



Building a Legacy...

One Student at a Time!

SASFAA Annual Conference

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Rethinking Our Marketing, Publicity, and Communications Efforts in the Aid Office

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Agenda

- Definitions
- Why Does This Matter?
- Before Marketing, Publicity, and Communication
- Changing Expectations
- Formalizing the First Plan
- Adding the Talent
- Moving to the Next Level
- Current Approach
- Going Forward
- Questions



Definitions

- **Marketing** - The management process through which goods and services move from concept to the customer. It includes the coordination of four elements called the 4 P's of marketing:
 - (1) identification, selection and development of a product,
 - (2) determination of its price,
 - (3) selection of a distribution channel to reach the customer's place, and
 - (4) development and implementation of a promotional strategy.

Source: <http://www.businessdictionary.com/definition/marketing.html>



Definitions

- **Publicity** - Type of promotion that relies on public relations effect of a news story carried usually free by mass media. The main objective of publicity is not sales promotion, but creation of an image through editorial or 'independent source' commentary. While the publicist can control the content of the story, he or she may not have any control over its placement or interpretation by the media.

Source: <http://www.businessdictionary.com/definition/publicity.html>



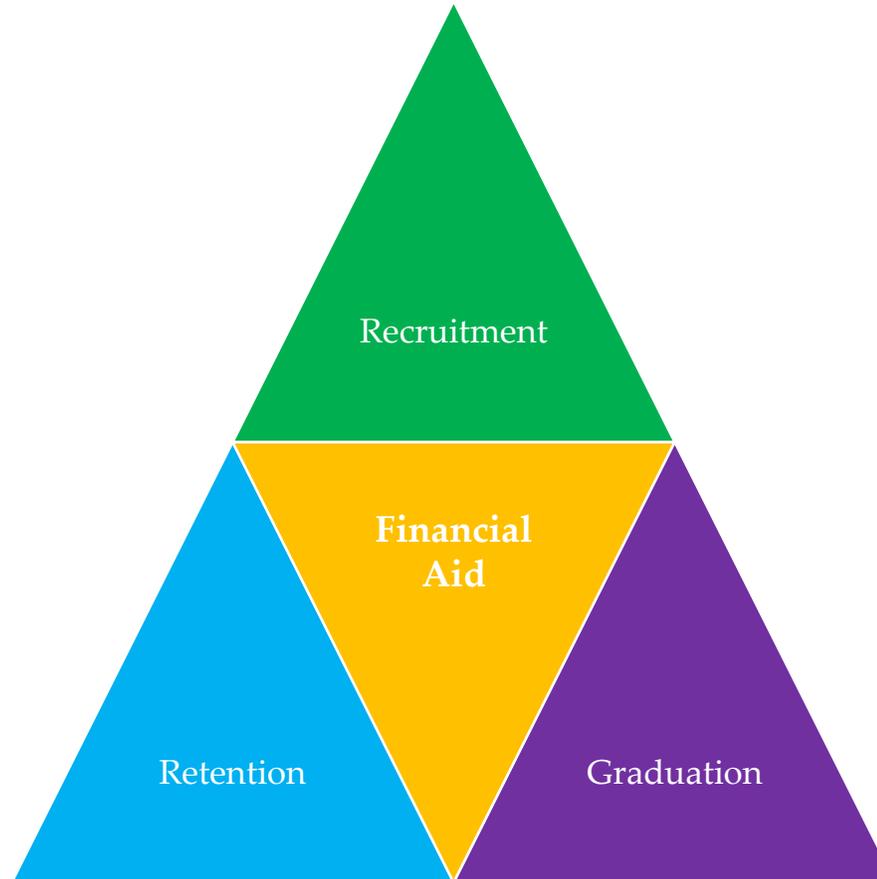
Definitions

- **Communication** - Two-way process of reaching mutual understanding, in which participants not only exchange (encode-decode) information, news, ideas and feelings but also create and share meaning. In general, communication is a means of connecting people or places. In business, it is a key function of management--an organization cannot operate without communication between levels, departments and employees.

