

# Better Together

## Expanding Access and Opportunity Through Community-Based Organization and College Partnerships

Jonathan April | J. Luke Chitwood | Benjamin Fresquez | Adam Rabinowitz

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## Four-year institutions consulted or mentioned in this report:

### Private Institutions

Amherst College  
Bowdoin College  
Colgate University  
Dickinson College  
Lehigh University  
Northwestern University  
Rice University  
Swarthmore College  
University of Chicago  
University of Dayton  
University of Miami  
University of Notre Dame  
University of Richmond  
Vanderbilt University  
Washington and Lee University

### Public Institutions

University of California, Los Angeles  
University of Illinois at Chicago  
University of Maryland at College Park  
University of Michigan  
University of North Carolina at Chapel Hill  
University of Texas at Austin

## Community-based and national organizations consulted or mentioned in this report:

100 Black Men of Chicago  
Breakthrough Collaborative  
Chicago Scholars  
College Advising Corps  
College Bound Opportunities  
College Bound St. Louis  
College Horizons  
CollegePoint  
College Possible  
College Match  
College Track  
Cristo Rey Network  
EMERGE Fellowship  
GEAR UP  
High Tech High Foundation  
Jack Kent Cooke Foundation  
KIPP  
Leadership Enterprise for a Diverse America  
Minds Matter  
National Association for College Admission Counseling  
National College Attainment Network  
National Partnership for Educational Access  
Noble Network of Charter Schools  
OneGoal  
The Opportunity Network  
Philadelphia Futures  
SCS Noonan Scholars  
SEO Scholars  
Simon Scholars Program  
Summer Search  
TRiO



The **American Talent Initiative (ATI)** is a Bloomberg Philanthropies-supported collaboration between the Aspen Institute [College Excellence Program](#), [Ithaka S+R](#), and a growing alliance of top colleges and universities committed to expanding access and opportunity for lower-income students.

ATI seeks to substantially expand access and opportunity for talented, low- and moderate-income students at the nation's colleges and universities with the highest graduation rates. Specifically, the initiative has one central goal: attract, enroll, and graduate 50,000 additional high-achieving, lower-income students at the nation's colleges and universities with the highest graduation rates by 2025.

Leading public and private colleges and universities comprise ATI's membership, collectively representing 31 states, seven Carnegie Classes, and a wide range of institution sizes. With the support of its member institutions, ATI centers its work around a commitment to achieve access and attainment goals, compile and elevate related research and promising practices, and regularly highlight the importance of its work. For more information about the American Talent Initiative, please contact Benjamin Fresquez at [benjamin.fresquez@aspeninstitute.org](mailto:benjamin.fresquez@aspeninstitute.org).



**College Greenlight** is a leading college admissions advocacy network for first-generation, low-income, and underrepresented students. College Greenlight makes college more accessible to first-generation low-income students by bridging the information & opportunity gap and bringing community-based organizations (CBOs), counselors, and colleges together to facilitate successful college enrollment and success.

Launched in 2012 by its parent organization, Cappex, College Greenlight supports a nationwide community of more than half a million students, more than 1,500 CBOs (including schools), and 15,000 counselors. Two hundred leading universities partner with College Greenlight to connect with high-achieving underrepresented students, build new recruitment pipelines with right-fit organizations, and promote their diversity initiatives to the access community. Sixty American Talent Initiative member institutions are also College Greenlight partners.

College Greenlight focuses its efforts on:

- Enhancing the collaboration between colleges, schools/CBOs, and counselors to improve outcomes for first-generation and low-income students.
- Closing information gaps, expanding opportunities, and reducing barriers for underrepresented students and providing meaningful resources for the counselors who support them.
- Enhancing diversity enrollment and sharing best practices for communicating with, recruiting, and enrolling students from underrepresented populations.
- Addressing the challenges of affordability, helping students pay for college, and increasing college options for low-income students.

For more information about College Greenlight, please contact Jonathan April at [japril@collegegreenlight.com](mailto:japril@collegegreenlight.com).

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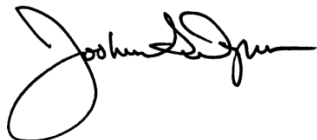
# Foreword

Across the United States, too many young people face substantial obstacles to attaining a college degree. Students from lower-income and racially diverse backgrounds especially are less likely than their peers to access and earn degrees from four-year colleges and universities.

Institutions of higher education and community-based organizations are each working hard to change those realities. College recruiters devise and implement strategies to reach first-generation students and others who never imagined the prospect of attending their institutions. At the same time, college access and success-focused non-profit organizations provide ongoing, often personalized support to high school students who are unsure about whether and where to go to college.

The following report, *Better Together*, demonstrates the power of what is possible when colleges and CBOs work together. In the spirit of collaboration, the [American Talent Initiative](#) and [College Greenlight](#) present in this report a three-stage partnership framework that institutions and CBOs can use to ensure that more students from underrepresented backgrounds enter and thrive at selective colleges and universities. Alongside each element of the framework, *Better Together* offers actionable recommendations and elevates institutions that have leveraged CBO collaborations to expand educational opportunity for more students.

Through collective efforts, colleges and CBOs can help close decades-long achievement gaps, providing opportunity that can advance our nation's social progress and economic recovery. We hope this report encourages colleges to develop new partnerships - and expand existing ones - and, in doing so, empower more CBOs to scale their efforts to expand opportunities for, and facilitate seamless transitions to, postsecondary education. By coming together, colleges and CBOs can do even more to activate the tremendous amount of untapped, diverse talent needed now more than ever.



**Josh Wyner**  
American Talent Initiative



**Jonathan April**  
College Greenlight

# Executive Summary

Over at least a half-century, the most selective U.S. colleges have partnered with K-12 schools, local organizations, nonprofits, philanthropists, and policymakers to address a shared imperative: enroll and graduate more young people from lower-income and first-generation backgrounds as well as communities of color, thus expanding pathways to opportunity and workforce success. While they have made significant strides in this effort, thousands of talented students across the United States continue to fall through the cracks, lacking the support, advising, and information needed to apply to and enroll in a postsecondary option that could change their trajectory.

Each year, tens of thousands of students from lower-income backgrounds have the credentials to enroll in the nation's more selective colleges, but instead choose less selective institutions.<sup>1</sup> This trend of "undermatching" has a ripple effect that spans the postsecondary pipeline. More than half of students at selective colleges ultimately come from families in the top fifth of the income distribution, and more than 75 percent of bachelor's degree recipients come from families in the top half of the income distribution.<sup>2</sup> At a time when economic uncertainty takes an increasing hold in communities across the country and institutions lack the resources to expand their reach to—and support of—more talented students, the progress the field has made in areas of college access and success is at risk. Our colleges require additional assistance now more than ever to realize a longstanding imperative; both as a part of their individual missions and for the public good.

**Better Together**, a report produced by the [American Talent Initiative](#) and [College Greenlight](#), makes the case for how community-based organizations (CBOs) are best positioned to provide that assistance, connecting thousands of talented minority and first-generation students and students from lower-income backgrounds to the colleges and universities they deserve to attend. For young people with limited postsecondary exposure and resources, decisions about applying, traveling to, and attending college are fraught with uncertainty, made even more challenging by complex application, financial aid, and enrollment processes. For these students, the potential impact of a trusted partner cannot be understated. Studies show that CBOs can generate promising gains in academic engagement, applications for financial aid, and postsecondary enrollment, remedying longstanding imbalances in the supports that students can leverage to access needed resources or advice.<sup>3</sup>

## **The Role of Community-Based Organizations**

In this report, CBOs include those postsecondary access and success organizations that support first-generation and students from low-income and minority backgrounds to and through their college journey. No matter their size, reach, and focus, they all represent trusted intermediaries for students seeking to navigate the growing complexities of the postsecondary journey. In short, they represent a powerful solution for colleges seeking to improve the diversity of their recruitment pipelines for three key reasons:

- **CBOs engage with traditionally underrepresented students who aspire to enroll in higher education and represent a critical pool of diverse talent.**
- **CBOs often bridge gaps in college counseling and advising services by propelling students through complex admissions and financial aid processes.**
- **CBOs can position students to make significant strides in postsecondary enrollment, academic engagement, and college-going behavior.**

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1 Hoxby, C. & Avery, C. (2013). *"The Missing One-Offs": The Hidden Supply of High-Achieving, Low-Income Students*. Brookings Papers on Economic Activity, Spring 2013.

2 Cahalan, M., Perna, L., Yamashita, M., Ruiz, R., & Franklin, K. (2016). *Indicators of Higher Education Equity in the United States: 2016 Historical Trend Report*. Pell Institute for the Study of Opportunity in Higher Education; Pisacreta, E., Schwartz, E. & Kurzweil, M. (2018). *Impact: A 2018 Report on the Progress of the American Talent Initiative in its First Two Years*. The American Talent Initiative.

3 Hooker, S. & Brand, B. (2009). *Success at Every Step: How 23 Programs Support Youth on the Path to College and Beyond*. American Youth Policy Forum.

## The CBO-College Partnership Framework

This report synthesizes insights gathered from various CBO and institutional representatives, drawn from College Greenlight’s network of partners and the American Talent Initiative’s coalition of members, to address two complicated questions:

- How might colleges and universities better serve students and families via CBOs?
- How might these partners create a sustainable process for evaluating CBO and college relationships for long-term student fit and success?

In response to those two avenues of inquiry, the report presents a series of proven practices that institutions can leverage as they **initiate**, **implement**, and **improve** their partnerships with CBOs. Each of these steps includes sub-strategies that are outlined in greater detail with accompanying examples.

CBO-COLLEGE PARTNERSHIP FRAMEWORK		
1. INITIATE	2. IMPLEMENT	3. IMPROVE
Define an “ideal” CBO partnership based on institutional priorities.	Develop communications strategies and materials focused on CBOs.	Maintain relationships and preserve institutional knowledge.
Examine CBOs’ missions and programs to evaluate potential fit.	Anticipate and minimize financial barriers for students from lower-income backgrounds.	Collect and act on data on the impact of CBO student initiatives.
Intentionally establish mutually beneficial partnerships.	Provide practical supports and exploration opportunities valued by CBOs.	Evaluate collaborative efforts and extend CBO partnership portfolios.

### 1. INITIATE

In selecting aligned organizations from an expansive network of potential partners, it is important to initiate a structured intake process, matching organizations based not only on their ability to realize the institution’s goals, but also on criteria such as location, support of students in a demonstrated area of focus, and/or interactions with peer institutions.

