





ABOUT THE URBAN EDUCATION INSTITUTE

OUR MISSION

The Urban Education Institute at The University of Texas at San Antonio produces improvement-focused, collaborative research to raise educational attainment, advance economic mobility, and help people achieve their potential in the Greater San Antonio region. The Institute pursues its mission by (1) producing rigorous and actionable analysis that supports education policymaking, program implementation, and philanthropic giving; (2) convening community leaders to address entrenched challenges that harm education and human development; and (3) training the next generation of social scientists and educators to address education challenges through observation, analysis, and discovery.

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INTRODUCTION

The Texas Higher Education Coordinating Board's (THECB) Virtual Advising Project reaches students with "critical, timely information needed to meet key college and career milestones" (THECB, 2023). The goal of the project is to help more Texans "access higher education and complete their credentials at Texas colleges and universities" (THECB, 2023). The tool, called ADVi, short for "advisor," is a text-based, artificially intelligent chatbot that sends text messages about college-going information and action steps and responds to incoming questions from users. It can automatically answer many questions texted by students and connect them with the ADVi's trained human advisors when questions cannot be addressed by the bot. ADVi started as a partnership with The University of Texas at Austin in 2019 and was brought in-house to the THECB and made available to all Texas students in fall 2020. Since then, most ADVi users have opted in to receive texts via the ApplyTexas application.

The Urban Education Institute (UEI) at The University of Texas at San Antonio (UTSA) established a research partnership with the THECB's Virtual Advising team in fall 2020, thanks to generous funding support from Greater Texas Foundation. Over a three-year period, the UEI team has collaborated with the THECB team to facilitate rigorous continuous improvement cycles to strengthen ADVi's effectiveness and engagement with students.



This research brief provides key findings from the project's third round of research. Findings include feedback from ADVi student users about the tool's content and usability, as well as their perceptions of the tool, understanding of the college-going process, and access to resources outside of ADVi. It also focused on getting feedback from college advisors working with high school students to understand both their perceptions of ADVi and of the needs of their students. Finally, this report includes findings that arose from conversations with program developers and staff at THECB. This conversation focused on their perspectives of the past, current, and future implementation of ADVi.

RECOMMENDATIONS TO CONSIDER FOR IMPROVEMENT

From Students

- Continue sending encouraging messages to students to finish their college applications.
- Remind students to check their emails.
- Offer information about specific schools.
- Personalize messages to feel like less of a mailing list.
- Implement a more formal introduction to ADVi.

From High School College Advisors & THECB Program Developers

- Increase high school staff (e.g., counselors and college advisors') awareness of ADVi.
- Improve and advertise the option to interact with a human 24/7.
- Target 9th through 12th graders and provide tailored information by grade to students. Meaning the information received by seniors and freshmen should be different. This can be accomplished through increased awareness for high school staff.
- Develop a way to send messages that are catered to specific colleges.
- Increase mental health related messages since many students appreciated the encouragement and wellness check ins.
- Develop a way to connect high school counselors with specific students who engage with ADVi and would benefit from a follow-up with someone on their campus.
- Improve the processing speed of the ApplyTexas website.
- Integrate ADVi into the new My Texas Future (MTF) website. This may partly address the 'distrust' that some students express as a factor that hinders their engagement with ADVi.

RESEARCH DESIGN

STUDENT INTERVIEWS

The UEI research team led 60-minute, virtual interviews with 11 high school seniors across Texas. (See Appendix A for the full interview protocol.) In fall 2022, the THECB team sent a text message through ADVi to all opted-in students enrolled in Texas high schools, explaining the interview opportunity and asking for permission to share their contact information with the UEI team. The UEI team then reached out to a subset of the 152 students who consented via text, making sure to include students from different community types (urban, suburban, and rural). All participating students received a \$10 e-gift card to the vendor of their choice.

Interviews were conducted between December 2022 and February 2023.

