FINANCIAL AID COMMUNICATION AND UNIVERSITY ENROLLMENT

Using Design-Thinking Methods to Determine University Intervention

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What is entrance counseling? Can I do it now?

WHY DO YOU NEED MY TAX FORMS?

Is there a payment plan for tuition?

When will we hear about the Parent PLUS Loan?

When will I get my financial aid award?

WHY WON'T ANYONE CALL ME BACK?

When will I get a bill? When is it due?

HOW WILL I AFFORD THIS?

What's a tax transcript? Why do you need it?

How much will I really owe the school?

What is a Master Promissory Note?

WHICH LOAN IS THE BETTER LOAN?

Who can I talk to about more money?

Should I accept all of my aid? Even the loans?

Did you get my taxes yet?

Can I use my aid award for my enrollment deposit?

WHAT ELSE DO YOU NEED FROM ME?

More than 30 million students file a Free Application for Federal Student Aid (FAFSA) each year. But what happens next? For many students, they must follow up with verification documents and loan requests among other documents, interpret and then accept the award offer, and often pay unanticipated out-of-pocket remaining costs.

This study uses design-thinking methods to identify challenges students and their families encounter at Radford University as they navigate the financial aid process, to explore opportunities for college interventions, and to generate new solutions to assist incoming students as they navigate the college financial aid review and acceptance process.

In total, seven workshops were conducted and 44 people participated, including current university students, parents of current university students, high school access counselors, admissions professionals, financial aid professionals, and other campus professionals who interact with incoming student.
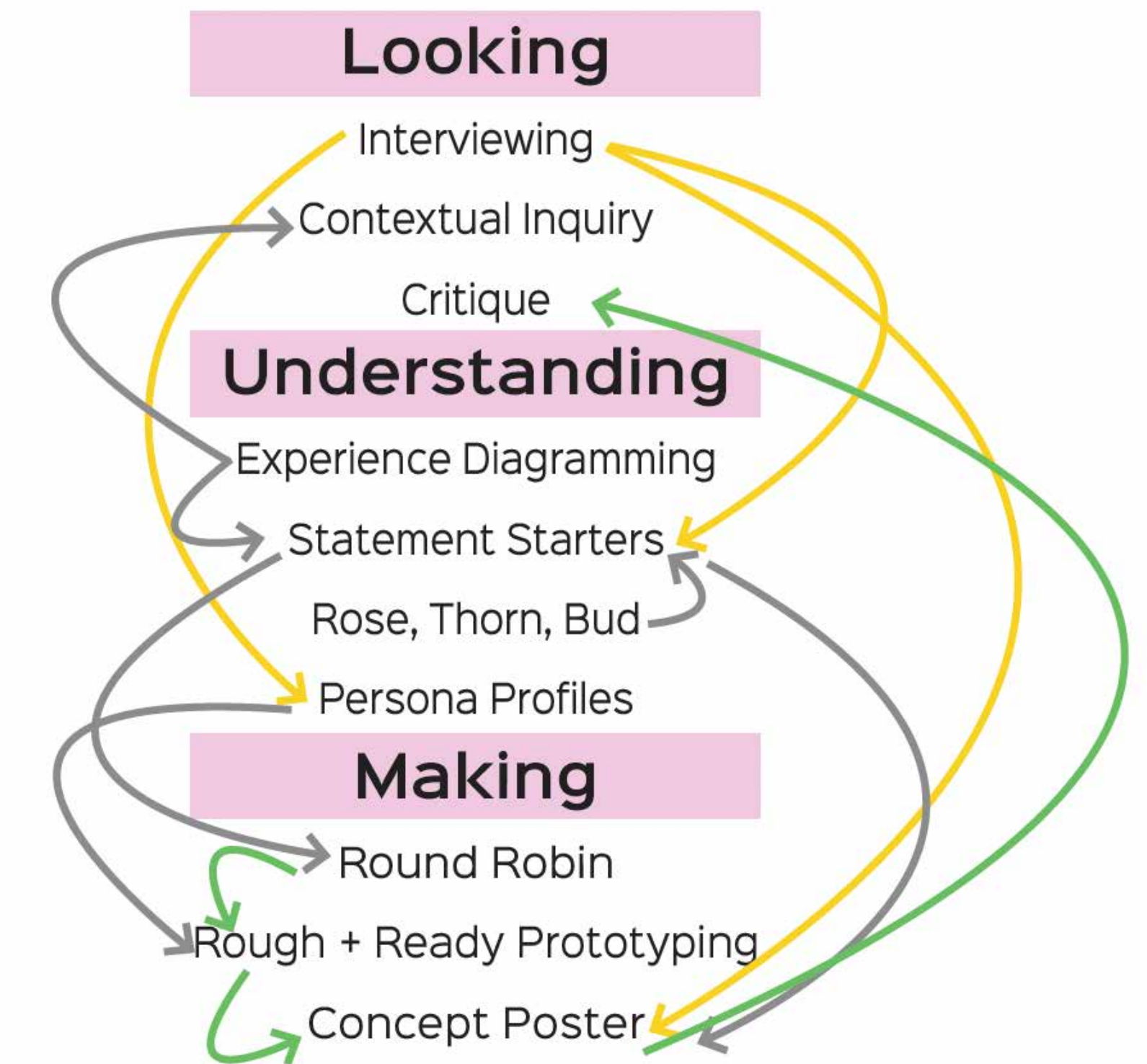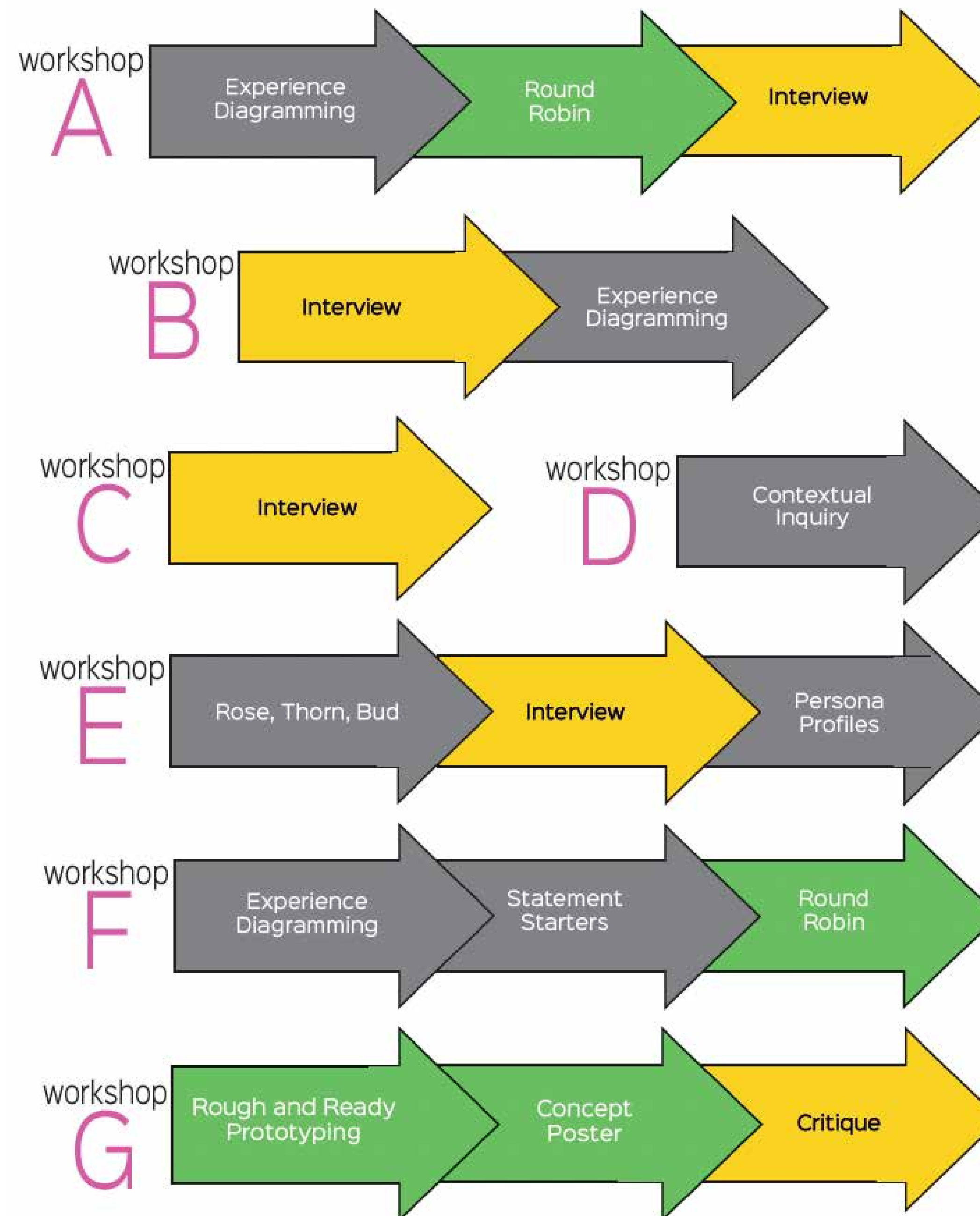
RESEARCH GOALS

