

# Creating FAFSA Ready Students!

## *NOSCA Fall 2013 Webinars*

### Moderator

**Jennifer A. Dunn**, Director, College Board, Membership and Higher Education Engagement, National Office for School Counselor Advocacy (NOSCA)

### Panelists

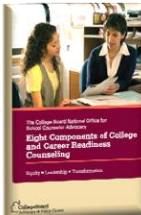
**Catherine Chiu**, Director of Guidance, Boston Public Schools in Massachusetts

**Greg Darnieder**, Senior Advisor to Secretary Arne Duncan on College Access, US Department of Education

**Erin Martinez**, School Counselor, Riverside Unified School District in California

## Participants will:

- Learn the importance of completing the FAFSA.
- Learn how to use FAFSA completion data in your school.
- Acquire strategies for monitoring the process of FAFSA completions and for increasing the numbers of 12<sup>th</sup> grade students who successfully complete the form.
- Hear best practices from a school counselor and school counselor district director on how they created FAFSA ready students.



# NOSCA's Eight Components of College and Career Readiness Counseling

*A Systemic K-12 Approach*

The Eight Components of College and Career Readiness Counseling should be applied in elementary, middle and high schools.

Component	Elementary	Middle	High
College Aspirations	•	•	•
Academic Planning for College and Career Readiness	•	•	•
Enrichment and Extracurricular Engagement	•	•	•
College and Career Exploration and Selection Processes	•	•	•
College and Career Assessments	•	•	•
College Affordability Planning	•	•	•
College and Career Admission Processes			•
Transition from High School to College Enrollment			•

# Connecting Components to Data Elements

**Data Elements for the Eight Components of College and Career Readiness Counseling**

The chart below shows key data elements for each of the Eight Components.

Each Component, by Component	Elementary School	Middle School	High School
<b>1. College Aspirations</b>			
Students reading on grade level in grade 3			
Students reading on grade level in grade 5			
Students reading on grade level in grade 7			
Students reading on grade level in grade 9			
Students reading on grade level in grade 11			
Students reading on grade level in grade 12			
Students reading on grade level in grade 13			
Students reading on grade level in grade 14			
Students reading on grade level in grade 15			
Students reading on grade level in grade 16			
Students reading on grade level in grade 17			
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Students reading on grade level in grade 91			
Students reading on grade level in grade 92			
Students reading on grade level in grade 93			
Students reading on grade level in grade 94			
Students reading on grade level in grade 95			
Students reading on grade level in grade 96			
Students reading on grade level in grade 97			
Students reading on grade level in grade 98			
Students reading on grade level in grade 99			
Students reading on grade level in grade 100			

## Data Elements for the Eight Components of College and Career Readiness Counseling

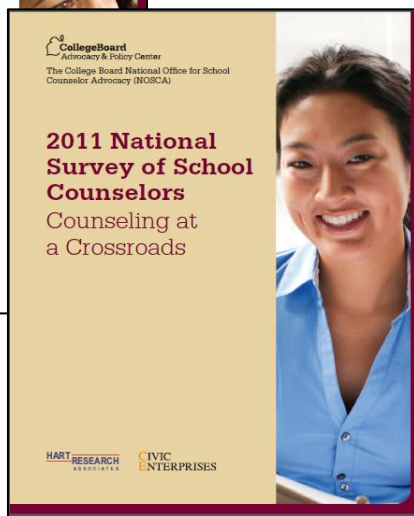
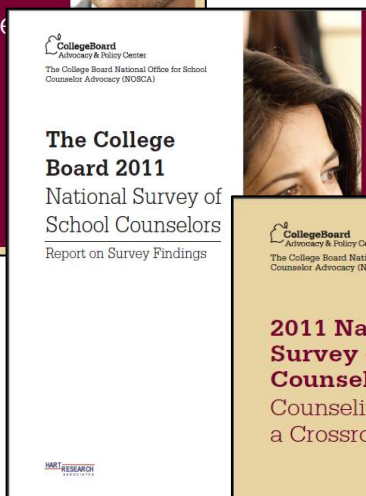
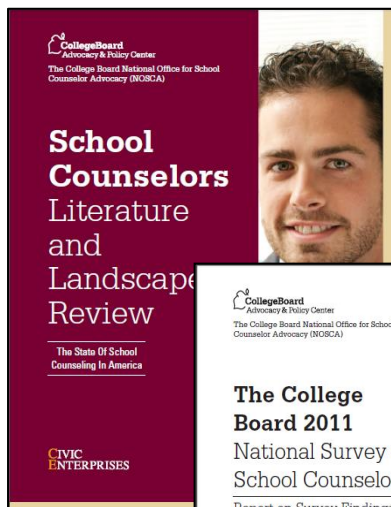
The chart below shows key data elements for each of the Eight Components.

Data Elements, By Component	Elementary School	Middle School	High School
<b>6. College Affordability Planning</b>			
Participation in early awareness financial literacy and financial aid initiatives	●	●	●
Participation in financial aid planning processes		●	●
Scholarship application completion			●
FAFSA completion ←			●

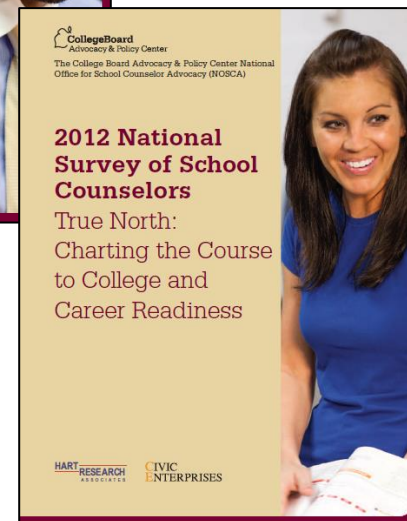
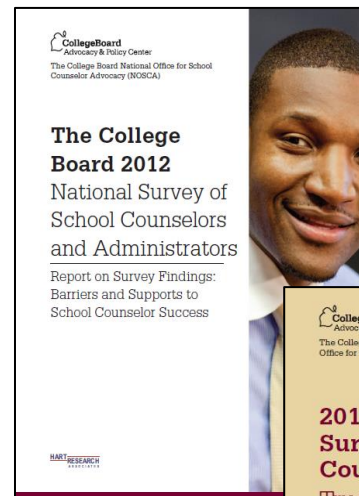
High School Guide, p.20  
Middle and Elementary School Guide, p.16



