

Work smarter, not harder – at scale! Using AI to coach students through college-going and financial aid processes

July 31, 2024



Housekeeping

- Please drop your name, org, and state in the chat
- Add your org to your Zoom name
- Meeting is recorded
- Camera and mute
- Use Q&A padlet for comments and questions
- Breaks



Agenda

- Opening Remarks
- Introduction to Washington's OtterBot
- Optimizing Texting Technology through Engagement Research with Students (OTTERS) project
- Breakout #1: How can generative AI enhance what chatbots are trying to do?
- Education Forward Arizona
- Breakout #2: Tell us about your experience with chatbots or other navigation tools or technology. What is something you would recommend based on your experience or ideas? What do you want to do next?
- OTTERS Toolkit Preview
- Closing Remarks

Washington Student
Achievement Council &
OtterBot

Washington Student Achievement Council

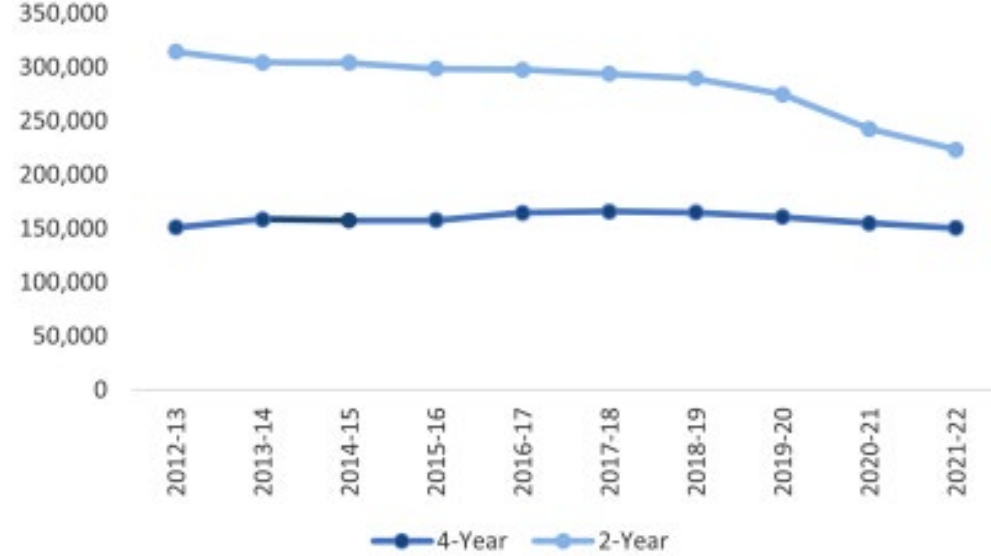
- The Washington Student Achievement Council (WSAC) is the state higher education agency.
- The OTTERS project is part of WSAC's Beyond Government agenda.
- WSAC is working to navigate the space between research, policy, and practice.
- We work collaboratively with partners and aim to build our capacity and the capacity of other state agencies.



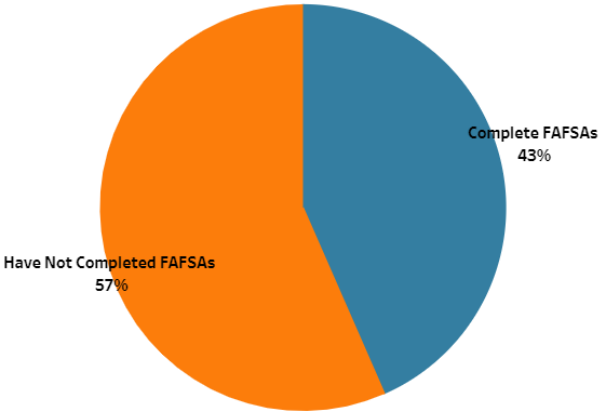
Washington State's OtterBot – the why

- Washington State struggles with financial aid and college enrollment despite having the most generous and equitable financial aid programs in the country

Undergraduate Enrollment at WA Postsecondary Institutions by Institution Level



Class of 2024 FAFSA Completion Rate as of 7/1/2024



OtterBot – where we started

- Launched in November 2019 with Legislative funding
- Mainstay (AdmitHub)'s platform
- Started by supporting approximately 15,000 College Bound Scholarship seniors



OtterBot – where we are & where we're going

- Supporting over 33,000 9-12th grade College Bound students – growing every day!

- Supporting over 120,000 parents/guardians with this additional support

- Increased data sharing and regionalization/customization efforts with trusted messengers

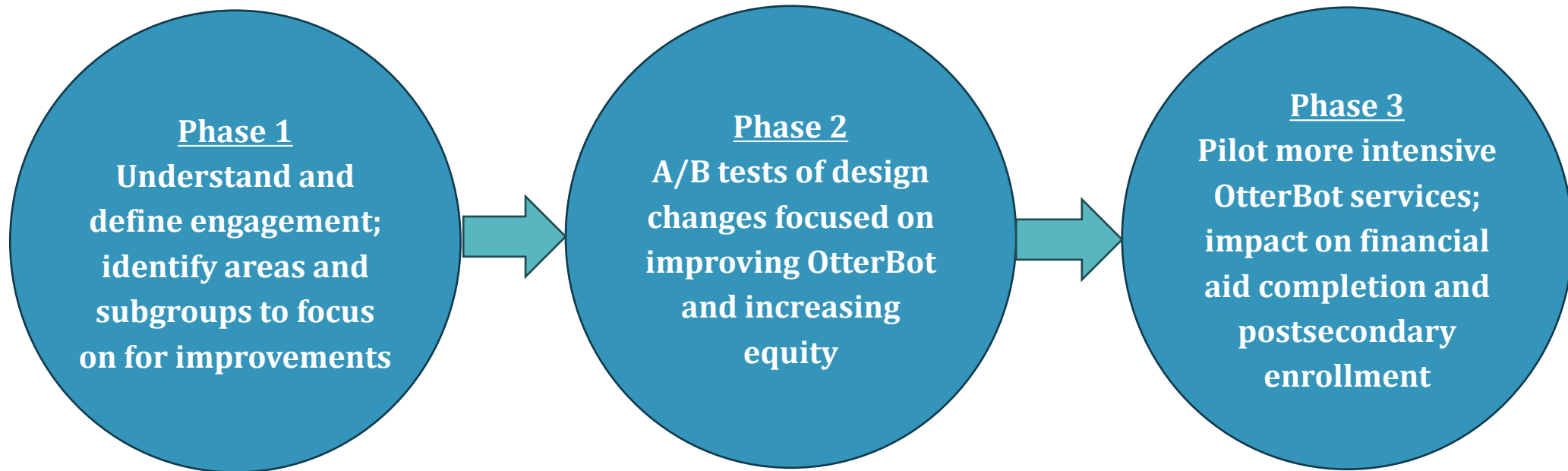


Optimizing Texting Technology through Engagement Research with Students (OTTERS) Project

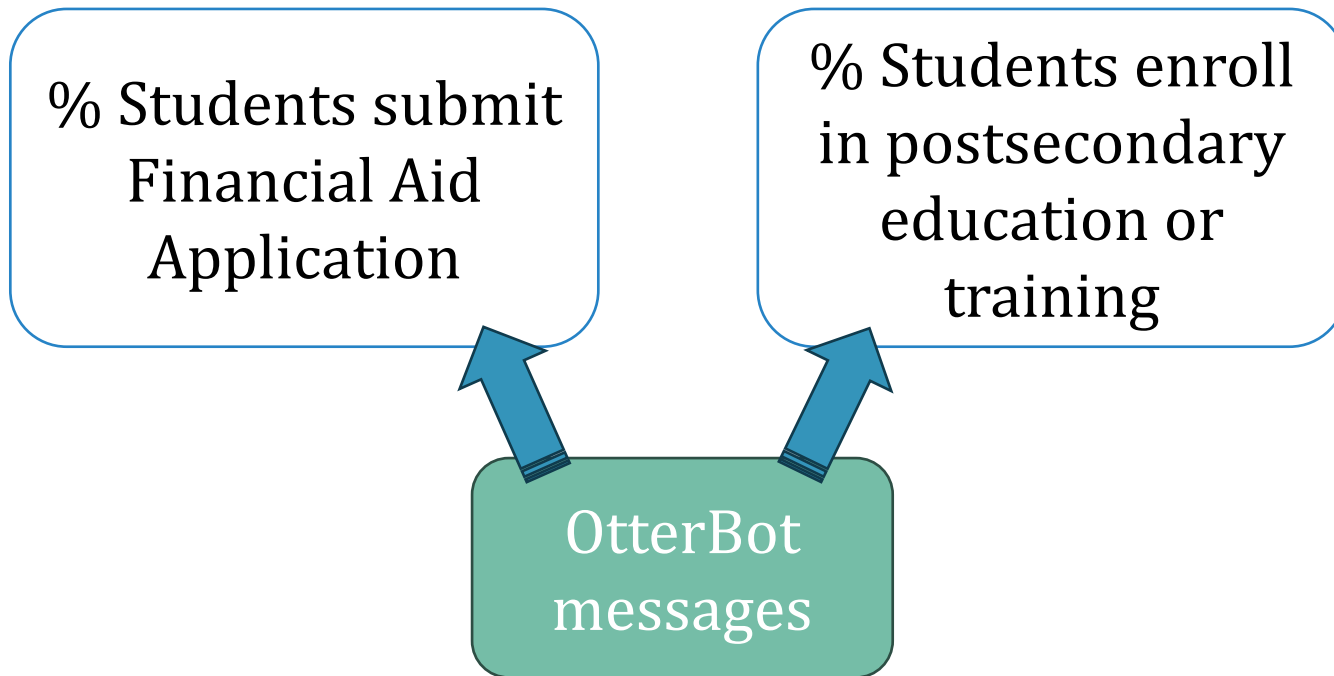
July 31, 2024



Overview of OTTERS Project



Phase 1 – The Why & How



- Process mapping
- Quantitative analysis of administrative data
- Literature review
- Focus groups with students and parents
- Student survey

See our toolkit for...

Phase 1 – Key Quantitative Findings on Financial Aid & College Enrollment

- **Financial Aid Application:** Only **39 percent of College Bound eligible students** submitted their financial aid applications (FAFSA) without errors.
- **College enrollment:** **Only 41 percent of College Bound eligible students** enroll in college.
- **Equity Considerations:** Disparities by
 - GPA
 - Ethnicity
 - Gender

Phase 1 – Key Focus Group Findings on College Access

College application and enrollment

- Academic preparedness and self-efficacy likely mediates engagement and demand for different message content
- Uncertainty avoidance
 - Especially salient for first generation students



Related Recommendations:

- Normalize various postsecondary pathways (community college, certificate programs, apprenticeships)
- Personalized information
- Localized lists of colleges and career information
- Desire to indicate preferences and interests

Phase 1 – Key Focus Group Findings on Financial Aid Application

Financial Aid

- Hassle factors
- Financial anxiety and financial aid awareness
- Parental support

Related Recommendations:

- Link to begin FAFSA and associated reminder
- Information about scholarships and individualized eligibility for college aid
- Guidance on how to talk to parents
- Bulleted list of what parents need to complete

Phase 1 – Key Findings on chatbot reach & engagement

Quantitative

- OtterBot aims to improve FA and college outcomes, but less than half of CBS students ever receive an OtterBot message.
- About half of those ever respond to an OtterBot message

Qualitative

- Translation and literacy needs
- Lack of trust in bots and automated messages
 - Can be perceived as “spammy”
 - Trustworthiness of hyperlinks
- Students receive a lot of messages and notifications!
 - Banner Saliency
 - Keep it brief & action-oriented

Phase 1 – Key recommendations from students and parents

➤ Content

- High demand for information on scholarships or other forms of financial aid
- High demand for information on career options and their requirements
- Parents/guardians want more basic information about the college process and available resources
- Personalized information

➤ Delivery

- Introduced to bot by a trusted messenger
- Keep it brief
- Clear actions
- Describe purpose & location of hyperlinks
- Deadlines & reminders
- Desire for information before senior year



