

# Special Report

## *How To Manage The College Admissions Campaign*



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*A successful college admissions campaign hinges on how well you manage 19 critical elements over a 12-18 month period of time. This special report identifies those critical milestones, shows you what to do and when. Detailed guidance notes for each milestone are provided. If you've been wondering where to begin and what to do to start college planning for your son or daughter, look no further. This is your starting point.*

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For over two decades, my colleagues and I have been advising families about the best ways to approach college planning. We provide professional oversight, project management, strategies and tactics as part of our professional engagements, but there is one element we cannot provide: Time. That's something doled out in equal quantities to every college bound family. How to make *effective* use of the time at your disposal is the subject of this report.

At the end of this report, you will find our Recommended Milestone Planning Chart. Refer to the chart in order to see the ideal window of time to complete each milestone. And remember, some of the milestones require several iterations. In other words, they need to be addressed several times as new data emerges.

Finally, let me say that we have used milestone planning in our private practice with thousands of families over the past two decades, and I can assure you that it works. Parents report that there is less stress at home than they expected and that working with a *system* keeps them focused on the tasks at hand. The students we've assisted typically

- finish their admissions applications early in November of senior year
- are admitted to the nations' better colleges at rates better than the national average
- have several *affordable* options from which to choose

I'm pleased to be able to introduce you to the concept of planning for college with project milestones and to share these milestones with you. If you would like to establish you own plan of action using the milestones, consider becoming a member of our online community. There, you can get more information about each phase of college planning, interact with me and my profesisonal colleagues and with other families who are part of our community.

You can join our community at [www.collegesearchgameplan.com](http://www.collegesearchgameplan.com).

## Milestone #1 – Setting Goals and Objectives

Typically, families who begin the college planning process early start by thinking through their goals and objectives. This exercise includes an overview of their financial circumstances, their student's academic progress and getting a feel for how many years of higher education needs to be funded. Those who really get serious about planning factor in their retirement needs, potential elder care issues, insurance needs and the likelihood of their family income remaining stable through the college years. Professional assistance with these issues is recommended. It is in this phase that setting up an overall planning calendar based on the Milestone Chart is a good idea. Make your college planning a family priority.

## **Milestone #2 – Prepare for the PSAT**

For college bound students, the PSAT is the first major milestone along the path to enrolling in a college. While the PSAT itself is not used for college admissions, it is used for several other important issues. The most important thing to keep in mind is that **the PSAT is NOT simply a “practice” SAT**. It does provide important feedback to the student with regards to his or her national and state standing in mathematics and verbal reasoning, but it also serves as the number one identifier of academic talent for the National Merit Scholarship Corporation. Top scorers may receive modest scholarships and commendations that will be of great help if applying to highly selective colleges. For most students, the PSAT is a way to get on the radar screens of many colleges who are recruiting from various score bands, zip codes and other criteria important to them. Get a grip on this assessment by going through several practice tests to learn the strategies and be prepared on test day.

## **Milestone #3 – Develop a Financial Plan for College & Determine How Much You Can Afford**

This is more involved than you might think, but it is not beyond the grasp of most families if they have the right tools for the job. Simply stated, you must determine how colleges will assess your financial circumstances in order to calculate what you could be expected to “contribute” toward college costs. This contribution is referred to as your “EFC” or Expected Family Contribution. You must learn the mechanics of two formulas that determine “aid eligibility” and determine the impact, if any, some strategic changes to your financial statement might make. This is called optimizing the EFC. Following this exercise, a thorough analysis of your resources should be undertaken in order to determine whether or not you can afford the EFC or if you must shop for colleges based on the resources you have. In many cases, families are surprised to learn that colleges they may have considered too expensive are ideal candidates, while others find out too late that certain colleges are beyond their financial reach.

