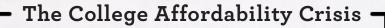
u*aspire

2019 Annual Report





Every young person deserves the opportunity to get a college degree and the economic opportunities it brings.

Yet only 1 in 10 students from low-income families earn a bachelor's degree by age 25.

We are on a MISSION to change that.

u Aspire is a nonprofit organization ensuring
that all young people have the financial information
and resources to find an affordable path
to and through college.

Through student advising, counselor training,

and policy and systems change, we work

to remove the financial barriers

to higher education.





17,629
students advised

"Going to college means getting
a chance to better my life
and taking care of family
with a great job. I'm thinking
about majoring in nursing,
then getting my master's
as a nurse practitioner so
I can care for people's
health, constantly meet new
people, and stay active."

- Dionne Rose M.

In 2018-19
uAspire programs & policy
projects impacted over

690,000

students nationwide.

1,506

counselors & college access providers trained who serve

278, 610 students each year.

393,769

STUDENTS IMPACTED
THROUGH POLICY
& SYSTEMS CHANGE

Friends,

I'm so grateful for the support you've shown uAspire, enabling us to reach more young people in 2018-19 than ever before.

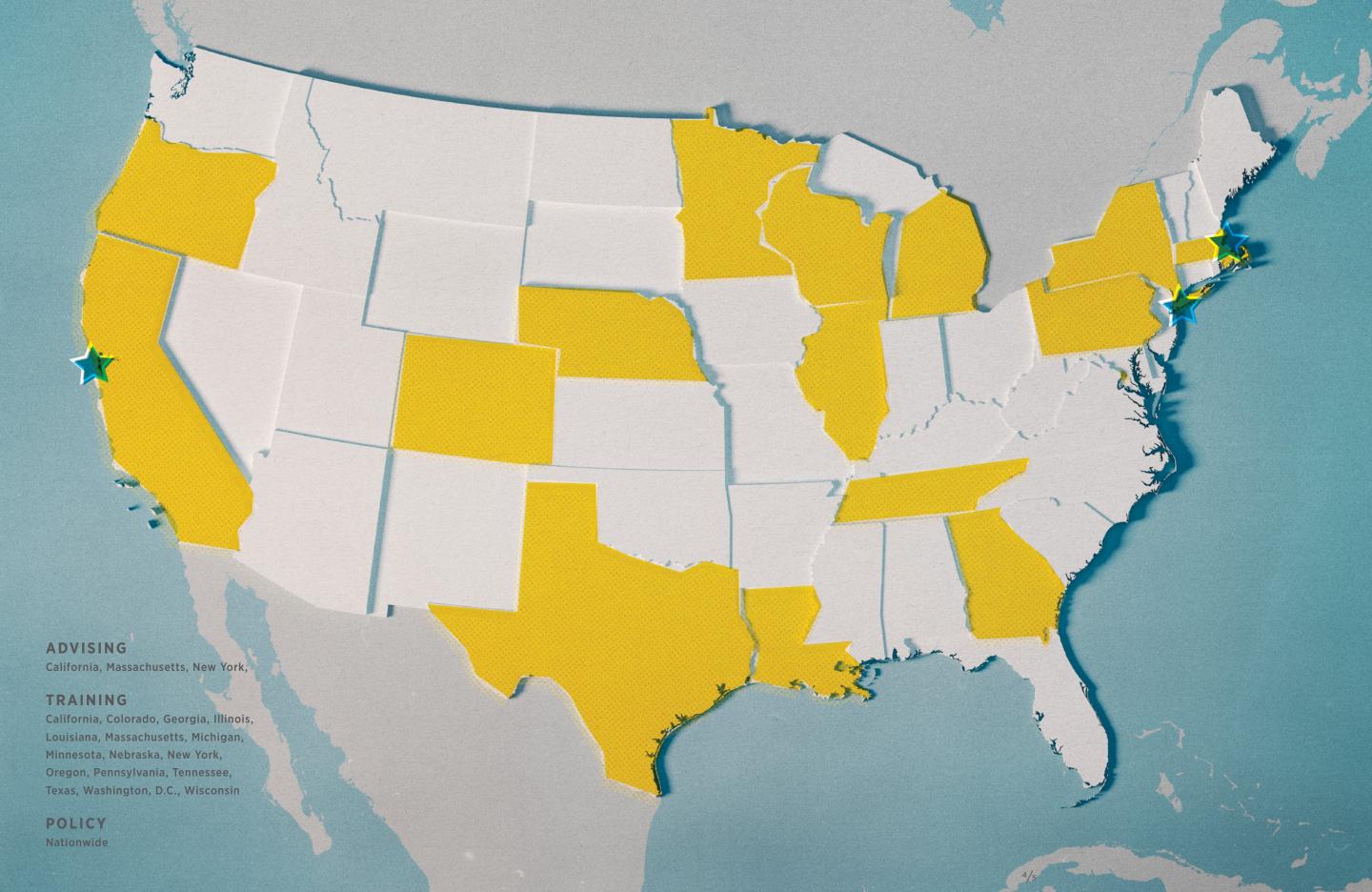
uAspire is making a meaningful impact on the college affordability crisis - in ways we never imagined when I arrived 15 years ago.