### 2. IMPLEMENT

As potential partnerships arise, institutions should equip all members of the admissions staff with the resources and training to highlight relevant programs, speak about the experiences of underrepresented students, and elaborate on financial aid opportunities and policies. Institutions should also offer ongoing, collaborative opportunities for their partners, whether through virtual convenings of their CBO networks, student panels, or sponsorship of regional CBO events, and designate a dedicated point of contact to manage the emerging relationship and ensure accountability for the goals set, whether they were outlined in a formal memorandum of understanding or in informal conversations.

### 3. IMPROVE

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To contribute to the sustained success of these partnerships, colleges and universities should create CBO advisory boards, embed information on CBO partnerships in transition and onboarding plans for relevant staff members, and continually engage with partner organizations even after their students enroll. These efforts are all designed to enable institutions to continually evaluate the efficacy of the partnership, using data systems to track student applications, acceptances, enrollment, academic success, and graduation rates and make needed adjustments to ensure they can meet their goals.

This framework serves as a starting point for institutions as they seek to expand opportunity for all young people. As outlined in the below synopses of the two case studies in this report, the University of Michigan and University of Richmond have provided a path forward; both for institutions that are just beginning to develop a partnership strategy and those seeking to scale their CBO networks.



#### UNIVERSITY OF MICHIGAN

##### *Embarking on the Initial Year of a CBO Partnership Strategy*

Beginning in 2015, the University of Michigan (U-M) set a goal to ensure that Pell Grant recipients represented at least 20 percent of its undergraduate enrollment by 2020. In service of that goal, its Office of Enrollment Management (OEM) identified the need to increase engagement with CBOs. To obtain a better sense of how departments and units across the institution were collaborating with CBOs and identify their ideal role in these efforts, the OEM staff spent a year canvassing various teams and departments, including Financial Aid and New Student Programs.

Following this engagement work, the team recognized the need for a coordinated strategy that integrated related CBO initiatives across the university and prioritized partnership development efforts with CBOs that focused generally on college access and success, offering a pipeline to underrepresented students and families less familiar with U-M. As a part of this strategy, the team determined the value of increasing financial aid investments and working with partners to issue clear, accurate messaging about various aid options, which could open doors for more high-achieving students across the country.

U-M's OEM and its partners are now exploring how to streamline processes across the enrollment pipeline and engage others around campus in building out their CBO partnerships. With input from a cross-section of institutional partners, the OEM has also developed criteria to surface potential partners based on the students they serve, the rigor and impact of their programming, and their efforts to demystify financial aid offers and expand postsecondary options for out-of-state students—and will embed these into memoranda of understanding. Finally, to ensure the longstanding success of these engagement efforts, the OEM is also in the midst of developing data systems that integrate information about CBO partners and students, embedding CBO representatives into virtual recruitment processes, and generating visibility for this work among departmental admissions teams across campus.

It is worth noting that this work is made possible by the time the OEM team spent up front to establish a comprehensive strategy.



#### UNIVERSITY OF RICHMOND

##### *Issuing Longstanding Investments in the Promise of CBO Partnerships*

Meanwhile, the University of Richmond (UR) has devoted two decades to the development of its CBO partner ecosystem, which now includes 27 organizations across the country that work with students from lower-income backgrounds, first-generation families, and communities of color. The investment has paid off as 20 percent of applicants from partner CBOs enroll at UR, compared with just 7 percent of students from the general applicant pool. Hundreds of those students ultimately thrive at (and after) their college experience, succeeding because of both the college's focused academic and social-emotional supports (including the Spider Firsts initiative, which connects cohorts of students with resources, mentors, and cocurricular opportunities) and its efforts to meet students' full financial need.



Decades into this effort, UR is continually exploring how to improve and expand its CBO engagement strategy, taking steps to develop a standardized memorandum of understanding, evaluate partnerships more frequently, and translate engagement and support to a remote context. UR continues to refine a rigorous screening process that identifies partners based on their alignment to the college's goals, criteria set forth as part of a standardized partnership development process, and ongoing data collection, tracking, and sharing efforts.

Once UR identifies those partners, it outlines safeguards that protect student privacy, offers clear expectations for engagement with the CBO, and highlights benefits for students, including application fee waivers, reserved spots for overnight student visit programs, and loan-free financial aid packages. The admissions team seamlessly embeds this work into its day-to-day practice, enabling UR to regularly assess the efficiency and effectiveness of its CBO collaborations.

The key to the success of these partnerships are that they are mutually beneficial, with UR providing partners with admission, persistence, and job placement data and CBOs using that information to prepare future students for postsecondary success. The return on their investment is clear, both in the number of transformative partnerships formed across the nation and trajectories of hundreds of students that have been impacted as a result.

### ***How Partners Can Be Better Together***

By applying the findings from *Better Together*, institutions can take steps to establish and deepen partnerships that promote increased access, equity, and success for students from lower-income backgrounds, first-generation families, and communities of color. While a network of dozens of partners does not form overnight, by establishing and nurturing a few relationships each year, an institution can ultimately transform its recruitment efforts—and position an increasing number of young people for success.

As leaders at institutions of higher education reimagine how to meaningfully engage with our nation's talented students, especially in times of crisis and uncertainty, the insights from this report offer a lens into how we can move forward together. While forming robust partnerships will not singlehandedly reverse historical achievement and attainment gaps, they can serve as a critical component of broader efforts to expand access to higher education to those from lower-income and first-generation backgrounds as well as communities of color.



Courtesy of College Horizons, Inc.

# Introduction

At the time of this writing, communities across the United States are grappling with social, economic, and public health challenges unlike any they have faced before. In the face of crisis, institutions of higher education have typically represented a key engine to recovery, offering a pathway to mobility and lasting success for many students of color and those from lower-income backgrounds. Now more than ever, institutions must continue to think creatively about how to expand opportunity for these young people.

The challenge is not a new one. As noted in the executive summary for this report, tens of thousands of high-achieving, lower-income students have the talent and credentials to enroll in more selective colleges, but instead enroll at less selective colleges than their higher-income peers.<sup>4</sup> Despite significant national efforts to equalize access to college, 87 percent of high school graduates from the highest-income quartile continue on to postsecondary education, compared to 61 percent of those from the lowest-income quartile.<sup>5</sup> Ultimately, students from families in the highest-income quartile are five times more likely to graduate with a bachelor's degree than their counterparts in the lowest-income quartile.<sup>6</sup> That gulf is only expected to grow as many American families struggle to afford postsecondary education and question its value.

Over several decades, an increasing number of community-based organizations (CBOs) have worked hard to close this gap through early, persistent, and personalized outreach to minority students and those from lower-income backgrounds, promoting college as an attainable option and helping them navigate the complex admissions and financial aid processes that often represent barriers to access. These range from personalized text reminders (“nudges”) about critical enrollment and financial aid deadlines to peer mentoring and advising. These and other tactics are designed to help bridge information gaps about the cost of college and the array of postsecondary options.

To maintain and build on this progress in the coming years, it is important to not only double down on

these solutions, but also explore additional ways that institutions can work with CBOs to expand access to students from lower-income backgrounds and students of color amid great financial uncertainty. In many ways, CBOs represent the ideal partners at a time when institutions are especially hard-pressed to identify and recruit thousands of talented young people who could thrive on their campuses.

By tapping into the potential of CBOs to bridge information gaps and expand the postsecondary horizons of thousands of students from lower-income backgrounds and students of color, institutions can continue the important work of diversifying their recruitment pipelines—and further help students realize their boundless potential.

## WHAT MAKES CBOs IDEAL PARTNERS

- 1** CBOs engage with students from lower-income backgrounds, first-generation students, and students of color who aspire to pursue postsecondary education but are underrepresented at selective colleges.
- 2** CBOs often bridge gaps in college counseling and advising services, propelling these students through complex admissions and financial aid processes.
- 3** CBOs provide these students with the resources and supports they need to make significant gains in academic engagement, college-going behavior, and postsecondary enrollment.

4 Hoxby, C. & Avery, C. (2013). *“The Missing One-Offs”: The Hidden Supply of High-Achieving, Low-Income Students*. Brookings Papers on Economic Activity, Spring 2013.

5 The Pell Institute. (2018). *Indicators of Higher Education Equity in the United States: 2018 Historical Trend Report*. The Pell Institute for the Study of Opportunity in Higher Education.

6 Ibid.







# Unpacking the Benefits of Community-Based Organizations

## *The CBOs in This Report*

The CBOs referenced in this report support students from lower-income backgrounds, first-generation students, and students of color underrepresented in higher education in their efforts to both access and succeed in college. This expansive definition includes:

- Independently governed nonprofit organizations (e.g., 501(c)(3) organizations such as Chicago Scholars or SCS Noonan Scholars)
- Federally-funded support programs (e.g., TRiO: Upward Bound, Talent Search, Student Support Services or GEAR UP)
- K-12 school networks (e.g., independent schools like those in the Cristo Rey Network or public schools governed by charter management organizations like KIPP or the Noble Network of Charter Schools)

Some CBOs, such as the Jack Kent Cooke Foundation, College Advising Corps, CollegePoint, and Leadership Enterprise for a Diverse America, work with students nationwide. Others, like The Opportunity Network in New York, College Bound in St. Louis, and Philadelphia Futures, focus on a specific region or community. Some CBOs, including College Possible, Summer Search, College Track, Minds Matter, and the Breakthrough Collaborative, operate in multiple communities. While they once focused on ensuring students enroll in college, many now also support students' efforts to graduate from college, reflecting the importance of a bachelor's degree.

**Regardless of their focus, composition, or geographic service area, CBOs' impact lies in four distinctive areas.**

## **1. Student Recruitment**

Many CBOs intentionally recruit and select students for their programs, prioritizing those from underresourced or underrepresented backgrounds who self-identify as college-bound (or are at least interested in college) and demonstrate high educational interest and potential. Much like colleges themselves, CBOs work to build trust with the communities in which they reside, establishing meaningful relationships with schools, students, and parents. With their own recruitment and admissions processes, they are able to identify and vet students months or years before students typically appear in colleges' pipelines. CBOs' recruitment efforts can ultimately help bridge a disconnect that largely exists between high schools with overburdened counseling staff and limited college advising resources and undergraduate institutions seeking to reach students across the country. Simply put: CBOs find students who colleges want to recruit. And, they are uniquely positioned to identify these students long before most colleges will.

