

# Improving College Access Chatbots: A Virtual Convening for Cross-State Learning

May 3, 2023

## Breakout Discussion Notes

### **Room 1: Developing engaging content (e.g., what has gone really well/really poorly?)**

- It is beneficial to keep all key information at the beginning of an interactive campaign (so that nothing is lost in the menu options)
- It is also beneficial to ensure all key information is placed in the nudge campaign in a concise manner
- When transitioning students out of chatbot (such as with graduating high school seniors), give them a large window for a warning so that they can ask any lingering questions (one chatbot mentioned this period of time coincided with an uptick in engagement)
- Build partnerships whenever possible and see if you can meet more specified needs (such as for smaller cohorts where they may benefit from specific information you can provide)
- Link with other educational partnerships and see how to facilitate student contact with other agencies (an example is using chatbot and Calendly to link students to advisors in educational non-profits for specific FAFSA support)
- Besides engagement through metrics of passive and active, you can check on engagement of link clicks through tools such as bit.ly
- The chatbot can also be an effective reminder system to increase event participation
- Message cadence was typically 1-2 times a week, but some sprinkled special campaigns throughout the month as needed
- Whenever doing a break, it was advised that it is best to give a warning that this would occur (breaks for long periods of time coincided for some with increased opt-outs)
- It was mentioned that it is a hope that earlier messaging such as in relation to the student high school career can facilitate more engagement and better outcomes
- A fun anecdote was how using an interesting trivia tidbit before a follow-up nudge campaign or other coinciding campaign messaging can improve engagement and participation (example is they mentioned how one campus was once a movie set to spark student interest/share something unique about that setting)

## Room 2: Promotion, outreach, and chatbot credibility (e.g., opting in vs. opting out)

Question – What strategies has your organization used to address opt-out issues? (Operational strategies, administrative strategies, etc.)

Rephrased question - Thinking of the audience you're hoping to reach, to what extent are you reaching them?

- **RIDE** – most of their students who are signed up are getting the message
  - But, it's a small number, and they all opt-in
  - Out of the larger population of potential users, RIDE has a small amount of them (about 1,400), and they should have at least ten times that
- **ADVI** – they reach about 250K+ seniors who have opted in, and the total number of received incoming messages is higher than the number of students who opted in (330K+). Currently, they have an engagement rate of 38%, and their passive engagement rate is also high – these students are not engaging with the bot, but they're not opting out either and still taking action
- **Education Forward Arizona (EFA)** – this has been a challenge
  - they get import lists from HS at the beginning of the school year, but a common issue has been whether they're reaching out to the students or parent
- **ADVI** - is also experiencing the same challenge as EFA. They've launched an expansion to reach Juniors. To do this, they need to do vast data collection, including the students'/parents' phone numbers, but there is no way to confirm which is which (some are even landlines). To address this, they'll need to reevaluate their data agreement
  - A possible solution is connecting with the schools directly and see if this is information that can be provided to them through a partnership
- **OtterBot (WSAC)** – (We) recently launched a parent bot, and a challenge has been that sometimes we aren't sure which audience is connected to which platform, or sometimes parents can be connected to both platforms.
  - To help with this, we've set up an automated campaign that responds to users who say they are the wrong person being reached. Then, the bot will send them to the correct platform.
  - Another challenge observed is for the parents with junior and senior students; are they inundated with messages?

Follow-up Question: What were some of the tactical challenges when connecting with schools to help connect students to the bot, or what are some ways that helped overcome this challenge? (*This question was raised when ADVI shared they'd like to partner with schools to gather updated contact information*)

- Education Forward Arizona (EFA) has seen success with this. Here is what they shared out:
  - They have an Outreach team dedicated to this work. They have created an MOU with the school, which helps contribute to the relationship. With that comes creating a data-sharing agreement.

- The Outreach team also meets with the school/district staff, which helps build a relationship between the staff and the school.
- They also work on creating brand recognition and name recognition:
  - They have posters of Benji (the chatbot) that is posted all over the school
  - They use phrases like, “This is Benji.” “This is how Benji can help you.” “This is what Benji can do for you.”
- They also announce this chatbot at student events like assemblies and football games. (Passive and active engagement)
- Outreach team also makes GIFs/memes and uses them as flyers to engage students

Follow-up Question: What is the MOU deliverable for the school?