While we have a ways to go to ensure every young person in America has the financial information and resources they need to find an affordable path to and through college, we have a vision and a suite of impact models to make that day a viable reality.

I'm so excited for what lies ahead for uAspire and the young people, families, and professionals who count on our work. Thank you for helping uAspire thrive!

Bob Giannino CEO, uAspire

"I want to further my education and pursue a career I want. I would like to beat the odds and prove that Latina women can obtain degrees and inspire my younger family members to attend college" - Dulce B.







17,629
STUDENTS
ADVISED

"I strive to assure students
that I'm in their corner
and that whatever
roadblock we face,
we'll face it together."

- Jasmine T., u.Aspire Advisor

AFFORD

HIGH SCHOOL ADVISING

From the fall of their senior year through the summer after graduation, students work with their advisor in their school or over text to obtain financial aid, find an affordable college option, and successfully enroll.

JUNIOR YEAR PILOT

Could we have an even greater impact if we got students thinking about financing college earlier? In spring 2019, we held college affordability workshops for 2,866

11th graders at our Massachusetts and Bay Area high schools to let them know what to expect during the financial aid process and that we're here to help. After an overview of college costs (it's not just tuition!), financial aid types and offer letters, students are given some steps they can take over the summer to get started.

TEXT ADVISING STRATEGY

We use texting because it's efficient and effective, providing students with substantial, individualized assistance when they need it, from someone they trust. Here's how we do it:

Partner Locally. Because our direct service is deeply rooted within our local communities, students know that we're invested in them and knowledgeable about their given local context.

Emphasize Personalization. Our program and caseloads prioritize advisors' ability to build relationships with their students and preserve the nuanced, empathetic nature of counseling.

Build Trust. We lay the groundwork so students view their uAspire advisor as a trustworthy, expert source of information on college affordability who cares about them and will help them.

Invest in Data. By accessing student-level data, we customize messages to a student's personal situation and avoid losing their attention with irrelevant messages.

Offer Comprehensive Help. Advisors help students with whatever questions and problems they find most pressing, pivoting between texting and use of video conferencing, email, phone, and in-person meetings.



COLLEGE ADVISING

During the first two years of college, students are supported primarily through text advising to continue to access financial aid and manage college costs to persist and ultimately complete their degree with a manageable amount of debt.

SUCCEED 3RD YEAR PILOT

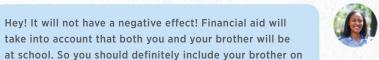
In 2018-19, we launched a pilot project to evaluate expanding the program to the third year out of high school. Advising is focused on supporting approximately 100 Massachusetts students who are enrolling in college for the first time, recently transferred colleges or are planning to transfer, and/or are attending a community college.

Julia T., Dartmouth College

TEXT ADVISING

October 1, 2018: Enrolled College Student & Thalia Peña, uAspire Advisor

Hi! I have a question. So my brother is applying for college this year and I was filling out FAFSA for 2019-2020 and one of the questions was asking how many of my moms kids will be in college starting July 2019. Would my brother applying to college have a positive or negative effect on my financial aid for 2019-2020?





Okay thank you!

No problem! Were you able to finish your FAFSA?



Not yet. I need to add my moms 2017 tax return. I'm doing that this weekend since I'll be going home.

> Awesome. Well let me know if any other questions come up about it :) How has school been going so far?

your application and he should include you on his!



It's good so far, October is a busy month for me. I have like 7 exams

Wow, that's a lot of exams ha ha. Do you feel good about them and your classes?