## **2. Programmatic Support**

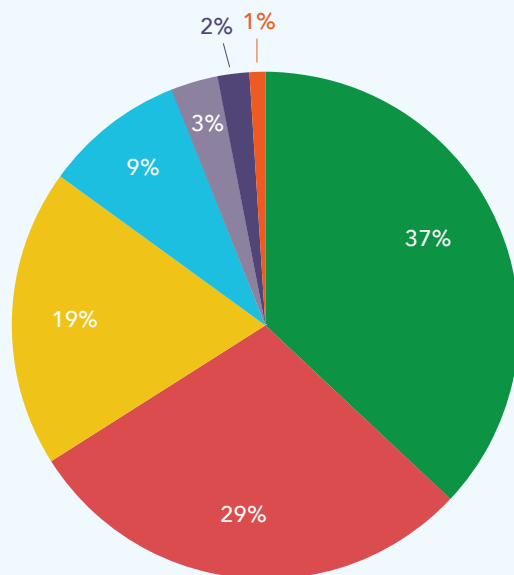
CBOs are well-positioned to support students as they complete applications for college admission and financial aid, connecting them with institutions that represent a good fit academically, socially, and



Courtesy of EMERGE Fellowship



## Overview of Race and Ethnicity Data for Students Served by College Greenlight CBOs<sup>7</sup>



NOTE: Community-based organizations are devoted to supporting the success of students from lower-income, first-generation, and underrepresented backgrounds. The data here illustrates how the CBOs in College Greenlight's network realize that imperative.

- Hispanic Latino
- African American
- White
- Asian or Pacific Islander
- American Indian or Native Alaskan
- Other
- Don't Know/Prefer Not to Answer

### Aggregate data from College Greenlight's 500,000 student user profiles



- **500,000** student user profiles since launching in 2012
- **90,000** Class of 2018 student users
- **84%** come from families with incomes of less than \$75,000
- **81%** are students of color



- **40%** attain above a 3.5 high school GPA
- **20%** attain above a 3.9 high school GPA

### Locations of Organizations that Use College Greenlight



financially. This demonstrated expertise and ability to offer advising capacity matters most for communities where college attendance and graduation are more of the exception than the norm.

CBOs also offer programming that imparts skills and competencies crucial to students' success in higher education, which is especially important for those with limited social or educational capital.

### 3. Outcomes

Through their deliberate recruitment practices and dedicated support, CBOs have increased college enrollment and graduation rates for their students. A recent nationwide survey found that students from college access CBOs enroll in, and graduate from, postsecondary education at higher rates than their peers from lower-income families peers who did not

<sup>7</sup> Race and ethnicity data for students registered on College Greenlight

participate in CBO programming.<sup>8</sup> As an illustrative example, 81 percent of OneGoal’s high school graduates enroll in a postsecondary institution, with 86 percent of those students persisting one year later. By comparison, only 22 percent of students residing in the communities in which OneGoal operates

graduate from college. Likewise, 83 percent of Chicago Scholars students graduate from college in six years, compared to 49 percent of Chicago Public Schools students overall.<sup>9</sup> Simply put, CBOs’ support can be instrumental to efforts to make postsecondary attainment a reality for more students.

OUTCOME DATA FROM SELECTED CBOs SUPPORTING HIGH-ACHIEVING STUDENTS FROM LOWER-INCOME BACKGROUNDS <sup>10</sup>		
COMMUNITY-BASED ORGANIZATION	AREAS SERVED	COLLEGE GRADUATION RATE
Chicago Scholars	Chicago	83%
College Horizons	Nationwide	80%
College Match	Los Angeles	95%
EMERGE Fellowship	Houston	87%
Leadership Enterprise for a Diverse America	Nationwide	90%
Minds Matter	Multiple cities, including New York, Chicago, Cleveland, San Francisco, and Seattle	94%
SEO Scholars	New York, San Francisco	90%
Simon Scholars Program	Southern California	92%
The Opportunity Network	New York	92%

#### 4. Key Pipelines of Diverse Talent for Colleges

Because these organizations begin working with students during, or even before, high school, they are often already trusted guides by the time these young people are slated to begin the college search and application process. Therefore, CBO advisors can represent essential resources for colleges committed to diversifying their campuses.

This is particularly true for institutions working to reach new or currently underserved populations and geographic regions. Recruitment visits to the same areas, schools, organizations, and college fairs year after year predictably yields similar applicant pools. But breaking out of the status quo often seems daunting—and almost invariably proves costly, requiring additional admissions staff and travel to less accessible communities. For colleges, CBOs represent a measure of external capacity for diversifying applicant pools and an established alternative that ensures resources devoted to recruitment in newer schools and communities are well-spent.

#### Laying the Groundwork for College-CBO Collaboration

The partnership framework and accompanying strategies, outlined in the below sections, are designed to help institutions in their efforts to tap into the promise of CBO collaboration. These are informed by both College Greenlight’s eight years of experience in fostering collaborations between CBOs and colleges and the American Talent Initiative’s practice-based research supporting its 131 member institutions. These insights also reflect recommendations surfaced from interviews with admissions staff who work across a diverse set of public and private four-year colleges and universities.

Best practices recommended below also emerged from College Greenlight’s Twenty20 Impact event held in 2019, where representatives from 20 institutions as well as 20 nationally affiliated and regionally based CBOs gathered for design-thinking and problem-solving workshops.

8 National College Attainment Network. (2018). *Closing the College Graduation Gap: 2018 NCAN Benchmarking Report*.

9 Chicago Scholars. *Impact and Results*.

10 College Greenlight: CBO outcomes data scan.

Participants were tasked with suggesting how institutions and CBOs could better serve students and surfacing effective tactics to support CBOs and colleges in developing stronger partnerships.

Taken collectively, these insights addressed two fundamental questions related to the goals of this report:

- **How might colleges and universities better serve students and families via CBOs?**
- **How might these partners create a sustainable process for evaluating CBO and college relationships for long-term student fit and success?**

Before answering either of these questions, it is vital to highlight the current state of play when it comes to the ways in which CBOs and colleges collaborate.



Courtesy of College Horizons



# The CBO-College Partnership Framework

## *Defining and Describing Partnerships Between CBOs and Colleges*

College and university enrollment teams generally understand the potential benefits of including CBOs in their recruitment efforts. However, the methods of collaboration vary widely and range from informal, one-off engagements to establishing formal memoranda of understanding.<sup>11</sup>

In what is considered a baseline means of collaboration, CBOs will invite admissions recruiters to share information about their college and offer structured workshops on general topics like applying to college or obtaining financial aid. Similarly, institutions may coordinate in-person and virtual campus visits specifically for students affiliated with a CBO. These activities can help connect students and colleges to each other, open channels of communication, and prominently highlight the array of college-bound paths students can pursue after high school.

However, there are other, more formal ways in which CBOs and colleges can realize their shared goals of propelling more diverse students to postsecondary success. For example, institutions may share admissions and enrollment data, flagging the applications of individual students affiliated with, or tracking the overall number of applications received from, CBO partners. Other collaborative practices may include identifying points of contact between CBOs and colleges who can help manage these relationships, providing tailored application or financial aid information for students affiliated with a CBO partner, offering special scholarship opportunities for CBO students, and supporting professional development for both CBO and college staff teams on the latest trends in college admissions and access.

Regardless of the extent of a CBO-college partnership, both entities have much to gain by working together to strengthen their practices. Recommendations follow for how higher education institutions can **initiate**, **implement**, and **improve** mutually beneficial partnerships with CBOs. In the ensuing section, we also introduce profiles of how two institutions—the University of Michigan and University of Richmond—have put this framework into practice.

## WHEN TO DEVELOP A MEMORANDUM OF UNDERSTANDING

If CBOs or colleges envision a longer-term partnership that includes short-term and long-term accountability measures to demonstrate progress, they may explore the feasibility of a memorandum of understanding (MOU). As a part of this agreement, both entities align on a set of specific counts or targets that reflect their shared vision for a successful partnership (e.g., a minimum number of visits made by a college recruiter to a CBO or a certain percentage of applicants from prospective students of color involved with a CBO). They can also use this process as a means to establish commitments to joint programming, encompassing both a series of educational workshops during the academic year or signature admissions events hosted at the college that CBO students and staff travel to. Other examples of commitments that may be found in a MOU include guaranteed admission for CBO students who both graduate high school and conclude their CBO program, dedicated scholarships or financial assistance for CBO students, and long-term tracking of CBO student outcomes, which are then shared with an institution's CBO partners.

In short, MOUs can serve as useful tools to guide the development of these partnerships over time and ensure their effectiveness. Colleges can consult with their general counsel or legal department to determine the relevant institutional policies and requirements needed to enter into such an agreement.

11 ATI Analysis: 2018 national landscape scan of college organizations, CBOs, and institutional partnerships.



# CBO-COLLEGE PARTNERSHIP FRAMEWORK

1. INITIATE	2. IMPLEMENT	3. IMPROVE
Define an “ideal” CBO partnership based on institutional priorities.	Develop communications strategies and materials focused on CBOs.	Maintain relationships and preserve institutional knowledge.
Examine CBOs’ missions and programs to evaluate potential fit.	Anticipate and minimize financial barriers for students from lower-income backgrounds.	Collect and act on data on the impact of CBO student initiatives.
Intentionally establish mutually beneficial partnerships.	Provide practical supports and exploration opportunities valued by CBOs.	Evaluate collaborative efforts and extend CBO partnership portfolios.

## 1. INITIATE

The best partnerships between CBOs and colleges ultimately enable each to achieve their respective missions and help more students succeed. To reach this point, both institutions and CBOs must determine what success looks like, the respective strengths and opportunities each brings to this collaboration, and the ways in which they can effectively support one another. In essence, they must collectively establish the parameters of the engagement—and, upon reflection, determine if it is one that enables them to meet envisioned access and success indicators as well as other important benchmarks (such as increased geographic representation and racial and ethnic diversity among prospective students).

### Define an “ideal” CBO partnership based on institutional priorities.

Before establishing CBO partnerships, an institution should create a clear vision for these relationships. At a minimum, partnership strategies should feature:

- Clearly defined institutional priorities, such as enrollment and matriculation goals
- An envisioned level of engagement from each CBO partner that considers opportunities for basic collaborations (e.g., recruiter visits to a CBO program) and more coordinated, longer-term approaches (e.g., data-sharing agreements

that encompass student-specific information on academic interests, extracurricular pursuits, and completion rates)

- An understanding of desired partnership outcomes

The most successful and sustainable partnership efforts hinge on a collective focus on diversity indicators like representation of students from varying socioeconomic statuses or of racial and ethnic diversity on campus. Partnerships that expand beyond joint recruitment efforts to include ongoing tracking and support of students can often lead to higher year-to-year retention and graduation rates.

