



**National  
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NCAN Benchmarking  
Spotlight:

# Bottom Line

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*“Get in. Graduate. Go far.”*

## Organization Overview

Founded in 1997, Bottom Line’s mission is to help low-income, first-generation students get to college and successfully complete degrees and, in so doing, help transform urban communities by infusing them with career-ready young adults. In its first year, Bottom Line had one part-time staff person who helped 25 Boston high school students apply to four-year colleges. Today Bottom Line serves 6,000 students in four cities (Boston; Worcester, MA; New York; and Chicago), and plans are underway to reach 10,000 participants by 2020.

Bottom Line assists students from the summer before 12th grade through college completion. Close to 80 percent of the college students served complete bachelor’s degrees in six years, eight times the bachelor’s degree completion rate of low-income students nationally.<sup>i</sup> Equally impressive, 75 percent of Bottom Line students who finished degrees in 2014 and 2015 either had jobs that required a bachelor’s degree or enrolled in graduate school within six months after graduating.

## Services

Bottom Line’s services cluster around two programs: the College Access Program, which supports 12<sup>th</sup>-graders in making affordable and responsible college choices, and the College Success Program, which supports college students through degree completion. Students in the College Access Program can and often do transition to the College Success Program, but the recruiting processes for the two programs are separate. Students can enter the College Success Program through the Success Direct recruiting process without having participated in the College Access Program. As part of its expansion to new sites and growth in current regions, Bottom Line actively recruits students to join Success Direct once they have enrolled in college, addressing the imbalance in access services and completion support available to first-generation, low-income students. Both programs include one-on-one student/counselor interactions, Individual Service Plans (ISPs), and curriculum guides outlining the specific steps students need to take from 12th grade to degree completion.

### College Access Program

Students receive intensive college counseling aimed at helping them gain admission to a college that is a good match for their academic background, career goals, social interests, and financial needs. Counselors work closely with students to build a top-10 list of colleges that includes at least one financial safety school. Each student has an application plan that breaks down the tasks involved in the application process, and counselors monitor students closely to ensure they meet deadlines. After students receive their acceptance letters, counselors help them to analyze their financial aid packages and compare the net prices of each college they are considering, a critical step to making an affordable college choice.

Students meet with their counselor one-on-one at Bottom Line's office six to seven times during the late summer and fall of 12th grade, and three to four times during the winter and spring. These meetings last about an hour and take place after school. Students receive homework assignments at each meeting that they must complete before seeing their counselor again. Students research colleges, work on their application essays, and gather the information needed for the Free Application for Federal Student Aid (FAFSA). Participation in the College Access Program culminates with students' acceptance of an admissions offer.

## College Success Program

The College Success Program focuses on college and career success. Students come to this program in two ways. Some students served by the access program transition to the success program. However, more students enter through the Success Direct recruiting process after being referred to Bottom Line by college and other community-based organizations. In both cases, students are then supported for four to six years through their postsecondary experience.

The program starts with a summer orientation, during which students receive help completing the tasks necessary to matriculate and prepare for the challenges often faced by first-year college students. The early college years focus on ensuring students accumulate credits that count toward their degree, while the last two to three years are spent preparing students to secure a full-time job related to their major after they graduate. In the near future, Bottom Line will also emphasize career readiness from the outset of the postsecondary experience.

The success program supports students in four key areas constituting the "DEAL framework." In this acronym, D stands for Degree and focuses on students making decisions that will keep them on track and fulfilling degree requirements. E is for Employability, which refers to students developing the skills and experience to land a job related to their major after they graduate. A is for Affordability, referring to renewing financial aid, avoiding excessive borrowing, and graduating with manageable debt. Finally, L stands for Life and the ability to cope with everyday non-academic issues that can interfere with college success. Each area encompasses a set of tasks that students need to complete. Success program students internalize the DEAL framework early on and refer to it regularly.