DESCRIPTION OF INTERVIEWEES

Six interviewees were from suburban areas (Donna, Houston, and Dallas-Fort Worth), four from urban areas (El Paso and Austin), and one was from

¹ This study adapted NCES's classification types for Texas public schools. It classifies campuses into categories based on population size and proximity to urban areas. We randomly chose 15 campuses from each community type (i.e., urban, suburban, and rural) and invited all students who opted to participate in ADVi and this study.

a rural area (Paris). Students were generally high achieving; all mentioned earning mostly A's, some mentioned a few B's, and one mentioned a C. Nine students planned to enroll in college in fall 2023, one student planned to work first and enroll in spring 2024, and one student planned to enroll in a trade program. This student did apply to college, which is how they opted into ADVi, but the major factor in the decision not to go to college was not being financially stable enough.

COUNSELOR FOCUS GROUPS

The UEI research team led virtual interviews and focus groups with counselors from three districts in Texas (See Appendix B for the full interview protocol.) In fall 2022, the UEI team began emailing counseling staff in the districts that corresponded with the student data reports from THECB and Mainstay. Three districts responded to the invitation. Two districts were in urban areas, and one was in a rural area. For two conversations, only one person attended each so those are considered interviews, and for the third, four people attended, making it a focus group.

COORDINATING BOARD FOCUS GROUP

The UEI research team held a virtual focus group with eight staff members at the Texas Higher Education Coordinating Board (See Appendix C for the full interview protocol.)

FINDINGS FROM STUDENTS

"Reminding me of stuff that I need to do, because like with all the things I have: sports, track events, powerlifting, and school stuff, and homework and having...so like a thing telling you that, 'You have to do this.'"

- Paris HS Student

"I would definitely recommend [ADVi]. Like it, because I said, it puts you in on schedule, and it keeps makes you like, keep updating your stuff and checking on your stuff and not just being laid back."

- Paris HS Student

"You get what you work for." Because my whole life like I've worked so hard to get my things like get in the honor society, student council, when I feel like even though sometimes it's straining, it like it pays off. So I would tell somebody like, "Hey, just keep working, even if it's draining, even if it's tiring, it will pay off because then you'll have more opportunities to like apply and get accepted than just being laid back and be like it's fine if I don't get in." Because you definitely need to pay things, so you need a good job to keep living and having those things that you want in life."

- Paris HS Student

"That is something I do not want to think about, because it has helped me so much. I would probably be lost right now or like buried in in the whole process in general." The reminders were specifically helpful."

- Burges HS Student

"I do not check my emails often so the texts help."

- Stephen F. Austin HS Student

"When I got the notification I was like, Oh my God! I forgot about the deadline of certain things, so it made me want to do it already."

- Stephen F. Austin HS Student

"All I would say is that if the person was never familiar with it to get introduced to it first, then they can use it. You have to have something like an email or someone come in to talk to you about what it is about, and what you can do with the app, and then they can use it."

- Cypress Lakes HS Student



PERCEPTIONS OF THE COLLEGE APPLICATION PROCESS

We asked students how the college application process has been for them so far. Seven students said the process was simple or relatively easy. Four students said the process became easier when they were able to ask their counselors or college prep teachers for help, and two students said the process got easier after their first one or two applications were set up in ApplyTexas, and one student said things got easier after completing the tedious tasks of submitting a lot of things in the beginning. Another student said, "In principle, it was simple, but in practice, it's a bit more complicated." Complicated tasks included writing multiple essays, remembering all the portal logins, and having to check different sites for admissions decisions.

UTILIZATION AND ENGAGEMENT WITH ADVI

Seven students said they use ADVi for the reminders and tips about the application process and college. One student said the reminders took some time to get used to, but they helped a lot and made life easier. Two students said they use ADVi to answer any questions. One student said, "I was able to get the help that I needed without feeling bothersome to a real person or like waiting for a reply back, so that was what kept me engaged." Another student uses ADVi because "you can never have too many resources" and appreciates the help with scholarships, and one student uses ADVi because it's free, easy-to-use, and useful.

ADVI'S HELPFULNESS

Seven students acted on reminders from ADVi, including reminders about financial aid and scholarships and submitting application materials. Students appreciated the frequency and the modality. As for critiques, one student said ADVi reminded them about things they had already done like writing essays and getting recommendation letters. Another student said some reminders were lengthy, which made it a lot to process. We asked the students what recommendations they could share to make ADVi more helpful: reminding students to check their emails, offering information about specific schools, personalizing messages to feel like less of a mailing list, and incorporating a more formal introduction to ADVi.