In addition to aligning on the above institutional priorities, both entities should conduct a capacity assessment, identifying the resources and inputs necessary to carry a partnership forward. This work can help inform clear expectations that proactively address potential misunderstandings and set the tone for engagement between institutions and their CBO partners.

### Examine CBOs’ missions and programs to evaluate potential fit.

Colleges can formulate a consistent intake process to evaluate potential CBOs, developing their own CBO database or utilizing a searchable third-party tool like College Greenlight’s [CBO Dashboard](#) that compiles and compares data across CBOs.

## SAMPLE PROFILE FROM COLLEGE GREENLIGHT CBO DIRECTORY

**COLLEGE GREENLIGHT**

**College Match**

**Organization Name:** College Match  
**Contact Name:** Erica Roales  
**Address:** 1900 N. Alameda St. Suite 240  
**Title:** Executive Director  
**City, State, ZIP:** Los Angeles, CA 90012  
**Email Address:** [ericaroesales@gmail.com](mailto:ericaroesales@gmail.com)  
**Phone:** (323) 804 4061  
**Year Founded:** 2003  
**Website:** <http://collegegreenlight.org>

**Program Description**  
**PERSONALIZED COLLEGE PREP FOR TALENTED LOW-INCOME STUDENTS**  
 We focus exclusively on low-income students with strong academic records at participating high schools. Our students are eager—they've already jumped through many hoops to get this far in their high school careers.

- Helping talented students from low-income families get into and graduate from the nation's top colleges and universities.
- Each student is assigned a dedicated college counselor to guide them through the process from application to graduation.
- For every dollar we raise, College Match generates a return on investment of 2,000% in total financial assistance for our students.

**HOW WE DO IT**  
**Partnerships with High Schools**  
 We have a selective screening process for schools and students.

- We have 31 partner high schools – we only choose schools that are ready for us.
- School counselors identify high-achieving students during their first semester of junior year.
- Students apply to join College Match – we evaluate based on their application, essay, interview and income verification.

**Relationships with Colleges & Universities**  
 Many college admissions officers know about College Match and have already seen our students thrive at their schools. Every year we personally contact every school that every student applies to and advocate on their behalf.

- Phone calls and letters to every school; our recommendations are trusted and respected.
- Close relationships with key admissions staff in at least 50 colleges across the country.
- College Match is a pre-loaded, drop-down selection the Common Application when they ask students to identify a community organization that has worked with them.

**SIDE-BY-SIDE WITH STUDENTS**  
 College Match provides much more intensive one-on-one services than most other programs. We develop an individual strategy for each student.

**Intensive College Prep Starting Junior Year of High School**

- All expenses paid: college campus visits across the country
- 100+ hours of intensive SAT Prep with teachers/independent contractors (not SAT factory instructors)
- Additional one-on-one tutoring as needed
- Intensive summer workshops to get ready for college applications
- Continued SAT prep during 1st semester of senior year

**Members Who Are Deeply Invested in Student Success**

- College counselors adopt a cohort of 10-20 students, side-by-side with students through the entire process from junior year preparations to senior year applications and beyond
- Personal attention to help with all applications and essays, and the financial aid process
- Individualized advice to help each student choose the best schools
- Mentoring and courses that continue informally through college, as desired

**Services Provided**

- Academic enrichment/tutoring/ready skills
- Career exploration and counseling/internships
- College admissions guidance and counseling
- College fairs/campus visits
- College transition and retention support
- Financial aid advising/FINPSA completion
- Mentoring
- SAT/ACT and other test preparation
- Scholarships and last-dollar grants

**Demographics**  
**EDUCATION LEVEL AND NUMBER OF STUDENTS**

- High School: 600
- Middle School: 0
- Elementary School: 0
- Post-secondary: 0
- Non-traditional: 0

**POPULATIONS SERVED**

- Academically High-performing

**FIRST-GENERATION**

- More than 75%

**Representative Colleges Attended by Alumni**

- Amherst College (12)
- Bates College (14)
- Bowdoin College (35)
- Brown University (41)
- Cornell College (23)
- Claremont McKenna College (11)
- Colby College (21)
- Columbia University in the City of New York (17)
- Cornell University
- Franklin and Marshall College (73)
- Georgetown University (15)
- Hamilton College (12)
- Harvard College (13)
- Heavenford College (7)
- Macalester College (34)
- Massachusetts Institute of Technology (5)
- Middlebury College (141)
- Pomona College (12)
- Princeton University (17)
- Smith College (10)
- Stanford University (14)
- Swarthmore College (18)
- University of California Berkeley (15)
- University of Pennsylvania (10)
- Vassar College (44)
- Wellesley College (44)
- Wesleyan University (24)
- Williams College (16)
- Yale University (21)

**Matriculation & Completion**

- 4-yr College Graduates: 94%

[Back to CBO Directory](#)

This represents one of the CBO profiles in the College Greenlight CBO Directory.

While colleges often use data from organizations like the College Board to assess the academic fit or profile of high schools and their students, networks like College Greenlight collect similar real-time academic data from CBOs and their students (e.g., grade-point average, areas of interest, colleges of interest, and institutions attended by alumni). This process can help colleges determine the level of alignment between their priorities and the focus of a prospective CBO partner.

Institutions such as **Dickinson College**, **UCLA**, **the University of Maryland**, and **the University of Richmond** have all employed their own internal rubrics to evaluate the many CBO partners and college access organizations they engage with. These rubrics will often seek to identify the students that CBOs engage with, the academic and extracurricular profiles of those students, and the unique enrichment activities that are offered to program participants.

Such information sheds light on what a CBO offers in a partnership and what it can expect from an institution.

Ideally, potential partners can clearly articulate the interventions they provide for distinct groups of students and illustrate how those programs are effective, using measures such as high school and college graduation rates or college matriculation statistics. Both CBOs and colleges may also illustrate their impact through changes in academic or social-emotional indicators of their students—or their career trajectories.

Additionally, as institutions consider the range of CBOs to partner with, they often choose to focus their partnership development efforts in their current high-volume recruitment markets. Some urban areas, such as Atlanta, Chicago, Houston, Los Angeles, New York, and Philadelphia, have a rich ecosystem of college access organizations engaged in exemplary work. Many colleges also believe in building key relationships with organizations in their own communities to support and invest in the growth of their campuses' surrounding areas. Especially as the national network of CBOs continues to grow over time, engaging in this process to determine an intentional exploration of fit can help surface criteria from which to search for, and identify, promising partnerships.

### Intentionally establish mutually beneficial partnerships.

Once an institution defines its partnership goals and identifies ideal CBO partners, it can focus on building relationships. For example, the **University of Michigan** sought to increase the representation of Native Americans on campus with the support of a CBO partner that directly served those students. With the support of a working group within the university, the institution identified an opportunity to parlay an existing and informal relationship with College Horizons into a deeper partnership. The next summer, Michigan hosted one of College Horizons' programs on its Ann Arbor campus, a pilot effort that addressed goals shared by both entities: bridging the college access gap that Native American populations face and increasing their postsecondary completion rates.

Colleges can distribute this responsibility of connecting with potential partner organizations across an admissions team, tasking each staff member with a goal of visiting several CBOs in their assigned territories or engaging with new or prospective CBO partners during their recruitment-related travel. For example, **University of Notre Dame** admissions officers visit at least three high schools and one CBO for every day of recruitment travel, while **Amherst College** expects traveling staff to meet with one or more CBOs in each of their territories. Staff members determine the number of CBOs they engage with during site visits based on both the time



Courtesy of The Opportunity Network

spent in a particular area and the concentration of prospective partners.

At the same time, colleges should know that organizations supporting college-going students exist in virtually every context and geographic region, leaving them with the challenge of how and where they build CBO relationships that align with their priorities. Colleges should anticipate the need to initiate these collaborative efforts rather than waiting for the CBOs to do so, because CBOs often lack the resources to reach out to potential partners, especially on a nationwide scale. Given their value to recruitment and outreach efforts, all staff should research—and prioritize connecting with—CBOs in areas they visit.

## 2. IMPLEMENT

To implement effective CBO-college partnerships, institutions should prioritize ongoing communications with their partners, providing practical, tangible incentives as part of strong, intentional recruitment efforts. These may include dedicated financial aid opportunities and scholarships and focused recruitment and outreach efforts for CBO staff and the young people they serve. To further reinforce their commitment to ensuring prospective students' fit on campus, the institution can rely on the CBO's years of experience and engagement with those young people to structure supports and services that will address the needs and challenges they may face in a postsecondary setting. Taken together, these interventions can ensure students' success—and represent evidence of a mutually beneficial collaboration.

### Develop communications strategies and materials focused on CBOs.

Once a CBO partnership is established, delegating the management of that relationship to a central person

or unit can help streamline communications among partners. Beyond assigning dedicated staff to engage CBOs and their students, colleges must design their materials and messaging in ways that are relevant to, and bridge the needs of, both advisors and students.

Institutions must make the case to students at partner organizations on how their college or university can be a place where they can thrive. For example, students from lower-income and first-generation backgrounds as well as communities of color want to know how peers attending that college typically fare and understand the extent of resources available to them, such as academic support programs, financial aid, and identity-based student organizations. Furthermore, as CBO counselors have dual roles of managing multiple partnerships and advising dozens (or hundreds) of students on college opportunities, they seek clear and effective sources of information from a range of institutions. Colleges can fill that need as an engaged, supportive partner, equipping CBOs with current informational sources, updated data, and available resources for students.

Colleges should also structure a regular cadence of communications with their CBOs (at minimum, twice a year), building in opportunities for regular feedback to ensure the successful growth of the partnership. As a part of this cadence, institutions should also engage with CBO partners at key milestones during the academic year, such as deadlines of application cycles, college visit seasons, or summer engagement opportunities. These touchpoints can include activities that either students and CBO staff can join, such as targeted student programming or professional development training for CBO counselors. Finally, as many colleges already prepare and distribute communications for school-based counselors, they can add or include their CBO contacts to those distribution lists so they receive the same relevant institutional updates.

### Anticipate and minimize financial barriers for students from lower-income backgrounds.

In serving students from low-income backgrounds, it is important to consider the financial support they need to enroll and graduate from postsecondary institutions. CBO counselors take note of institutions that clearly communicate their financial aid policies—and those that provide aid packages that cover either most, if not all, demonstrated need.