### DEAL Attainment Goals

- **Degree:** earn a bachelor's degree
- **Employability:** have the ability to implement a career plan
- **Affordability:** graduate with less than \$36,000 of loan debt
- **Life:** be resourceful and responsible

Students communicate with their counselor during the semester by phone, text, and email. Counselors also make monthly visits to partner campuses that enroll 20 or more success program students and meet with each student two to three times a semester. During winter and summer breaks, students meet individually with their counselor to review courses completed, grades and credits earned, and identify their progress in meeting the benchmarks outlined in their ISP. Based on this assessment, counselors

work with students to update their plan for the following semester. The plans reside in Bottom Line's tracking system, and counselors follow students' progress against their plans at intervals throughout the semester, intervening when students appear to be falling off-track.

## *Student Recruitment and Selection*

Bottom Line recruits for its access program through public high schools and community organizations serving low-income students. Students also hear about the program from family members and friends. To be eligible for participation, students must:

- come from a family where neither parent has a bachelor's degree and/or have a family income below 200 percent of the federal poverty level;
- be a U.S. citizen, permanent resident, or refugee/asylee; and
- be interested in pursuing a bachelor's degree.

### **Profile of Students**

- **91% Low-income**
- **96% First-generation**
- **67% Female**
- **33% Male**
- **27% Asian-American**
- **35% Black**
- **32% Hispanic**
- **4% White**

While there are no specific academic cutoffs, students must be college-ready, i.e., able to meet the admissions requirements of a four-year college. Students apply online for Bottom Line participation in the spring of 11th grade. Those who appear to be eligible provide copies of their tax returns and high school transcript to document that they meet the income and academic criteria. Fewer than half of applicants are accepted, most of whom have GPAs of 2.5 or higher.

High school graduates who plan to attend one of Bottom Line's partner colleges are eligible to participate in the College Success Program. Approximately 70 percent of the college success participants completed the college access program. The other 30 percent enroll directly in the college success program during the summer before they start college.

In the 2015-16 academic year, Bottom Line served 1,106 12th-graders and 3,853 college undergraduates. These numbers will grow as Bottom Line continues to expand in each city and establishes new sites. By 2020, Bottom Line will likely serve over 10,000 students.

## *Staffing*

Bottom Line had 126 staff members during the 2015-2016 school year:

- 87 full-time counselors;
- 25 regional managers overseeing programming and fundraising in each city; and
- 15 members of a national team responsible for programming, training, evaluation, development, communications, finance, and human resources.

Access counselors have average caseloads of 60 students, while success counselors work with approximately 85 students each. New counselors receive eight weeks of training during the summer before they begin working with students, as well as ongoing

professional development throughout the year. Most frontline staff are recent college graduates interested in both college access for underserved populations and the ability to build trusting relationships with students.

## *Tracking Student Progress*

Bottom Line tracks and closely monitors data on student progress. The access and success programs have six and five program objectives, respectively. Each objective has one to three performance indicators against which Bottom Line tracks progress for individual students and the program as a whole. The access program tracks each student's progress toward building a college list, completing the admissions and financial aid application processes, and accepting offers of admission. The success program collects semester-by-semester data to monitor each student's progress toward a degree: grades, credits earned, major(s), enrollment status, class schedules, and financial aid awards. Both programs track data about counselor interactions with students, which is important information for service continuity as students move along the path to a degree. Counselors access data regularly to check their students' status of meeting each objective. The collected data also allow staff to know the impact of different interventions on student achievement.

Counselors are responsible for collecting and entering data for students in their caseload and monitoring their students' progress. Bottom Line emphasizes earning counselor buy-in to capture and use data starting with the hiring process and continuing throughout counselors' initial training and employment. Hiring managers stress counselors' responsibility for compiling and inputting data, and the use of data to assess performance at student, staff, and organizational levels.