## 2011 Survey Reports



## 2012 Survey Reports



Source: <http://nosca.collegeboard.org/research-policies/annual-survey>

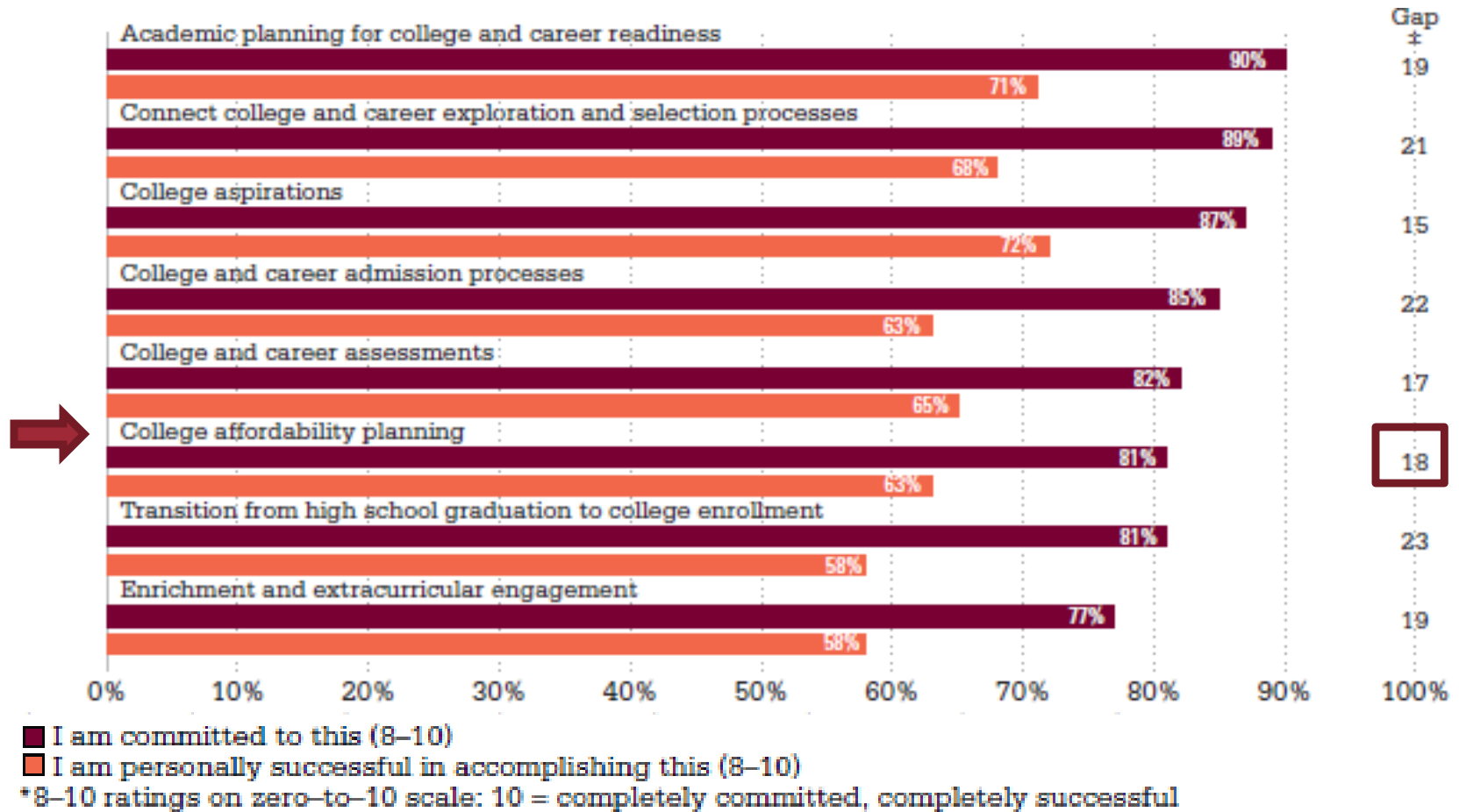
## **Poll Question**

### **National Survey of School Counselor, 2012**

**1. How successful have you or your counselors been in providing students and families with comprehensive information about college costs, options for paying for college, and the financial aid process?**

- A. Not successful
- B. Somewhat successful
- C. Completely successful

## How committed and successful are you in accomplishing the college affordability planning?



**Source:** 2012 National Survey of School Counselors and Administrators  
 Report on Survey Findings: Barriers and Supports to School Counselor Success  
**Website:** <http://nosca.collegeboard.org/research-policies/annual-survey>