For the most part, yes. There's a lot of resources with the classes this semester so I'm not feeling as stressed as last semester

Good. I'm glad you're feeling less stressed!



I'll be texting you every few weeks, but if you have any questions let me know. I'm here to help via text, phone call, or in person.



Okay thank you!

You're welcome, good luck with all your exams! You'll do great :)





When it comes to college access and success, we don't just focus on how many students we serve, but also on how effectively we serve them. That's why, from 2014 to 2018, we participated in a randomized control trial at our Bay Area site to evaluate the implementation and impact of our Afford advising.

During the 2017-18 school year, WestEd randomly assigned 1,091 seniors in five San Francisco Unified School District high schools to treatment (714) and control (377) groups. A further analysis of the treatment group compared students who completed all three core activities (331) to a matched control group sample.

IMPLEMENTATION

WestEd found that the Afford program was implemented with fidelity, according to its intended model, in all five high schools. Treatment students opted into offered services and completed the core activities at significant rates:

95% completed the Planning Session

82% completed FAFSA/CA Dream Act Certification

47% completed Financial Aid Offer Review

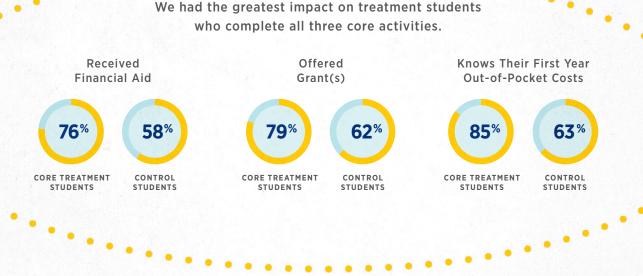
School staff reported appreciation for Afford advisors' financial aid expertise and confirmed that uAspire fills a gap in services that would otherwise not be provided.

IMPACT

WestEd found that the Afford program was effective in increasing student understanding of the financial aid process, helping students complete the steps for financial aid submission, and assisting students to leverage financial aid. Treatment students were offered an average of \$23,828 for their first year of college.

Treatment students were statistically more likely than control group students to:

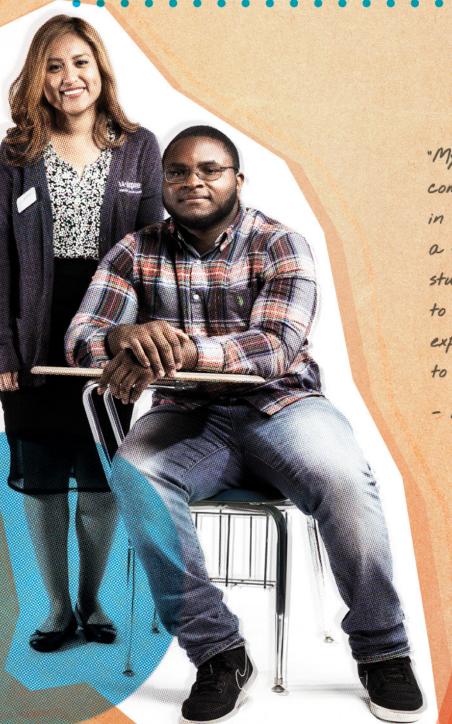
- Submit the FAFSA/CA Dream Act application with greater accuracy
- Report beliefs that college can be affordable
- Report that they received the information and support needed to complete the financial aid process and were clear on the steps to get financial aid for college



THE FUTURE OF AFFORD

The findings from this study have shaped our programmatic strategy. We're refining the Afford program to maximize the number of students who complete the three core activities, helping us have an even greater impact in each community that we serve.

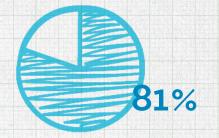
Our Impact

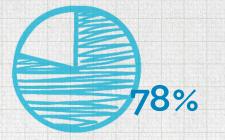


"My hope is to be a computer engineer working in cyber security. I'll be a first-generation college student, exposing myself to a completely foreign experience that is sure to influence my future."

- Peace 1.