Until the 2016-17 academic year, Bottom Line used a custom-designed database to compile and analyze data. Staff found this database cumbersome to use, however, and so in fall 2016 Bottom Line migrated its data to a custom Salesforce database that was developed over two years.

## *Organizational Culture*

Bottom Line leaders describe the organizational culture as more corporate than that of most non-profits. They place a high emphasis on fidelity to a set of core values similar to those of for-profit organizations: relationships, persistence, results, efficiency, responsibility, and excellence. These values are posted on the walls throughout Bottom Line's offices and are used to evaluate job candidates and conduct performance reviews. Bottom Line operates with the mindset that its students are customers, and the program is designed and measured to focus on the value it provides. Rather than inputs

like the number of services provided, Bottom Line focuses on outcome measures like credit accumulation and college completion.

Another example of Bottom Line's corporate culture is the requirement that staff members comport themselves in a professional manner as reflected in the dress code, timeliness requirements, and their relationships with students.

Students describe the culture as one where the counselors are welcoming, meet students where they are, and make the process of getting to and through college feel like a collaborative experience. Many of the counselors come from backgrounds similar to their students and so are able to quickly establish trusting relationships. Meeting with students monthly, checking with them in between meetings, and taking an active interest in their achievements also contribute to students' sense that their counselor genuinely cares about them.

## *Finances*

Bottom Line is funded primarily from private sources. In 2016, foundations contributed 40 percent of the budget, corporations 38 percent, and individual donors, 13 percent.

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Other contributors like community-based organizations and colleges and universities procuring Bottom Line's services for their students comprised the remaining nine percent. Typically, foundations cover the start-up costs of Bottom Line's new programs and sites, while funding for ongoing operations comes from local corporations, philanthropic organizations, and individual donors. In addition, a small number of colleges and community-based nonprofit and charter school management organizations partially subsidize the cost of Bottom Line services for their students. This

"earned income" for Bottom Line is an arrangement these organizations say is more cost-effective than developing college advising expertise themselves. Two universities in New York State pay up to half the cost to serve Bottom Line students at their institutions. Earned income accounted for approximately 10 percent of the budget for Bottom Line's New York office in 2015.

Bottom Line's per-student cost is approximately \$1,500 annually, an amount that varies from city to city because of differences in salary levels and rent. This amount reflects the cost of providing students with highly personalized, one-on-one assistance for up to seven years.

# Policies and Practices Contributing to Students' College Success

## *Data-driven Decision-making*

Using metrics allows Bottom Line managers to know what is happening with a student at any given time and keeps accountability for student success at the forefront of everyone's work. Data-driven decision-making also enables staff to better support students and use organizational resources in more efficient and effective ways.

Each program goal for students has a Key Performance Indicator (KPI) for which staff at all levels are accountable (Attachment A). The KPIs, some of which overlap with NCAN's Common Measures, vary somewhat across cities based on local circumstances. Progress Milestones within each KPI track students' progress with completing the short-term tasks necessary to fulfill the long-term KPI. Monitoring these data allows staff to quickly identify students experiencing problems and intervene appropriately. In addition to KPIs, staff members use Service Indicators to track the services provided to individual students month-by-month (Attachment B).

### KPI Examples

- College essay finalized
- Aid award letters collected
- Persisted through first two years of college
- Success graduates employed or continuing their education

The DEAL framework (Attachment C) utilizes Progress Milestones to help spot students who are falling behind. Examples of Milestones include declaring a major, earning enough credits each semester to graduate on time, identifying a post-graduation career path, and developing the skills needed to secure a meaningful job. Status Indicators are a part of end-of-semester assessments used to identify students who need support to meet Progress Milestones.

Indicator and Milestone data come from students' college records and Bottom Line's student service files. Although success program participants sign a Family Educational Rights and Privacy Act (FERPA) release, advisors find it easier to secure college record data through students' online college portal, which students give them permission to access. This approach allows staff to compile information that is not available through the National Student Clearinghouse, including grades, attempted and earned credits, GPA, semester bills and balances, and loans. These data inform the development of students' service plans and help staff understand the impact of services on student outcomes and identify changes they need to make to improve student outcomes.