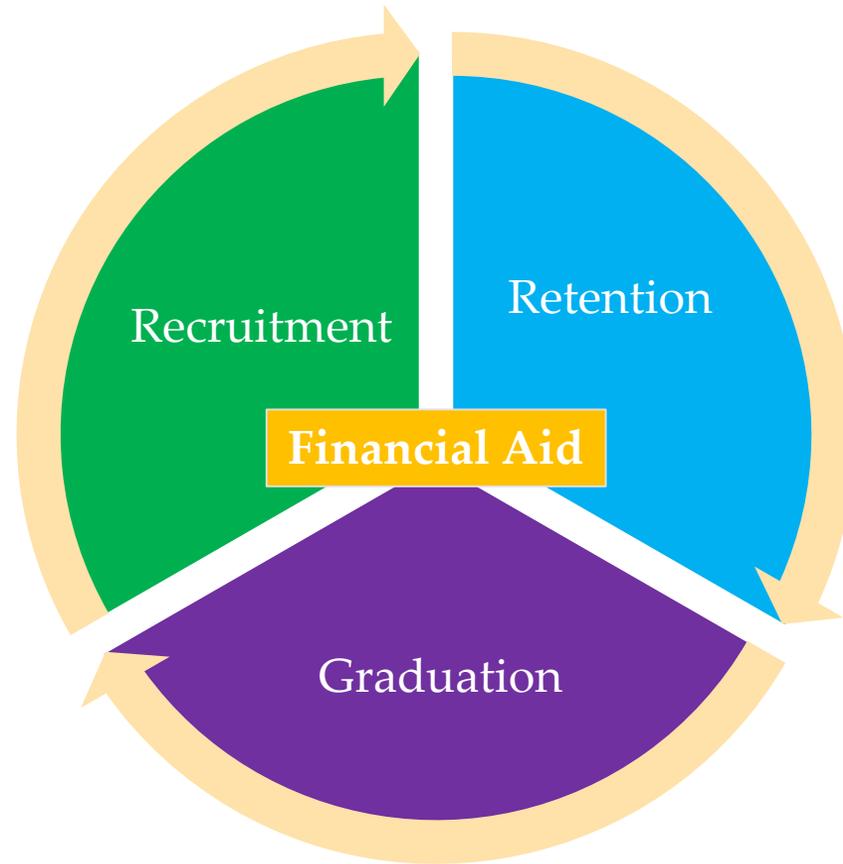
Source: <http://www.businessdictionary.com/definition/communication.html>



Why Does This Matter?



Why Does This Matter?



Why Does This Matter? Recruitment

- Effective and useful information for prospective students on the web
- Timely, relevant material for outreach events
- Regular interaction with incoming students
- Clear communication about items needed for aid determination (verification, etc.)
- Making the aid office feel accessible and supportive



Why Does This Matter? Retention

- Effective communication about requirements to maintain various awards (institutional awards, state scholarships, etc.)
- Timely communication about issues affecting continued aid receipt (SAP, etc.)
- Relevant information on the web for continuing students
- Regular outreach to specific student populations



Why Does This Matter? Graduation

- Effective communication about requirements to maintain various awards (institutional awards, state scholarships, etc.)
- Timely communication about issues affecting continued aid receipt (SAP, etc.)
- Effective notifications about student loan borrowing accumulation and exit counseling



Before Marketing, Publicity, and Communication



Before Marketing, Publicity, and Communication

- Segmented Website
- Various Targeted Emails
- Scrambling to Address Issues That Were Already Happening (Verification Issues, Loan Entrance Counseling Activity, etc.)
- Treating Marketing, Publicity, and Communication as a separate Effort, Rather Than Part of Strategic Planning



Changing Expectations

- Proactive Outreach
- Customer-Facing Website
- Presence Across Different Media Platforms
- Effective Use of Social Media
- Accessible and Responsive Staff
- Return to Print Media
- Office Visits for the Right Reasons



Formalizing the First Plan in 2011

- Defined the need:

“Recent experience has shown that an effective publicity campaign is needed to better communicate needed aid-related actions to students. In the past, publicity campaigns were generally administered by each individual area within the aid office, with varying degrees of success. During the 2011-2012 aid processing cycle, publicity efforts were largely abandoned, with significant negative consequences during the Fall 2011 fee payment period.”



