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.