## **Poll Question**

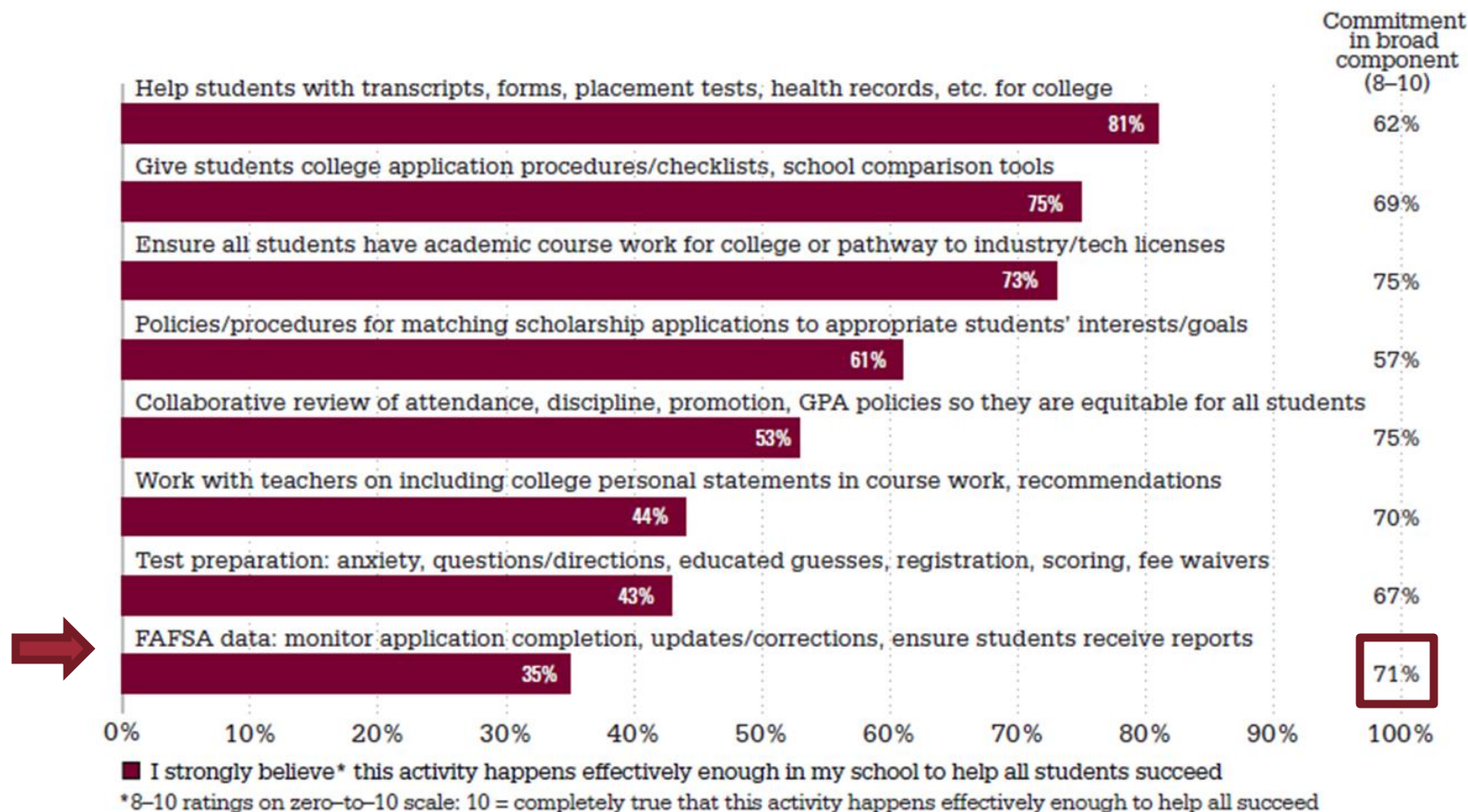
### **National Survey of School Counselor, 2012**

**2. Do you effectively implement and use FAFSA data: monitor application completion, updates/corrections, ensure students receive reports in your school?**

- A. Not effective
- B. Somewhat effective
- C. Completely effective



## Does this activity happen effectively in your school to help all students succeed?



**Source:** 2012 National Survey of School Counselors and Administrators  
 Report on Survey Findings: Barriers and Supports to School Counselor Success  
**Website:** <http://nosca.collegeboard.org/research-policies/annual-survey>

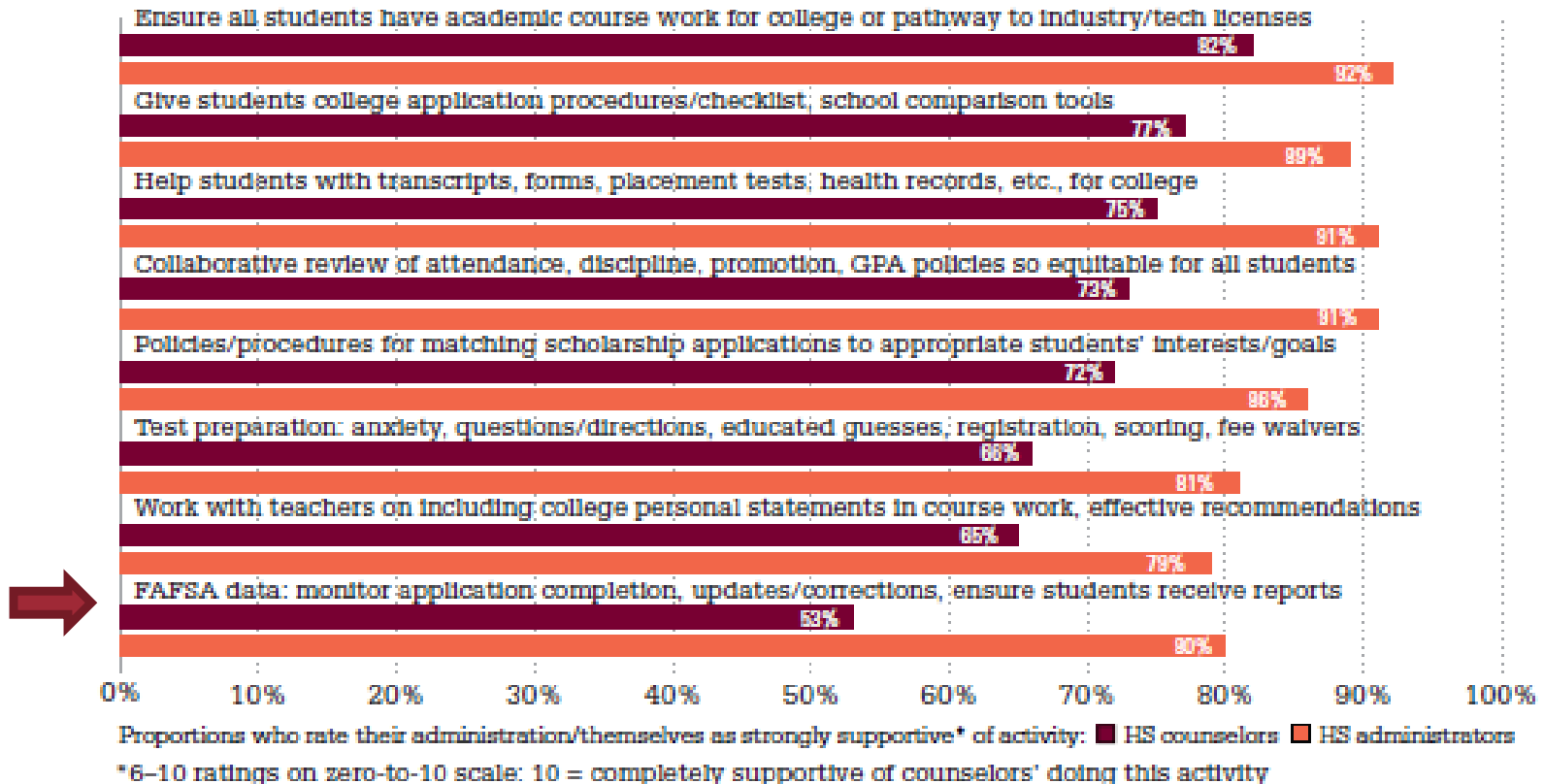
## **Poll Question**

### **National Survey of School Counselor, 2012**

**3. How much does your administrator support FAFSA data: monitor application completion, updates/corrections, ensure students receive reports.**

- A. Not at All
- B. Somewhat
- C. Completely Supportive

## How much does your administration support this activity to prepare students for college and career?



**Source:** 2012 National Survey of School Counselors  
True North: Charting the Course to College and Career Readiness  
**Website:** <http://nosca.collegeboard.org/research-policies/annual-survey>



**Greg Darnieder**

Senior Advisor to Secretary Arne Duncan on College Access  
US Department of Education

**Email:** [greg.darnieder@ed.gov](mailto:greg.darnieder@ed.gov)

**Phone:** (202) 401-1367

# Importance of FAFSA Completion

The FAFSA determines whether a student qualifies for Pell grants as well as other federal & state grants, loans and work-study opportunities and helps families figure out how to afford higher education.