Formalizing the First Plan in 2011

Identified Effective Forms of Communication at That Time:

- Email
- Auto-Dialer
- Blackboard Announcement
- VIP Announcement
- Office Website Announcements
- Daily Gamecock Print Advertisements
- Office Facebook Posts
- Print Media
- Formal Letters



Formalizing the First Plan in 2011

Established Rules of Thumb:

- When communicating complex needs or lengthy URLs, email communication is the most effective approach.
- Portal announcements are effective when used to communicate general information, and lengthy URLs.
- Auto-Dialer communication is effective when used to reach students during the summer, when students are traditionally away from University email, University websites, and portal. Auto-Dialer communication is effective for general, simple reminders, but is less effective for communication of complex needs.
- Facebook communication is effective when used to communicate a variety of different types of information, but the current audience is limited.
- Print media is effective when used in person and as part of mailings.
- Office website announcements are generally effective throughout the year, but can't be targeted to specific students



Formalizing the First Plan in 2011

Identified Topics of Immediate Need:

- Direct Loan Activity (Accept/Decline, Entrance Counseling, Master Promissory Note etc.)
- FAFSA Completion (Reminders about upcoming year, incomplete FAFSA, verification, etc.)
- State Scholarship Certification Activity (Certification)
- Summer Financial Aid
- Reminders to Current PLUS and Private Loan Borrowers Who Have Not Applied for the Upcoming Year



Row Labels	Email	Daily Gamecock	Adobe Captivate for Commercial	You Tube	Facebook	Autodialer	Letter on letterhead	Newsletter	Website	Postcards	Pamphlet	Messages on SSC
January												
April 1 Priority Deadline (define what this means) (December 2013) (After Admissions Deadline)	X	X			X			X	X			X
Communicating to current LIFE recipients after fall if in jeopardy of losing (January)							X					
January 1 First Day to Complete FAFSA (December 2013) (After Admissions Deadline)	X	X			X			X	X			X
Options for summer coursework to retain/regain LIFE (January and perhaps again at conclusion of Spring)		X			X		X					
February												
Documents specific to office policy (February and ongoing)												
Readmit – SAP (February)	X											
SSC Education – (specific instructions on financial aid section) (February and ongoing, bill-specific around Mid-July)		X	X	X	X			X	X			
Transfers/Campus changes – Refer to transfer checklist, transfer GPA vs USC GPA (February) Verification (students who have not responded, incomplete) (February)	X				X		X	X				X
March												
Summer (March)	X	X			X			X	X			X
April												
August 1 deadline (define what this means) Complete FAFSA, Complete verification, complete PLUS applications (April 2)	X	X			X	X	X	X	X	X	X	X
Clarify loan acceptance process (accepting for the year) (April)	X											
DL Accept/Decline Loans (April 1)	X											
DL Entrance Counseling (April 1)	X											
DL Prom Notes (April 1)	X											
FWS (April)	X											
How we are communicating (eg what email address) (December 2013 and ongoing)		X						X		X		
Non University Scholarships					X			X	X			
Students Nearing 600% Pell (April)	X											
Students Nearing Loan Limits – warning them, alternatives (April)	X											
May												
LIFE – must meet SAP (May)	X	X			X			X	X			
LIFE – summer coursework and expectations of award timing (May)	X	X			X			X	X			
PLUS Application (May 1)	X	X			X	X	X	X	X			X
SAP (deadlines, refer to SSC, where to find Academic Progress tab) (mid-May)	X	X			X							
June												
Private Loans (June)	X	X			X	X		X				
Students Deciding Not to Attend (June)	X											
July												
Aid posted to account automatically (authorized vs paid) (July)	X	X	X		X			X	X	X		
Bill (Mid July)	X	X			X			X	X			
Disbursement Error Messages (mid July)	X	X			X			X	X			X
GA Tuition Supplement (proration) (mid July)	X	X			X			X	X			
Review balance after aid posted (July)	X	X	X		X			X	X			X
August												
Health Professions – term-based prom notes (contingent upon report to ECSI)	X											
Perkins Loan – everything (MPN, entrance counseling, ECSI site) (contingent upon reporting to ECSI)	X											
Per Term												
Transient/Study Abroad (per term)		X			X			X	X			
TBD												
Gamecock Gateway interaction and guidance (During Year of Enrollment)		X			X			X				
Grand Total	27	19	3	1	21	4	6	20	15	3	1	8