In addition to internal assessments of student outcomes and program effectiveness, Bottom Line has used external evaluators to assess its impact. In 2014, the organization launched a seven-year randomized controlled trial – the gold standard for impact evaluations – to determine the impact of its programs on college enrollment and degree completion. This study<sup>ii</sup> involves the random assignment of students from the high school classes of 2015 and 2016 who met Bottom Line’s admission criteria to either a treatment or a control group. Initial results indicate that students who received Bottom Line advising in high school were 14 percent more likely to enroll in a four-year college and attend institutions with higher graduation rates than control group students. Students receiving Bottom Line services also participated in student activities at higher rates and reported feeling more comfortable on campus than did control group students. Almost 60 percent indicated their Bottom Line advisor played an important role in their college applications and decisions; just 20 percent of the control group said the same of the help they received from other sources.

### *Trusting Personalized Support*

Bottom Line’s counselors must have trusting relationships with students in order to assess their progress and help them plan for how they can resolve problems impeding their academic performance. Counselor-to-student ratios of 60:1 at the high school level and 85:1 at college allow counselors to develop personal relationships with each student in their caseload and tailor communications and interventions to individual interests and needs. Working one-on-one, counselors are able to close gaps in the guidance and support provided by high schools and colleges. They connect with students at much deeper levels than do most public high school guidance staff and professional college advisors, assisting with myriad issues from time management to renewing financial aid and talking through issues that interfere with their progress. Students report turning to their Bottom Line counselor for specific pieces of information, advice with solving academic and personal problems, and emotional support. They also say they value having someone monitoring how they are doing, reminding them of upcoming tasks, and helping them feel less anxious.

Bottom Line counselors check with their students monthly and promise students that someone will respond to phone calls and text messages within 48 hours. Because students know they can rely on counselors to be responsive, they trust that Bottom Line has their best interests at heart. Trust also develops because of counselors’ transparency with students. They tell students everything they are doing on their behalf, while making clear their expectations of students (Attachment D).

## *Staff Training*

Ongoing training is another key factor contributing to Bottom Line’s college success rates. The training involves four components: an eight-week summer onboarding program for new employees, school-year workshops focused on upcoming activities, weekly staff meetings reviewing data and discussing solutions to student problems, and weekly one-on-one check-ins between managers and the counselors they oversee. The training aligns closely with the KPIs in order to prepare staff members to intervene in ways that help students achieve these benchmarks (Attachment E).

Bottom Line’s training around data is designed to ensure that staff members understand the critical role data plays in meeting organizational goals, and buy into the role they play in maintaining detailed records of services provided and students’ progress toward a degree. During the first week of the summer training, new staff members are introduced to how Bottom Line uses data and the associated benefits. The KPIs and how they are measured come next, followed by training on the activities and tasks related to achieving each indicator, and how to capture and use data to assess student progress and organizational performance. Data also is a focus of the training on Bottom Line’s core values, one of which is “Results.” Finally, new staff members learn how to compile and input information into the data management system and to allocate time in their weekly schedules for this work. Data tracking and use are reinforced throughout the academic year, when counselors and managers review their progress toward achieving the KPI goals in preparation for weekly staff meetings.

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Another emphasis of Bottom Line’s training is how to build trust with students. The summer onboarding focuses on adolescent development theory, how to cultivate strong student relationships, diversity and inclusivity, and treating students as “paying” customers. School-year training stresses the importance of quality, accuracy, and timeliness in all student interactions, maintaining ongoing contact with students, and consistently delivering on promises – all essential to trusting relationships with students.

## *Partnerships*

Bottom Line has strong partnerships with the public high schools and community-based organizations from which staff recruit students, the corporations that provide financial support and internships, colleges and universities, and foundations.