FAVORITE THINGS ABOUT ADVI

We asked students to share what they liked most about ADVi. They shared that they liked the texts with number options so students can pick the topic they want to know more about and that ADVi responds to students "so you

kind of feel like you're not being ignored or left out." Of course, students appreciated the reminders. One student said, "With all the things I have: sports, track events, powerlifting, and school stuff, and homework...a thing telling you that, 'You have to do this,' it helps me a lot." Other students liked that ADVi isn't biased, it gives the facts straight from the colleges to students, which brought more closure. Other favorite things were the friendly tone of the messages, that it's easy to contact someone, and that it doesn't bombard you with a lot of messages like other systems.

LEAST FAVORITE THINGS ABOUT ADVI

We also asked students to share what they liked least about ADVi. One student did not like the influx of text messages. Another expressed trust issues because the texts come from a different area code and because they didn't know how they opted in. And one student said they replied to a prompt with a hashtag but didn't receive a response.

THOUGHTS OF APPLICATION PROCESS WITHOUT ADVI

Five students said the application process would've been slower/taken longer if they did not have ADVi because the reminders kept them on track. Two students said they would probably be lost right now, and another student would have forgotten a lot more things and missed deadlines. One student said they wouldn't have had as many college-going resources, which would've taken away from their study time to look for more resources. Finally, one student said it wouldn't have made much of a difference because he had school staff available for his questions.

LIKELIHOOD OF RECOMMENDING ADVI

All students said they would recommend ADVi to other students because it's free and useful, it provides a timeline and keeps you updated, and it's easier to contact people through ADVi than by going through their counselors at school. One student said they would especially recommend ADVi to people with multiple siblings, specifically because of the help with financial aid. Two students said they would only recommend ADVi to certain people because "everyone is different," so they'd recommend it to people who had an experience like theirs or who also have trouble remembering things. And one student also said they'd recommend ADVi to their school's Go Center to create a partnership so all students can access it.

WHAT STUDENTS HAVE LEARNED

Through the college application process, students said they have learned to set aside dedicated time to work on the applications, and they have learned reach out to people, like counselors, who can help to make it easier. Students also learned to keep a note and write things down (i.e., passwords, social security number) just in case they pop up again, and that essays are required as part of the application package. One student mentioned learning that some colleges offer online courses for students who cannot physically be there and another learned that FAFSA is based on earnings after taxes. Finally, one student felt like teachers/counselors made the application process seem harder than it was, but another felt the opposite.

WHAT STUDENTS STILL NEED TO LEARN

When asked what students thought they still needed to learn, one student mentioned that they want to learn more about opportunities like research and work studies because they don't want to just walk in, go to school, and learn.

STEPS STUDENTS WISH THEY'D TAKEN EARLIER

After completing most of the college application process, we asked students which steps they wish they'd taken earlier. The students shared that they wished they'd asked for and collected letters of recommendation and transcripts earlier, organized and maintained community service hours since freshman year, enrolled in more dual credit and other advanced classes, taken college more seriously at the beginning of high school, and researched scholarships and which programs colleges offer and don't offer to avoid wasting time and money.

THINGS STUDENTS WISH THEY'D KNOWN EARLIER

We also asked students what they wish they'd known earlier about the college application process. Responses included more about scholarships and financial aid (i.e., what's out there, application deadlines, a document checklist and dictionary for navigating FAFSA), how to prepare a good college application versus just getting it in by the due date, a timeline of the application process, which they felt takes a long time, specifically the wait time between submitting and hearing back from the schools. Students also mentioned wanting better, more specific SAT/ACT preparation, which can also improve access to financial aid, and wishing they had more information about essays, one student wrote three essays when they only had to choose one topic out of the three.

PERCEPTION OF PREPAREDNESS

Almost all of the students we spoke with felt somewhat prepared and somewhat unprepared. Four students relied on themself to figure out the process, two of whom gained confidence in their ability after the first application or doing more research, one learned from asking their teachers questions, and the last students' older sister applied for college last year but wasn't much help, so the student plans to help his younger sister when it's time for her to apply. Two students said their perception of preparedness depended on the college; they felt prepared to apply to larger universities, but not to apply to other, less popular colleges. Finally, one student said COVID-19 made them feel less prepared.