Therefore, admissions counselors working with this cross-section of organizations must be educated on the institution's financial aid policies, especially on what financial aid packages for which Pell-eligible students are eligible. Colleges can take the initiative to empower admissions counselors with the training and materials to make complex financial aid language accessible for lower-income students and their





Courtesy of EMERGE Fellowship

families. Just as colleges can establish a recruitment liaison for CBOs, they may want to appoint a financial aid point of contact as well.

Encouragingly, in support of an increasingly important field-wide goal of recruiting and enrolling students from lower-income backgrounds, first-generation students, and students of color, a growing subset of the nation's most selective institutions have committed to meet full demonstrated financial need for students with no-loan financial aid packages. Colleges and universities may establish a simple income threshold (e.g., families earning \$65,000 or less annually) or guarantee no-loan financial aid to admitted students meeting certain financial criteria. Even with these policies, students may worry that they will not be able to afford to attend if admitted, choosing not to apply after reviewing an annual cost-of-attendance number approaching six figures. Therefore, it is vital for institutions with the most generous financial aid policies to communicate proactively that the above practices can make a postsecondary education affordable.

For colleges that are unable to meet full need for CBO students, they must provide other reasons why their institution would be a good home. These might include a commitment to ensuring strong academic and professional outcomes during and after college, availability of academic and other supportive campus resources, and opportunities to participate in a variety of high-impact experiences. For example, **UCLA's Academic Advancement Program** provides students from low-income, first-generation, and historically underrepresented groups with scholarships and long-term comprehensive supports like peer learning, academic and career counseling, graduate school

advising, and research opportunities that contribute to their academic and personal growth. Additionally, the **University of Dayton's Flyer Promise Scholars program** offers students with high financial need a combination of university- and donor-funded scholarships and grants, study abroad opportunities, and various academic enrichment, mentoring, and leadership opportunities.

Even seemingly small cost savings can have an outsized impact on lower-income students' likelihood of applying to, and attending, selective institutions. Offering widely accessible application fee waivers and accepting standardized test scores from a CBO counselor (instead of students paying fees to have official scores sent from a testing agency), for example, can greatly reduce barriers to entry. **Northwestern University** offers a specific fee waiver for students affiliated with CBOs, incentivizing these young people to self-report their organizational involvement and providing their admissions staff with the ability to track the number of those affiliated with CBOs in their applicant pool.

It is important to note that concerns about other unanticipated expenses that may arise throughout college, such as student activities fees and charges for expenses like mandatory healthcare coverage, can represent additional barriers for students from lower-income backgrounds. **Swarthmore College** has thoughtfully invested in dismantling these barriers and promoting equitable, proactive supports through a range of initiatives that include: funded internships or research opportunities, standardized study abroad opportunities, restrictions on tuition hikes during a student's tenure, and a reduced reliance on loans in financial aid packaging. Such policies help make



the full college experience accessible, regardless of income. This approach also helps an institution prove itself as a trustworthy, receptive partner in ensuring their students' successful development, which is especially pertinent when working with those from lower-income and first-generation backgrounds as well as from communities of color.

### Provide practical supports and exploration opportunities valued by CBOs.

Colleges can also play a key role in assisting students and CBO advisors at each stage of the complex postsecondary search, application, and matriculation processes. For example, admissions representatives and other staff at the institution can facilitate workshops on topics that range from application essay and resume writing to choosing a major.

Students from lower-income backgrounds, first-generation families, and communities of color can also explore their college options through subsidized or no-cost on-campus visits and virtual visits, all of which intend to promote the sense of belonging and inclusion that they would feel at an institution. These visits are particularly successful when prospective students can connect with peers enrolled at the college and see that those students are thriving. In these settings, current students may serve as tour guides, peer advisors, or workshop panelists. In an effort to expand access to this instrumental opportunity and make the institutional experience tangible for students, some institutions fully cover students' and CBO staff expenses to attend these programs. Many reserve spaces for both students and staff affiliated with a CBO partner.

Several colleges will target CBO counselors directly, providing opportunities for them to visit their campuses. **Bowdoin College's CASCO Conference** convenes professionals from high schools, community organizations, and college admissions, financial aid, and student affairs offices to surface promising practices to advance student success for students from underrepresented backgrounds. Many institutions have even opened preexisting counselor "fly-in" programs (where they are brought to campus in a group for specialized programming) or multi-campus tour programs to CBO counselors, repurposing these when needed for a virtual setting. The **University of Chicago** has hosted multiple such programs, including one that focuses on counselors from rural communities.

Institutions also have an opportunity to fill any budget gaps that CBOs may encounter in regard to their recruitment and outreach activities. For example, they can provide the resources and space that CBOs need to organize college fairs and other community events that help increase the visibility—and accessibility—of postsecondary opportunity for their students. For example, the **University of Illinois at Chicago** provides

event space for several regional college fairs and other CBO events hosted by local partners such as Chicago Scholars, College Possible, and 100 Black Men of Chicago. A single campus can serve as the setting at which thousands of students meet with representatives from hundreds of different colleges and universities, expanding their postsecondary horizons.

Regardless of the financial or in-kind resources an institution can offer, offering regular opportunities for engagement can reflect a commitment to partner with CBOs, provide prospective students with opportunities to connect with the campus community, and expand the available resources that students can access after enrolling.

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## 3. IMPROVE

Identifying and implementing mission-aligned partnerships requires dedicated resources and time from both entities. To ensure that any collaboration is well-positioned for lasting success, the CBO and institution should identify short-term and long-term indicators that reflect the effectiveness of their partnership, continually revisiting those—and revising if necessary—through both formal and informal means. To do this well requires regularly scheduled meetings to review student data, committed personnel that are monitoring the CBO partnership on an ongoing basis, and an eye to long-term strategy. At the institution, the success of a partnership also hinges on a commitment to embedding CBO outreach efforts into longstanding admissions, outreach, and student success practices as well as any transition or onboarding plans. Taken together, these actions ensure that such efforts extend beyond the tenure of the particular staff members that spearheaded the engagement—and are sustained for many years.

### Maintain relationships and preserve institutional knowledge.

Colleges can periodically communicate their CBO outreach priorities to both new and tenured staff responsible for CBO relationships, ensuring they can build and refine a transition plan that encompasses institutional knowledge built over time. Institutional teams benefit when there is a shared understanding of the overall CBO partnership strategy and plans are in place to manage the exchange of information, such as student data or CBO records.

**Washington and Lee University** created a dedicated CBO liaison to manage this task, a potential step for institutions to consider as they seek to manage and sustain a given partnership. While the institution worked with CBOs before this position was created, the liaison had the capacity to focus on executing a more cohesive CBO strategy, deepen relationships, and document updates relating to CBO and institutional engagements.

The CBO liaison adds and updates organizational and student profiles to the admissions system, manages written communications with CBOs, identifies invitees for a counselor fly-in event, coordinates with national CBO networks, and answers CBO-specific inquiries, to name a few responsibilities. In recognition of the value of this support, both **Washington and Lee University** and the **University of Texas at Austin** structured CBO advisory boards to effectively maintain partnerships, share updates about CBO efforts across the university, and develop plans for enhanced collaboration.

Even as the institutional context in which a CBO-college partnership resides may change over time, the needs, interests, and experiences of students, especially those from lower-income backgrounds, first-generation families, and communities of color should remain central to its success. For example, **Colgate University created an Undergraduate Scholars Program** that offers a select group of students confronting personal, economic, and social challenges various opportunities to transition to university life, acclimate to the academic rigor of the institution, and establish meaningful connections through their college years. Colleges should also always commit to maintaining relationships with CBO students themselves once they matriculate, structuring cohorts and dedicated programming that reinforces a sense of belonging. Another more tangible way to convey this commitment is to honor students' stories and amplify their voices across the institution's communications platforms, which resonates with CBOs and students gauging the extent to which their partner continues to attend to the needs of—and elevate—their peers who enroll.

### **Collect and act on data on the impact of CBO student initiatives.**

Both colleges and CBOs can leverage outcomes data to understand what students are experiencing and how they are progressing through college. On the enrollment side, data can illustrate a partnership's ability to generate applications from CBO students and position those students who are accepted to ultimately matriculate. Academic performance data can also enable institutions to identify where groups of CBO students may be struggling, then connecting them to the early interventions and supports they need. Ongoing efforts to track data can also surface areas for improvement, which may indicate the need to increase first-year retention of CBO students of color or perhaps show that CBO students are disproportionately transferring out within their first two years. Colleges can also use data as a means to gauge evidence of CBO students' success, assessing and comparing outcomes from CBO students to similar student populations on campus.

College admissions teams can use data on the number of students enrolled from CBO partners and other descriptive and academic information to inform their recruitment schedules and make the case for increased leadership support of, and investment in, these partnerships.

For example, by tracking CBO student applications, they can readily indicate that the growth of a partnership has translated to a higher volume of applicants. To document this link, institutions can create a CBO field within their customer relationship management system and structure their admissions applications to prompt students to note their CBO affiliations. Beyond flagging CBO students, the **University of Richmond** includes in their partnership MOU a FERPA-compliant data-sharing agreement, enabling the university to offer student performance data to CBO partners.

On the opposite end of the partnership, CBOs can leverage institutional data on past enrollees' success in conversations with students as they choose a college or as a means to support their own recruitment efforts, demonstrating the successes of their peers through and beyond college. Both institutions and CBOs can utilize outcomes data in myriad ways, provided they align on agreed-upon metrics, determine how to track progress against them, and have a plan in place to use the data for evaluative purposes.

### **Evaluate collaborative efforts and utilize networks to extend partnership portfolios.**

A well-informed CBO partnership strategy also includes regular opportunities to assess this data through both quantitative measures (e.g., numbers of students served, CBO/college partners engaged) and qualitative measures (e.g., CBO student stories or CBO/college staff feedback) that indicate the strength of a particular partnership. Results should be shared with stakeholders from both CBOs and institutions to ensure all parties are satisfied with the pace of progress and, if not, surface interventions designed to refine the partnership and achieve better results for students.

National and regional organizations like **College Greenlight**, the **National Association for College Admission Counseling**, the **National Partnership for Educational Access**, and the **National College Attainment Network** can all support these evaluative efforts, given they frequently connect with institutions and CBO partners to identify best practices and assess opportunities across the higher education landscape. For example, the **University of Miami** called on College Greenlight to suggest vetted CBO partners that could support their efforts to increase outreach with, and applicant pools from, major urban centers across the country.