Formalizing the First Plan in 2011

Did it Work?

- On 6/19/14, a letter was mailed to the permanent address of all 2013-14 FAFSA filers enrolled for Fall 2014, with no 2014-15 FAFSA received. The letter encouraged the student to complete their 2014-15 FAFSA as soon as possible. After the letter was sent, an additional **1525** 2014-15 FAFSAs were received within two weeks. This represents a **4%** increase.



Formalizing the First Plan in 2011

Did it Work?

- On 6/19/14 a letter was mailed to the permanent address of all 2014-15 FAFSA filers enrolled for Fall 2014, who had not completed the verification process. The letter urged the student to complete the verification process as soon as possible. After the letter was sent, an additional **266** applicants completed verification. This represents a **11%** increase.



Formalizing the First Plan in 2011

Did it Work?

- On 7/17/14, an email was sent to all 2013-14 FAFSA filers enrolled for Fall 2014, with no 2014-15 FAFSA received. The email encouraged the student to complete their 2014-15 FAFSA as soon as possible. After the email was sent, an additional **1300** 2014-15 FAFSAs were received within two weeks. This represents a **3%** increase.



Formalizing the First Plan in 2011

Did it Work?

- On 7/7/14 an email was sent to all 2013-14 PLUS Loan recipients enrolled for Fall 2014, with no 2014-15 PLUS Loan application received. The email urged the student to complete the PLUS Loan application as soon as possible. After the email was sent, an additional **808** PLUS Loan applications were received within two weeks. This represents a **91%** increase.



Formalizing the First Plan in 2011

Did it Work?

- On 7/17/14 an email was sent to all 2013-14 Private Loan recipients enrolled for Fall 2014, with no 2014-15 Private Loan application received. The email encouraged the student to complete the Private Loan application as soon as possible. After the email was sent, an additional **275** Private Loan applications were received within two weeks. This represents a **73%** increase.



Formalizing the First Plan in 2011

Did it Work?

- On 7/17/14 an email was sent to all 2014-15 FAFSA filers enrolled for Fall 2014, who had not completed the verification process. The email urged the student to complete the verification process as soon as possible. After the email was sent, an additional **353** applicants completed verification within two weeks. This represents a **12%** increase.



Adding the Talent

- Identified the need for a full-time position dedicated to our marketing, publicity, and communication efforts. That position would be charged with managing our “image.”
- Created and filled a new Assistant Director for Marketing, Publicity, and Communication Position.



Moving to the Next Level

- Assistant Director of Marketing, Publicity, and Communications responsibilities:
 - Provide consistent communications across all mediums to include print and web media
 - Manage the office brand to include digital presence
 - Participate in various outreach activities
 - Coordinate our role in New Student Orientation



Moving to the Next Level

The Epiphany...

- Recognize the vision of the University
- Understand the strategic goals of the financial aid office
- Set up a plan of action to move the office forward



Operation R.I.D.

- Review the current policies and procedures
 - Entailed working through a semester with the current policies and procedures
- Identify areas to improve upon
- Develop an improved marketing strategy and communications calendar



Operation R.I.D.

What were the results?

