Dear Friends,

This past year has further exposed the widening income and education gaps in our country. At uAspire we see the need for college affordability services and awareness as greater than ever before. Soon, two-thirds of all jobs will require a postsecondary education, yet students from low-income families receive only 10 percent of all college degrees awarded.

This must change.

This report shows how we are working to ensure every student has an equitable opportunity to succeed. uAspire is “Changing The Game” by confronting inequities on a national scale to level the playing field for young people from all economic backgrounds.

Since 1985, uAspire has developed a deep understanding of the issue of college affordability and how to best help students navigate this economic minefield. As a leading service provider and voice on the issue, we impact the lives of more than 400,000 students nationwide each year. Aspiring students like Dejah Morales, featured in these pages, who overcame multiple barriers to find a way to afford college.

Because we believe America is strongest when it fields a full team of educated, engaged citizens, we recently announced an ambitious strategic vision to expand our reach to three million students by 2022. Our strategy is rooted in improving the outcomes of our student advising and counselor training, expanding to key markets such as New York City, and launching policy efforts to increase degree completion and decrease student debt.

We believe this new strategy is achievable thanks to supporters like you, those committed to building brighter futures for low-income and first-generation students. Their success—the key to securing America’s prosperity—is made possible by you. Together we can transform the lives of millions of students through our advising and training programs, and by ensuring our higher education systems are equitable and provide opportunity for all.

With gratitude,

Bob Giannino
Chief Executive Officer

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2 Bureau of Labor Statistics data for 2015; Published April 5, 2016.
WE FOCUS ON SERVING THE STUDENTS WHO NEED US MOST.

77% will be first-generation college graduates
85% are from low-income families (Pell Grant eligible)

OUR STUDENTS ENROLL AND PERSIST IN COLLEGE AT HIGHER RATES THAN THEIR PEERS.

ENROLLMENT

Started college the fall after high school graduation

- uAspire students: 67%
- National average for low-income students*: 54%


PERSISTENCE

Enrolled in college or have graduated

- uAspire students: 79%
- National average for all students*: 73%

*National Student Clearinghouse Research Center (2017) Snapshot Report 2017

STUDENT DEMOGRAPHICS
- African-American: 38%
- Hispanic/Latino: 30%
- Asian/Pacific Islander: 17%
- White: 11%
- Multiracial: 2%
- Other: 2%
DEJAH MORALES
STUDENT SPOTLIGHT

“She had me pretty young,” Dejah, who has six siblings, says of her mother, “and now she’s getting her associate degree. I’m pretty proud of her and seeing her do something different encouraged me to go to school too and be something better.”

A recent graduate of Fenway High School in Boston and a freshman at Framingham State University, Dejah and her mom will be the firsts in their family to graduate college.

“I grew up with both parents pushing me and encouraging me, and always there to support me through everything that I’ve been through. Now this is like, ‘Hey, thank you to you guys, I’m doing something bigger.’”

Like many of the students at her high school, where nearly 75 percent of their families are at or below the federal poverty line, the biggest barrier Dejah faced getting to college was financial. When she needed help with the FAFSA, she connected with Katelyn, the uAspire advisor at her high school.

“Katelyn was a very big help,” says Dejah. “She would always email me like, ‘Hey do you want to set up an appointment? Did you get the chance to look over this? Did you do this?’”

After celebrating her acceptances in the spring, they worked together to review Dejah’s financial aid award letters. “Katelyn made a chart to see the difference between each school and how much I’d be paying. She was also the one pushing me to do a lot of scholarships. She did more than I expected from someone, so I appreciated that.”

Over the summer after graduation, Dejah recalls, “I didn’t know that certain paperwork and certain questions needed to get done at a certain time, so when I got billed what I had to pay for tuition, I was like, what are all these numbers?” She turned to her summer uAspire advisor, Simone, on her phone for text support.

“It’s very helpful. Whenever something pops up in my head that I forgot to do or I have a question, I’ll just shoot her a text and she’ll always respond with an answer. Whenever something pops up in my head that I forgot to do or I have a question, I’ll just shoot her a text and she’ll always respond with an answer. Even if I’m not texting her, she’ll always text me. She was always there to help, which was useful and met my needs because everything has been kind of confusing starting this new process.”

Determined and resourceful, Dejah pushed herself through this complicated process of financing college to achieve more than her peers, and she can continue to count on uAspire’s text advising support throughout her first two years at Framingham State.

Dejah, who wants to be a nutritionist, says, “I want to be able to tell someone my story, ‘I got to experience college, and these are the many things I got to do.’ And then going off and starting my career, being able to say, ‘I’m helping others because I went to school and learned something that I’m passionate about.’ I’m just ready to grow as this young adult and go through this new journey and see what comes from there.”
College Affordability Advisors are experts, advocates, educators, problem-solvers, and coaches. They offer hope and encouragement as they support students to navigate systems that, despite a mission to the contrary, often hinder their success. Advisors’ dedication to this hard work is matched by the commitment of our exceptional students. They continue to aspire, confront seemingly insurmountable challenges, and persevere. The stakes are high and the odds may be stacked against them, but together our advisors and students rise to the challenge.