Phase 2: Designing Alternative Messages

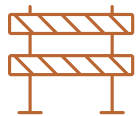
Our Targeted, Research-Informed Goals



Goal 1: Improve OtterBot's **reach** and student **engagement**

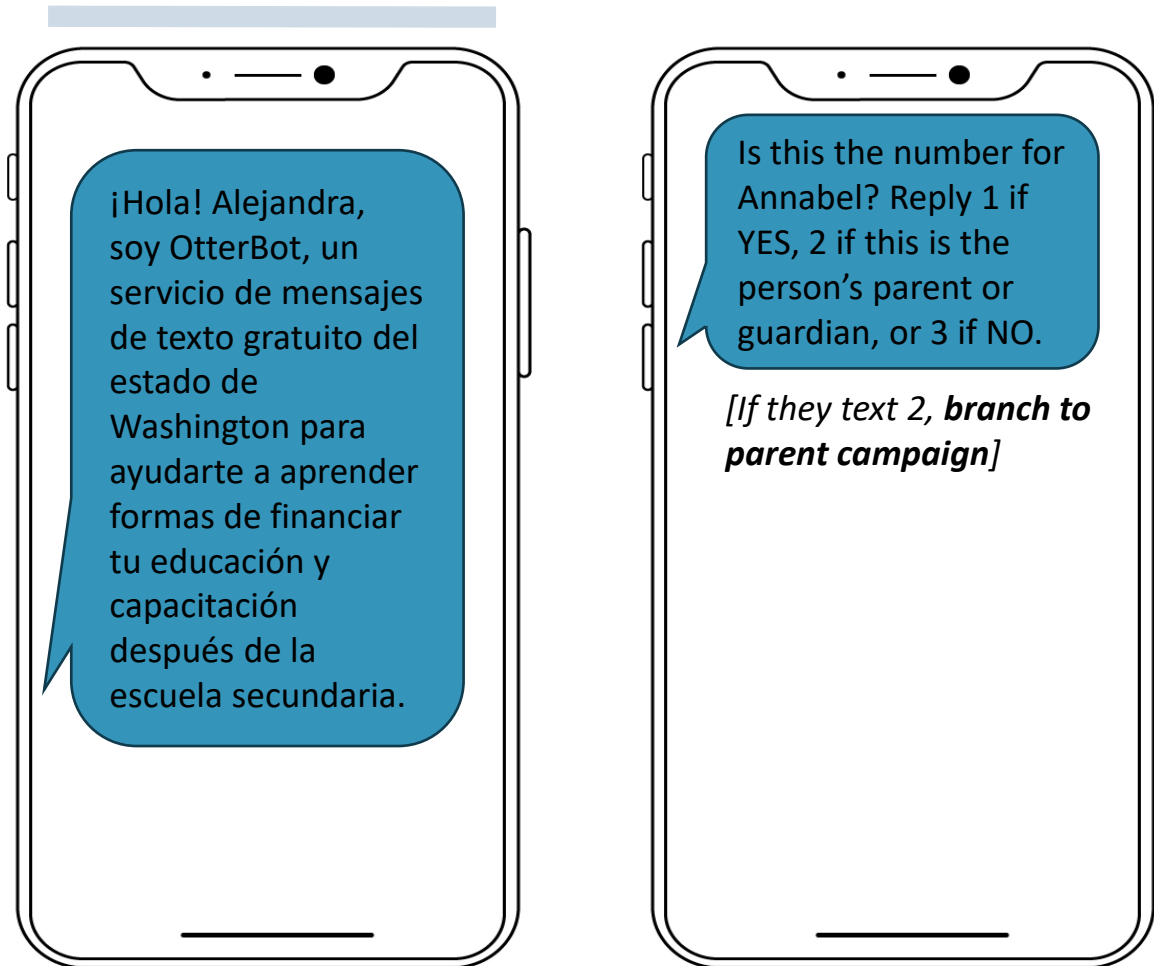


Goal 2: Provide **information** and guidance to help students navigate financial aid and college applications



Goal 3: **Encourage action** on key steps

#1: Improve Reach and Engagement

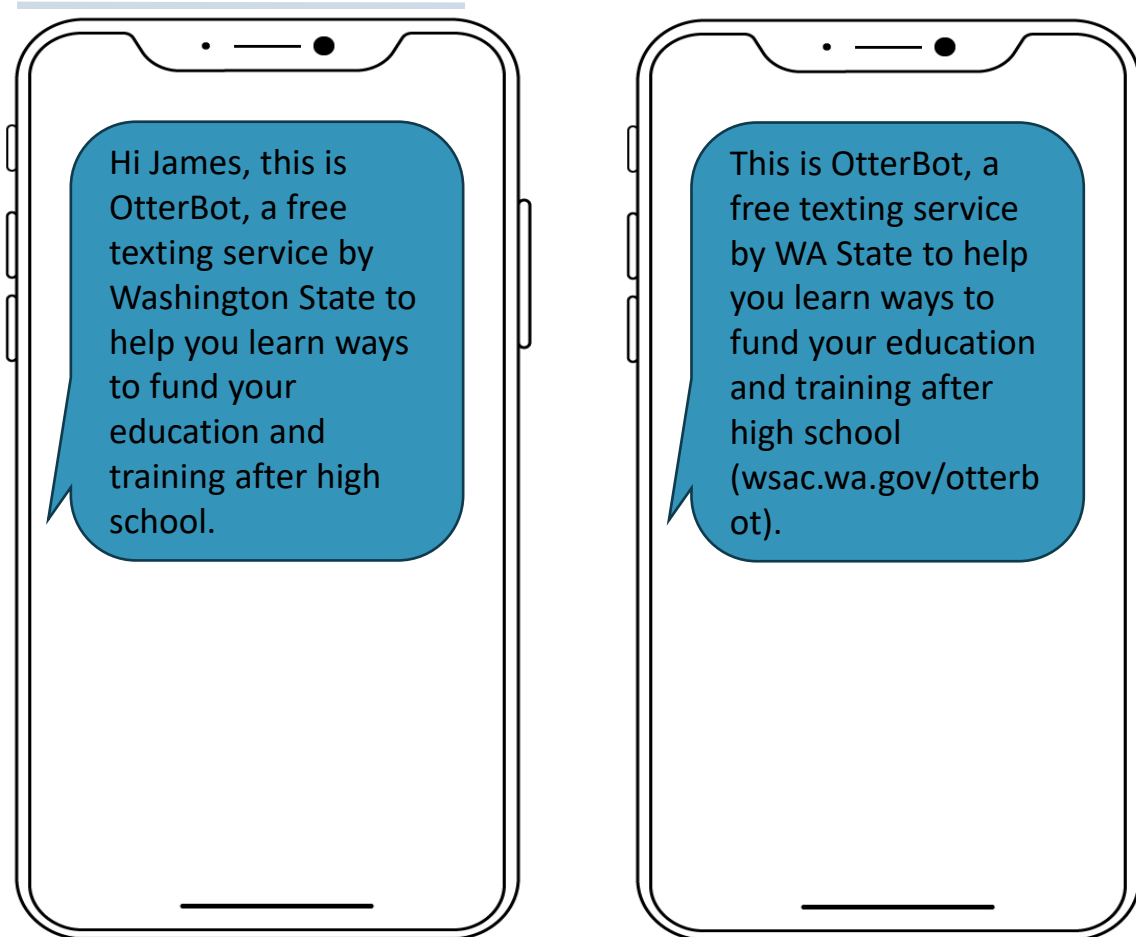


More inclusive reach

Spanish translations to improve understanding and sense of belonging among Hispanic students

Redirecting recipients to other sources of information and attempting to correct numbers in the database

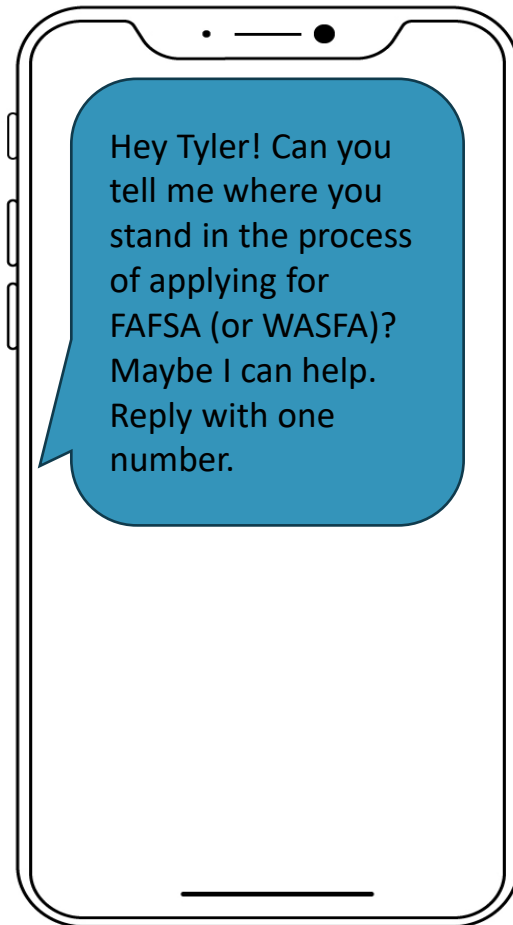
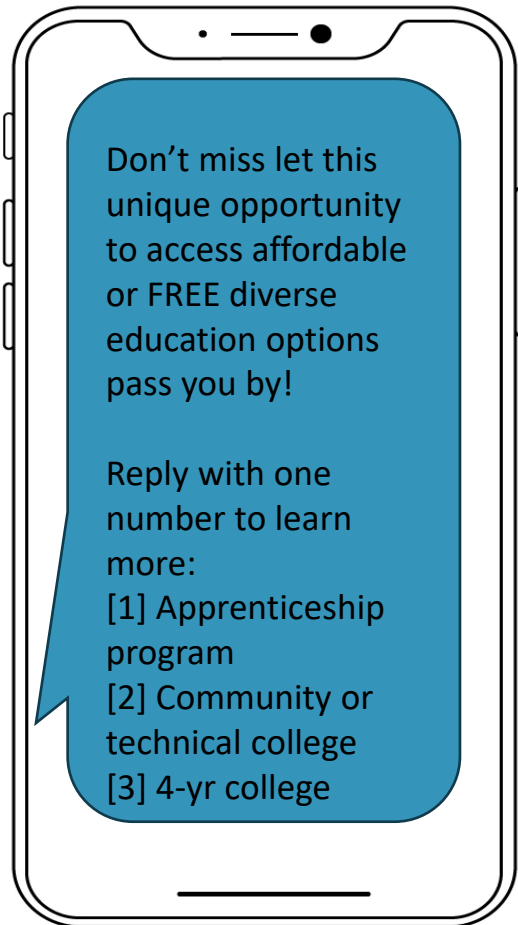
#1: Improve Reach and Engagement



Establish trust and credibility

Repeatedly associated OtterBot with the state of Washington and WSAC.

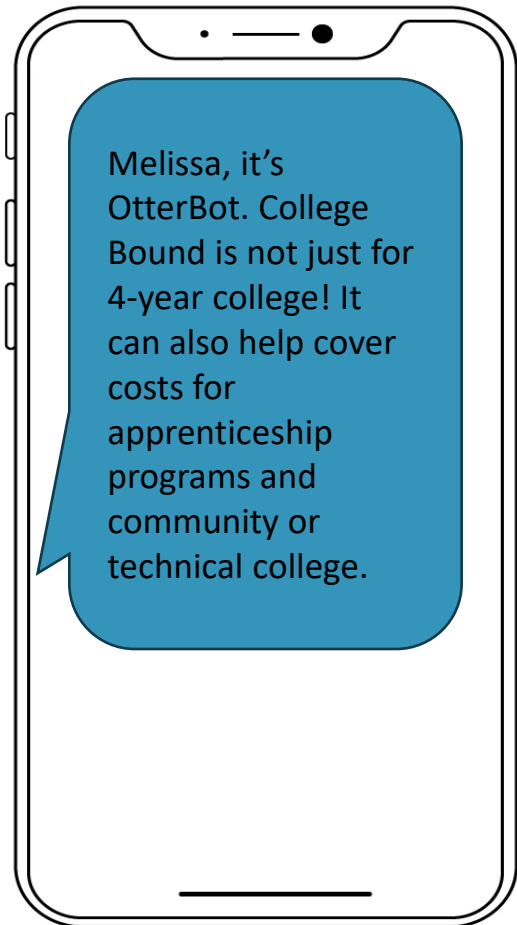
#1: Improve Reach and Engagement



Foster two-way interaction

We relied more on messages that allowed students to ask for information that best fit their needs

#2: Provide Information and Guidance

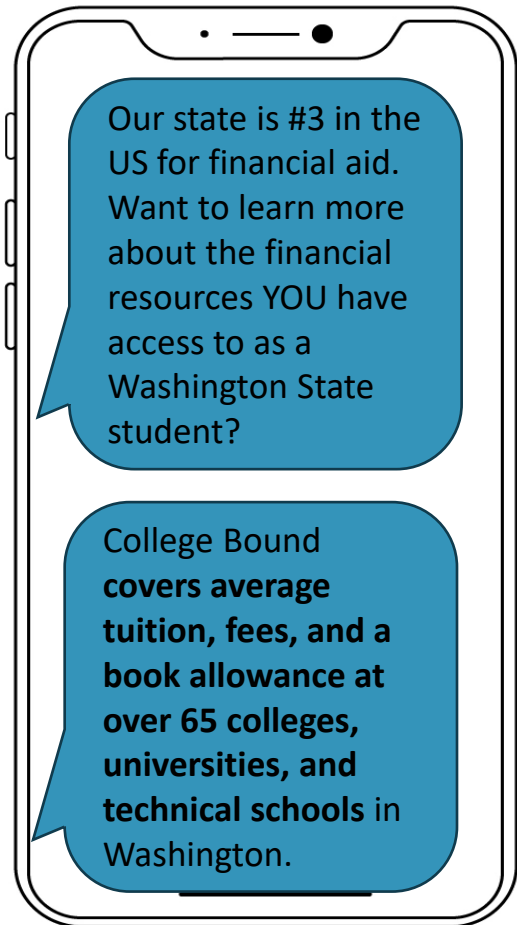


Shifting mental models



Post secondary education is only for really smart students!