We asked the students to share their most helpful college-going resources and four students said counselors, teachers and other school staff, three said ADVi, and one said their parents.

LEAST HELPFUL COLLEGE-GOING RESOURCE

We also asked students to share their least helpful college-going resources. Five students said parents or family and friends in general were the least helpful either because they didn't give new information, they were too busy or tired from their jobs to give the students their full attention, they were biased and blinded the students' view, or they did not go to college, so they did not know how to help or answer questions. Four students said their teachers and high school counselors were the least helpful because the staff doesn't reach out to students or make as much effort because the staff have so many students and have other stuff to do. One student said ADVi was the least helpful because it didn't give new information, and another student said Google because the information is too general.

FINDINGS FROM COUNSELORS

INTERVIEWEES' ROLES WITH STUDENTS

The umbrella term used to describe the support the interviewees provide to their students was "post-secondary success." Within this umbrella, support with the college application process and career research were noted as the areas where they spend most of their time. Other focus areas included financial aid, scholarships, mental health support, college tours, military recruitment, and parent engagement. One counselor called different parts of the school year "seasons" and explained that how they spend their time depends on which season they are in. Another counselor suggested that about 55% of his students go on to college or university, about 40% go straight to the workforce, and about 5% go on to the military.

COUNSELOR KNOWLEDGE OF ADVI

When asked about ADVi , the counselors had some but not much prior knowledge to share. One counselor responded that ADVi is "a tool used to answer general questions about the college application process and the transition from high school to college". This counselor also shared "If the bot isn't able to answer definitively, it will at some point go to a human who could speak to those individual questions during certain hours of the day".

When counselors were asked about their students' use of ADVi, the counselors expressed that their students have not shared much about the bot. They did say that the students do not call the bot "ADVi," they usually call it the ApplyTexas bot or the college text bot. The counselors also reported hearing that the reminders were helpful to students, but the students were overwhelmed by the number of texts they received from the bot. One counselor said he was worried about the overwhelming texts leading to students to pay less attention to communication from the counselors.

THE COLLEGE APPLICATION PROCESS - STRUGGLES

Many aspects of the college application process were listed as areas of struggle for most students. One main area is the financial aid process, specifically the difficulty that students have getting financial information from their parents to complete the application. One counselor said, "The financial aid process has proved to be the most challenging because we have to include parents." Monitoring email communications throughout the process is another difficult area for students. Colleges send important information through email, but many students don't check their email accounts often enough to receive the information in a timely manner.

Similarly, if students apply to multiple colleges and set up an online account with each of those colleges, it is difficult for them to keep track of login information and communications from each of those accounts. One counselor said sending transcripts was also a difficult part of the application process since students can only gain access to their transcripts with permission from the school. Multiple counselors mentioned essay writing as a struggle for students, so much so that the requirement of writing an essay is the only reason some students don't apply to college.

The counselors also reported a common theme of students thinking they are unable to go to college at all either because of cost, transportation, or a sense of not being good enough.

THE COLLEGE APPLICATION PROCESS - STUDENT PREPAREDNESS

When discussing the level of their students' preparedness, multiple counselors described two distinct groups of students they support. The first group are "go-getters" who already know how to move through the application process or can figure it out by themselves. This group requires little guidance. The second and largest group are students who think they are unable to accomplish the task and often require "hand-over-hand support." One counselor commented on the difficult task of differentiating their support to students with such a wide range of needs and said that his job is to "bridge the gap" of understanding.