- Policy creation
- Customer segmentation inaccurate
 - Student driven but not student focused
- Email communication consistency
- Digital presence engagement
 - Provide quality content
- Revitalization of image
- Website overhaul



Current Approach

- Communications Calendar
- Email communication reports
- Created a Content Calendar for Social Media
- Use of various print and web media
 - The Daily Gamecock
 - The Garnet Guide
 - Brochures
 - Email
 - Social Media
 - Website



Using Different Types of Media

- The Daily Gamecock—the University's newspaper
 - Reminders of deadlines or special announcements
- The Garnet Guide—New Student Orientation publication
 - Provide a two-paged ad for frequently asked questions that's provided to students attending orientation sessions in the spring
- Brochures—Quick informational pieces about the financial aid process and financial aid programs available
 - Used internally and externally



Using Different Types of Media

- Email
 - Call to Action and Informational—Targeted Emails
 - Based on communications calendar
 - Counselors on email duty
- Social Media
 - Currently using Facebook and Twitter
 - Created a content calendar
- Website—new website launched January 23, 2017
 - User friendly and student focused



Effectiveness of Media

Print Media is hard to measure but the easiest way to measure it is to look at your inventory and your target customer response.

1. Do you frequently order replacement material?
2. Is your counseling staff using the information?
3. Is there a demand for your brochures from other departments?



Examples of Print Media



Applying for Aid

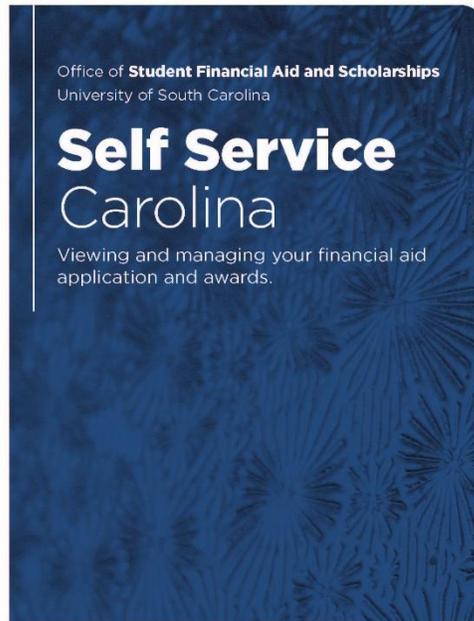
- Complete the Free Application For Federal Student Aid (FAFSA). This application is required for federal financial aid, including federal student loans. You can complete the FAFSA online at www.fafsa.ed.gov. We will send you an email when we receive your FAFSA.
- Check your financial aid eligibility and review any outstanding requirements on Self Service Carolina once our office has received your FAFSA. Federal aid cannot be awarded until your FAFSA is complete and all requirements are satisfied.
- Apply for non-institutional scholarships. Assistance can be found on our website at www.sc.edu/financialaid.

Reviewing and Finalizing Your Awards

- Review and Accept, Decline, or Make Changes to your awards on Self Service Carolina.
- If you are accepting Federal Student Loans, complete the Federal Direct Loan Entrance Counseling at www.studentloans.gov.
- If you are accepting Federal Student Loans, you may complete your Federal Direct Loan Master Promissory Note (MPN) at www.studentloans.gov.
- If you were awarded a Federal Perkins Loan, please complete your promissory note and other loan requirements.
- If you have been awarded Federal Work Study, search for job postings that interest you. You can search the job postings online at www.sc.edu/financialaid. If you have not been awarded Federal Work Study and you wish to be considered for it, please contact our office.

Receiving Your Financial Aid

- Complete the Title IV Fee Authorization on Self Service Carolina by clicking on the "Resources/Additional Information" tab under "Aid For Award Year."