## Conclusion

With a partnership development strategy that incorporates the above nine best practices, institutions and CBOs can position themselves to initiate, implement, and improve their collaborative work so that more students from historically underrepresented backgrounds can access and complete college. Institutions looking to deepen their CBO partnerships and yield more diverse students do not have to initiate a dozen relationships at once to see results. They may instead seek to pilot a revamped strategy with one or a few CBO partners that directly tie to institutional goals, which both requires less capacity and can generate comparable impact.

Most importantly, the framework presented above illustrates how all institutions can tap into the promise of CBO collaboration, ranging from those that are just initiating a partnership strategy to those that are seeking to scale and expand their work in this realm. The ensuing sections of the report provide illuminating context for institutions on either side of this partnership spectrum in the form of two case studies. The first elevates the **University of Michigan's** efforts to develop a comprehensive CBO partnership strategy, leveraging a newly created Office of Enrollment Management. The second shows how the **University of Richmond,** a longstanding exemplar, adapted its established approach to CBO partnerships when seeking to scale its network of local, regional, and national collaborators.

As institutions and CBOs take on this work, they are encouraged to look to the above framework—and the below case studies—as a reference point for how to set strategic and aligned expectations, build a network of diverse partnerships, and find creative ways to bring value to each other.



Courtesy of College Match



# University of Michigan Case Study: Laying the Foundation for CBO Partnerships

## *How the University of Michigan leveraged preexisting relationships and an institutional commitment to equity to develop a cohesive CBO partnership strategy*

Devin Raymond seemed like an ideal candidate for the University of Michigan (U-M). He sported a sterling GPA, led his high school's student council, and navigated countless extracurricular activities.<sup>12</sup> Yet he assumed the school was out of reach, both due to the anticipated cost of attendance and a perception that students from lower-income backgrounds like him didn't belong at U-M. Likewise, while Jachin Ammons was a strong student who also excelled on the football and track and field teams in high school, he also worried he wouldn't be accepted to U-M—or if he was, that he would be able to afford it. They easily could have missed out on U-M, with all of the opportunities it offered to expand their academic skillset and build lasting connections with adult mentors.

However, Devin received U-M's High Achieving Involved Leadership (HAIL) Scholarship, a pilot program launched in 2015 that centered on personalized outreach to highly qualified students with high financial need. HAIL Scholars receive four-year, full-tuition scholarships if they apply. And Jachin had the opportunity to join the Wolverine Pathways program, an initiative that provides students from 7th to 12th grades who demonstrate the potential to excel in college mentoring, academic enrichment, and college application support and advising. Initiatives like these have boosted enrollment rates of students from lower-income backgrounds from across the state<sup>13</sup> and prompted efforts like the Go Blue Guarantee, an offer of free tuition for four years to all admitted in-state students with family incomes up to \$65,000 (a figure consistent with the state's median income).<sup>14</sup>

Opportunities for students like Devin and Jachin are made possible through the university's dedicated

commitment to diversity, equity, and inclusion work, buoyed by a five-year strategic plan, an accompanying \$85 million investment, and an ongoing commitment from President Mark Schlissel to build a more diverse, equitable campus. But they have also been made possible by connections with local and state CBOs, which help to propel thousands of students like Devin and Jachin to postsecondary success.

### ***Identifying the Need for a Comprehensive CBO Partnership Strategy***

Within the first full year of his tenure, President Schlissel, along with Kedra Ishop, the inaugural leader of U-M's newly created Office of Enrollment Management (OEM), placed a stake in the ground on a collective effort to increase socioeconomic diversity, reflected in a strategic priority to ensure Pell Grant recipients comprised 20 percent of undergraduate enrollment by 2020. As a result, U-M, a founding member of the American Talent Initiative, served a greater percentage of Pell-eligible students each year following the 2014-15 academic year. To continue advancing the university toward this vision, the OEM recognized the potential of partnering with CBOs to identify, recruit, and enroll more talented students from urban communities outside Michigan.

Admissions leaders had made some initial forays into this arena, including partnering with College Greenlight (since 2013) and the Posse Foundation (starting in 2016). As a part of these early-stage collaborations, U-M sent informational packets to all CBOs in College Greenlight's directory of organizations and partnered with Posse to recruit and

12 University of Michigan. (2016). *U-M attracts 262 HAIL Scholarship recipients to campus in first year.*

13 University of Michigan. (2019). *College ready: Wolverine Pathways paved way to higher ed for kids unsure how to get there.*

14 University of Michigan. (2017). *U-M unveils tuition guarantee for Michigan students with need.*



retain STEM students from diverse backgrounds in the Chicago area. While much work needed to be done to fully leverage the promise of a network of CBOs, the OEM recognized it did not have to build this partnership ecosystem from scratch, especially at an institution as far-reaching as U-M.

The efforts that the OEM initiated in its first two years (“Year Zero” and “Year One”) to identify, align, and expand this network represents an illustrative case study for institutions—especially those searching for a natural place to start in initiating and expanding their CBO partnerships. Through its work, the university’s OEM has illustrated how robust planning efforts, system-wide engagement, and goal-setting efforts can pave the way for powerful CBO partnerships—and expanded opportunities to better tap into the collective potential of high-achieving students from underserved communities across the United States.

### ***The Office of Enrollment Management and CBOs: Starting “Year Zero”***

In seeking to identify opportunities to advance CBO-college collaborations, the OEM took a deliberate approach, aiming first and foremost to understand the extent of CBO outreach and engagement currently taking place across the university. While the enrollment arm was relatively new to CBO outreach, the OEM team was aware of numerous units, schools, and colleges already engaging CBOs and their students. They then prioritized locating, convening, and learning from those institutional stakeholders, using the below questions to guide discussions that provided the OEM team with insights into the nature of CBO partnerships, ways to better coordinate efforts to reach shared goals, and opportunities to strengthen working relationships. To account for the range of individuals who are instrumental to CBO students’ success and can provide a more complete snapshot of

engagement with these entities, U-M’s OEM convened partners from undergraduate admissions, financial aid, and new student programs.

Through this research and engagement, the OEM team uncovered ample opportunities to learn from, collaborate, and deepen relationships with, department-level CBO programs, some of which were already thriving. For instance, the College of Engineering engaged in partnerships to expand the diversity of students in its magnet and summer enrichment programs while the Ross School of Business recently created a fly-in program for underrepresented students during their junior year of high school, promoted through a CBO newsletter distributed by College Greenlight.

The team also understood that at a large, complex school like U-M with a decentralized structure and creative culture, the OEM’s nascent CBO partnership efforts ultimately needed to look different than they would at smaller or more centralized schools. Therefore, the OEM team determined that their comprehensive engagement strategy should reflect a dual focus: an emphasis on aggregating and coordinating existing CBO relationships across the university and adding value and capacity to other departments’ existing efforts.

By better integrating and leveraging its disparate CBO initiatives, U-M could rapidly expand its CBO strategy. The OEM then identified the three distinct ways they could add value as a centralized unit at the nexus of these relationships: collecting best practices, aligning efforts of distinct teams, and fostering broad buy-in for this work. In offering these value propositions to various departments across the institution, the OEM noted the importance of accounting for both challenges that could constrain the potential of CBO partnerships and aspects of the institution that could position it to excel in its work with CBO students.

## **CAMPUS-WIDE CBO ENGAGEMENT ASSESSMENT: UNIVERSITY OF MICHIGAN OFFICE OF ENROLLMENT MANAGEMENT’S KEY QUESTIONS FOR U-M COLLEAGUES**

- 1** Are we engaging CBOs across the University in prospective student recruitment efforts from low-income and urban communities? If so, how?
- 2** How are CBOs currently benefiting from informal and formal partnerships with various units across campus?
- 3** Which current campus initiatives provide an opportunity for close collaboration with the new CBO initiative proposed by U-M’s OEM?



Courtesy of the University of Michigan

### Challenges to Overcome with CBO Students

#### Higher tuition than local or regional campuses:

U-M's OEM recognized that many CBO students are especially attentive to price in their application and enrollment decisions and presume the U-M's cost of attendance figures are higher than some other options. Even while CBO students might ultimately pay a lower net cost at U-M than elsewhere, students and their advisors often did not realize this and were deterred by the sticker price.

#### Decreasing state investments in higher education:

U-M's OEM also noted continuing declines in state-led investment in higher education, including a \$247 million drop-off (in 2019 dollars) in appropriations for the university between the 2002 and 2019 fiscal years.<sup>15</sup> This trend, while hardly unique to U-M, is only likely to be exacerbated further with the onset of the COVID-19-induced recession, constraining the resources that institutions can devote to supporting CBO students at a time of greater financial need.

**Out of state financial aid limitations:** U-M cannot meet full demonstrated need or offer no-loan financial aid packages for out of state students. While the university offers awards that can match or exceed the aid packages students see from some their in-state flagship institutions (particularly for a number of its Midwestern neighbors), this more nuanced message is important to relay to CBO students and their advisors as they compare offers from institutions.

### Strengths to Highlight for CBO Students

#### Status as a publicly funded, state flagship research

**university:** U-M is positioned to offer students a wealth of academic resources and professional development experiences, especially as compared to many other institutions. The institution should use this competitive advantage as an opportunity to highlight its expansive research and internship opportunities; diversity, equity, and inclusion initiatives; and student success programs that potential CBO partners and their students find particularly appealing.

#### University leadership's commitment to (and investment in) diversifying the institution:

With the support of President Schlissel and senior leaders, U-M has implemented an array of initiatives to minimize the cost of attendance (e.g., scholarships for students from lower-income as well as first-generation backgrounds, a laptop program for incoming students, and emergency funding assistance for qualifying students). The value of advocacy and buy-in from key university stakeholders is difficult to overstate, both from the perspective of external partners and its impact on the on-campus student experience.

15 Michigan Daily. (2019). *Regents approve budget and tuition rates, appoint new LSA dean.*

## 1. INITIATE

### How the University of Michigan Developed Its Parameters for CBO Engagement

Following its stakeholder engagement work during “Year Zero,” the OEM assumed its ideal role as an intermediary for managing CBO relationships across the institution, identifying opportunities to streamline processes across the enrollment pipeline and engaging others around campus in an effort to encourage more frequent information-sharing.