The two most common areas that define the less prepared students are scholarships and parental support. Applying for scholarships can be difficult because the process relies on student initiative since each scholarship has its own set of requirements and its own due date. This makes it difficult for students to know how to be considered for applicable scholarships. A lack of understanding of the application process by parents also leads to underprepared students. One counselor explained that either the students are first generation college applicants, whose parents did not go through the process themselves, or "a lot of parents haven't gone through the college process in a long time" and too much of the process has changed for them to be of much help. Specifically, parents don't understand that the application process needs to start before the student's senior year of high school. Cultural differences also play a role as some parents do not value a

college education as much as the student might, and therefore the parent does not prioritize supporting the student through the process. Another area where students are less prepared is in collecting and organizing the information needed to complete an application. Counselors reported that students do not keep track of things like coursework and community service hours and then must scramble to remember or find out the information. Also, financial decisions often require information from previous years. Both tasks often delay the process.

When counselors were asked what students wish they would have known earlier, multiple responses included applying for scholarships and beginning the application process earlier. One counselor mentioned current college students that said they wished they would have taken different classes when they were in high school and acquired better study skills. When asked what counselors wish students understood about the process, one counselor described his desire for students to understand the importance of prioritizing passion and happiness over money as well as an understanding that college can be for anybody. The counselor stated, "I think passion equals commitment, and commitment equals money... My job is to help them find happiness, and if they like what they do, the money will come."

THE COLLEGE APPLICATION PROCESS - SUCCESSES

The counselors shared many successful strategies that have helped students through the application process. These strategies include calling parents, face-to-face meetings with students, large group disseminations, starting with an easy application, and using checklists. One counselor said their use of parent nights and senior nights helps to disseminate information to lots of people at once. He explained how providing the content to a large group

"knocks off a big chunk of the core" and eliminates the need for individual appointments for most of the students. He held multiple large group events throughout the year, some providing general information and some focusing on specific parts of the process such as FAFSA. Another counselor said their school requires every student to complete at least one application, which is typically an easy one for a local community college that does not require an essay. This strategy shows the students that the process isn't that difficult and makes it more likely that they will complete more applications. One counselor said, "If you can learn to do the super easy ones, the challenging ones aren't quite as intimidating to look at because you've already done it once and you've met it with success." Many useful apps were also mentioned as successful tools including GoingMerry, RaiseMe, JLV College Counseling, and Loper.

RECOMMENDATIONS FOR IMPROVING ADVI

The interviewees had many suggestions for improving the ADVi program. One suggestion that was brought up by multiple counselors was targeting the program to younger students. This suggestion involved having a different level of the ADVi program for each grade level (9th-12th). The ability for the information provided by ADVi to be specific to individual colleges was also a common suggestion. One counselor commented on the usefulness of more encouraging types of messages that targeted the issue of senioritis and helped students maintain the stamina to finish out the school year. Other suggestions included a 24/7 human availability option, the opportunity for counselors to know which of their students are participating in ADVi, the ability to contact those students through the bot, the option for schools to release batches of student transcripts all at once, and improvements to the slow processing of the ApplyTexas website.

FINDINGS FROM COORDINATING BOARD

OVERVIEW OF TEXAS ONCOURSE

The Coordinating Board focus group began with a brief history of Texas OnCourse. It was noted that Texas OnCourse was created because of a legislative mandate and charged with the task of creating an online resource to support college and career counseling and advising efforts across Texas to achieve post-secondary success. The program originally focused exclusively on educator tools and only recently transitioned to student-focused tools. Over the years, these tools included The Academy, MapMyGrad, MiddleGalaxy, ADVi, and ApplyTexas. They explained that most initiatives are legislatively driven, and the board often partners with the Texas Education Agency to develop the programs. This collaboration led to plans to "consider the whole trifecta of folks involved in ensuring a student is successful in their post-secondary planning and journey" instead of "treating students or educators in isolation." The team also utilizes a variety of data tracking systems, specifically for The Academy and ApplyTexas.

MAIN GOAL OF RESOURCES

When asked about the goal of all of these resources, one focus group participant referred to the goal as their "North Star vision," which is "to ensure that all Texans receive holistic and equitable advising that propels them to obtain credentials of value." Another participant summarized the Texas OnCourse mission as ensuring that all Texas students "no matter where they came from or where they were heading, had a plan for where they were going." These two statements are geared toward two audiences. The first audience is the learner, which includes middle and high school students as well as adult learners. The second audience is referred to as the supporters, and includes people such as counselors, coaches, and parents.