It is also critical to students qualifying for most private scholarships and institutional aid.

## U.S. Secretary of Education Arne Duncan

***"If students don't think they can pay for college, they won't apply for college. Giving more young people access to the tools they need to apply for federal student aid is a key part of our strategy to make America number one in the world for college graduates by 2020."***



# Overview of the National FAFSA Completion

# FASFA Tracking Pilot Program

**92 New  
Sites**

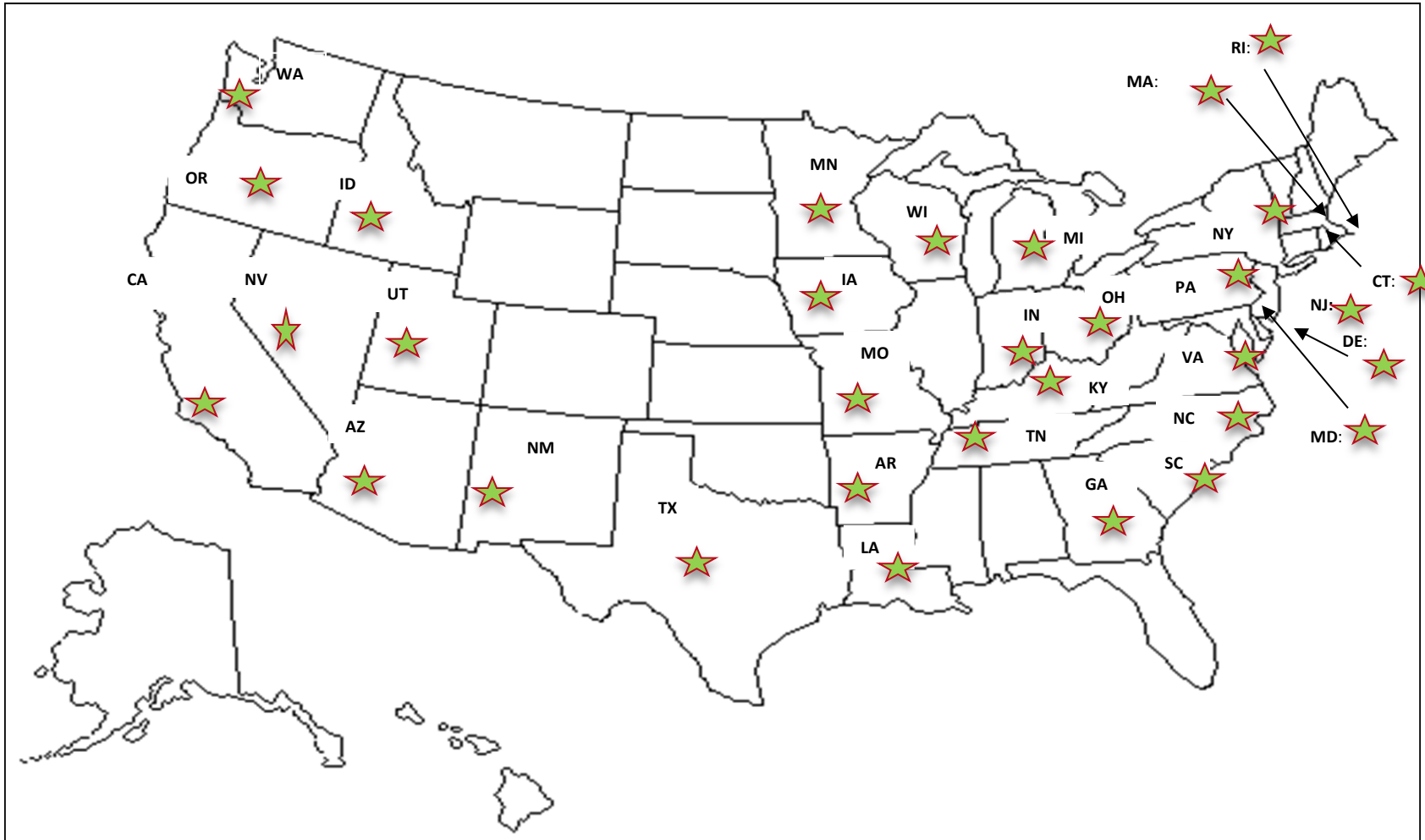
**18  
Alumni  
Sites**

Districts in the FAFSA Completion Project are able to **track whether high school seniors have completed the FAFSA** starting in the 2012-13 school year.