Support When + Where Students Need It
Our Afford and Succeed advising programs support students to maximize financial aid, minimize loan debt, and make informed financial decisions to enroll and persist in the best postsecondary option for them. Students are empowered with the knowledge and skills to face future obstacles and access the financial aid that enables them to complete their degree with a manageable amount of debt.

A GAME-CHANGING SOLUTION

2016-17 Program Reach + Highlights

BAY AREA
1,711 HIGH SCHOOL STUDENTS
Launched text advising to 485 11th graders through the University of California (UC) President’s Pre-College Scholars Initiative in partnership with 3 UC campuses. In 2017-18, we will serve over 1,000 12th graders near 8 UC campuses.

As our contribution to San Francisco’s My Brother’s and Sister’s Keeper Initiative, launched dedicated advising for 230 African American 12th graders in 16 public high schools.

“Google.org is excited to partner with uAspire because they’re a proven, evidence-based model that we know works for young people.”
JUSTIN STEELE, PRINCIPAL, GOOGLE.ORG

With support from The James Irvine Foundation, launching uAspire’s Succeed advising program for 500 college freshmen in 2018-19.

MASSACHUSETTS
3,547 HIGH SCHOOL STUDENTS
3,828 COLLEGE STUDENTS
Collaboration with our State Street Boston WINs partners in 30 Boston high schools led to 22% more FAFSA submitted and 29% more award letters reviewed over last year.

Succeed program enhancements allowed each advisor to serve 3 times as many students as last year.

NATIONAL VIRTUAL ADVISING
The second year of our collaborative text advising program with the College Board reached 15,000 high school seniors in 8 states. We supported these students along critical college affordability milestones from October 2016 through September 2017.

11TH + 12TH GRADE
Students meet with their advisor in their high school or use texting to find a way to afford college.
- Identify affordable college options
- Complete financial aid applications including FAFSA, CSS Profile, California Dream Act
- Identify scholarship opportunities
- Review financial aid award letters

AFFORD

SUMMER
Via text, students receive personalized guidance to understand and complete the tasks necessary to successfully enroll in college in the fall.
- Pay first-term tuition bill
- Manage loans
- Register for classes
- Access on-campus resources

SUCCEED

YEAR 1 + 2 OF COLLEGE
Students are supported through text advising to persist through their first years of college while gaining knowledge and skills to afford to finish.
- Renew FAFSA
- Know GPA and credit progress to degree completion
- Have plan to pay college bills
- Know current and overall debt amounts
Our College Affordability Training is professional development with the power to impact countless students year after year.

We train the school counselors and college access providers to whom students turn for help with financing college. Together, we are dramatically expanding opportunity, achievement, and success for all students.

**40 SCHOOL DISTRICT + NONPROFIT PARTNERS IN 26 STATES INCLUDING**
- Achievement First Public Charter Schools
- Broward County Public Schools
- College Advising Corps
- College Track
- Denver Public Schools
- Houston Independent School District
- iMentor
- KIPP Foundation
- Uncommon Schools

**TRAINED 2,805 PRACTITIONERS**
These game changers play a pivotal role in helping students obtain a higher education, but they often lack the knowledge to guide students through complex financial aid systems. We share our expertise and tools so they can effectively support their students every step of the way.

**WHAT THEY SAY ABOUT US**
- 96% find our tools **helpful** and easy to use
- 98% are **satisfied** with the training content & delivery
- 99% would **recommend** uAspire to a colleague

**CONDUCTED**
- **26 WEBINARS + 49 IN-PERSON COURSES ON**
  - College affordability planning
  - FAFSA completion
  - Financial aid award letter review

**IMPACT**
> 400,000

Students now have access to a knowledgeable advisor to help them navigate the process of financing college.

**IN JUST ONE YEAR, OUR MAJOR PARTNERS INCREASED THE NUMBER OF STUDENTS WHO**
- Participated in a planning session by 62%
- Reviewed award letters with a trained staff member by 188%
- Completed their FAFSA by 46%

"uAspire has given our dedicated professionals the knowledge and skills to deliver exceptional financial aid counseling to our low-income first-generation students."

CONAN VERNES, DIRECTOR, UNIVERSITY OF WASHINGTON GEAR UP

"I work with homeless, DACA, and students in foster care. This has encouraged me that I can help this population."

ACHIEVE ATLANTA TRAINING PARTICIPANT
LEVELING THE PLAYING FIELD

Introducing the uAspire Policy + Systems Change Team

In 2017, with the support of the Lumina Foundation, uAspire strategically increased the scope and reach of our policy and systems change work to address the financial barriers that keep too many of our nation’s young people from graduating college. Here are selected highlights from our inaugural year.