Based on both the existing partnerships that peers across campus developed and the institution’s goals to build an inclusive, equitable campus of students from both Michigan and communities across the country, the OEM team defined an inclusive set of criteria for the ideal CBO partner, which encompassed the following characteristics:

- Dedicated work with high-achieving students in new rural, urban, and suburban populations
- Demonstrated commitment to partner with students early in high school, establish student support models, and provide robust college search and application programming that includes frequent, in-depth interventions
- Clearly defined transition-to-college programming, including near-peer coaching and/or staff mentoring after matriculation
- An understanding of financial aid policies aligned with U-M’s approach, including offers with a modest amount of loans
- A commitment to sending students out of state for college

Additionally, because preexisting CBO partnerships on campus primarily connected students from lower-income and first-generation backgrounds as well as communities of color with specific interests or programs of study at the university, the OEM concluded there was an opportunity to establish partnerships with aligned CBOs that focused more generally on college access and success in niche geographic markets. These organizations were well-positioned to offer opportunities to students and families who are underrepresented in higher education and lacked familiarity with U-M.

## 2. IMPLEMENT

### How the University of Michigan Is Beginning to Put Their Partnership Principles into Practice

With a deeper understanding of how departments across the institution are engaging with CBOs and clear measures in place for assessing potential partners, U-M’s OEM team envisioned 2020-21 as Year One in their CBO partnership journey. Their focus will shift to

implementing systems that better support the OEM’s strategic outreach efforts, foster an institutional culture of community-based recruitment initiatives, and encourage formalized external agreements with CBOs.

### APPROACH TO BUILDING PARTNERSHIPS WITH CBOs

- 1 Building effective systems and data infrastructure for tracking CBO partner and student engagements
- 2 Positioning CBO representatives in established recruitment channels and mailing lists
- 3 Fostering awareness of relationship building and CBO partnership best practices across the admissions team and with other internal stakeholders
- 4 Establishing clear expectations with CBO partners on how to better support students through the college search, application, and transition-to-college processes

Even before Year One began, though, OEM acted on immediate opportunities to pilot several new CBO outreach initiatives grounded in their new criteria. Building on their existing partnership with College Greenlight, they successfully convened their first CBO counselor fly-in during the fall of 2019 and launched summer programming earlier that year for College Horizons, a nationwide CBO serving Native American, Alaskan Native, and Native Hawaiian students.

As the department addresses challenges that rise to the surface during the Year One engagement work, there are opportunities to prioritize efforts in future years that include efforts to: secure continued financial aid investments essential to increased diversity and engage in ongoing conversations with CBO counselors about departmental and alumni-funded scholarship opportunities for students who are first-generation and from low-income and historically underrepresented backgrounds.

## 3. IMPROVE

### How the University of Michigan is Laying the Groundwork for Sustainable CBO Partnerships

Heading into 2020, U-M took the step of incorporating CBOs and their advisors into preexisting communications channels, which previously only included high school counselors. They also looked to establish formal agreements with CBOs and structure customer relationship management systems to account for CBO data indicators grounded in best practices. Getting these pieces right initially stand to save the U-M team significant time and resources in the long run.



To raise awareness internally about an expanded, centralized approach to CBO partnership development, the OEM engaged all admissions counselors and staff in the implementation of its strategy, gathering input from those out in the field about CBOs on their radar. To further equip admissions staff to build relationships with CBOs, the OEM leveraged on-campus partners' expertise, bringing in staff from the Ginsberg Center, a community and civic engagement organization invested in inspiring local change, and the Center for Educational Outreach, a unit at U-M dedicated to inspiring a college-going culture for all youth. U-M's OEM also tapped into its partnership with College Greenlight to lead a staff training on effective CBO outreach strategies.

As the university deepens relationships with CBOs and develops recruitment pipelines, the OEM aims to establish a foundation of trust and transparency.

The team solicited input on formalized MOUs from university partners and CBOs to develop a standard agreement with the support of the university's Office of General Counsel, which will continue to evolve as it is disseminated to CBOs during 2020-21. Essentially, the team views the MOU process as a prime opportunity to clarify the distinct benefits that U-M can offer to CBOs and their students while also addressing potential misunderstandings. In discussing financial aid, for instance, the team can directly address CBO advisors' concerns about adequate student aid with insights on U-M students' loan default rate (less than 1 percent) and dedicated financial assistance funds (which address pressing needs for technology or other basic services). The conversations associated with the MOU development process can also help surface distinctive university investments in equity-focused programming that includes student resource centers and dedicated first-generation supports.



Courtesy of the University of Michigan

## LESSONS LEARNED FROM THE COVID-19 CRISIS

In planning to ramp up CBO outreach during 2020-21, U-M could not have anticipated the drastic impacts of the COVID-19 pandemic. Understandably, this crisis has caused shifts in the ways in which the university originally planned to reach out to CBOs. Bringing access groups to campus (like they did with College Horizons in Summer 2019) is no longer tenable, at least in the short term. However, with a keen understanding of both the OEM team's strengths and unique challenges that emerged from the

Year Zero engagement processes, they have been able to move more swiftly, adapting yield and outreach activities to present circumstances. This adaptiveness is evident in the several in-person recruitment events for admitted students that they transitioned to an online format, which still proved to be a success due to the ability of trusted CBO partners to spread the word. Additionally, the team is using new modes of digital communication to stay in frequent contact with CBO students and their counselors, such as texting, video conference calls, and interactive webinars. This ensures their input is continually accounted for and concerns are rapidly addressed as they structure future outreach and engagement opportunities. With traditional recruitment avenues like in-person college fairs and campus visits shuttered for the foreseeable future, relationships established with students early in their high school careers will take on even greater importance.



# University of Richmond Case Study: Building on a Legacy of CBO Partnerships

## *How the University of Richmond has strengthened and sustained powerful, community-driven partnerships over two decades*

On a crisp, mid-October day, over 100 high school students from across the country converged on the University of Richmond's (UR) wooded campus. Some were nervous; others were excited. Most were eager to experience the feelings of independence and inspiration they had been told to expect at a residential, four-year university. More than a few had taken their first plane ride to get to this point. Some had ventured outside their home state for the first time. These prospective applicants--students of color and those passionate about multicultural interests among them--sought more than what guidebooks and search websites could offer. They were there to find out if the UR was a good fit *for them*.

This event, the UR's 2019 Multicultural Overnight Visitation Experience, or "MOVE," represented just one effort in a longstanding imperative to recruit students from dozens of community-based programs and organizations geared toward expanding postsecondary access and opportunity. While these students were only staying for a single evening, their experience at this event resulted from the efforts of scores of people working for the better part of a generation to build bridges to highly talented students from lower-income and first-generation backgrounds, and communities of color, across the United States who often do not have access to such institutions.

The UR is no stranger to the world of partnerships with CBOs, having established its first formal external collaboration for recruitment purposes in the early 1990s. Over several decades, Richmond's portfolio of partnerships has expanded to include partnerships with 27 school networks, scholarship organizations, and CBOs, a timeline of which is included at the end of this case study.

The benefits of this growth on the diversity and inclusivity of the UR's campus is clear. In the 2018-19 admissions cycle, the UR received 200 percent more applications from students affiliated with partner organizations as compared to 10 years ago, with the number continuing to grow to this day. In 2016-17, the UR received applications from 130 prospective students affiliated with partner CBOs, with 30 of them ultimately enrolling. Just two years later, in 2018-19, more than 200 students applied from partner CBOs, with 41 enrolling at the UR as of the start of the 2019-20 academic year. In short, 20 percent of applicants from partner CBOs are ultimately enrolling at the UR, compared with just 7 percent of the general applicant pool. This highlights the success of targeted, aligned recruitment and outreach efforts that meet the needs of students in these programs.<sup>16</sup>

It is worth noting that these students are not just applying and enrolling; they are also thriving academically. Over the past 10 years, CBO students matriculating at the UR have maintained strong retention and graduation rates, outpacing the general student body on each metric. Therefore, to maximize the impact of this burgeoning network of partnerships (along with an even more expansive assortment of informal relationships), the UR's Enrollment Management and Admission teams have focused on identifying and sustaining CBO partnerships that reinforce these powerful outcomes.

Whether at the beginning of an effort to develop recruitment-focused partnerships with CBOs or in the midst of a fully developed initiative, institutions can gain many insights from the UR's gradual expansion of its partnerships. As a leading institution in this field that has made a long-term investment in continually

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<sup>16</sup> University of Richmond: 2019 internal research on partnership student data.

reorienting, reexamining, and reinvigorating its CBO partnership practices, the UR illustrates the power of well-established, sustained collaborations, particularly in regard to how they support a diverse, equitable pipeline of students that can access postsecondary education—and the lifelong opportunities that come with it.

### ***Institutional Support: Two Decades of CBO Partnership Growth***

The UR's extensive work in partnering with CBOs has benefited from the sustained support of prominent administrative leaders. Multiple university presidents have emphasized the importance of increasing application and enrollment numbers for students from backgrounds traditionally underrepresented in higher education (including students from lower-income and first-generation backgrounds as well as communities of color). The UR's current president, Ronald A. Crutcher, a first-generation college student himself, recently reaffirmed this legacy in the institution's most recent strategic plan.

**"The University will recruit, retain, and inspire academically talented students from all economic, racial, and ethnic backgrounds. [...] Each generation has worked in new ways to extend opportunity and welcome to students from all backgrounds. We will continue to build on that tradition to open doors for students with the potential to excel and contribute to the University, and help families understand clearly the value and affordability of a Richmond education."<sup>17</sup>**

The longstanding success of students who apply and are admitted from CBO partners can also certainly be traced to the UR's generous financial and social-emotional supports, beginning with a need-blind admissions review process and 18-year commitment to meeting the full demonstrated need of all admitted students. This effort expanded in 2014 with the

establishment of the Spider Firsts initiative, which offers first-generation college students a suite of opportunities to connect with each other, participate in related initiatives and clubs on campus, and engage with key faculty and staff, many of whom were also first-generation students.

The UR's steady focus on supporting students enrolling from their CBO partners even endured during the 2009-10 academic year, which challenged institutions nationwide to increase postsecondary access for students with limited financial means following the 2008 Great Recession. To continue to recruit diverse students during this time, the UR relied on the ability of its CBO partners to identify and elevate hundreds of young people from historically underrepresented backgrounds, allaying their concerns about financial uncertainty in the process. The results speak for themselves, with the UR's enrollment of students eligible to receive federal Pell Grants rising dramatically in this span — from 9 percent of undergraduates in 2009 to 16 percent the next year.