Applying for Aid

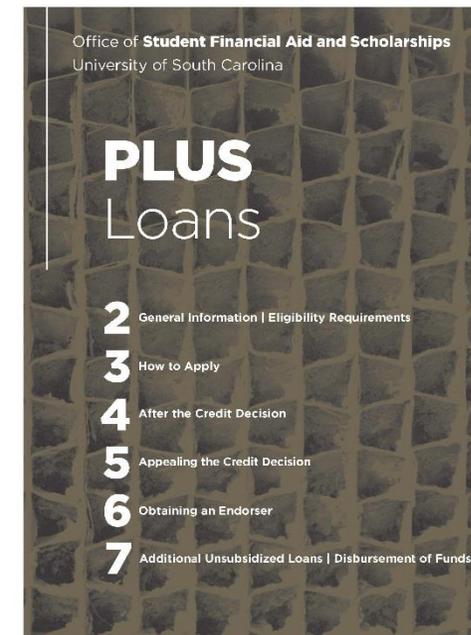
- Complete the Free Application For Federal Student Aid (FAFSA). This application is required for federal financial aid, including federal student loans. You can complete the FAFSA online at www.fafsa.ed.gov. We will send you an email when we receive your FAFSA.
- Check your financial aid eligibility and review any outstanding requirements on Self Service Carolina once our office has received your FAFSA. Federal aid cannot be awarded until your FAFSA is complete and all requirements are satisfied.

Reviewing and Finalizing Your Awards

- Review and Accept, Decline, or Make Changes to your awards on Self Service Carolina.
- If you are accepting Federal Student Loans and have not borrowed any federal loans in the past, complete the Federal Direct Loan Entrance Counseling and the Federal Promissory Note (MPN) at www.studentloans.gov.
- If you have been awarded Federal Work Study, search for job postings that interest you. Visit our website at www.sc.edu/financialaid to search for job postings. If you have not been awarded Federal Work Study and you wish to be considered for it, please contact our office.
- If you have been awarded a Graduate Assistantship/Tuition Supplement and it is not on Self Service Carolina, contact your department to ensure the form from your department has been completed and returned to our office.

Receiving Your Financial Aid

- Complete the Title IV Fee Authorization on Self Service Carolina by clicking on the "Resources/Additional Information" tab under "Aid For Award Year."



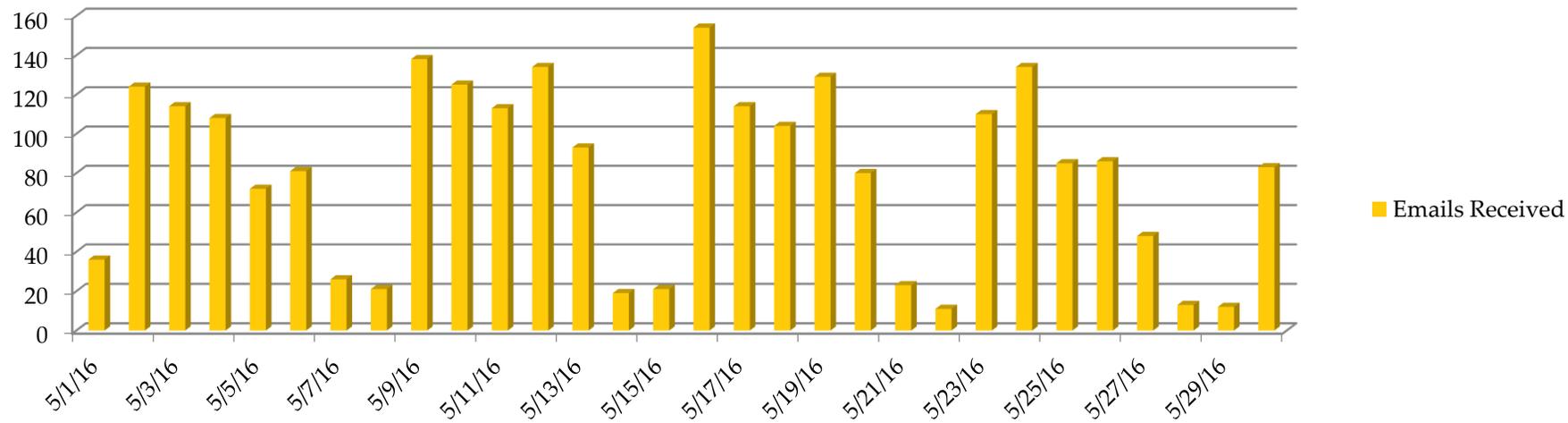
- 2 General Information | Eligibility Requirements
- 3 How to Apply
- 4 After the Credit Decision
- 5 Appealing the Credit Decision
- 6 Obtaining an Endorser
- 7 Additional Unsubsidized Loans | Disbursement of Funds