Because the success program's face-to-face model requires counselors to visit campuses regularly to support students, college partnerships are critical. Bottom Line staff have found that successful college partnerships require collaboration both at top institutional levels and on the ground. College partners contribute private space where counselors can meet students, areas with Internet access, parking for Bottom Line staff, access to facilities, and introductions to campus offices that provide student support, including financial aid. Some institutions also support Bottom Line's annual fundraising events. Campus staff view their Bottom Line counterparts as important partners in their efforts to retain and graduate students. They value the help Bottom Line provides to students with managing financial issues, understanding college policies, and navigating institutional bureaucracies, and appreciate counselors actively encouraging students to use campus support services.

Bottom Line employs a full-time staff person to manage its community and school partnerships. Besides referring students to the access program, these partners help Bottom Line re-engage students who have been missing meetings with their counselor. In turn, Bottom Line provides partners with regular reports on students' progress. Staff also organize periodic convenings for partners, where people share their experiences with supporting students on issues related to financial aid and summer melt. These meetings, which attract 50-60 people, also facilitate connections among community organizations and school counselors who are actively involved in encouraging students to go to college.

Corporate partnerships are based on the value proposition that Bottom Line plays an important role in developing the future workforce. The emphasis Bottom Line places on career success during students' last two years of college lends credence to this proposition. A number of the corporations that support Bottom Line financially also provide paid internships for success program students. Because of the importance of these partnerships, in the larger regional sites, Bottom Line has a full-time director of corporate engagement.

Bottom Line engages partners across sectors in its governance structure, which consists of Regional Boards of advisors and a National Board of Directors. The Regional Boards focus on building awareness, fundraising, and other capabilities within the region. The national board has fiduciary oversight and responsibility for hiring and terminating the CEO. It consists of one representative from each region, 10 at-large members mostly from the corporate sector, and Bottom Line's CEO.

## Replication

Bottom Line has a wealth of experience and resources upon which organizations interested in replicating its model can draw. Based on 20 years of experience and lessons learned, staff have codified virtually all the elements that lead to successful college outcomes, including KPIs and Milestones, a curriculum that supports student progress from 12th grade through degree completion, and an eight-week counselor training program.

Clearly, the most efficient way to replicate Bottom Line's model would be to join its network of sites. This approach would provide access to all of Bottom Line's materials, staff training and technical assistance, tracking database, and payroll and HR support. The local sponsors would need to raise funds for operating expenses and some start-up costs, and a percentage of the budget would need to support the services provided by Bottom Line's national office. This approach would work best in cities where graduating high school classes have over 500 eligible students and where there are affordable college options within two to three hours by mass transit or car.

Organizations could also replicate elements of the Bottom Line model, although doing so would require an investment to build some of the features that contribute to the program's success. Compiling and analyzing data from students' acceptance and aid award letters, college transcripts, and other sources could significantly improve an organization's capacity to assist students with applying to and attending colleges that fit well with their interests, needs, and resources. A staff person designated as a "knowledge" expert could develop the depth of content expertise counselors need to provide high-quality services to students all along the pathway to a college degree. Establishing strong partnerships with higher education institutions attended by significant numbers of an organization's students could result in increased student persistence and degree completion rates.

## Conclusion

Bottom Line plays a significant role in enabling the students it serves to enroll in college and earn bachelor's degrees at much higher rates than low-income students nationally. Bottom Line's success working with students can be attributed to three key features of its programs: the personalized and professional support students receive through college completion, the laser-like focus of this support on issues critical to college success and career readiness, and the extensive use of data to ensure students stay on track toward attaining their goals.