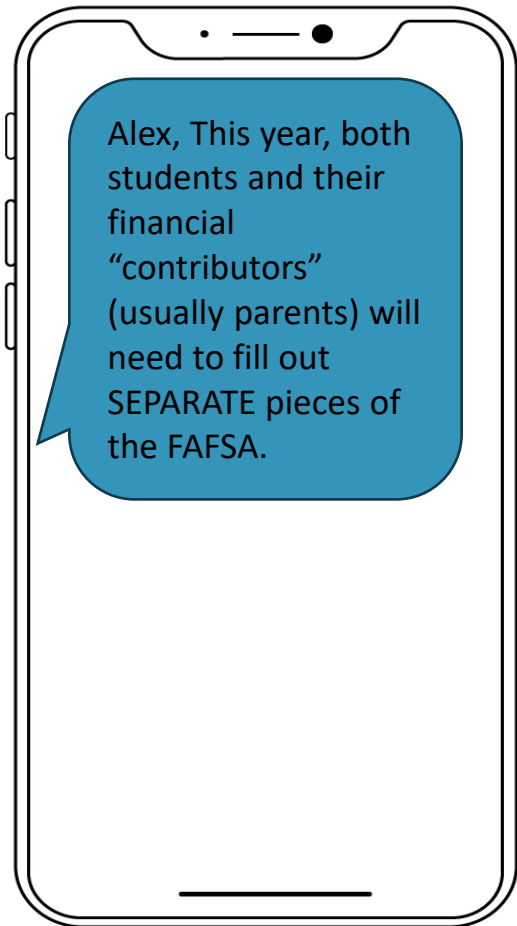
#2: Provide Information and Guidance



Address financial uncertainty

Repeatedly message generous WA financial aid with specific numbers and reminders that *they* can attend tuition-free

#2: Provide Information and Guidance



Use simple language

We explained some of the technical jargon and used simple language and syntax.

#2: Provide Information and Guidance

THE ROAD TO YOUR FINANCIAL AID

To receive ANY financial aid—including grants, scholarships, work-study, and student loans—you MUST submit FAFSA or WASFA*.

STEPS TO COMPLETE FAFSA OR WASFA

- 1 DETERMINE YOUR "CONTRIBUTOR(S)""**
 - If your parents are married or live together, **both** are contributors
 - If your parents are separated and don't live together, **primary caregiver** (and their **spouse** if applicable) is contributor
 - Contributors are NOT expected to pay for student's college
- 2 YOU & CONTRIBUTORS CREATE A FAFSA OR WASFA ACCOUNT**
 - You'll need: mobile phone number or email address (plus an SSN for FAFSA)
 - Contributors will need: Email and mailing address, phone number
- 3 YOU COMPLETE YOUR SECTION OF THE FAFSA OR WASFA**

You need to provide: contact info, "About you," approval to share tax info, list of potential schools, contributors contact info
- 4 CONTRIBUTORS COMPLETE THEIR SECTIONS**

Contributors need to provide: contact info, "About you," approval to share tax info, contact info of spouse (if applicable)

★ **APPLY TO SCHOOLS & PROGRAMS**

YOU RECEIVE FINANCIAL AID OFFERS!

- Washington State offers generous grants and scholarships.
- This is **FREE money**, NOT loans!
- DO not let the opportunity to get life-changing financial aid pass you by!

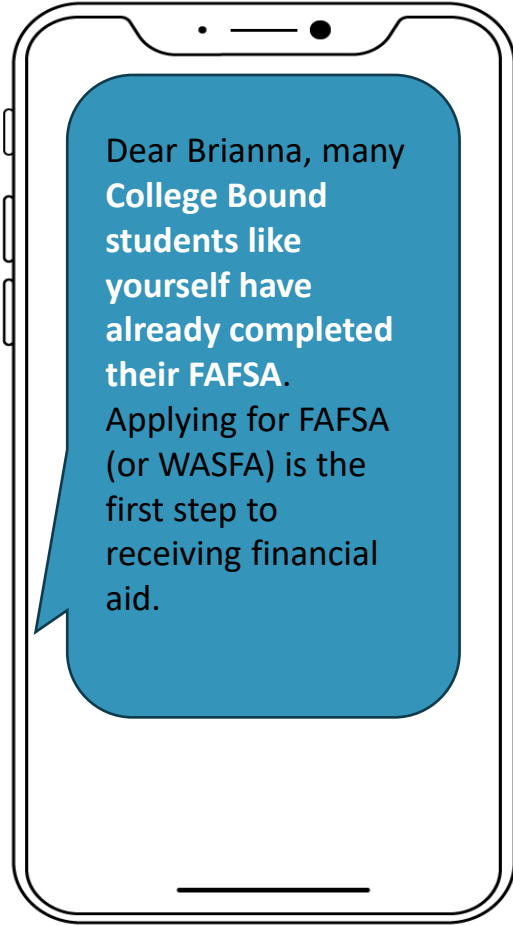
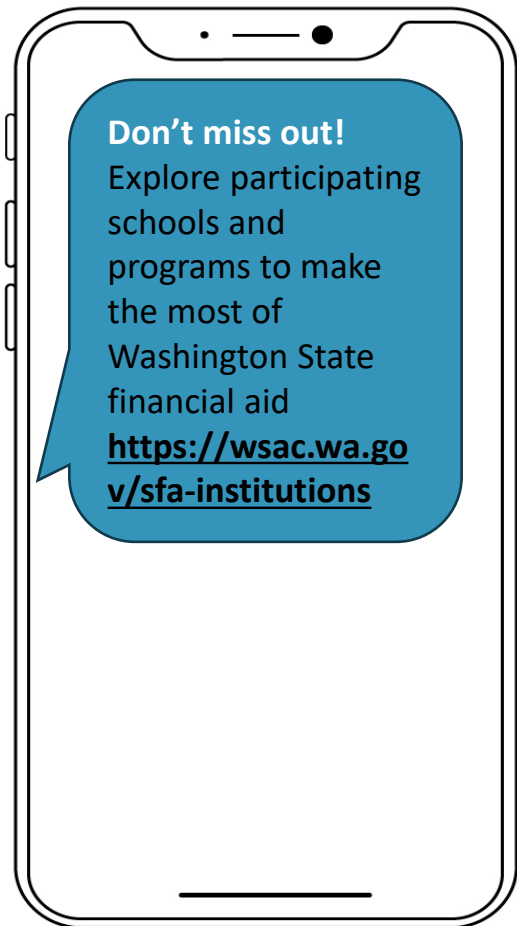
*Students who do not have an SSN or cannot file a FAFSA should complete a WASFA instead
**Independent students are their sole contributors



Offer tools to help students engage their caregivers

We created and encouraged students to share materials with their parents.

#3: Encourage Action



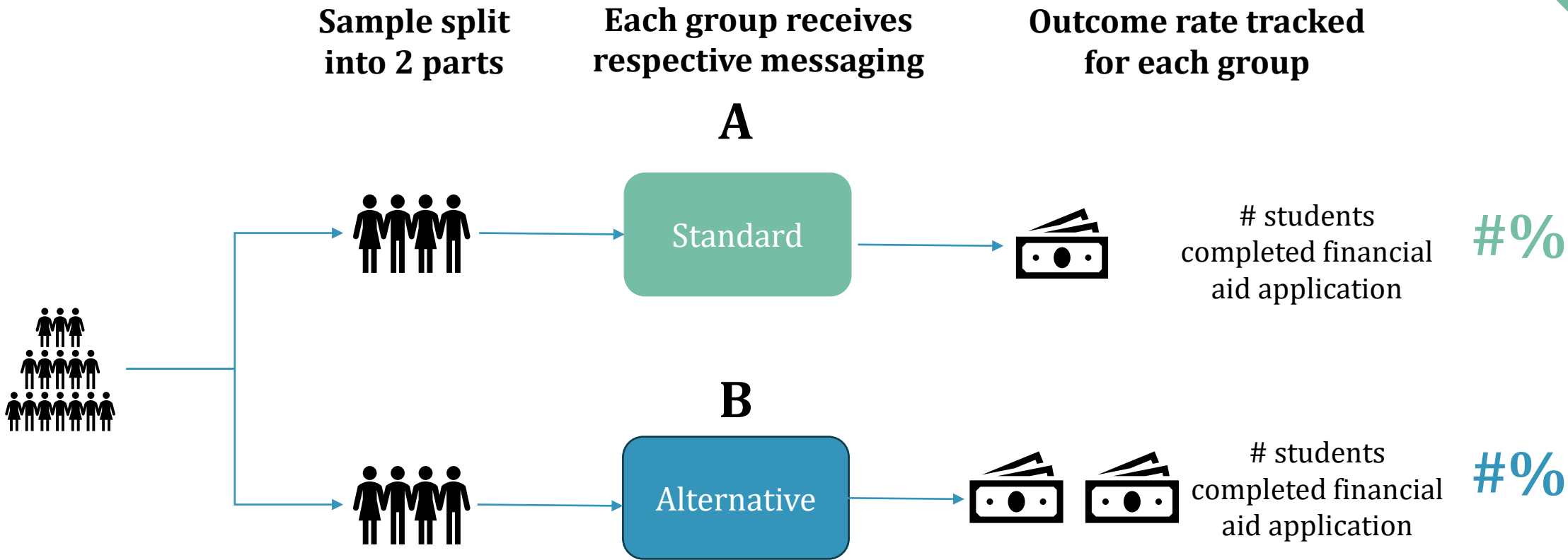
Nudge action!

We used principles such as loss aversion, social proof, reminders, etc.