## **Milestone #4 – The Student’s Personal Assessment**

All too many families focus on the “getting in” aspect of the admissions process with little or no attention paid to “fitting in if admitted.” This is troublesome in that some students who are admitted to selective and highly selective colleges are not able (or not willing) to fully engage in the academic rigor that is required for success. We highly recommend that each student complete an assessment of his or her academic attitudes, learning skills, maturity, social-interpersonal skills, and dependence on family and others prior to the initial college search. Combined with the high school record and standardized test scores, the Personal Assessment provides additional insight as to which colleges are the best targets for a particular student.

We also recommend that each student take some version of the Myers-Briggs Type Indicator. This helps to assess learning style, personality preferences, potential careers and ***which standardized test (SAT or ACT) might be more comfortable.***

## **Milestone #5 – Evaluation of the Student’s Grades, Courses and Extra Curricular Activities**

As just about any college admissions officer will tell you, grades in college prep courses are the single most important item in making an admissions decision. This does not mean that ECAs and standardized test scores are not considered. It does mean that they are viewed within the

context of how much the student embraced challenging course work in high school and the subsequent performance in those courses. While it is not necessarily critical to take every honors or AP level course available, it is important to take higher level courses in areas of interest to the student. A straight A average won't necessarily get you into your top college, nor will a C or two keep you out. Activities should be chosen wisely. It is not in your best interests to be so involved in sports, drama, student government, community service, etc. that your grades suffer. Choose a few activities that you really like and be excellent in those. Learn to manage your time well.

It serves each student well to complete an objective assessment of his or her competitive position at each college under consideration, or to have such an assessment conducted prior to conducting the college search. This will help identify suitable colleges more quickly and prevent needless wheel spinning.

### **Milestone #6 – The Initial College Search**

This step usually overwhelms most families, but if you have taken the steps noted above it should be easier for you. The college search should be driven by clearly defined criteria and preferences. Among these, size, available majors, geographic location, grant and scholarship eligibility, campus facilities and overall competitive position are most important. The student should do his or her best to identify precisely what the key criteria and preferences are and then locate colleges that are suitable and appropriate with regards to the admissions criteria and rigor required of enrolled students. Be willing to look a little further away from home for some outstanding opportunities. And, if money is a key consideration, avoid loading up on “reach” colleges. Stay with colleges where you'll be among the top 25 percent of typically admitted students.

### **Milestone #7 – Preparing For Standardized Admissions Assessments (SAT, SAT Subject Tests & ACT)**

Much has been written about preparing for these assessments and an entire industry has been spawned from the idea of being prepared prior to taking any of these admissions tests. Needless to say, you will do better if you are prepared no matter which test you take. What does not get nearly the attention it deserves however, is which of these to take. Experience with thousands of students has taught us that for some, the SAT is a better choice. For others, the ACT is a better fit. We recommend that you take diagnostic assessments of each and make a decision as to which is more comfortable. The SAT and ACT are very different. Each should be investigated. And, don't forget the importance of timing. When to take these tests often determines how well you perform.

### **Milestone #8 – Researching Colleges**

Let's face it, college is expensive. Nowadays, Four years at a public university will cost at least \$60,000 and four years at a private college could exceed \$240,000. What would you do before you purchased a home in this price range? You'd do a whole lot of fact finding, wouldn't you? This same diligence needs to be applied as you research the colleges on your list. We recommend that you focus more on “outcomes”, that is, what do graduates of these institutions

actually do, earn, accomplish as opposed to how fashionable or “in” a particular college might be. As the adage says, the proof is in the pudding. Be a savvy consumer.

### **Milestone #9 – Visiting & Interviewing**

The purpose of researching your colleges is to determine which ones to physically visit. Nowadays, the competition is such that visits are not optional if you want the best shot at admission and scholarship money. You must *demonstrate your interest* by showing up! The best times to visit are when students are on campus and the college is in session. Summers are okay, but you will miss the life of the college. On your visit, don’t just settle for “the tour.” Instead, have some questions prepared that you can ask of admissions personnel, faculty and students. And do visit the dormitories, the student union, bookstore and athletic facilities. Your goal is to get a feel for the campus, the faculty, and the students with regards to how you fit in. Don’t forget to have lunch, too!