Stephanie Dupaul, the UR's vice president of enrollment management since 2015, also noted that the enrollment increases during this time coincided with enhancements to students' financial aid packaging, likely because of a commitment to meet students' full need without loans. Amid a time of economic crisis, the expansion of financial aid made the UR a more affordable choice for students from lower-income backgrounds. Maintaining these investments in financial aid has also served as a key differentiator for students that CBOs work with, positioning the institution to buck a field-wide trend and preserve its enrollment of Pell-eligible students in the years following the recession, at a rate that ranges from 14 percent to 16 percent.

### ***Partnership Development Process: Parlaying Informal Collaboration into Mutually Beneficial Partnership***

The UR's core CBO partnership team includes staff from across the Office of Admission, including the executive director of admission and data analytics, the associate vice president and dean of admission, and the vice president of enrollment management. Admission officers act as CBO advisors, engaging with partners on a day-to-day basis and liaising closely with other departments, including Student Affairs and the Office of Financial Aid when they need materials on the cost of attendance, for example, or information on student support programming. The diverse composition of the partnership team then enables the

17 University of Richmond. (2019). *Forging our Future, Building from Strength: A Plan for the University of Richmond*.





Courtesy of the University of Richmond

UR to consider—and account for—a range of factors involved in enrolling and retaining more students from underrepresented backgrounds.

The partnership team within the UR’s admissions office has developed and institutionalized rigorous processes for building relationships with, and vetting, potential CBO partners. In recent years, Vice President Dupaul has spearheaded efforts to ensure these processes can be adapted for scale. To support the expansion of its mutually beneficial partnerships, the UR is standardizing the ways in which it establishes new partnerships and is conducting ongoing analysis to ensure the continued efficiency and effectiveness of existing collaborations.

### ***Tracking Today’s Data with the Future in Mind***

Much of the UR’s most innovative work with CBOs centers around how they thoughtfully collect, track, utilize, and share data at every step of the process.

For the UR, the process of adding a new CBO partner begins as much as a decade before any formal MOU gets drafted or inked. The UR’s application management system enables admissions staff to tag prospective students as affiliated with either “partnership” or “relationship” CBOs and to record the associated organizations. The admissions team uses this delineation to indicate the extent of the collaboration, with “partnership” pertaining to an organization that has entered into a formal agreement or MOU and “relationship” suggesting a

less-structured connection. This tag might denote the level of commitment needed for an organization that brings students to the UR on a college tour, works with counselors to nominate multiple students for a fly-in program, and/or simply supports students who indicate their CBO affiliation when applying to the UR.

The UR can then monitor CBO application data over time to identify ongoing CBO relationships that can potentially transform into mutually beneficial partnerships. With the Schuler Scholar Program, for example, Richmond observed years of increasing interest from the organization’s Chicago-area students. With collaborative efforts increasing steadily over time, and a growing level of alignment and fit to the institution’s goals, UR ultimately added Schuler as a formal CBO partner in 2019.

### **1. INITIATE** **A Rigorous Screening Process for Potential Partners**

As the university evaluates both potential and recurring partners, quantitative data continues to play a crucial role. In 2018-19, the UR’s Office of Enrollment Management standardized the process by which it collects these insights, creating a detailed intake form that encompasses information on CBO expectations, demographics, and the types of interventions they administer. The team reviewed what staff typically asked of potential partners and solicited feedback from others involved in CBO partnership initiatives to create this rubric, designed to further streamline the evaluation process.

The enrollment management team then models the data collected from this intake form to identify anticipated applicants and matriculants from that CBO, which informs how the admissions office dedicates resources and personnel to various outreach and recruitment efforts. This enables the team to maximize the impact of limited resources (including how and where financial aid and admissions officers spend their time), ensuring the university is invested in preemptive supports and measures that facilitate the success of CBO students who ultimately matriculate.

To complement quantitative data on CBO partners, the team also places great importance on the interpersonal and qualitative aspects of partnerships. Frontline staff (especially the two CBO advisors on the UR's admission staff) provide critical insights on whether a partnership is a good fit, using the below criteria for consideration.

### THE UNIVERSITY OF RICHMOND'S CBO CHARACTERISTICS TO CONSIDER

- 1 Mission
- 2 Demographics of students served
- 3 Area of service (geographic region and number of high schools served)
- 4 Program curriculum and/or activities (type and rigor)
- 5 Student performance in high school
- 6 Affiliated CBO student performance in college (e.g., those who matriculate to UR)
- 7 Outcomes data (e.g., retention and graduation rates) for students attending other colleges and universities

Qualitative feedback from admissions staff can help account for changes in, and potential opportunities to expand, CBO relationships over time. To further ensure that the UR is efficiently and effectively allocating resources to work with their partner CBOs, its team also assesses how an organization's students engage with targeted opportunities (such as fly-in programs) and to what extent they apply to, gain admission to, and enroll in the university after

engaging in these recruitment and outreach activities. Over time, this rigorous, iterative approach toward annual review has enabled UR to broker partnerships with geographically widespread CBOs and broaden its partnership model to encompass non-CBO partners, including high school networks such as KIPP and San Diego's High Tech High Foundation.

## 2. IMPLEMENT

### Establishing Partnerships with Mutually Understood Expectations and Benefits

After identifying potential partners, the UR formalizes the relationship with documentation, usually in the form of an MOU, that establishes safeguards for student privacy and outlines expectations for how the UR and the CBOs will engage as partners. This document accounts for the fact that colleges and universities typically operate under different student privacy policies than most CBOs and high schools, highlighting their approach to data-sharing at the outset of an agreement and positioning CBOs to distribute and collect the necessary releases to comply with FERPA and protect student data. Since CBOs have preexisting, personal relationships with their students, it ideally positions them to explain why these releases are important and demystify what can otherwise be an imposing concern.

In the agreement-setting process, each partner is assigned a dedicated point of contact within the admissions office, along with a designated number of student spots for the UR fly-ins, CBO counselor visit invitations, and annual visits from an admissions officer. Students affiliated with CBOs also receive loan-free financial aid packages as part of the UR's ongoing partnership commitment, which is endorsed at the highest level of the institution. For evidence of this commitment, President Crutcher and two senior staff members visited partner CBO Chicago Scholars in 2018, meeting with its high school student participants and immediately outlining two tangible commitments to increase the outcomes of the partnership.

As the UR accommodates additional students from a growing number of CBOs, its admissions team has had to expand overnight visit program capacity by more than 30 percent. During these visits, which include the popular multicultural MOVE program, the UR engages current CBO-affiliated students enrolled at the university to serve as overnight hosts for prospective students.

An expanded list of partnership benefits that the UR outlines to CBOs as they develop an agreement can be found below.

## EXAMPLES OF PARTNERSHIP BENEFITS

- 1 The UR shares updates on the application status of partnership students with CBOs (with students' approval).
- 2 The UR grants application fee waivers to partnership students.
- 3 The UR shares partnership students' retention and graduation rate data with CBOs.
- 4 The UR distributes reports on student success metrics to partnership programs.
- 5 Admissions officers make annual visits.
- 6 The UR conducts targeted outreach and reserves spots for overnight student visits.
- 7 Intentional outreach centers on pre-college programming, peer mentoring programs, living/learning programs, and other student success initiatives.
- 8 The UR offers students from new partner organizations continued opportunities to meet other students.
- 9 The UR encourages on-campus visits for partnership groups. (In 2018-19, for example, eight partnership programs brought 278 total prospective students to attend campus group visits, each of which sent between 5 to 83 students.)
- 10 The UR extends invitations to the Partnership Prom, an annual welcome program specifically for partnership students.

As noted above, the UR's commitment to rigorous data management and internal research provides another key benefit for CBO partners. With student approval, admissions advisors report back to partners on their admission, persistence, and performance data. When the UR's team discovers factors that could better position CBOs to prepare their students for college success, they readily share that information. For example, the UR may share that an increasing number of students from a particular partner CBO are exploring a set of majors or academic disciplines,

prompting the CBO to tailor its programming to meet that interest. This proactive communication of, and transparency around, data serves as the groundwork for continued, mutually beneficial collaboration. The resources that the UR offers build on students' preexisting support systems, increasing the likelihood of their persistence, completion, and lasting success.

## 3. IMPROVE

### Engaging in Continuous Improvement and Thoughtful Growth

Looking to current and future recruitment cycles, the UR has identified several ways to streamline and enhance the management of their CBO partnerships. As partnerships continue to grow in both number and depth, Vice President Dupaul aims to standardize the evaluation (and reevaluation) process, moving beyond a case-by-case approach to criteria that indicate the effectiveness of the collaboration. The UR is in the process of implementing a standard memorandum of understanding for partner organizations, which has been developed in collaboration with the enrollment management and admission offices, as well as the university's contracts team and general counsel. The MOU aims to outline partnership benefits, expectations, performance metrics, and protections for student participants, while also specifying what student data will be collected and shared—and how it will be communicated.

This process can also yield insights on how the CBO and the UR can better identify, recruit, and position students for postsecondary success, surfacing targeted interventions and supports that are needed to reach commonly agreed-upon goals. Where necessary, the MOU encourages the two entities to adjust their goals to reflect the emerging needs of students at that partner CBO.

The UR is planning to reassess each of its established CBO partnerships every three years as part of a uniform evaluation process, envisioning routine assessment not as a punitive process, but as an opportunity to deepen relationships. Through ongoing dialogue and formal reevaluation, the team seeks insights on how to develop even more robust programs for partners and their students. At the same time, they are continually searching for creative approaches to deepen partnerships with their CBOs—and reach and support even more students from underrepresented groups.



## LESSONS LEARNED FROM THE COVID-19 CRISIS

During the COVID-19 crisis, the UR's diversity recruitment and outreach team leveraged longstanding relationships with CBOs to ensure students' financial and learning needs were accounted for, especially as many of these students lacked the resources to navigate such a crisis. For example, recognizing they were the most likely to lack technological equipment, the UR arranged for laptops and internet hotspots to be sent to those students. Even beyond the crisis, this could represent a potential long-term solution for those who engage in summer learning or opt for online courses in a future hybrid model.

And while marquee admissions events like "A Night to See, Witness, and Explore Richmond" (ANSWER), a signature fly-in program for admitted students affiliated with CBO partners, transitioned to a virtual setting, the ability to rapidly disseminate and highlight this opportunity via trusted CBOs assured it remained a success. While the admissions team plans to return to in-person visits as soon as possible, the virtual visitation model expands the ways in which prospective students can engage with UR, especially for those who may not have the means, or are unable, to visit campus in-person.



Courtesy of the University of Richmond

# Appendix I: The University of Richmond's Partnership Development Timeline and Milestones

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