Implementation Considerations for Redesigning Financial Aid Offers

Redesigning a financial aid offer can take time, requiring input and approval from various internal stakeholders. As financial aid offices embark on redesigns to apply the ten principles outlined in ATI’s Improving Clarity in Financial Aid Offers brief, they may want to take the following implementation steps.

**Before Proceeding with a Redesign**
- Secure the support of leaders in admissions and enrollment management, IT, communications/external relations, and all academic units whose students will be affected.
- If part of a university system or other network with shared policies and/or enterprise resource planning (ERP) systems, work with counterparts at other campuses to agree on system-wide changes and ensure they are compatible with shared products.
- Ideally, secure time from a user experience (UX) design expert.
- As needed, secure time from graphic designers and IT staff on other teams.

**During the Redesign**
- Engage financial aid counselors throughout the process.
- Consider opportunities to incorporate electronic features, such as “smart” text, roll-over and click-down features, and embedded videos.
- Decide whether the financial aid offer will be an electronic-only notification or if a print copy will also be mailed to students’ homes.
- Ensure the electronic offer is mobile-friendly.
- Integrate any software used to produce the offer with other enrollment systems, such as Slate.
- Collect user feedback at least twice before finalizing the offer design. Consider workshopping the new offer in student focus groups, including at a feeder high school (where students may not yet be familiar with financial aid offers).
- Translate the offer into languages other than English as needed, based on applicants’ backgrounds.

**After the Redesign**
- Train admissions recruiters and financial aid counselors to use common language that matches the terminology in the financial aid offer.
- Incorporate the redesigned financial aid offer into financial literacy trainings, such as those conducted through college access programs and at FAFSA completion nights at local high schools.
- To assess the impact of the redesigned offer, compare call volume to the financial aid team before and after the implementation of the new offer.
- Decide on a regular cadence to reevaluate the financial aid offer design, including gathering student feedback.