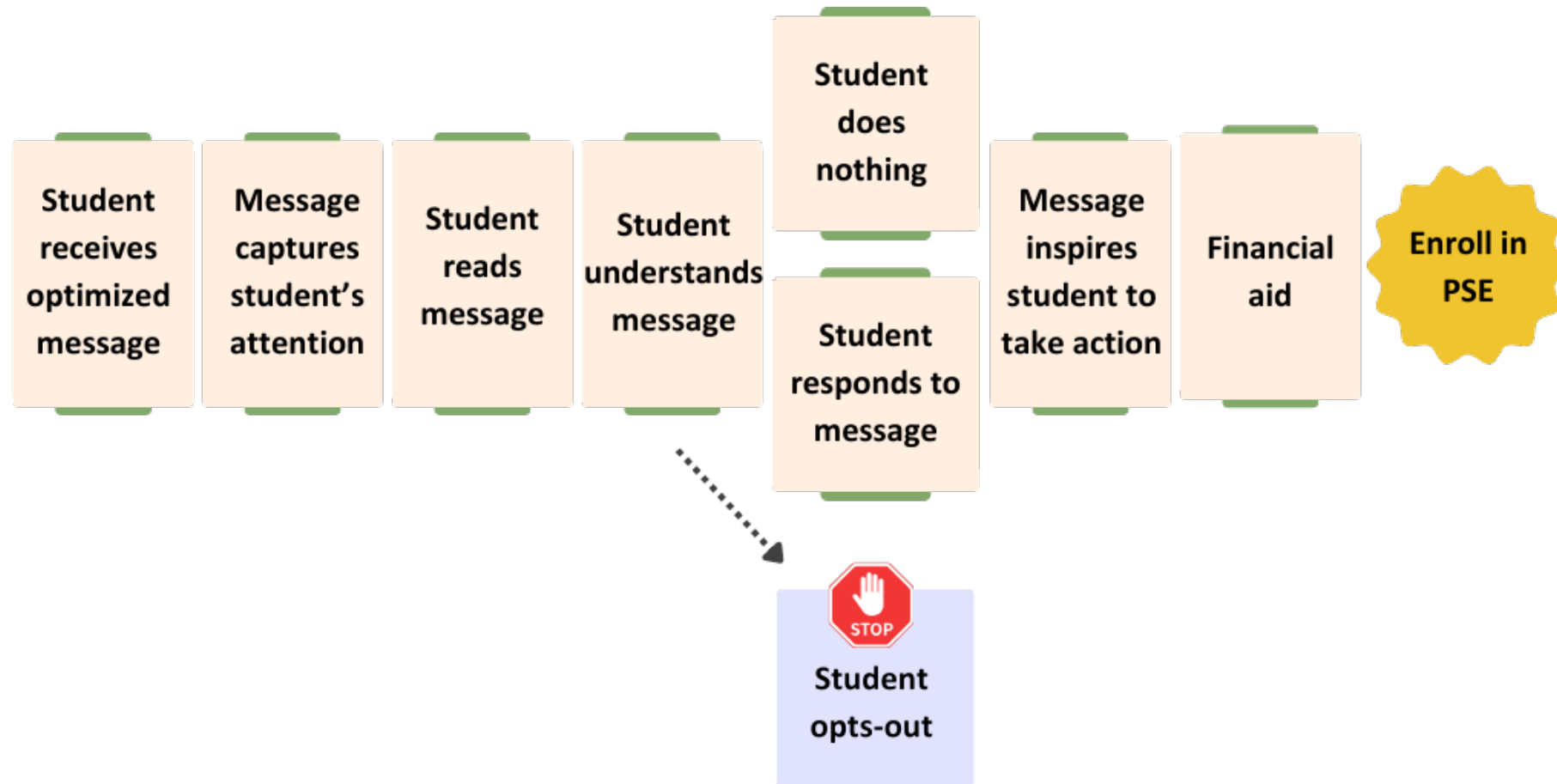


Phase 2: A/B Testing

OTTERS Project: Phase 2 – Overview

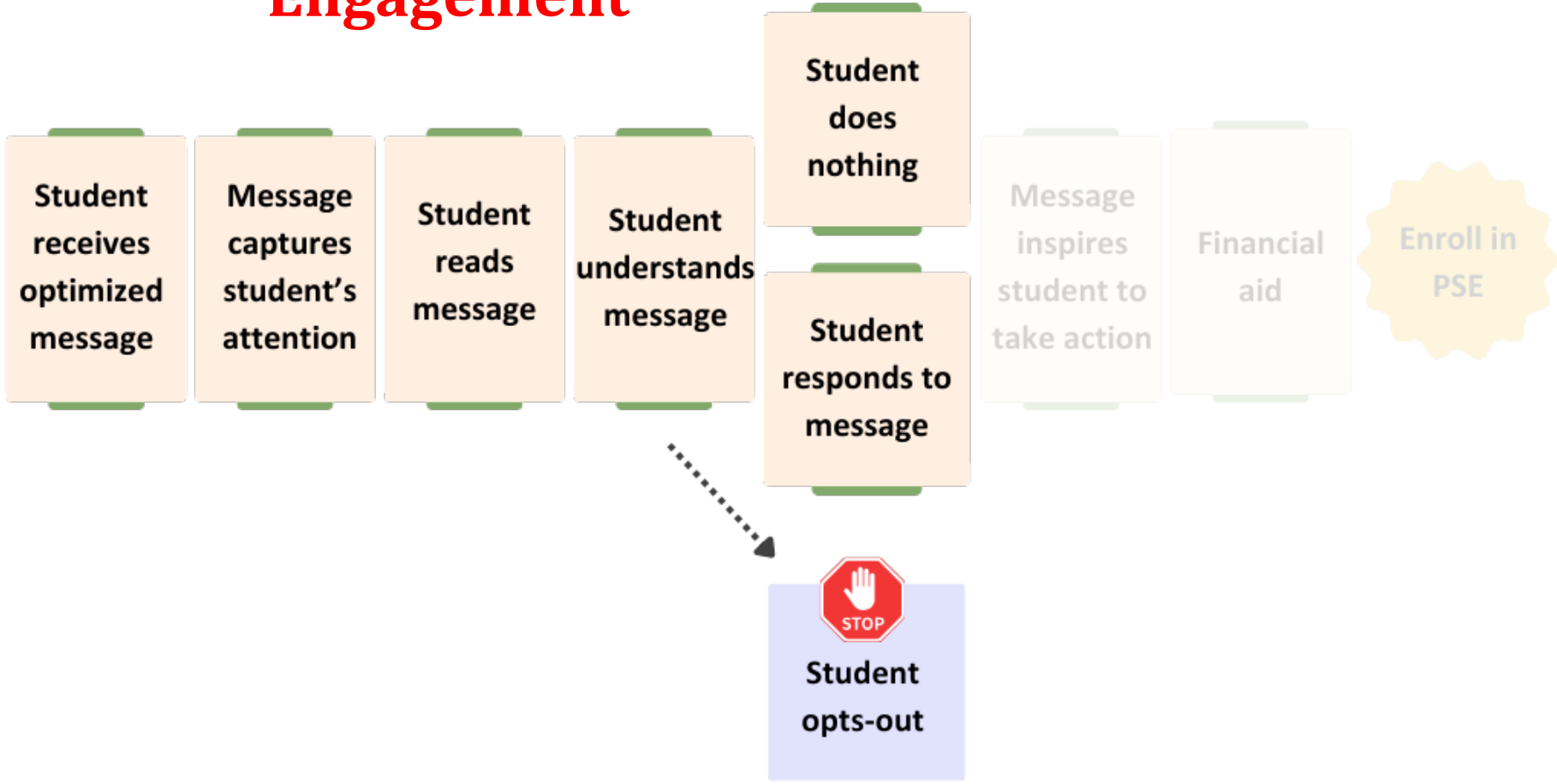


OTTERS Project: Phase 2: Overview

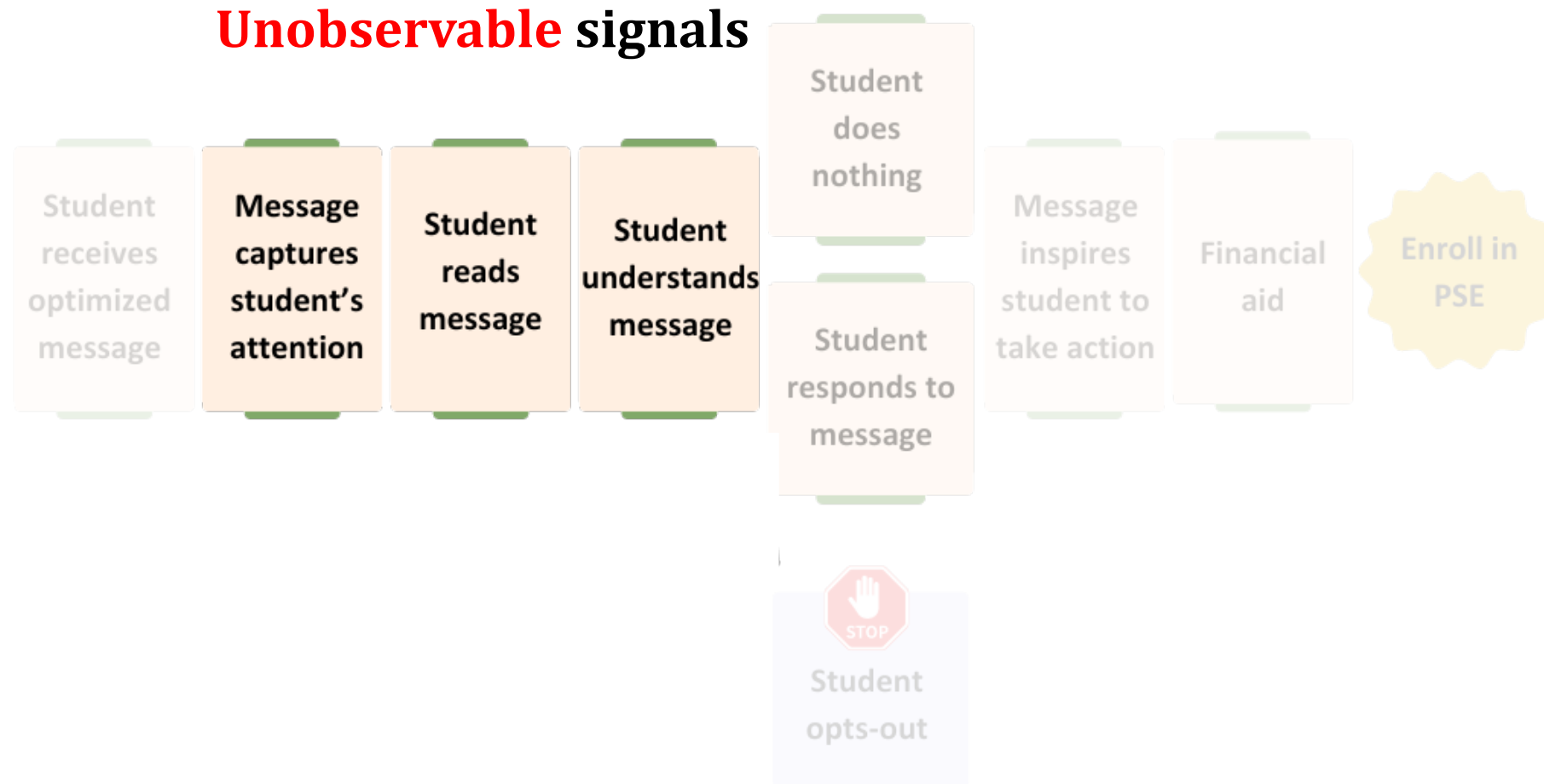


OTTERS Project: Phase 2: Overview

Engagement

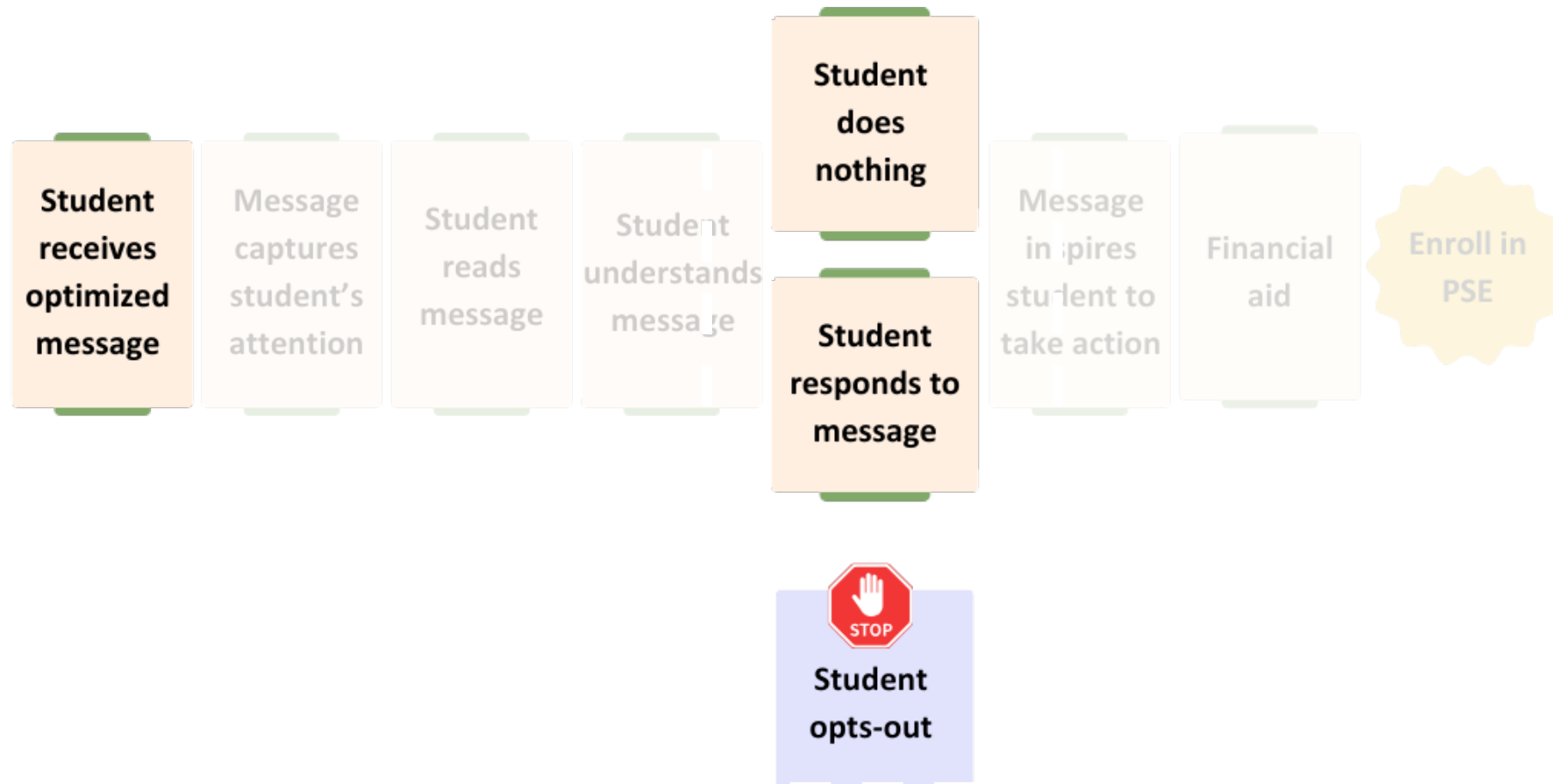


OTTERS Project: Phase 2: Overview



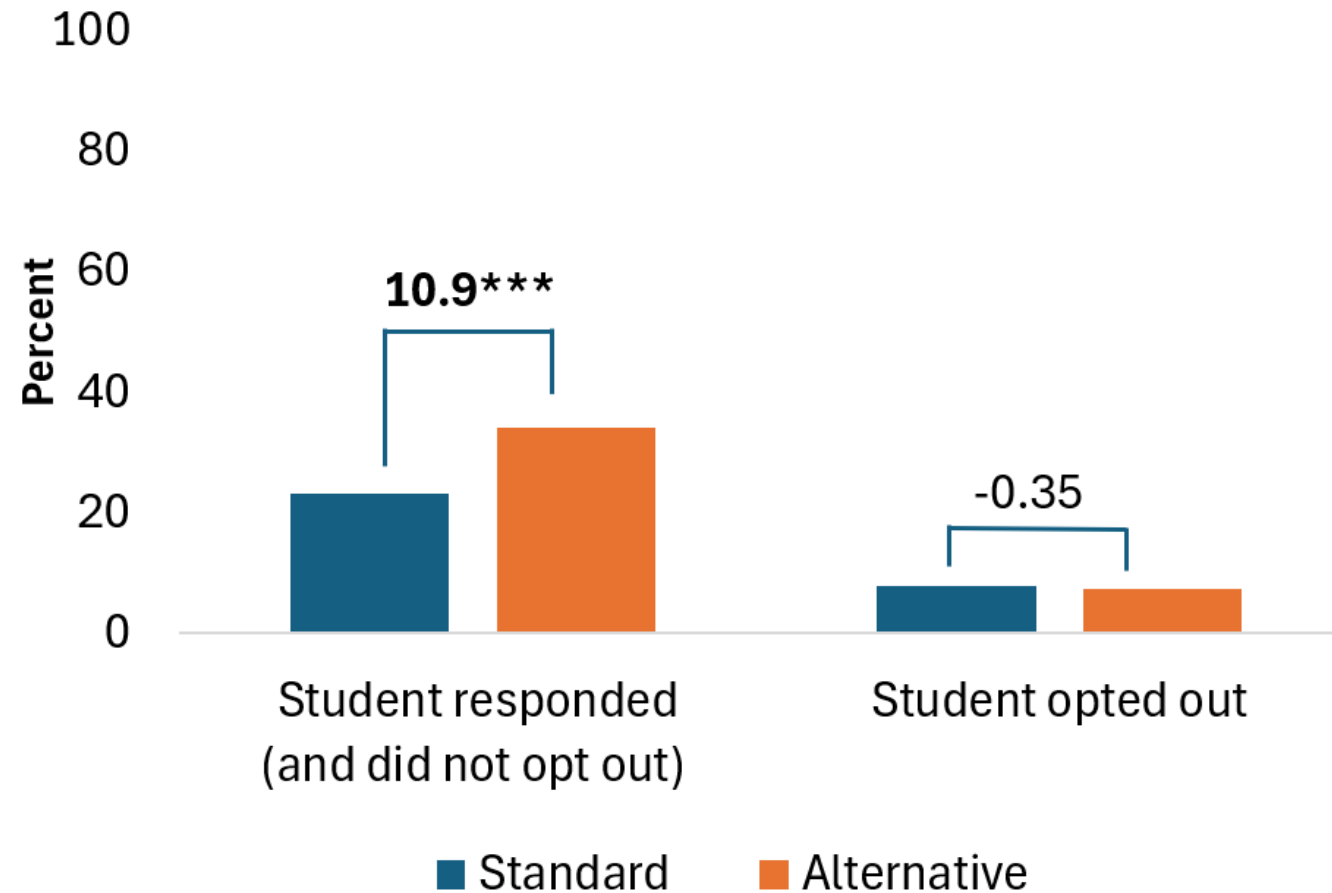
OTTERS Project: Phase 2: Overview

Observable signals



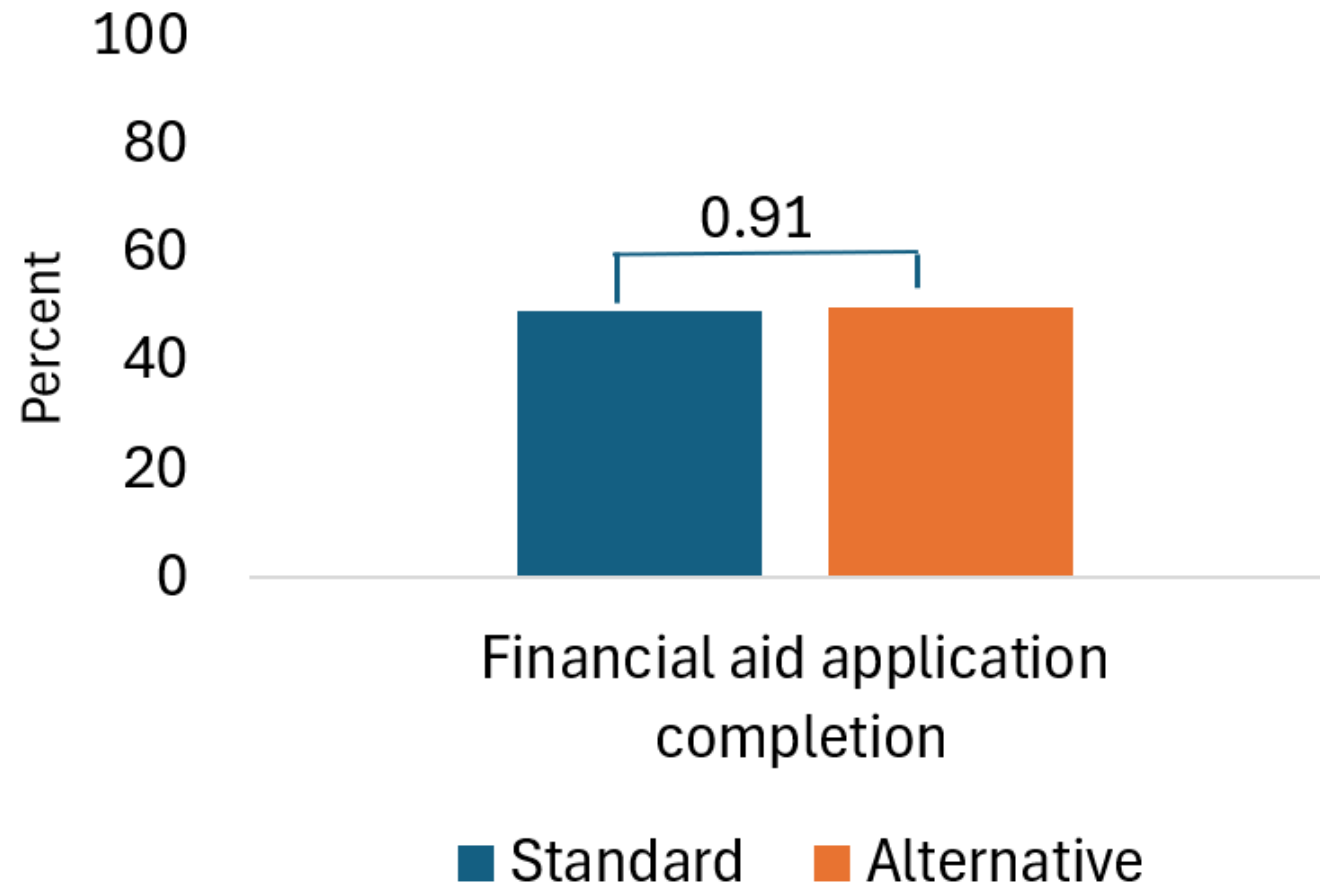
OTTERS Project: Phase 2 - A/B Testing

Alternative messaging led to higher response rates



OTTERS Project: Phase 2 - A/B Testing

No impacts on financial aid application completion so far



OTTERS Project: Phase 2 - A/B Testing

Subgroups

- Ethnicity (Hispanic vs. all other ethnic identities)
- Gender (male vs. female and nonbinary students)
- GPA (< 2.0, 2.0 – 3.0, and > 3.0)
- Population density (rural vs. non-rural)

OTTERS Project: Phase 2 - A/B Testing

-
- **Generally, the impacts are the same across subgroups**
 - Alternative messaging increased financial aid completion among non-Hispanics; Non-Hispanics also had higher rates of financial aid completion
 - Positive impact on financial aid completion among male students, but levels still lower than female-identifying and nonbinary students
 - Students with GPA > 3.0 had highest rates of engagement; among students with GPA < 2.0, alternative messaging reduced rates of opt out
 - Rural students receiving alternative messaging less likely to opt out

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 - **Rural students receiving alternative messaging less likely to opt out**

OTTERS Project: Looking forward

- OTTERS Report: Phase 1 & 2 Findings
- OTTERS Toolkit
- OTTERS Phase 3

Questions?

Thank you!

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WSAC:
sarahwe@wsac.wa.gov

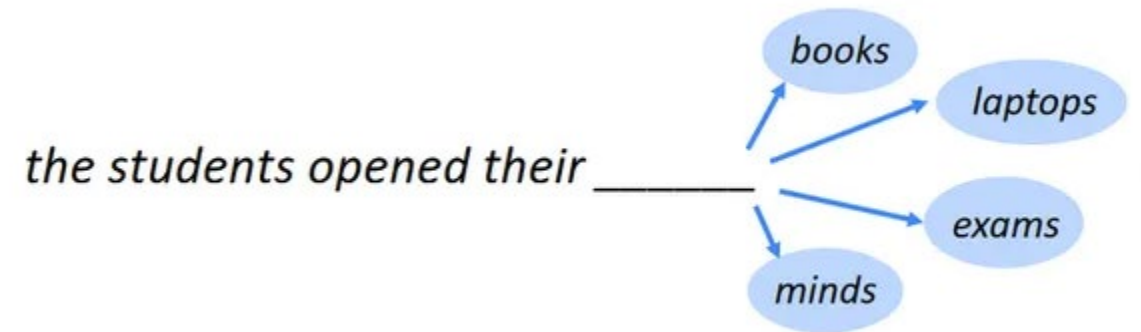


What is Generative AI?

A type of artificial intelligence that uses existing data to produce *new* content, including images, text, video, and audio

Different from traditional AI, which is trained to follow specific rules or perform discrete tasks, not to generate new content

Creates the possibility of everyone getting their own personalized intervention.

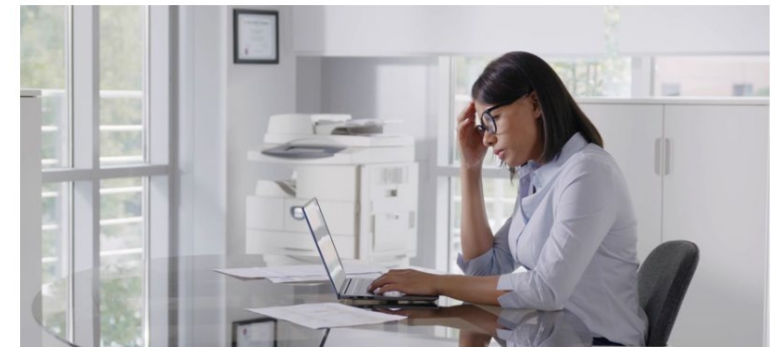


<https://www.analyticsvidhya.com/blog/2023/07/next-word-prediction-with-bidirectional-lstm/>

Six Tips to Get Gen AI Right (editorial)

- **Think it Through:** Ensure AI fits the problem and develop a theory of change.
- **Start with a Pilot Program:** Validate safety and effectiveness before scaling.
- **Analyze System Performance:** Understand flows and journeys.
- **Rapid A/B Testing:** Iterative testing to improve AI programs.