USE OF FEEDBACK

The participants said continuous feedback is a highly effective aspect of the work. For example, the team received positive feedback about providing incentives for counselors and advisors using The Academy, as well as dedicating time to professional development. Feedback during development of the project extended the release date, but focused on ensuring students with disabilities would be able to access the content as well as improving the user friendliness of the platform. The financial aid graduation requirement is also an area that provides differentiated feedback of content specific to students, families, counselors, advisors, and community partners.

NEW TOOL

A new tool called My Texas Future (MTF) is a robust initiative with the intent of being "the main hub for any student seeking to plan for their post-secondary journey." The new website is an online portal, similar to Texas. gov, that will enable students to explore things such as career assessments, program finders, and advisor connections. The program launched with a phased rollout, initially focusing on the adult learner population. As different

versions of the site become available to different populations, eventually, MTF would be a "one-stop shop" where a learner in middle school could begin building a profile identifying their interests, documenting desired programs, and recording their accomplishments. This information could be automatically uploaded to ApplyTexas when needed to streamline the application process.

The integration of ADVi into the new MTF website was described as "natural" because of the overall strategy of college and career advising and the desire to continue to provide supplemental advising resources to Texas students. It was noted that the MTF website will include an opt-in option for the ADVi web bot feature to support students. The structure of the MTF website also allows for students to opt-in via text using a single phone number. This may partly address the 'distrust' that some students express as a factor that hinders their engagement with ADVi.

ADVI: BACKGROUND

The group explained that the initiation of the ADVi program was driven by a need for virtual advising services across the state of Texas during COVID. After piloting the program with small groups, a full advising team was hired and transitioned to the Coordinating Board in December 2020. Two specific populations were targeted in the first full year: current high school seniors and recently graduated seniors impacted by COVID who had not gone on to college. The program targeted the high school seniors in supporting their transition to beginning college and the adult learners in supporting their return to college. At first, students were found through different partner institutions, but more recently, nearly all the students participating in the ADVi program were captured through ApplyTexas. Within the ApplyTexas

application, students choose whether to consent to receive messages from ADVi.

FEEDBACK

A surprising piece of feedback the participants received about students' use of ADVi was the helpfulness of the bot, even to students who did not actively respond to the messages. Because "active engagement" is a data point that the ADVi team analyzes, the team was surprised to receive feedback from so many students saying things like, "I never texted back, but I want you to know that your messages were always really helpful." This feedback led the team to realize that the "active engagement" piece doesn't necessarily tell the full story of how a student is engaging with ADVi. One participant said, "Even if a student isn't actively engaging with the bot, they may still be taking action based off the messages that we're sending." Another common example of feedback received from students is the usefulness of the due date reminders, which serve as a prompt for next steps and help students keep track of their timeline.

NEXT STEPS

Finally, the group discussed the impact of ADVi on school counselors and the need for more outreach. The text reminders mentioned above were said to be helpful to advisors by taking some of the responsibility off them. After speaking to a large group of students, counselors still need to follow up with some one-on-one. Students who receive information and reminders from ADVi are less likely to need follow up meetings with the counselor, freeing up space within the counselor's day to meet with other students. Based on our findings here, ADVi will be very helpful in schools with a small number of counselors, which are prevalent in rural areas.



A recommendation was made to be more intentional about connecting school counselors with the ADVi program. One person pointed out that if a counselor who is unaware of ADVi is helping a student fill out the ApplyTexas application, they might suggest the student not opt-in to the messages since they don't understand the program or the support it provides. Even though many counselors have not heard of ADVi, when the idea is introduced to them, many are excited about the bot, and some mention their intent to share the information with their students. Despite many resources being dedicated to increasing the outreach of ADVi, the participants noted that the program is still new, and people still tell them they need to do more to expand ADVi's reach, especially with school counselors.

REFERENCE

The Texas Higher Education Coordinating Board (2023). About Us. https://askadvi.org/about/.

ADVi the Virtual Advisor

Formative Feedback from Student Users, College Advisors, and THECB Staff

By Sharon Nichols, Ph.D., Jasmine Victor, Mikayla Williamson, Helena Fischer, Karina Cruz, Jessica Tenorio, and Han Bum Lee, Ph.D.