Understand student and parent challenges navigating the college decision process, with a focus on finances and financial aid.

Document current financial aid award and communication processes.

Identify gaps and opportunities for intervention. Prototype potential solutions

Each workshop used a combination of design-thinking methods to better identify problems in communication and generate potential solutions. In the workshops, seven key insights regarding incoming students' interactions with financial aid communication pieces were developed. Using these insights, recommendations for improvement were made through prototypes and concept posters and presented to university leadership.

Workshop flows

- **workshop A:** Experience Diagramming → Round Robin → Interview
- **workshop B:** Interview → Experience Diagramming
- **workshop C:** Interview → **workshop D:** Contextual Inquiry
- **workshop E:** Rose, Thorn, Bud → Interview → Persona Profiles
- **workshop F:** Experience Diagramming → Statement Starters → Round Robin
- **workshop G:** Rough and Ready Prototyping → Concept Poster → Critique

Process Diagram

Looking
- Interviewing
- Contextual Inquiry
- Critique

Understanding
- Experience Diagramming
- Statement Starters
- Rose, Thorn, Bud
- Persona Profiles

Making
- Round Robin
- Rough + Ready Prototyping
- Concept Poster

DESIGN-THINKING METHODS USED IN RESEARCH

Rough and Ready Prototyping

Concept Posters — Overhaul Communication Pieces

Interviews — "I'm pretty sure my parents are paying the loans, so I'm not sure. I have a guess, but I could be wrong." —Current Student

Rose, Thorn, Bud — rose

Contextual Inquiry — ~confused caller is unsure if she will have enough aid to take summer classes but told she won't know until she applies for summer aid

Round Robin — How might we...

Statement Starters — How might we...

Persona Profiles — Naomi, Paula

Experience Diagramming