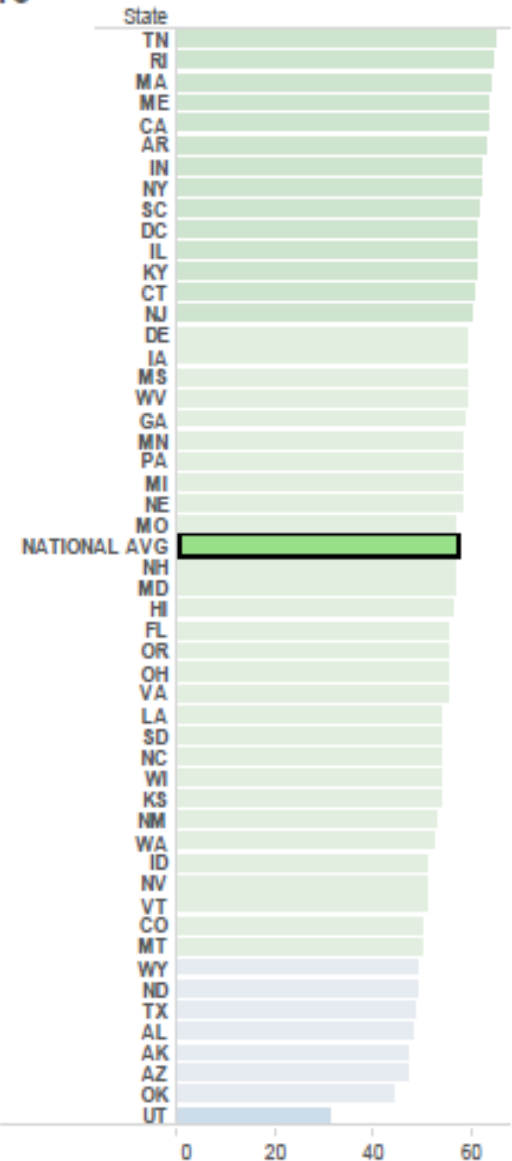
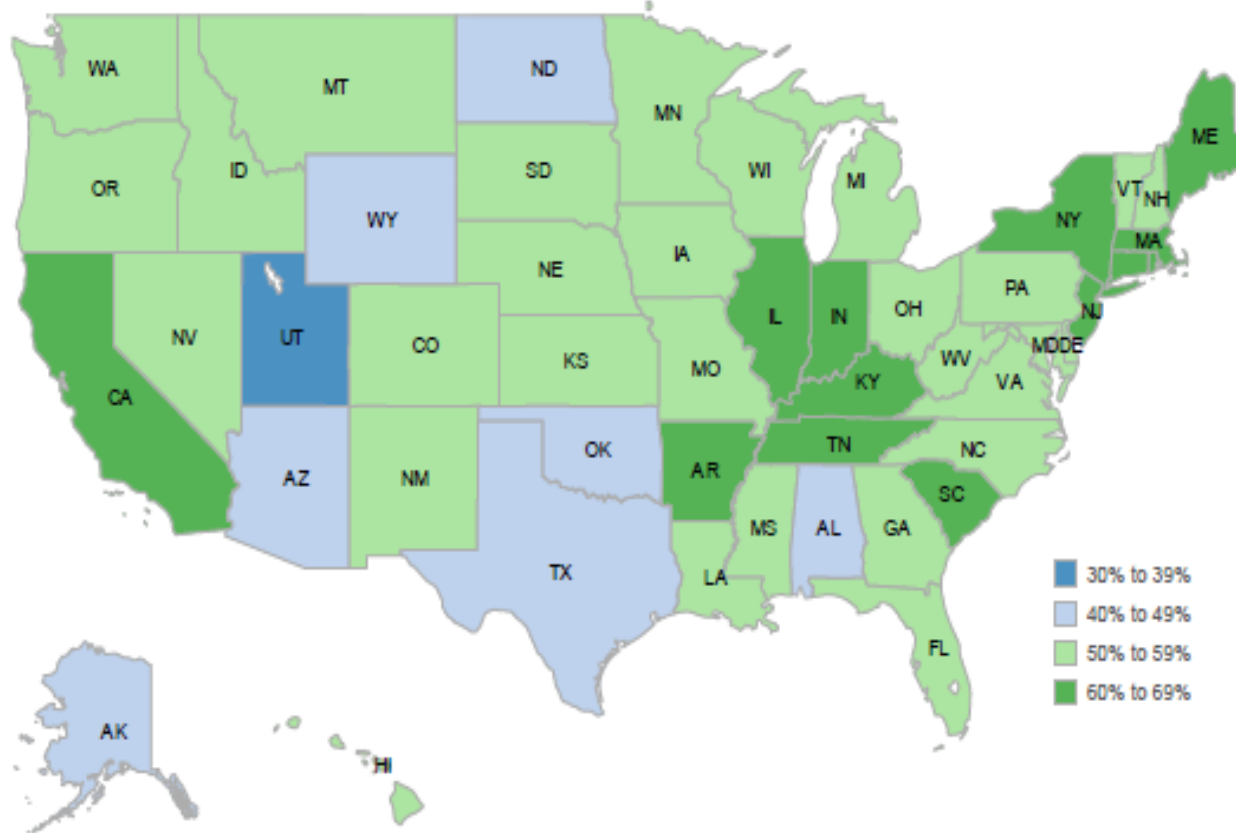
This information will help **school counselors focus efforts and resources** on students who have not yet completed the process.



# FAFSA Tracking Sites



## Percentage of High School FAFSA Filers by State as of June 30, 2013



Percentage of High School FAFSA filers were calculated by the number of completed FAFSAs as of June 30, 2013 for the 2013/14 Application Cycle divided the number of seniors that graduated in the Class of 2013 as reported projections by the Western Interstate Commission for Higher Education (WICHE). Percentages were rounded to the nearest whole number. For FAFSA completion data, applicants identified based on several criteria to reflect likely high school seniors (non-renewal applicants, entering college freshman with high school diploma, and no older than 18 years of age as of June 30th, 2013. Central Processing System (CPS).

# FAFSA Pilot Site Performance



**Albuquerque, New Mexico:** 11 percentage point increase in one year and 11 percentage point increase in college enrollment the following Fall semester



**Riverside, California:** 21 percentage point increase in first year



**San Antonio ISD, Texas:** 36 percentage point increase in one year



**Chicago, Illinois:** reached 91percent in 2010

# Lessons Learned From the FAFSA Pilot

- Obtaining the data isn't enough – coordinated community efforts must ensue.
- Not an initiative requiring counselors to fill out FAFSA forms, but to utilize community resources:
  - ✓ business
  - ✓ volunteers
  - ✓ financial experts at area colleges
  - ✓ mayoral involvement
  - ✓ etc....
- Opportunity to increase financial literacy around paying for college.
- Opens the door for schools and districts to strategize around building “college going cultures”.

# STARTING January, 2014

## Each state grant agency will be given the opportunity to set up their own FAFSA Completion System

- 6 states (CO, IL, ME, MI, LA and TX) have already established such systems.
- Encourages coordination of state education leaders to collaborate around a key metric.
- Terrific community engagement metric around the collective impact theory of change and cradle to career efforts.