- **Ethical Data Use:** Diverse review boards and internal policies.
- **Understand Context:** Participant advisory boards for relevant questions and answers.

No shortcuts: Only well-managed AI will deliver on its promise



NIMTO/GETTYIMAGES

| By Richard Hendra

JUNE 14, 2024

How Could GenAI Improve Otters?

- 1. Enhanced Personalization** "Hi [Student Name], based on your interest in computer science and your GPA of 3.2, we found a scholarship specifically for students pursuing tech degrees at your preferred university, [University Name]. The deadline to apply is next month. Click here to learn more and start your application!"
- 2. Improved Engagement:** "Hello [Name], we noticed you're interested in applying to [University Name]. Here are some tips on how to enhance your application based on your academic profile and extracurricular activities."
- 3. Timely Information:** "Hi [Student Name], a new scholarship opportunity just opened up that aligns with your interests in environmental science. The application deadline is in two weeks. Here's the link to apply."
- 4. Scalable Coaching Models:** "Hi [Student Name], I see you have questions about your student loan options. Based on your financial background, here are some tailored loan options you can consider. If you need further assistance, our support team is here to help."

Breakout #1

How can generative AI enhance what chatbots are trying to do?



Ask Benji

Your Digital FAFSA assistant

Ask Benji Team



Graciela Nobles
Ask Benji Program
Manager



Lizette Blancas-Hernandez
Engagement Coordinator



Michael Wang
Partner & Data Coordinator



Dr. Murphy
Senior Director,
Attainment and AzCAN



AskBenji

Your Friendly FAFSA Digital Assistant

Anytime, Anywhere

24/7 FAFSA assistance
in the hands of all high
school seniors

Text "Hi Benji"
to 602-786-8171
and ask away



FAFSA Expert

Can answer over
1000+ responses to
FAFSA, college &
career questions

English & Spanish with
live agent support



Personalized Support

Align Benji with your
student's needs based
on FAFSA status

Custom messaging to
promote your FAFSA &
postsecondary events



A Collaborative Effort

Ask Benji is part of the
Arizona FAFSA
Coalition, a statewide
group of FREE
resources to increase
FAFSA awareness and
completion rate



Benji Class of 2024

Students Welcomed and launched in **October 2023**

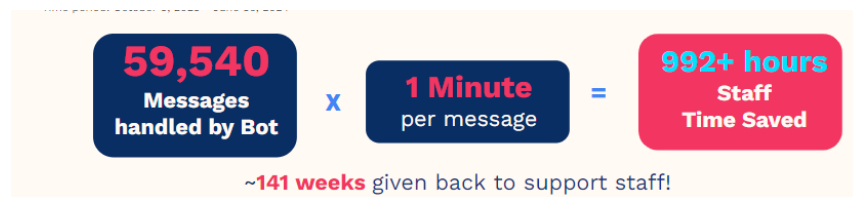
Topics:

- **FAFSA** & Promise Grant
- College & Career
- Scholarships and Student Programs
- Partner & Regional Event reminders
- Creating *more Benji* Commands #askbenji
- Summer Melt Themes

We created over 177 messages for students throughout the school year. Students average about 4-8 messages a month.