Our Students



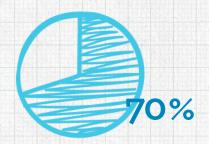


Low-income backgrounds

First-generation college students

Enrollment

Started college the fall after highschool graduation.





uAspire students

National average for students from low-income high schools*

Persistence

Still enrolled in college or have graduated.





uAspire students

National average for all students**

Kamaiya

Josiah Quincy Upper School's first Black female valedictorian and first-generation college student shares her college application journey.

I always knew that I wanted to go to college, even at a really young age, but I didn't start thinking about it seriously until around sophomore year. Of course I was concerned about things like being rejected, SAT scores, but the biggest thing was affordability.

I knew that if I was going to college it would be a big responsibility for me. My mom is a single parent, we don't have a lot of money, so I knew that I'd have to pay everything out of my pocket and if I took out a loan the responsibility for that loan would be on me.

It was definitely scary. I was a little reluctant at first applying to colleges. I was saying to myself, "Ok I've applied, but if I'm accepted how am I going to pay for it?" The financial aid process was a lot more challenging than I expected it to be. I thought it was like, fill out a form and you're done!

But when they write me back saying we need verification or a non-custodial waiver from your parent that you don't have access to, that was challenging.

The support from my school and counselors and Jasmine, my uAspire advisor, helped.

Jasmine really explained the process and made it seem not as scary. She helped me find scholarships, get the forms I needed and get references from the people I needed, like my school college counselor.



Even if I didn't see Jasmine one week while she was at my school, she would still text me to make sure I got the forms I was waiting for, make sure I submitted them, and that everything was going ok. She was always checking up on me, even if I wasn't directly in face-to-face contact, which was really helpful.

I applied to 14 schools. I got accepted into 11, and the total amount of financial aid and scholarships came to a total of \$700,000. I was definitely a little shocked because I didn't realize how much I was getting until I sat there and calculated all of it. It's pretty amazing considering that a couple of months ago that was one of my fears—that I wouldn't even be able to pay for college.

In the end, I chose Tufts University. I have pretty much a full ride but there was a small fee that I had to take out in loans, but I'm a part of a scholarship program that will repay my loans at the end of four years. That means I won't have to graduate with any debt. It's a huge weight off of my shoulders.

Besides the financial aspect, Tufts was a top choice because they have an early childhood development program and I plan to be a teacher or maybe something in the education field.

I want [kids] to know that anything is possible and they can achieve anything that they put their mind to. Just instilling that type of mindset in them will take them a long way.

Training



uAspire trains school counselors and college access providers to support students through the complex financial aid process. These professionals play a pivotal role in helping students access higher education. By sharing the expertise and tools we've honed over decades of student advising with them, we're able to impact countless students year after year.

2018-19 TRAINING PARTNERS

Together, we're dramatically expanding opportunity, achievement, and success for students.