## EXPANDING FAFSA COMPLETION NATION-WIDE!!!

### **For Additional Questions :**

Please Contact **Greg Darnieder**, Senior Advisor to Secretary Arne Duncan on College Access , US Department of Education

Email: [greg.darnieder@ed.gov](mailto:greg.darnieder@ed.gov)

Phone: (202) 401-1367



# FAFSA Completion By High School

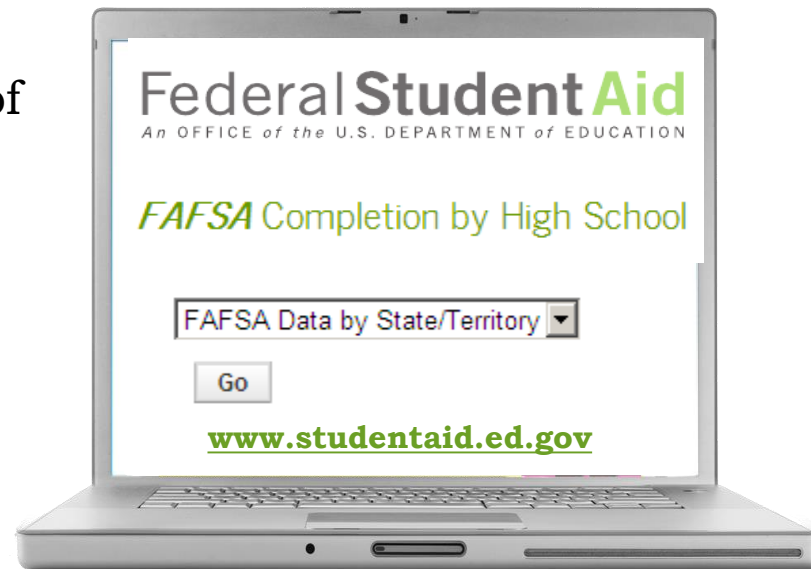
For high schools to track their progress FSA regularly updates estimates for the first twelve months of an application cycle.

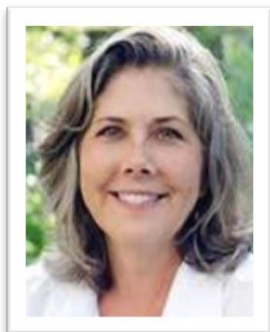
From January through June, data releases are **biweekly** starting on the third Friday of January.

For the remainder of the calendar year, data releases are **monthly** occurring on the first Friday of the month starting on the first Friday of August.

## Website:

<http://studentaid.ed.gov/about/data-center/student/application-volume/fafsa-completion-high-school>





**Erin K. Martinez**, School Counselor,  
Riverside Unified School District



**Catherine Chiu**, Director of Guidance,  
Boston Public Schools



## Question #1

How do you gather and use FAFSA completion data?



# FAFSA School Reports on Students

## Key:

**1—by high school**

**2—by counselor**

**3—by completion status**

❖ **0** = no FAFSA found

❖ **1** = missing signature

❖ **2** = FAFSA processed

❖ **3** = submitted, not processed  
*follow up required)*

**4—by special programs**

The screenshot shows the 'FAFSA Counselor Report' interface. At the top, there are navigation tabs: 'View', 'Properties', 'History', and 'Subscriptions'. Below these are search filters for 'School Name' (set to 'King') and 'Counselor' (set to 'Brayley, J'). A message box states '0 Record was not found on the FAFSA Completion database table'. Below this is a table with columns: Student ID, Last Name, First Name, Birthday, ELL, SpEd, and AVID. The table contains several rows of student data, with a large black redaction box covering the 'Last Name' and 'First Name' columns for most entries. Annotations 1, 2, 3, and 4 are placed on the interface: 1 points to the 'Subscriptions' tab, 2 points to the 'Counselor' dropdown, 3 points to the '0 Record was not found' message, and 4 points to the 'AVID' column header.

## Data Dialogue:

1. Who completed or Who did not complete the FAFSA?
2. Which group of students need more support? (Race/ethnicity, Gender, Special Ed, AVID, English Language Learners, Free and Reduce Lunch Students, etc...).

## **Erin K. Martinez**

School Counselor, Riverside Unified School District, California

- **Focus early on students with errors/missing information on submitted FAFSA.**
- **Use data to make direct, personal, and specific contact with students.**
- **Share the data with coordinators and teachers of special programs:**
  - ✓ International Baccalaureate
  - ✓ AVID
  - ✓ Academies
  - ✓ Special Education
- **Collaborate with District-wide counselors, program coordinators, teachers, bilingual community to assist in FAFSA completion effort:**
  - ✓ Workshops
  - ✓ Information Nights
  - ✓ Peer-to-Peer
  - ✓ Summer Follow Up



## Question #2

This is a two part question: 1) How do you monitor the process of FAFSA completions and 2) increase the numbers of 12<sup>th</sup> graders completing the form?

## **Erin K. Martinez**

School Counselor, Riverside Unified School District, California

### **Monitor the Process:**

- Receiving regular FAFSA reports
- Getting help
- Meeting with students individually

### **Increase 12<sup>th</sup> Grade FAFSA Completion:**

- Counselors meet with seniors in small groups (advisory classes) beginning in September.
- FAFSA worksheet and FAFSA videos from [www.studentaid.gov](http://www.studentaid.gov).
- Financial aid information night in December – FAFSA discussed in detail with parents/students.
  - ✓ Letter entitled FREE Money May Be Available for Your Student's Education
  - ✓ *Early Bird FAFSA Workshop in January*
  - ✓ Deadline: March 2, 2013
  - ✓ Encouraging Seniors to attend workshops in the area
  - ✓ Schedule walk-in time for assisting students in the school counseling office
- This year (Dec-Jan)- mini lessons through advisory classes on Financial Aid – myths, mistakes, words to know.

# Erin K. Martinez

## School Counselor, Riverside Unified School District, California

### Financial Aid—Myth v. Reality

**Objective:** Students will be able identify at least ten good reasons why every senior should apply for financial aid.

**Materials:** One copy of AVID’s Financial Aid Myths (cut into strips, folded, placed in container to draw from) and a class set of AVID’s Financial Myths...and Realities.

#### **Instructions:**

1. Select a student to draw one myth and read it aloud. Ask other students to share why they think it is a myth. Then read the answer (the reality) to the class. Repeat the process until all the myths have been read aloud.

2. Distribute copies of “Financial Aid Myths...and Realities” to students. Have students work individually, in pairs, or in small groups to come up with a list of 10 good reasons why every senior should apply for financial aid.