- **64 Interactive Messages & 113 Nudge Messages**

Platform Support: Mainstay



Personalized Messages



MOU Partnerships: Non-expiring and districts self-renewal by submitting data.

- ✓ Key data is required at the start of the year from our partners
- ✓ Personalization (“Hi Barbie”)

Opt-in process: Anyone can opt-in via the **number** and a **new web form**.

Benji will work with ABOR’s **AZ College Connect** Database for 2024-25.

- ✓ Our team tracks FAFSA application progress, aids in individual interactions
 - ✓ No match, partial match, incomplete, missing signature, incomplete, action required, and complete

First Name

Last Name

Middle
Initial

Birth Date

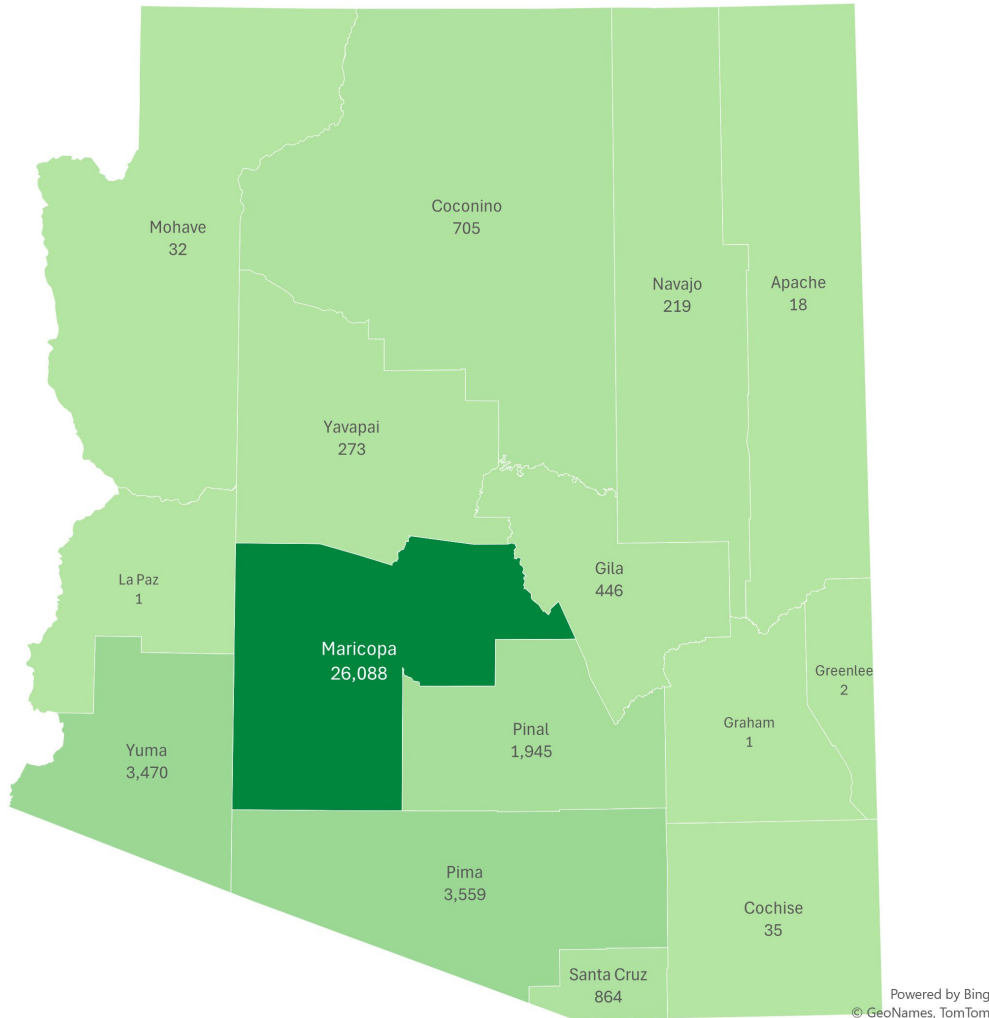
Zip Code

Graduation
Year

Phone
Number

Benji Seniors

Ask Benj by the County 2.10.24



Current MOU Partnerships

1. We are in 27 Districts, two unique partnerships, and 132 High Schools
 - **Two unique program partnerships**
 - **WestMEC**
 - **Grad Solutions**
2. We are in 198 High Schools via Benji partnerships and student opt-ins

New 2023-24 Benji Partners

Sahuarita Unified - Fall 2023

Nosotros Academy – Fall 2023

Colorado City District – Fall 2023



Junior Expansion

Junior Cohort Study

Study: We wanted to compare the AZ FAFSA completion rates of the class of 2025 compared to other students*

* This was our goal before the 2024-25 rollout of the FAFSA

- Limited messaging 2-3 a month vs. Seniors 4-8 messages a month

Question: Does Ask Benji messaging juniors...

- Increase FAFSA completion
- Increase steps taken towards CCR
- Increase postsecondary enrollment
- Increase sense of support

Comparison groups:

- Class of 2024 & 25 who didn't get junior messaging
- Class of 2024 & 25 who didn't get any Benji messages



A screenshot of a chatbot interface showing a list of cohorts. The list is titled "Cohorts" and contains ten entries, each with a checkmark icon, a name, and a number of messages.

Cohort	Messages
Dysart	1
Mesa	2
Marana	1
Nogales	1
Paradise Valley PV	1
Queen Creek	2
Yuma	1
Globe	1

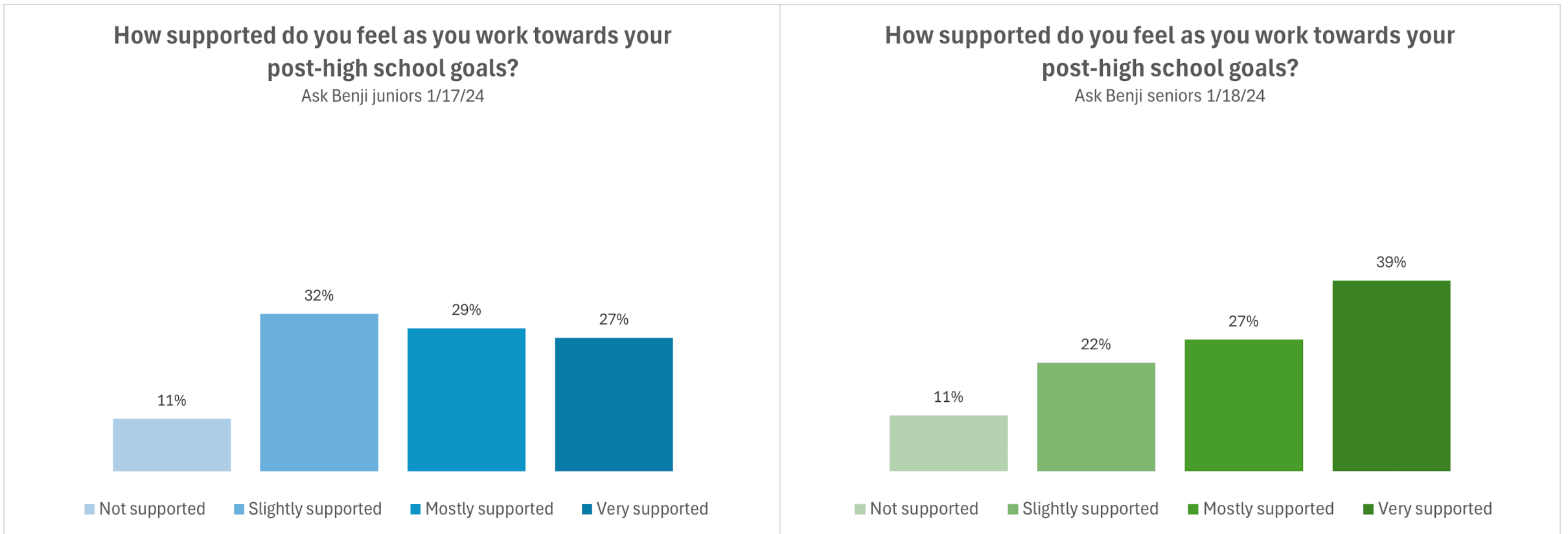
Junior Cohort Notes



Cohort Class of 2025	Frequency	Notes
Point of Contact for Juniors @school	2023-24 Academic Year	Send to Michael @ Ask Benji
Junior & Senior data needed	Submit by September 2023	Data Request Notification
Benji will start		Early October
Junior messaging a month	Bi-weekly	2-3 messages a month
Updates with the school team	2-3 update meetings/year	Onboarding plus data check-ins
Student Questionnaire "Survey"	6-8 questionnaire	During the Academic Year 2023-24
Benji branding on the school site	Start of year	School Materials and parent letters on Benji's toolkit
Region specific messages	1-3 a Semester	If you have school/district college, career, or FAFSA events, Benji can send student "nudges."

Junior Ah-Ha #1

Juniors feel less supported than seniors when it comes to their post-high school goals

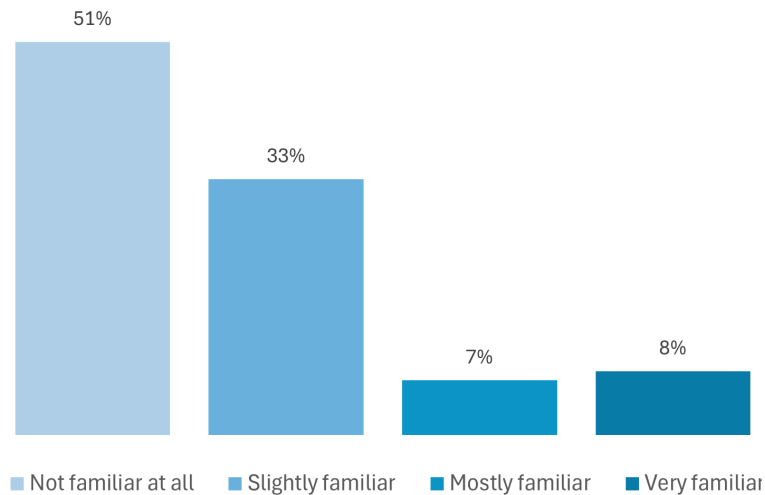


Sample size: 102 juniors, 444 seniors

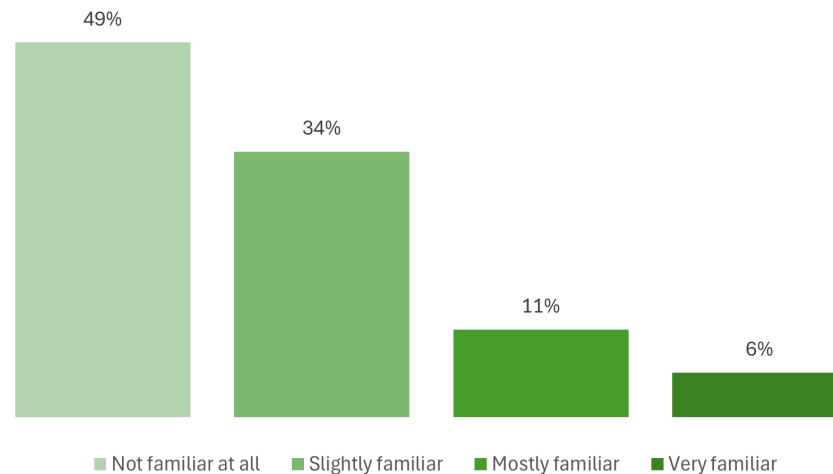
Junior Ah-Ha #2

Across hundreds of Benji juniors & seniors, students consistently feel they are not familiar with their options to pay for college

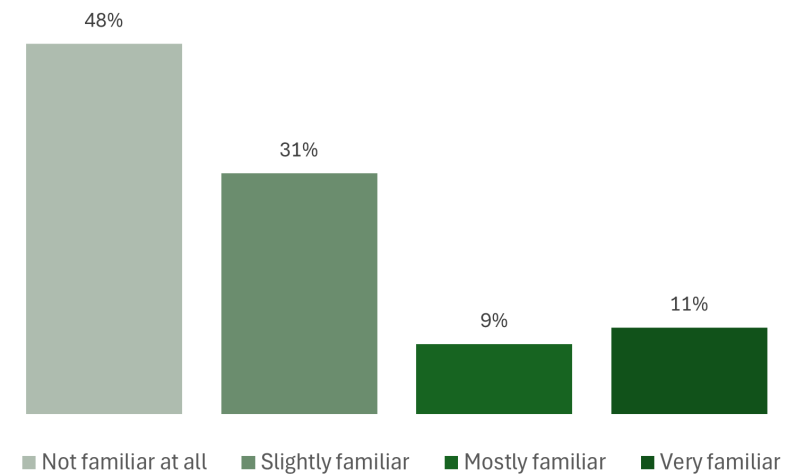
How familiar are you with your options to pay for college
All Benji juniors 5/15/24



How familiar are you with your options to pay for college?
All Benji seniors 12/7/23