The work of our new policy team, led by Chief Policy Officer Laura Keane, focuses on:

FINANCIAL AID SYSTEM IMPROVEMENT
- Alongside the National College Access Network, discussed a simplified, streamlined FAFSA with the staffs of Senator Bob Casey (PA) and Senator Elizabeth Warren (MA)
- Met with Minority Leader Nancy Pelosi’s staff to promote the value and importance of Pell Grants for California’s highest-need students
- Presented to congressional staffers on simplifying the burden of verification
- With support from the Barr Foundation, presented key learnings on changes to the FAFSA—earlier filing date and prior year taxes—at four national conferences

AWARD LETTER TRANSPARENCY
We teamed up with Massachusetts Attorney General Maura Healey to launch an online and social media campaign that helps families better understand financial aid packages and college costs. Over 4,600 have accessed the online tools to make an informed college choice, while our educational videos reached an audience of over 20,000.

TRUE COST OF DEGREE COMPLETION
With support from the MetLife Foundation, we convened 35 national leaders to address the growing number of students facing food and housing insecurity, and leaving college because they are unable to make ends meet. Innovative, scalable solutions to reduce their risk of dropping out are shared in our report, Affording to Finish.

Joining Forces to Break Down Barriers

We are excited to expand our policy work as a member of these national coalitions:

- America Forward
- National College Access Network
- Postsecondary Data

10 | uAspire 2017 Annual Report
THANK YOU TO OUR SUPPORTERS

The impact we made together this year was remarkable and set the stage for our future. Thank you for your partnership and generous support. Your investment in our sustainability and expansion is an investment in the boundless potential of our young people. We truly could not do this work without you.

2016–2017 Program Year Supporters

$1,000,000+
State Street Foundation, Inc.1,2
Jonathan and Jeannie Lavine1,3
$600,000+
State Street Foundation, Inc.1
Jonathan and Jeannie Lavine1,3
Spark*SF Public Schools (in conjunction with Google.org)2,3
$250,000+
Barr Foundation1,2
The Boston Foundation1,2,3
College Board
GreenLight Fund1,2
James Irvine Foundation1,2
$100,000+
The Lloyd G. Balfour Foundation,
Bank of America, N.A., Trustee1,3
Biogen Foundation
Michael and Susan Dell Foundation1
ECMC Foundation1
Samuel Freeman Charitable Trust
Greater Boston Real Estate Board1
Institute of Education Sciences (IES)3
Pewry Foundation1,3
$50,000+
Anonymous1,3
Citizens Bank Foundation1
Eastern Bank Charitable Foundation1
Diane and Neil Efran1
Edwin Gould Foundation
The Charles Hayden Foundation1
Innovate Foundation1
Liberty Mutual Foundation1,2
The Lavett-Woodisum Foundation1,3
Lumina Foundation for Education New America
State Street Corporation
Zug Family Fund1
$25,000+
Adobe Foundation1,2
Bain Capital Children’s Charity
Andrew and Melora Balsam1,2,3
The Bisconti Family Foundation1,3
Ching Foundation1
Jack Kent Cooke Foundation
Maria and Robert Dewey1,3
El Abboud Family1,3
The Highland Street Foundation1

Champion Spotlight: Jeannie & Jonathan Lavine

Economic and educational equity are at the core of Jeannie and Jonathan Lavine’s philanthropy. “There is no greater way to improve someone’s future than giving them access to postsecondary education,” Jonathan says. “We know that intellect is not distributed based on income, neither should education be,” adds Jeannie. These beliefs inspired their multimillion-dollar gift to uAspire, a game-changing investment that has helped us achieve higher levels of impact and scale. We are deeply appreciative of the Lavines for their bold leadership that makes college affordable for thousands of students.
### THank You to Our Supporters

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<th>Amount</th>
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<td>$5,000+</td>
<td>Eric Leiterman and Stephanie Leiterman of Directors</td>
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**List reflects donors who made gifts between July 1, 2016 and June 30, 2017. We regret any omissions or errors.**

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*Thank you so much, I was really stressing and you helped me a lot.*

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1. uAspire Massachusetts commitment
2. uAspire Bay Area commitment
3. Multi-year commitment

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For a complete list of donors, please visit [uaspire.org/supporters](http://uaspire.org/supporters).
## OUR FINANCIAL REPORT

### Support and Revenue

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### Expenses

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### Change in Net Assets

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### Net Assets at End of Year

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<td>NET ASSETS AT END OF YEAR</td>
<td>$2,586,831</td>
<td>$2,026,318</td>
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### uAspire National Board of Directors

- **Scott Aldsworth**
  Chief Revenue Officer, Bowdoin Group
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  Leadership Volunteer

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- **Laurie Thomerson**
  Director, The Travelers Companies and MFS Mutual Funds
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### uAspire Organizational Growth 2013–2017

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