#### **Source:**

**AVID’s Website:** <http://www.avid.org>

### Financial Aid—Words to Know

**Objective:** Students will be able to explain important terms related to the financial aid process.

**Materials:** A Financial Aid Glossary

**Instructions:** Introduce a word a day as a sponge activity, and have students add it to their notes or planner. Play a game to reinforce the new terms (lots of templates available online)...I got this one from AVID materials:

#### **Bluff:**

- Divide students into two teams
- Teacher reads either the word or definition. When teacher reads the definition, students must provide the word. When the teacher reads the word, then students must provide the definition.
- Students who know the answer stand up; and those who don’t and wish to “bluff” the answer stand up, also.
- One of the students standing is to give either the definition or word.
- If the student gives the correct answer, count the number of students standing and award that number of points to the student’s team.
- If the student answers incorrectly, count the number of students standing and deduct that number of points from the student’s team.



## **Question #3**

What best practices, strategies and/or tools do you use to create FAFSA ready students?

## Catherine Chiu

Director of Guidance, Boston Public Schools, Massachusetts

### Monthly FAFSA Timeline:

Month	Topic	Activity
Sep/Oct/Nov/Dec	<b>Students—do your HW!!!</b> Research schools, learning about steps you need for applying, admission, and financial aid process.	Host workshops at the high schools and at the district's city-wide college fair.
Oct/Nov	Solicit community financial aid experts, community partners, and volunteers to conduct workshops and engage students and families in the financial aid and FAFSA process.	Identifying and partnering with: <ul style="list-style-type: none"> <li>• Financial Aid Officers</li> <li>• Community-Nonprofits</li> <li>• College Goal Sunday Events</li> </ul> <b>Website:</b> <a href="http://www.collegegoalsundayusa.org/">http://www.collegegoalsundayusa.org/</a>
Dec	Advertise	Sending out letters, flyers, Tweets on Twitter, Posts on Facebook, email, and phone tree

## Monthly FAFSA Timeline Continued:

Month	Topic	Activity
Jan/Feb	Roll out events and activities	<p>Use FAFSA completion data to target students and categorize them into <b>group A, B, and C</b>.</p> <p><b>Group A and B</b> – are those students who are on track and have applied to colleges</p> <p><i>(These students &amp; families are sent to district wide FAFSA event and pushing these students by your states completion deadline)</i></p>
Mar	Host a district-wide FAFSA Night/Day in collaboration with a college admission event	<p><b>Group C</b> – are students who are Johnny &amp; Jeannie Come Late <i>(“Yes missed it and I’ll do it later”)</i></p> <p><b>*Use list from FAFSA School Report by Student!!</b></p>
Mar	Students that did <b>NOT</b> receive a calculated EFC (expected family contribution)	Use FAFSA Data to identify and follow up with students.



## Monthly FAFSA Timeline Continued:

Month	Topic	Activity
Apr	Transition workshops	Compare Financial Aid Award Letters (FAAL) and support students in contacting F.A. officers to get clarity and request appeals. <i>Encourage colleges to not only post electronically, but include hard copies</i>
May	Take care of post FAFSA details	Following-up with students after May 1 <sup>st</sup> : <ul style="list-style-type: none"> <li>• Deposits</li> <li>• Submitting copies of tax forms</li> </ul>
Jun/Jul	Addressing “ <b>summer melt</b> ” transition from high school to college enrollment	Work with community partners.

## Catherine Chiu

Director of Guidance, Boston Public Schools, Massachusetts

**University of the United States (UUS)**  
Student Name, Identifier

**Costs in the 2013-14 year**

Estimated Cost of Attendance	\$ X,XXX	\$ X,XXX /yr
Tuition and fees	\$ X,XXX	
Housing and meals	X,XXX	
Books and supplies	X,XXX	
Transportation	X,XXX	
Other educational costs	X,XXX	

**Grants and scholarships to pay for college**

Total Grants and Scholarships (from all sources)	\$ X,XXX	\$ X,XXX /yr
Grants from your school	\$ X,XXX	
Federal Pell Grant	X,XXX	
Grants from your state	X,XXX	
Other scholarships you can use	X,XXX	

**What will you pay for college**

**Net Costs**  
(Cost of attendance minus total grants and scholarships)

\$ X,XXX /yr

**Options to pay net costs**

**Work options**

Work-Study (Federal, state, or institutional) \$ X,XXX

**Loan options\***

Federal Perkins Loans	\$ X,XXX
Federal Direct Subsidized Loan	X,XXX
Federal Direct Unsubsidized Loan	X,XXX

\*Recommended amounts shown here. You may be eligible for a different amount. Contact your financial aid office.

**Other options**

Family Contribution (As indicated by the institution's information reported on the FAFSA or to your institution)	\$ X,XXX /yr
- Payment plan offered by the institution	- Military and/or National Service benefits
- Parent PLUS Loan	- Non-Federal private education loan

**Graduation Rate**  
Percentage of full-time students who graduate within 7 years

**Loan Default Rate**  
Percentage of loans not repaid as required

**Median Borrowing**  
Students at UUS typically borrow \$X,XXX in federal loans for their undergraduate study. The Federal loan payment over 30 years for this amount is approximately \$X,XXX per month. Your borrowing may be different.

**Repaying your loans**  
To learn about loan repayment choices and work out your Federal Loan monthly payment, go to [www.ed.gov/loanrepayment](http://www.ed.gov/loanrepayment)

**For more information and next steps:**  
University of the United States (UUS)  
Financial Aid Office  
123 Main Street  
Anytown, NY 12345  
Telephone: (123) 456-7890  
E-mail: [financialaid@uus.edu](mailto:financialaid@uus.edu)

Customized information from UUS

### Financial Aid Shopping Sheet:

- Review and Analyze Financial Aid Award Letters (FAAL)
- Comparing Financial Aid Award Letters (FAALS)

**Website:** <http://www2.ed.gov/policy/highered/guid/aid-offer/index.html>

## Erin K. Martinez

School Counselor, Riverside Unified School District, California

- One page “**Cheat Sheet**” created to help counselors, teachers, volunteers who help at FAFSA workshops—the vast majority of questions, problems are **SIMPLE!**

### Helpful Hints

- ✓ Don't hit the back button

### Frequently Ask Question's

- ✓ My parents are divorced

### Common Errors

- ✓ Names must match social security card

### COMPLETING THE FAFSA: HELPFUL HINTS, FAQs, & COMMON ERRORS

- ✓ Make sure student is completing the 2014-2015 application.
- ✓ NAMES MUST MATCH SOCIAL SECURITY CARD—EXACTLY. If name has a suffix, such as Jr. or III, include a space between your last name and the suffix.
- ✓ PIN: student and parent must both have one. They can apply for a pin while completing the application (option at beginning and end of application). PIN numbers cannot be the same for any family member. Application will be held until name and social are verified (2-3 days). To retrieve forgotten PIN or new pin go to [www.pin.ed.gov](http://www.pin.ed.gov)