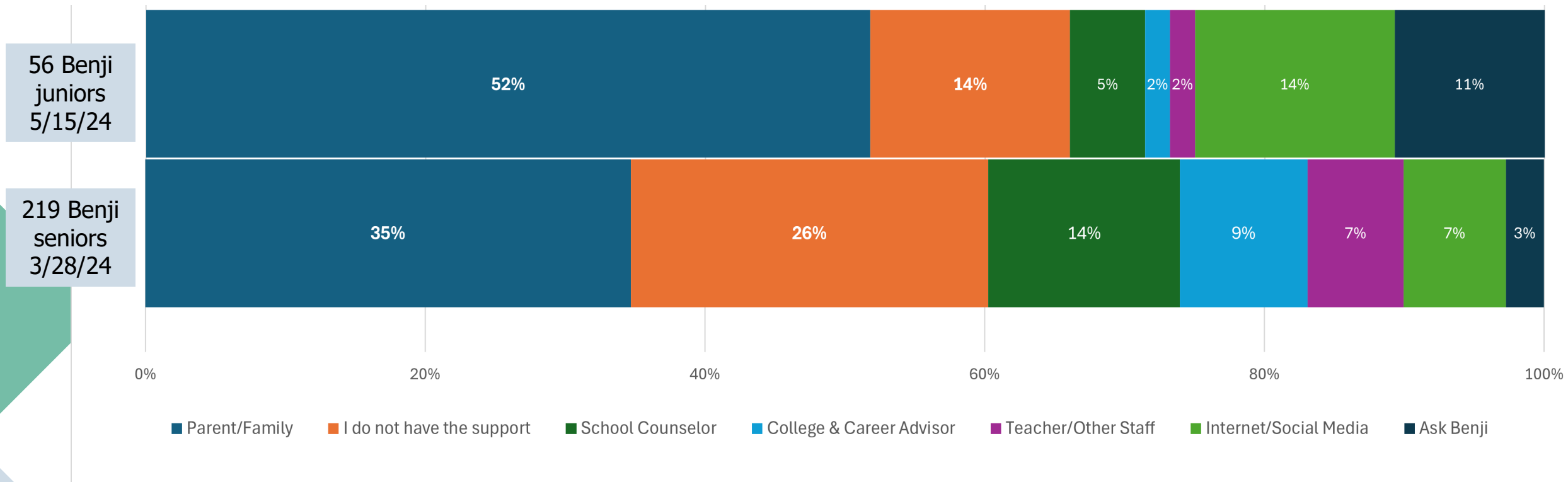
How familiar are you with your options to pay for college?
All Benji seniors 3/28/24



Sample size: 84 juniors, 540 seniors, 373 seniors

Junior Ah-Ha #3

Who has been the most helpful support when it comes to understanding your options to pay for college? The answers are concerning...



Partner Benefits

Messaging Flow

	October	November	December	January	February	March	April	May	June	July	August	September
Seniors	<ul style="list-style-type: none"> Postsecondary Goal 2023.10.25 Retake ACT 2023.10.19 	<ul style="list-style-type: none"> DE/AP/IB 2023.11.29 	<ul style="list-style-type: none"> Financial Aid Options 1 2023.12.07 Bot Survey 2023.12.20 	<ul style="list-style-type: none"> Helpful Support 2024.01.18 	<ul style="list-style-type: none"> FAFSA Myth 2024.02.01 	<ul style="list-style-type: none"> Spring Next Steps Financial Aid Options 2 	<ul style="list-style-type: none"> Bot Survey 2 Postsecondary match and fit question 	<ul style="list-style-type: none"> Postsecondary Selection 	<ul style="list-style-type: none"> FAFSA Check IN FAFSA/Partner Nudges 	<ul style="list-style-type: none"> College Next steps Award Letter FAFSA/Partner Nudges 	<ul style="list-style-type: none"> FAFSA last reminder College Start dates Goodbye! Class of 2024 	
Juniors	<ul style="list-style-type: none"> Postsecondary Goal 1 2023.10.26 	<ul style="list-style-type: none"> DE/AP/IB 2023.11.30 	<ul style="list-style-type: none"> Bot Survey 2023.12.20 	<ul style="list-style-type: none"> Helpful Support 2024.01.17 	<ul style="list-style-type: none"> Prepare for ACT 	<ul style="list-style-type: none"> Spring Next Steps 	<ul style="list-style-type: none"> Bot Survey 2 Postsecondary Goal 2 	<ul style="list-style-type: none"> How well do you understand options to pay for college? 	<ul style="list-style-type: none"> Paused 			<ul style="list-style-type: none"> Hello Seniors! Scholarship & Senior Prep

Partner Nudge Messages



Parent Breakfast/Workshop FAFSA

Please join us to finish your FAFSA
SATURDAY | JAN. 13 | 8-10AM

Red Mountain High School
In the Commons
NOTE: Student and parent BOTH have to have their FSA ID's finished a week ahead (Sign up required)



Hey, Benji here! Red Mountain High School is having a Parent Breakfast/FAFSA workshop on Jan. 13, 2024 from 8am-10 am. Parents and students must have FSA IDs completed a week ahead. Sign up is required, go to <https://forms.gle/UMqHeRZjcvhv5f999> to save your spot!

Hey there! Quick reminder: As you apply for FAFSA and other financial aid, it's also important to apply to the schools on your list if you haven't already. Schools can't send you a financial award letter if you haven't applied for admission!

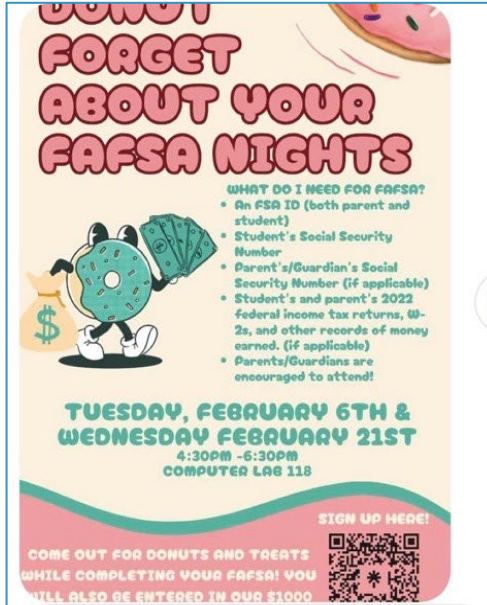
You can text #priority and #azcolleges to receive more info about priority deadlines and admission for AZ's institutions!

Hey there! College Depot is having a Scholarship Expo on Feb 1st from 4:30-6:30 pm at the Burton Barr Central Library where you'll get the opportunity to meet w/ local & national scholarship providers, attend a panel presentation, and receive scholarship help. Go to <https://mainst.ai/424Az4Z> to save your spot!

MOU school partners and our Az partners can request their events to become nudges.

Hey! There will be a FAFSA workshop on May 4th at 7014 E Camelback Rd. Suite 1459 from 10 a.m.-2 p.m. FAFSA experts will be available to answer your questions. Please create your FSA ID beforehand & view <https://mainst.ai/39pB7vj> for a list of required documents to bring.

Go to <https://mainst.ai/3Pluwnl> to RSVP now. Do you plan on attending the workshop? {Pls reply Yes or No}

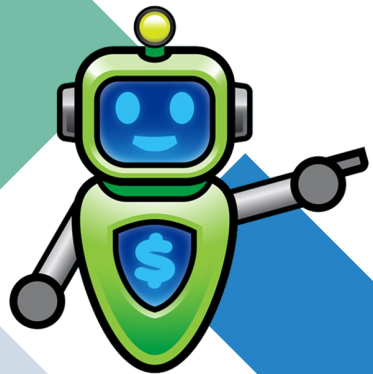


Hey seniors! Donut forget your FAFSA night at Marcos De Niza High School is on Wed, Feb. 21, from 4:30 PM to 6:30 PM @computer lab 118. There will be free donuts & raffles! Students and parent(s) please create your FSA IDs in advance. Check out the flyer for more info, or go to <https://mainst.ai/3Srd9m> to contact your College Connect advisor.

Partner Items & Events

Partner Benji Marketing Resources

- § Educator Toolkit and Media Toolkit for partners
- § Parent Letter about Benji (Eng & Esp) to explain Benji
- § Benji Logos for promotional use
- § Presentations to students and parents (on request and based on team capacity)



Juniors, why Ask Benji?

Pursuing a trade program, vocational, or college takes planning. There are many opportunities for students, don't miss out on Arizona opportunities for students!

- JUNIOR YEAR**
Your senior year will be busy, so it is important to take some steps this year. It will save you time and money!
- FINANCIAL AID**
Learn about the different types of financial aid include need-based and merit-based scholarships, grants, loans, and work-study programs.
- SUPPORT**
DON'T do it alone, ask questions to Benji to learn about what to expect your junior and senior year.

Ask Benji Text "Hi Benji" to (602) 786-8171 and get your financial aid questions answered!

Family Notification Class of 2025

Dear Parents and Students!

We are proud to partner with your school district and are excited to introduce Ask Benji, a free text chatbot designed to assist students and parents. Please take a moment to familiarize yourself with Ask Benji and how to use it this year.

Why Ask Benji?
Ask Benji is here to guide and support students and families through the financial aid and postsecondary education process, making it easier and more convenient. At the start of the school year, Ask Benji will send the student or parent a welcome text. You can opt-out anytime by texting STOP if you don't want to receive Benji's reminders. Standard message and data rates (including SMS and MMS) may apply.

Topic areas for students and parents:
Financial Aid information, processes, and benefits
Free Application for Federal Student Aid (FAFSA)
College and trade school event reminders
Parent and student information
Junior and senior action items

How to get started?
Ask Benji will launch October 2024 and our team will send out a welcome text from Ask Benji's number, (602) 786-8171. Save this number to your contacts, so you will know who is messaging to (602) 786-8171 to get started!

Sincerely,
Ask Benji Team
Digital FAFSA Assistance

Education Forward Arizona | 602-786-8171 | askbenji.org

Lunch & Learn Pathways to Student Success

VIRTUAL EVENTS
Monthly @11:30 AM - 12:30 PM
Registration Zoom links are attached to each event title, RSVP and share!

WED, AUG 14
Postsecondary Planning Resources and Updates
11:30 AM - 12:30 PM

WED, SEP 25
FAFSA Completion Secrets Unlocked
11:30 AM - 12:30 PM

WED, OCT 23
Addressing Basic Needs
11:30 AM - 12:30 PM

Updates from ADE
11:30 AM - 12:30 PM

Dr. Jennifer Murphy and Graciela Nobles, members of the Education Forward Arizona team, hope to create a community of practice by exploring relevant and insightful topics throughout the 2024-25 academic year.

2024-25 AY Benji's New Updates

NEW

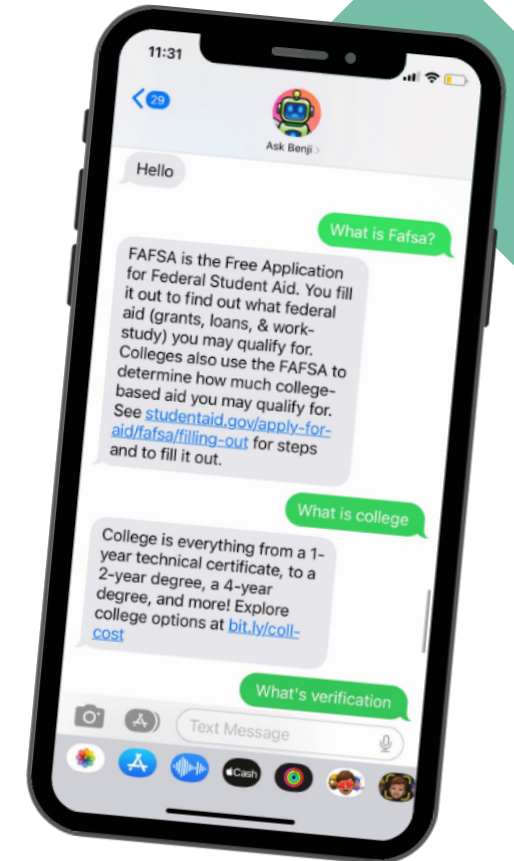
Parent Message

Senior Parents who engage with Benji will receive student messaging* throughout the school year, just like our senior students.

**Due to relevancy, parents may not receive all the messages to personalize their messaging experience better.*

Our team will customize key FAFSA messages for our parent users

- Send parents action items to help their student with FAFSA completion and next steps
 - FSA ID, contributor section, priority dates, and FAFSA help
- Share financial aid milestones their student should be completing
- Send potential custom partner nudges that are directed to parents



Senior and Juniors

Hello Lizette, Benji here! Setting goals can help you learn how to prepare, focus & challenge yourself. Now that you're navigating through your last year, I am curious about what your post-grad goals are as of now. {To get more info, choose the option that best applies to you by selecting one number}

- [1] Community College
- [2] University
- [3] Vocational/Trade School
- [4] Military
- [5] Workforce
- [6] Unsure

- **Updating the Ask Benji KB** 🧠 to include more vocational and college next steps
- **Revamp interactive questionnaire messages** to follow the rhythms of our AZ students
 - Including career and unsure messaging
 - Summer melt messages
- **Expansion of Juniors:** we will continue our Junior messages and are looking to add new school partners.
- **Student Toolkit** to be created so students and parents can access resources for their postsecondary goals.
- Providing the Benji Webchat bot for our partner schools
- College students using Benji for FAFSA help
- **New Opt-in form coming Fall 2024**



Thank you!