Achieve Atlanta Collegiate Academies

America Achieves

Aspire Public

Schools

College Possible

College Track

CollegeBound Initiative

Commit Dallas

Connecticut RISE

EdNavigator

EMERGE Fellowship

KIPP Foundation

Michigan College Access Network Success Academy

Success Boston

Texas College Access

Network

Tulane University

YES Prep Public

Schools

YouthBuild LA Charter Schools

COURSE TOPICS

Financial Aid and College Affordability Planning

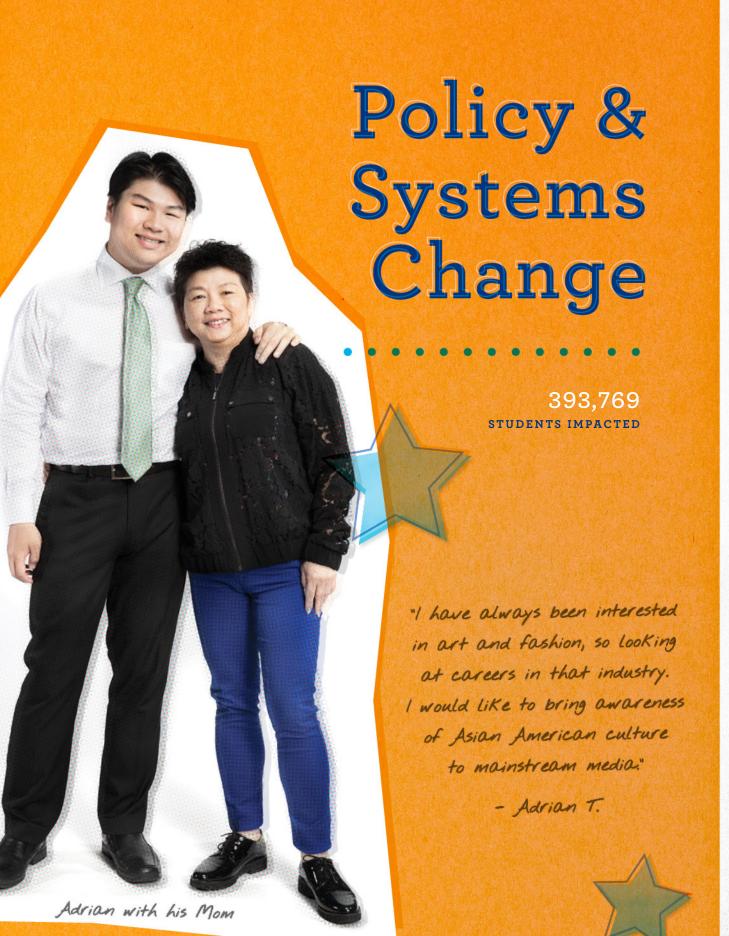
FAFSA Completion

Student Aid Report Review and Verification

Award Letter Review

Summer Transition and College Success





Decoding the Cost of College, our 2018 research report with New America, offers practical solutions to make financial aid offers transparent, such as listing gift aid and loans separately and calculating the student's net direct cost or "estimated bill." By standardizing the communication of financial aid and providing critical consumer information, students can make informed college decisions, ultimately leading to more degrees with less debt.

The impact has been widespread. Thirty-seven colleges confirmed they revised their aid offers to be more transparent. Federal Student Aid issued student-friendly financial aid terminology guidance to all colleges. And, two bipartisan, bicameral legislative bills were introduced, Understanding the True Cost of College and the Financial Aid Communication Transparency Act, that directly align with uAspire's recommendations.

STUDENT ADVOCATES

uAspire students, Junie Arcene and My Pham, met with members of Congress to advocate for financial aid policy reforms on Capitol Hill in March 2019. "The issue of financial aid letters is very important and oftentimes overlooked," said Junie.



POLICY AGENDA

We're excited to share uAspire's policy priorities. By simplifying the pathways to federal aid, making college costs transparent to students, and ensuring equitable distribution of resources, uAspire seeks to create more degrees with less debt.

SIMPLIFICATION	TRANSPARENCY	EQUITY
Shorten the FAFSA	Standardize financial	Restore and strengthen
Streamline verification	aid terms	the Pell Grant
Increase access to public benefits	Require aid offer formatting	Create equitable access to Work-Study
	Mandate better	Expand aid to cover
	loan counseling	indirect expenses

Massachusetts Est. 1985

Boston / Cambridge / Fall River / Malden / Lawrence / Somerville

9,136 TOTAL STUDENTS ADVISED

4,427 HIGH SCHOOL STUDENTS 4,709 COLLEGE STUDENTS

We established our policy and systems change work in Massachusetts, hiring our first MA policy director.

The MA site also gave a record-breaking \$622,000 in scholarships to 84 students through the Greater Boston Real Estate Board (GBREB) Foundation and uAspire's Last Dollar Scholarship.

San Francisco Bay Area Est. 2014

Hayward / Oakland / San Francisco / 9 University of California surrounding communities

3,779 TOTAL STUDENTS ADVISED

3,031 HIGH SCHOOL STUDENTS **748** COLLEGE STUDENTS

The Bay Area launched our Succeed advising program for college students, who were highly engaged with 85% responding to their advisor over text. The Bay site also completed the implementation of a multi-year randomized control trial study in San Francisco Unified School District high schools (details at end of Advising section).

U+ASPire

New York Est. 2018

New York City

4,714 TOTAL STUDENTS ADVISED

2,751 HIGH SCHOOL STUDENTS 1,963 COLLEGE STUDENTS
28 COUNSELORS TRAINED

Our uAspire 360 model came to New York City through a collaboration with the College Bound Initiative (CBI), a best-in-class college access and success program serving New York City Public Schools. uAspire supported over 4,700 CBI students through text-advising to access financial aid and trained CBI counselors to do the same.





ST ONES HASpire

In our ninth year hosting the First Ones in Boston and first year in New York, we honored business and community leaders, as well as our students, who are the first in their family to graduate from college. In both communities, the First Ones was an unforgettable evening of inspiration and gratitude to those who believe in the potential of young people and support their dreams.