Effectiveness of Media

- Email
 - Email Counselors
 - Visitor and call volume were down and email volume increased for May 2016

Emails Received



Targeted Email Example

To: Day, John
From: USC-Columbia Financial Aid
Subject: Important Info - Spring Aid



Subject

Dear John,

Our records show that you have applied for admission to the University of South Carolina - Columbia for Spring 2017. If you are planning to attend classes in January, and wish to apply for any type of financial aid or South Carolina state grant or scholarship assistance (Palmetto Fellows, LIFE and HOPE Scholarships, and SC Need-Based Grant), we have provided you with a checklist that we hope will help guide you in the process.



Concern

The checklist is available at http://www.sc.edu/financialaid/checklists/incoming_transfer/default.html.



Call to Action

Please feel free to contact us by email at USCFAID@sc.edu or by phone at (803) 777-8134 with any questions you may have. You can also find us on Facebook at <https://www.facebook.com/USCFinaid> and Twitter at [@USCFAID](https://twitter.com/USCFAID). We look forward to helping you.



Contact Information

Office of Student Financial Aid and Scholarships

A00012345



Student ID

USC-Columbia Financial Aid
USCFAID@sc.edu



Effectiveness of Media

- Social Media
 - Facebook
 - Increased followers to 2,290
 - Increased engagement with audience
 - Twitter
 - June 2016, highest number of tweet impressions 6,789



USC Columbia Office of Student Financial Aid and Scholarships

Published by Rosalind S. Elliott [?] · September 26, 2016 · 🌐

The Office of Student Financial Aid and Scholarships is looking for dedicated students who will exemplify professionalism and integrity while working in an office setting. If this is you, apply today at http://www.sc.edu/cgi-bin/finaid/job_show.cgi?jobid=19. You must be eligible for work study.



3,164 people reached

Boost Post

Effectiveness of Media—New Website

January 23, 2017- January 31, 2017

23,776 Page Views

- Top 10 Pages
 - Scholarships
 - Homepage
 - Scholarships for non-residents
 - Student Forms Index page
 - 1718 Student Forms
 - Departmental Scholarships
 - Scholarships for South Carolina residents
 - Cost and Aid
 - Grants
 - Student Employment

January 23, 2016 – January 31, 2016

15,869 Page Views

- Top 10 Pages
 - Homepage
 - General University Scholarships
 - Department Scholarships
 - Scholarships Index Page
 - Duplicate Scholarship Page
 - Scholarships for non-residents
 - Contact Us
 - Life Scholarship
 - Non-institutional scholarships
 - South Carolina State Scholarships

Old Website— sc.edu/financialaid

- Not user friendly
- Not responsive
- Hard to manage
- No integration with university level site
- Excessive content in areas
- Required coding expertise



New Website— sc.edu/financialaid

- User friendly
- Responsive Design
- CMS platform easy to manage
- Built in online form section to contact us
- Ability to share information with other departments
- Embedded hyperlinks



Website Launch Preparation

TIMING IS EVERYTHING!!!

- Reviewed analytics
- Completed a heuristic analysis
- Customer Segmentation
- Trainings
 - Style, Editor, Contributor, Site Manager, Staff
- Coordination of 1718 Processing with launch



Website Impact

- Email counselors received form submissions within an hour of launch
- Staff and key leadership pleased with the outcome
- 1718 processing started successfully
- Users are navigating more throughout the site



Going Forward

- Financial Aid Office move
 - Roll out a publicity plan
 - Update all marketing materials
 - Update all location fields on social media
- Financial Aid Software Update
 - Oracle Forms going away
- Create tutorials specific to USC financial aid processes
- Improve upon our email marketing
- Move to a scheduling platform with social media
- Continue expansion of the office “brand”



Questions?



Contact Us

- Joey Derrick (jcderric@mailbox.sc.edu)
- Rosalind Elliott (stevenrd@mailbox.sc.edu)





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