Questions?

Email gnobles@educationforwardarizona.org



Questions?

Breakout #2

- Tell us about your experience with chatbots or other navigation tools or technology.
- What is something you would recommend based on your experience or ideas?
- What do you want to do next?

OTTERS Toolkit: Preview

OTTERS Toolkit Contents

- Tool 1: Process Mapping
- Tool 2: Focus Groups to Gather input from Students and Parents
- Tool 3: Messaging Prototypes
- Tool 4: Survey Instruments
- Tool 5: How to Use the GitHub Repository
- Tool 6: How to prepare for administrative data analysis
- **Tool 7: How to create a Sankey Flow Chart**
- Tool 8: Regression Analysis
- **Tool 9: Random Forest Analysis**
- **Tool 10: Craft more effective communications with simple behavioral science tips**
- Tool 11: Random Assignment Best Practices
- Tool 12: Other A/B Testing Best Practices

Github Toolkit Overview

What is Github?

- Open-source code
- Promotes collaboration

Overview of the OTTERS Toolkit Repository Structure

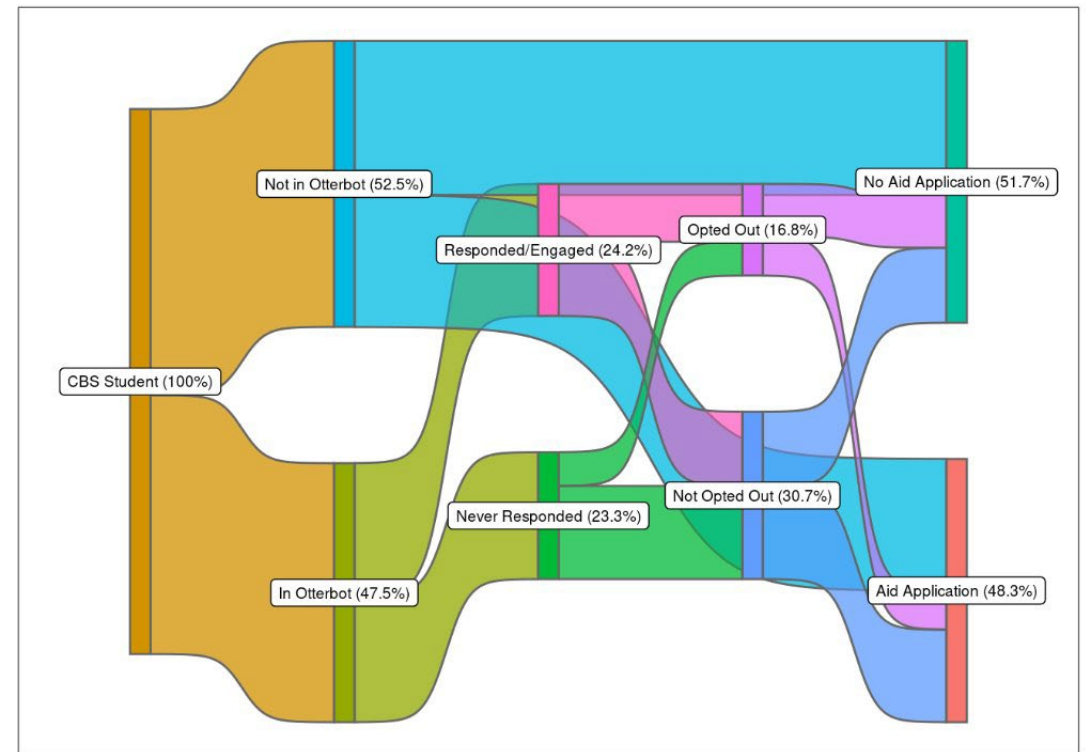
The folders and files within this repository are prefixed with numbers to indicate the order we suggest following. Below is an overview of this sequential structure:

0. [How to use this repository](#): general instructions on using the GitHub platform and the code provided. If you are new to this repository, please start here!
1. [Random Assignment](#):
2. [Creating Baseline Tables](#):
3. [How to create a Sankey Flow Chart](#):
4. [A/B Testing](#):
5. [Subgroup Analysis](#):
6. [Regression Analysis](#):
7. [Random Forest Analysis](#):
8. [Path Analysis](#):

Github Toolkit Overview

```
p1 <- df2 %>% filter(!is.na(student_research_id))%>%
  ggplot(aes(x = x,
            next_x = next_x,
            node = node,
            next_node = next_node,
            fill = node,
            label = paste0(node, " (", round(pct* 100,1), '%)' ))) +
  geom_sankey(flow.alpha = 0.5,
             node.color = NA,
             show.legend = FALSE) #+
  # geom_sankey_text(size = 3, color = "black", fill = NA, hjust = 0,
  #                  position = position_nudge(x = 0.1))
p1 <- p1 + geom_sankey_label(size = 2.5, position = "identity", color = "black", fill= "white", hjust = .5)

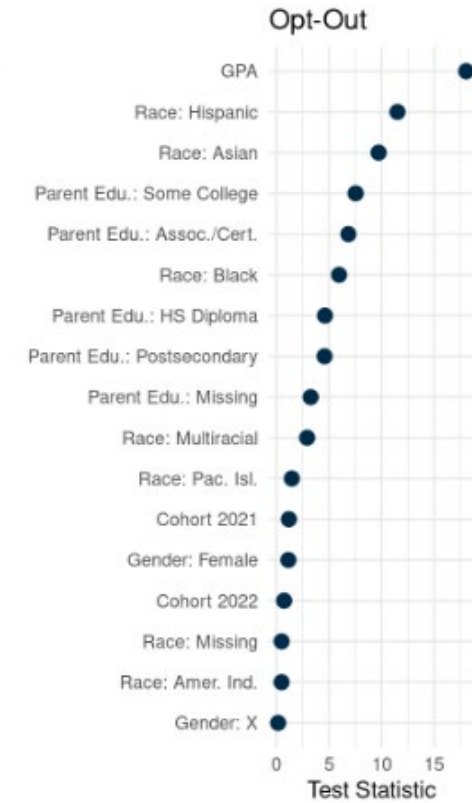
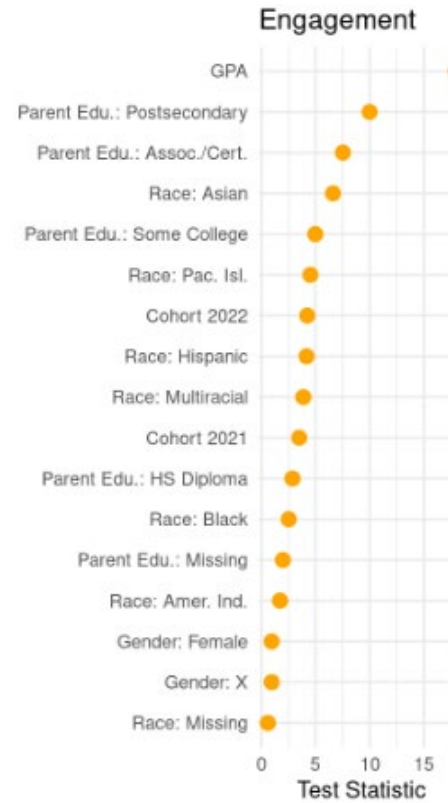
p1 <- p1 + theme_bw()
p1 <- p1 + theme(legend.position = "none")
p1 <- p1 + theme(axis.title = element_blank()
                , axis.text.y = element_blank()
                , axis.ticks = element_blank()
                , panel.grid = element_blank())
```



Github Toolkit Overview

```
# Create feature importance plot
p1 <- ggplot(importance_df, aes(reorder(Feature, Mean_Decrease_Accuracy), Mean_Decrease_Accuracy)) +
  geom_point(color = "#B1CBEB", size = 3) +
  labs(x = "Feature", y = "Mean Decrease Accuracy") +
  theme_minimal() +
  coord_flip() +
  theme(text = element_text(size = 14))
p2 <- ggplot(importance_df, aes(reorder(Feature, Mean_Decrease_Gini), Mean_Decrease_Gini)) +
  geom_point(color = "orange", size = 3) +
  labs(x = "", y = "Mean Decrease Gini") +
  theme_minimal() +
  coord_flip() +
  theme(text = element_text(size = 14))

plot_row <- plot_grid(p1, p2, ncol = 2)
```





**OTTERS Toolkit:
Behavioral Tips for More
Effective
Communications**

About this Tool

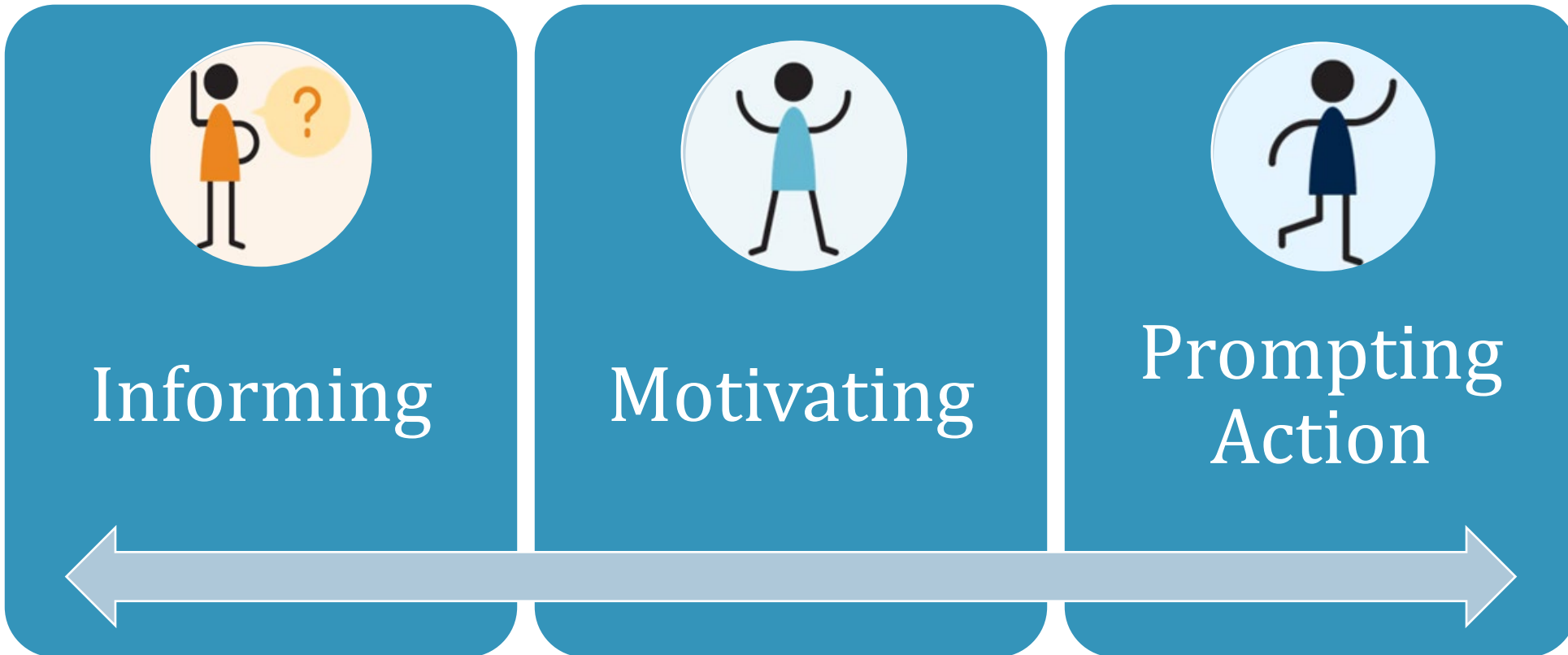


Goal: Help you support your audience to **take actions** (*e.g. sign up for benefits, complete forms, show up for meetings, etc.*)

What it is: A **checklist** with tips and behavioral science principles to improve the effectiveness of emails and text messages.

Who is it for: **Anyone** who writes emails or text messages.

Effective Communications



Tips to Craft Better Communications

Informing



1. Capture Attention

- Identify the (trusted) sender
- Personalize the message
- Convey a sense of importance or urgency

2. Ensure effortless understanding

- Avoid jargon
- Keep it short
- Use formatting strategically

Tip: Focus on one key message per communication to avoid overloading the recipient with information.

Tips to Craft Better Communications

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Motivating



1. Tailor the content

2. Highlight the consequences

Tip: Use clear and specific examples to make the consequences vivid and relatable.

Tips to Craft Better Communications

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Tip: Consider scheduling reminders at strategic intervals, such as a few days before the deadline or at key milestones in the process.

Motivating



1. Tailor the content

2. Highlight the consequences

Inspiring Action



1. Simplify the process

2. Provide clear instructions

3. Give deadlines

4. Prompt plan making

5. Send timely reminders

Tips to Craft Better Communications

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- Identify the (trusted) sender
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Inspiring Action



1. Simplify the process
2. Provide clear instructions
3. Give deadlines
4. Prompt plan making
5. Send timely reminders

Questions?

Thank you!

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