At the NYC First Ones, longtime supporters Jeannie and Jonathan Lavine launched a matching gift campaign with their donation of \$7.5 million. We're profoundly grateful to the Lavine Family for their commitment to uAspire and passion for solving the issue of college affordability for our nation's young people.









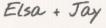














Education was always important in my family.

My parents didn't go to college, so it was very important for them that my siblings and I do well in school and find a path to get to college. Although apart at the time, my parents always reminded us that there was a future beyond what we were exposed to in our neighborhoods, and even in our schools, and that our future could be much brighter than their own.

Applying to colleges and financial aid was a nightmare. I was terribly nervous because I knew that somehow, someway I needed to make it to college. I just didn't know how. I was in a maze and didn't know where to start. I started poking around online, but it was never really clear how to apply for college and I certainly didn't have the resources at home. It was three boys, we lived with my mom. Neither of my parents speak English so that was certainly a barrier. My school didn't really have the resources to help students with just two counselors for a large student body. It wasn't until I found uAspire that I got support.

I remember our first meeting, it was in the computer classroom on the first floor where I met Elsa, my uAspire advisor. She basically laid it out from start to end: this is a college application, the process of applying for financial aid, what it meant, explaining costs, the difference between going to a state university versus going to community college, and all of the requirements of the FAFSA, which I had never heard of. I couldn't do it on my own, that's for sure. All I knew was that Elsa was going to help me get that done, and she did.

I applied to quite a few schools. I didn't know what I was going to be able to afford. I didn't know where I was going to get in and Elsa was adamant about my applying to multiple places to see what I could get for financial aid and then go off of that. Elsa was there to go over every financial aid package and explain what each meant. To avoid large amounts of debt, I chose to attend a community college first, then proceeded to complete my college career at a four-year school.

All throughout college, Elsa was there to help and advise me. I knew the time would come when I would have to pay all the money back, so I began to save for it. I worked while attending school full time. As difficult as it was, it didn't compare to the struggle I saw my parents go through to give us the best that they could. It was one of the many perspectives that always kept me motivated. I am now in the financial services industry and I do private wealth management.

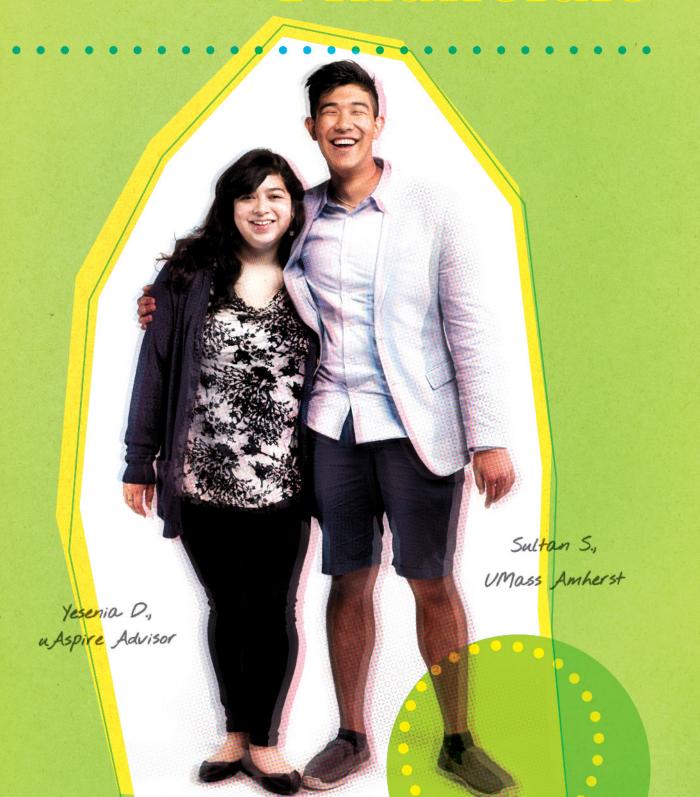
Without Elsa's support, I strongly believe that my chances of going to college after high school were slim. Elsa was not only my financial aid advisor; she took a sincere interest in my life, where I came from, and my dreams for who I wanted to be. The great thing is that she was also able to help my brother in the same way.

