students with the transition to post-secondary education. Such examples suggest the need for increased coordination and collaboration across organizations and institutions serving the post-secondary access and success needs of students. However, it is important to note that coordination and collaboration require time and resources on the part of the individual programs and initiatives and often benefit from infrastructure for basic communication and resource-sharing. It might be worth considering how state-level coordinating bodies (e.g. SCHEV or VCAN) could enhance the work and improve the collective impact of access providers.

***Recommendation 4: Improve the availability of data related to key access outcomes, and enhance the capacity of access organizations to conduct evaluations of their programs and initiatives***

Many of the conversations with state access leaders reflected an interest in investing in efforts to use data, research and evaluation to gauge the impact of access initiatives and to support the development of new programs. This work would be enhanced by (1) efforts to increase the availability of data (e.g., through data sharing agreements with school divisions), (2) efforts to build the research and evaluation capacity within access organizations, and (3) support for additional targeted university-based research work around critical issues in access.

***Recommendation 5: Build flexibility into the work of access organizations that help them predict and adapt more quickly to ever-changing contextual factors***

The work of access providers is heavily influenced by a number of critical contextual factors. A few examples include rising costs for post-secondary education, growth of technology-based resources, changing student demographics, changing academic priorities within school divisions, and changing mandates from the state and federal levels. In discussing provider activity changes, all college access leaders referred to various combinations of these factors. This changing environment creates both opportunities and challenges for access providers. Consequently, it is important that access organizations establish models that are responsive and adaptable to changes in context. This requires organizations to engage in regular strategic planning that attends to the ever-evolving landscape of access work.

**Conclusion**

The interviews with access leaders conducted for this report provided ample evidence of the importance of the 2009 Access Study. The results and recommendations of that research have helped guide conversations about the focus and strategies for access work over the past six years. However, the findings also suggest a need for re-assessing the landscape of access work in the state, which may point to some redefinition of priorities.

## APPENDIX A – Research Method

### Method of research

Below is an outline of the method used to address the research questions guiding this report, including the selection of participants, data collection strategies, and data analysis.

#### Participant Selection

To produce a list of potential interviewees, SCHEV and Virginia529 collaborated to identify key leaders involved at different college access providers, and at umbrella organizations that help to coordinate provider activities in Virginia. There was also an interest in identifying access leaders that represented various geographic perspectives (e.g., Southside, Northern Virginia, Hampton Roads, etc.). This led to a list of nine potential participants. After the development of the list, SCHEV and Virginia529 made contact with each potential participant by e-mail to request an interview, to provide an initial brief description of the study, and to introduce MERC as the group conducting the research. MERC then followed up to schedule the interview. From the original pool of nine, seven participants responded. Brief information about each the participants and the role their organizations play in the Virginia college access community is provided in Table 1 on p. 7.

#### Data Collection

An interview protocol was developed that asked participants to (1) provide a description of their organization's role within the college access community, (2) provide perspectives on each of the six 2009 recommendations for increased provider activity, and (3) reflect on current challenges and emerging trends in college access work in Virginia. See below for the full version of the interview protocol.

Phone interviews were conducted over a three-day period (October 26-28, 2015), with each lasting from 20 to 50 minutes. Interviews were digitally recorded.

#### Data Analysis

The following steps were used in the analysis of the data for this report.

- **Code List.** An initial code list was developed by the research team that included key themes identified in the 2009 study and code categories that correspond to the interview protocol.
- **Transcription Notes.** Immediately after data collection, detailed notes were taken from interview recordings. These notes included direct quotes that were determined to be connected closely to the key themes of the study.
- **Theme documents.** Matrices were created around key themes (e.g., financial literacy, early awareness, emerging trends, etc.) that included key quotes and aligned codes.
- **Memos.** Research memos were written for each theme that organized and synthesized key themes into an organized narrative.

## Interview Protocol

Note recording and ask for consent

Request permission to use names/identify organizations in reporting

### Overview of purpose of the interview

In 2009, SCHEV supported a research project comparing the college access provider resources in Virginia to the access and academic achievement needs of the state. This research, which included both analysis of state and school division level data as well as survey and interview efforts with college access providers, led to a number of recommendations. Funding was recently secured to update the information from the 2009 study and to assess the progress the state has made in improving access services. As a first step in this we are conducting an exploratory study to get an initial impression of the Virginia college access environment in 2015 and changes that may have occurred over the past 6 years. To do this we are reaching out to a small sample of key leaders in Virginia's college access community that we believe can offer perspectives on the changes, emerging trends and current challenges of college access work in the state.

### Role and organization

1. Can you tell me a little about the role you and your organization play within the Virginia college access community?

### Identified areas for increased provider activity

The 2009 report drew on research within the Virginia college access community to outline six recommendations for increased access provider activity. In this next part of the interview we are going to run these recommendations by you to get your perspective. We are interested in knowing if, from your organization's perspective, the need to provide each service has increased, decreased, or not changed over the past 6 years? We understand that your knowledge in some of these areas might be limited. Also, if the area is not applicable for your organization, please note that.

2. One suggestion was that access providers focus attention on *success* in post-secondary education, in addition to *access* to post-secondary – so in other words, provide support for the logistical and emotional challenges of college transition, especially for first generation college students.
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]
  - b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?
3. Another suggestion was for access providers to increase their focus on financial literacy, specifically helping students and parents comprehend the details of the financial aid process.
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]



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- b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?
4. A third suggestion was for access providers to recognize the importance of supporting and nurturing positive dispositions toward college attendance prior to high school and begin programs and services as early as kindergarten. This would include work in both middle and elementary schools.
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]
  - b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?
5. There was a suggestion that both college access provider organizations and state agencies enhance efforts to inform parents of the value of post-high school education.
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]
  - b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?
6. Another suggestion was for access providers to focus on increasing computer skills training for students so the students would have necessary computer skills when entering post-secondary.
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]
  - b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?
7. Finally, there was a suggestion for access providers to increase their involvement in test preparation activities (e.g., SAT, ACT).
  - a. Do you see this as a priority area for the state? What about for your organization? [Why/why not?]
  - b. Have you seen change since 2009 in the need for provider activity in this area?
  - c. What knowledge do you have about new work being done in this area?

### **Emerging trends, new challenges, recommendations**

8. Are there any newly emerging trends in college access work that are worth noting?

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9. The college access community has certain priority populations (e.g., first generation students, students in poverty, etc.). Have you noticed any shifts in the population that are target of your services?
10. Are there any new efforts to use technology, especially social media, as a platform for providing services or as a way to enhance ongoing efforts?
11. Other than fiscal challenges, what are the top three challenges your organization faces?
  - a. Have these challenges changed since 2009?
12. This report is going to a committee of Virginia legislators. What recommendations would you make for improving the impact of Virginia's college access work?