- MOU deliverable to the school is to help with creating the message and promoting Benji and to provide Education Forward Arizona data and work with them so Benji can promote bigger school events (like FAFSA completion night)
- A huge piece with credibility is that you need staff buy-in.
- We may have access to the teachers, but not the buy-in, and the MOU can be a way for staff members to be voluntold to participate here.

Advice regarding how to increase staff buy-in:

- Karen Zeribi with Shift shared that they use the technology/chatbots as a tool for staff to take care of other tasks, and that way, they have more opportunities for personalized, focused student support. The chatbot can help with attendance or scheduling (administrative support).

### Room 3: Engaging with parents, counselors, or other supports (e.g., other than students)

Goal is to understand how organizations are using student ecosystems as additional effort of engagement. They are using parent communications and partnerships with counselors and school districts.

Introductions:

- **Ask Benji in AZ.** It is used to engage with senior students. They also use FAQs, direct to hotline contact, and Calendly for appointments with a FAFSA expert. They don't have direct engagement with parents yet. They are hoping to have that and an expansion to juniors next year. If they have trouble getting student phone numbers (privacy restrictions), then they target parents to help with engagement.
- **NMAEF.** They do not have a bot yet, so they are learning what others are doing. They communicate with parents using data use agreements at schools. Their communication methods include text, email, phone calls, and postal mail. They sent postcards to parents of juniors about FSA ID. They also do in person presentations in schools. They are interested in expanding to a chatbot.
- **Ask ADVi in TX.** They are communicating mainly with seniors and recently added juniors. They do not have direct parent engagement with the bot, but they do have a parent tool as a standalone website (Tomorrow Ready TX – 8<sup>th</sup> -12<sup>th</sup> grade). They cover college planning and military readiness by giving them checklists for conversations with their students and what to have on their radar. They have promotions with marketing teams and hope to integrate with the chatbot soon.
- **OtterBot in WA.** WSAC has begun engaging with parents in last 30 days with the roll out of the OtterBot ParentBot. Their contact info is okay, but it could be better. They receive data from OSPI starting in middle school for CBS students, so some of it is 4-5 years old. They ask schools to update the contact information regularly in the College Bound portal and send postcards to families asking for information updates.
- **OSPI in WA.** They communicate at a state level with school counselors.
- **Mainstay.** They launched a new partnership in California. They use focus groups with parents where the parents asked them to see the same messages the students receive so they know what the student is getting and can be more helpful.

Question: How does content for parents, counselors, etc. needs to be different? Some may not know they are communicating with parents because it isn't direct, but how is everyone thinking about that?

- In WA - OtterBot ParentBot messages need to align with student messages, so they are just changing verbiage to direct it to the parents. So far, they are seeing more opportunities to align messages.
- In TX - the parent creates an account on the website or explores information by selecting the state of their student. They then select what they are interested in. The system will deliver specific milestone information specific to that grade level. They use a lot of research with vocational rehabilitation division to change the content and find out what they need. They have found that plain language important! They try to use an 8<sup>th</sup> grade readability level. This is similar to counselors saying they get too much info. They just need to know who to go to and who to trust. Specific pathways and short and concise are best because it is a website. They have no

longform pages. Their goal is just getting it at the parents' fingertips. Link to their website – [tomorrowreadytexas.org/en/landing](https://tomorrowreadytexas.org/en/landing)

- WSAC has done focus groups in WA. Some students said they look to their parents for college information and some parents look to the students for that information. Parents will ask the student if the information is legit and right. Having reliable information from both angles and providing the same information to both students and parents is key. WSAC will continue to look at that. If parent and student information gets misaligned, the parent trust level drops.

Question: What can and can't a chatbot do?

- Web tool to connect to and organizing that to let the parents know who talk to and about what – it is helpful to frame it that way. What helps in terms of getting parents involved in first place?
- Traditional mailings work well, can be alongside chatbot. For example, WSAC sends postcards to students asking for updated information.
- TX found that paper works. They go through the educators by providing promotional kits to advisors. They also post on social media and provide a one-pager to advisors with information for parent nights. All their information is provided in English and Spanish. They found that getting schools involved works best. Data shows that their educators are using the toolkit. It was released in February 2023 and they already have 800+ counselors and advisors who have downloaded it.