My college degree represents the struggles my parents endured to give my siblings and me hope for our future. It represents the mutual love, support, and motivation of my siblings. It represents the prayers from my wife before big exams during my last few years of college.

It represents individuals like Elsa whose determination to help me is a gift that I can never repay. It represents students from all backgrounds who find themselves in similar circumstances.

There are countless students experiencing similar challenges. The paths may be different, but the toilsome process is the same. To them, my advice is to seek help, don't be shy about it. Don't feel as though you're not worthy enough to attend or even attempt to go to college, and seek advice. When Elsa gave a presentation at my school about what she does, it was like, "this is what I've been looking for." It was certainly a godsend, but it definitely took my initiative to seek it out and figure out how to do it. If you know a teacher, a counselor, a nonprofit where they help students get to college, ask them. Get their name, email, number. Call that person and see what they can do to help you. I know that for myself, that journey began when I made the decision to meet Elsa at the computer lab to simply ask, "how do I start?" It is a decision that changed my life completely.

Financials



2018-19 was the most impactful year we've ever had.

We raised more money and changed the lives of more young people than ever before.

	2019	2018
Contributions	\$8,006,547	\$5,738,315
Program Revenue	\$891,515	\$1,089,636
Other Revenue & In-Kind	\$546,191	\$454,739
Total Revenues	\$9,504,253	\$7,282,689
Program Services	\$5,660,693	\$5,622,605
General Administrative	\$867,784	\$870,716
Fundraising	\$2,212,973	\$2,130,940
Total Expenses	\$8,741,450	\$8,624,260
Change in Net Assets	\$762,303	-\$1,341,571
Net Assets at End of Year	\$2,008,063	\$1,245,260
Please note that the negative FY18 budget variance	ce was driven by a funding delay to	the first half of FY19.



Our Supporters

Thank you.

Our work would not be possible without your astounding generosity.

\$1,000,000+

Jonathan and Jeannie Lavine*

\$600,000 - \$999,999

State Street Foundation, Inc.*

Biogen Foundation*

\$250,000 - \$599,999

ACCESS Education Fund at the Boston Foundation

Barr Foundation*

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The University of California. Office of the President

\$100,000 - \$249,999

The Lloyd G. Balfour Foundation, Bank of America, N.A., Trustee

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Heckscher Foundation for Children

James Irvine Foundation

Peery Foundation

State Street Corporation

Stupski Foundation

Zug Family Fund*

\$50,000 - \$99,999

Anonymous (2) The Jeffrey H. and Shari L.

Aronson Family Foundation

Goodwin Procter LLP

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Liberty Mutual Foundation*

Lovett-Woodsum Foundation*

Rowland Foundation

\$25,000 - 49,999

Bain Children's Fund

Melora and Andrew Balson

The Bank of America Charitable Foundation, Inc.

Bella Charitable Foundation

Patti Bellinger

The Bisconti Family Foundation*

Charles Couric

Loomis, Sayles & Company*

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Koret Foundation

MetLife Foundation

Ho Nam and Mary-Ragan Macgill*

The PwC Charitable Foundation, Inc.

Mabel Louise Riley Foundation

Warriors Community Foundation

Winston & Strawn LLP

\$10.000 - \$24.999

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Dodge & Cox

Bill Draper

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The Brooks and Joan Fortune Family Foundation

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Greater Fall River Development Corporation*

Innovate Foundation

J.P. Morgan Private Bank

Kerry Ann James*

Suzy and John Lehner

Daniel and Marjorie Levin

Bill and Susan McClements*

Alexander Navab

New York-Presbyterian Hospital

Red Sox Foundation

Santander Bank, N.A.