## **Erin K. Martinez**

School Counselor, Riverside Unified School District, California

- Use the **“Cheat Sheet”** along with FAFSA demo to train counselors, volunteers, etc...during our district meetings, professional learning communities, and prior to FAFSA workshops.
- Federal Student Aid:  
[www.fsa4counselors.ed.gov](http://www.fsa4counselors.ed.gov)
  - ✓ Username: eddemo
  - ✓ Password: fafsatest
- 1-800-4FED-AID (1-800-433-3243) They are quick and will answer any questions on the spot. **I have them on Speed Dial!**

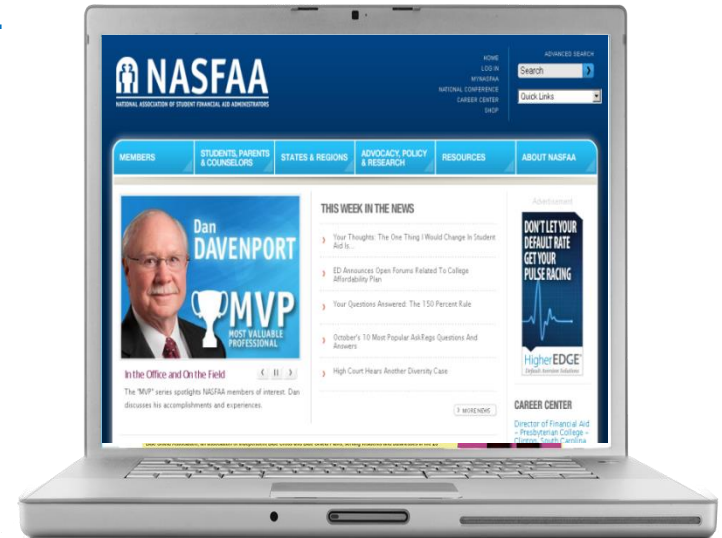
# Action Plan:

- Step 1:** Retrieve your FAFSA School Report .
- Step 2:** Share your data with in-school and out-of-school supports (teachers, special school programs, volunteers, community agencies, etc...).
- Step 3:** Analyze your data and create a goal.
- Step 4:** Develop systemic interventions.
- Step 5:** Measure your results.

# Tools and Resources

## National Association of Student Financial Aid Administrators (NASFAA) Offers:

1. **National Training for Counselors**
2. **Financial Aid Night Toolkit**
3. **Resources for Supporting Students with Special Circumstances** (e.g. foster youth, homeless students, incarcerated parents, independent students, missing parents, undocumented students)
4. **Speaker and Mentor Directory**



**Website:**

<http://www.nasfaa.org/Default.aspx>

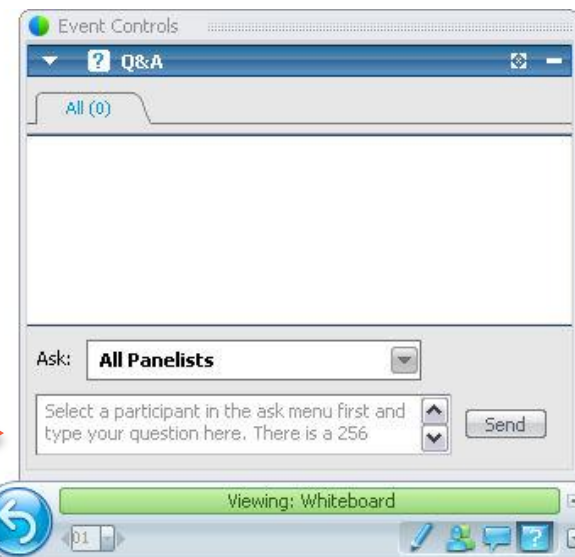
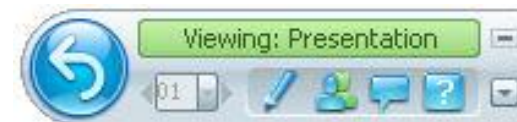
# Submitting Online Questions & Comments

**Questions may be submitted at any time during the presentation.**

**To submit a question:**

- Click on the question mark icon (?) on the floating toolbar on your Web Session screen (as shown at the right).
- This will open the Q&A window on your computer only.
- Type your question into the small dialog box and click the send button.

## Q&A Icon



# Now Responding to Your Webinar Questions

## Panelists



**Catherine Chiu**, Director of Guidance, Boston Public Schools

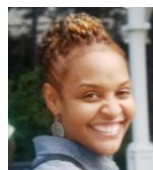


**Greg Darnieder**, Senior Advisor to Secretary Duncan on College Access,  
US Department of Education



**Erin K. Martinez**, School Counselor, Riverside Unified School District

## Moderator



**Jennifer A Dunn**, Director, College Board, Membership and Higher  
Education, National Office for School Counselor Advocacy (NOSCA)



# Upcoming NOSCA Webinar

**March 20, 2014, 1:00 PM to 2:00 PM EST**

## **Building Leadership Skills in College and Career Readiness Counseling**

This webinar will focus on the skills school counselors need to create a college-going culture. Hear from leaders who have influenced policies and decisions that impact student outcomes for college and career readiness. The panel will also share suggestions for acquiring professional development at the national, state and district levels at NOSCA's conference and by utilizing webinars, trainings and the NOSCA website.

**April 30, 2014, 1:00 PM to 2:00 PM EST**

## **Engage in Policy Conversation and Elevate Your Voice**

Learn how to engage policymakers and leaders in your school, district and state. A panel of policy experts from school counseling–serving organizations discuss today's educational trends affecting school counselors. They'll also share strategies for impacting state and school policy that effects on-the-ground counseling practice in secondary schools.

[destinationequity.collegeboard.org](http://destinationequity.collegeboard.org)



**Destination  
Equity 2014:**  
Charting Bright Futures for All Students

April 11-12, 2014 | Westin Bonaventure | Los Angeles, CA

**Conference Proposal Submission Deadline\*:** Dec 20

**Early-Bird Registration Deadline:** Dec 20

**Regular Registration Deadline:** Apr 3

\*New Discounted Presenter Rate

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