At the core of the personalized support Bottom Line provides is the Individual Service Plan that addresses the unique needs of each student and specifies the milestones they must attain to make progress toward degree completion. Bottom Line counselors develop the initial ISP using a combination of data on the status of students' college applications and enrollment, course registration, and financial aid, and information gleaned from conversations with students about factors contributing to their successes and challenges. Based on this assessment, counselors identify priorities for students over the next four to six months and services they will provide to help students reach them. Counselors update ISPs during semiannual meetings with students.

The critical areas in which Bottom Line focuses its support services are those constituting the DEAL framework. Bottom Line has identified tasks in each area that students need to complete to stay on track toward a degree. The types of support counselors provide to help students with these tasks are summarized below.

<p><b><u>Degree</u></b>  <b>Earn a bachelor's degree</b></p>	<ul style="list-style-type: none"> <li>• Help students identify and select an appropriate major</li> <li>• Complete a degree completion plan</li> <li>• Assess credits toward meeting degree requirements semester by semester</li> <li>• Interpret syllabi to succeed in class</li> <li>• Identify strategies to improve performance</li> <li>• Connect students with tutoring, advising, and other resources</li> </ul>
<p><b><u>Employability</u></b>  <b>Have the ability to implement a career plan</b></p>	<ul style="list-style-type: none"> <li>• Help navigate the career exploration process and find a career path</li> <li>• Assist with writing and updating resumes and cover letters</li> <li>• Connect with Bottom Line internship partners and help securing internships and part-time jobs related to career interests</li> </ul>
<p><b><u>Affordability</u></b>  <b>Graduate with less than \$36,000 of debt</b></p>	<ul style="list-style-type: none"> <li>• Help with renewing scholarships and financial aid</li> <li>• Support with determining how to pay balances and resolving problems with bill</li> <li>• Conduct loan counseling aimed at minimizing debt</li> <li>• Assistance with making smart financial decisions</li> </ul>
<p><b><u>Life</u></b>  <b>Be resourceful and responsible</b></p>	<ul style="list-style-type: none"> <li>• Stay connected with students through monthly campus visits and frequent phone calls, texts, and emails</li> <li>• Help students stay positive with cards and care packages</li> <li>• Stay determined to work hard and achieve goals</li> <li>• Connect students to resources</li> <li>• Develop students' life-coping skills</li> </ul>

As described earlier, Bottom Line makes extensive use of data to measure the impact of its services on student achievement and identify areas where changes are needed to improve student outcomes. Data gathering and analysis are embedded in everything Bottom Line does, from assessing students' needs for support to developing ISPs and determining how effective specific interventions are for enabling students to reach program milestones. Over the years, Bottom Line's emphasis on data has allowed staff

to refine program elements in significant ways, resulting in an increase in students' degree completion rates from 74 to 80 percent.

Finally, few college access and success programs have codified the elements of their service-delivery model with the precision that Bottom Line has. This codification has been key to enabling Bottom Line's replication of its programs in New York City and Chicago and building a strong foundation for additional replication efforts. With bachelor's degree completion rates eight times higher than national rates, Bottom Line clearly is a model worthy of scaling to serve students in many more cities across the country.

## Acknowledgments

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## List of Attachments

- Attachment A: Access Program Objectives and KPIs
- Attachment B: Service KPI Details
- Attachment C: Bottom Line's DEAL Model
- Attachment D: Program Expectations
- Attachment E: Staff Training Milestones

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<sup>i</sup> Cahalan, Margaret, Perna, Laura, Yamashita, Mika, Ruiz, Roman, Franklin, Khadish. 2016. Indicators of Higher Education Equity in the United States: 2016 Historical Trend Report, Washington, DC: Pell Institute for the Study of Opportunity in Higher Education, Council for Opportunity in Education (COE) and Alliance for Higher Education and Democracy of the University of Pennsylvania (PennAHEAD).

<sup>ii</sup> Barr, Andrew, Castleman, Benjamin. 2016. [Advising Students To and Through College: Experimental Evidence from the Bottom Line Advising Program](#). Boston, MA: Bottom Line.