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U.S. Bank

Melissa Williams

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\$5.000 - \$9.999

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\$2.500 - \$4.999

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UST Global

\$1,000 - \$2,499 Mark and Christine Alper

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Bill Barke

Andrew and Rosemary Bentley Bunker Hill Community College

Andrea Carlin

Gerald and Kate Chertavian

Citizens Bank Foundation Anne Columbia and Richard Lester

Gregg and Maria Congleton

Brendan and Courtney Coughlin

Carol and Gary Crossen

Dan Curtin

Jeffrey Davis and Ulloa Davis Matthew Davis

Daryn and Lindsey Decesare

Wally and Tracie DeGuglielmo Anuradha Desai

Susan Edelstein

Sam and Alex Épée-Bouyna Lisa Fanjoy

Ellen Dubner

Yale and Donna Fergang Katherine and Jim Finn

Jennifer and Jay Flanagan Abe and Jen Friedman

Rebecca Haag Bob Hatch Whitney Hewitt

Rich and Susan Holbrook

Tim Hornbrook Casey Johnson Anton Katz

Kathy Horgan

Robin Katz

Jonathan Kutchins

Jonah Lansky

Emily Lavine and Nathan Rosin Hau Lee

Nick Leone

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Quincy and Jenna Miller

Kelley Murphy

Kevin and Kristin Nguyen Ruben Orduña and Elizabeth Hill

Larry Orr and Nicole Lederer

Alexander and Alison Packard Katherine Parker

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E. Puopolo & Son George and Carol Raffoul

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Mike and Susan Scannell Jeremy Seeger Aline Shapiro

Bob Shireman and Lucinda Sikes Michael B. Simons

Joel Steinhaus*

Natalie Velasquez

Laura Tuttle

James Valentini and Teodolinda Barolini

Deanne and Rick Wherry* Howard and Candice Wolk

Linda and Eddie Zizmor

*MULTI-YEAR COMMITMENT

THIS LIST REFLECTS GENEROUS SUPPORT RECEIVED BETWEEN JULY 1, 2018 AND JUNE 30, 2019, WE REGRET ANY OMISSIONS OR ERRORS.

Donor Feature

These uAspire champions are giving more by volunteering to support students in schools and during our office hours. They've been through some of the same rigorous training as our advisors to help students complete the FAFSA and review financial aid offers, ultimately ensuring they can access financial aid and make more informed decisions.

Why do you support uAspire?

Jen: When I learned about college affordability and what this generation is up against—the increasing student debt and how it can keep them from entering the economy and having a life, getting married—that really made me want to do something to help. With uAspire you can affect young lives just as they're entering the workforce, just as they're making choices about what they want to be in this world. They have such challenges ahead and they're working hard to overcome them. To be a part of that, it's where I want to be.

Jeri: Every student should have the chance to go to college and helping them understand the financial picture will get them there. Education is the ticket to a better life—every student who wants to learn should have that opportunity.

John: It's becoming more and more difficult for students to get out of college without large debt. It's important to help students find a path through college and close the opportunity divide across the country.

Can you share a reflection about your experience working alongside students and advisors, something that made an impression on you?

Jen: A financial form like the FAFSA actually requires a ton of vulnerability. I admire that courage to sit down with someone they may have just met and answer all those questions. I think the most important thing is showing students that there are caring adults in their life, that we're here and they're not alone. It eases some of the anxiety. Also, the beautiful thing I found is that I really enjoy being with teenagers, it really energizes me. They're so full of life, so present and working so hard.



Jen Waldron, Marianne Thompson, Tony Brooke, Jeri Tarini, and John Hudson (not photographed)

John: I've been most impressed by students' determination. When they come in, they're so determined to figure out how they're going to make this work, to apply and pursue a degree.

I've helped to read through students' essays and it's really inspiring to discover where a person is at, what's going on in their lives, or what issues they want to solve, and what's driving their desire to get a college degree.

Marianne: Seeing the affordability advisors in action and what they're able to do over the course of a day is just so impressive. I was in one school, every 15 minutes or so another student comes in with a completely different question or problem and the advisor is able to help every single student no matter where they are in the process. A big surprise was the obtuseness and complexity of the award letters. Students get this letter and its gobbledygook and no one can make sense of it. The whole financial aid process is very complicated, it's not straightforward.

Jeri: I've learned that students have incredible energy and drive. I remember a student came in with six aid offers, she'd been accepted to all these wonderful schools, and she was trying to figure out which one was giving her the best financial aid package. She was just ready to go, so mature and hopeful.

What makes uAspire stand out as an organization?

Jen: uAspire's mission is so clear and focused. It's very easy to see the effects, it's very tangible. I can attend a session and help students directly. The impact is clear and measurable. And the advisors are just amazing.

Marianne: I just can't get over the work ethic here, and the excitement and enthusiasm every single person has for what they do. Everyone is so committed to the mission and to doing an excellent job.

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"Going to college means
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to be in the corporate giving
world because I want
to be able to invest in
non profit organizations."

- Ny H.

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