Recommended Action: Do send a thank you note (not an email) to any college representatives with whom you interact.

### **Milestone #10 – Refine the Initial Search**

After visiting your selected colleges, you are ready to refine the list. There will be some colleges to which you are strongly attracted as well as others you like but may not be on your “A” list. What you want to accomplish here is to keep some balance in your list. Don’t have so many highly selective or selective colleges on the list that you introduce more risk than necessary. Attempt to get a list of finalists that meet your criteria, where you have a reasonable chance of being admitted and where you fall into the top 25%-30% of admitted students (*especially if financial aid is a concern*). The refined list is your first attempt at coming up with the final list of colleges to which you will apply. Be sure that you are on the mailing list of each school for updates and announcements that may be of importance to you.

### **Milestone #11 – Identify Admissions and Financial Aid Deadlines**

When the refined list is established, we recommend that you determine the deadlines for admission, financial aid and merit scholarships. These are usually posted on college web sites or in the print literature you have received directly from the colleges. Be sure to put these in whatever calendar you are using and allow at least two weeks lead time in order to complete the applications. You should also be identifying which colleges accept the Common Application, which have supplements to the Common Application, which colleges have additional essays to complete and what forms are required to apply for financial aid and merit scholarships. At this stage of the game, you’ll begin to discover the FAFSA and CSS Profile. They will soon become part of your everyday vocabulary.

### **Milestone #12 – Arrange Recommendations from Faculty**

Every college bound student in your class will need at least one, and usually two letters of recommendation from faculty (or others who know you very well) who know you well and can speak to your classroom accomplishments. Choose these people carefully! When you request your recommendation, provide the faculty member with a short biographical summary of your

activities, awards, honors and other significant events from high school along with a copy of your high school transcript. This will give your recommender something to reflect upon as he or she composes your letter. Depending on the procedures at your high school, your recommender may be required to mail the letter out to several colleges personally. If so, provide addressed, stamped envelopes. Check with your guidance office to determine the procedures at your school. If your school subscribes to eDocs through the Naviance Family Connection portal, be especially careful to check on school procedures as your Common Application and Family Connection accounts will be synced.

Recommended Action: Ask for letters of recommendations from teachers prior to the end of junior year to provide lead time. It's a courtesy that will be appreciated.

### **Milestone #13 – Draft Your Personal Statement/Essays**

Your Personal Statement is an opportunity for you to shine! College admissions officers want to know what interests you, how you write, how you express yourself. Typically this is done in a 500-600 word statement on a topic of your choice or one assigned by each college. Much has been written about how to do this, and the most important thing to remember is this: Be yourself – not the person you think the college wants you to be. And keep in mind that although your English teacher may be a great writing coach, you'll want a lot of input on this essay. It's different from anything you have attempted in the past.

### **Milestone #14 – Determine Your Final List of Colleges**

You've had plenty of time to review your college list and determine the "finalists." Usually, this will be a group of 6-10 colleges that fit you and who know you are interested, either from your personal visits or from correspondence you have initiated and followed through upon. Remember, any college that makes it to this stage is one in which you are willing to enroll.

If you are not willing to enroll, don't apply! If you have done your homework well, you do not need the typical "safety school" approach. Load your list with target schools at which you can thrive!

### **Milestone #15 – Complete Admissions and Financial Aid Applications**

You are close to the finish line! Take care to submit your admissions applications early – by December 1<sup>st</sup> of senior year is best, unless you are applying under an Early Action or Early Decision plan. This will ensure that you are done before the holiday season AND will position you to apply for financial aid early as well. Financial aid applications should be completed during the first two weeks of January using estimated income. They can be updated when tax returns are prepared in early spring. By the way, if you (parents) typically file your taxes on extension, that's over. Tell your tax preparer you'll now need to have taxes done no later than March 15<sup>th</sup>.

### **Milestone #16 – Evaluate Offers of Admission & Financial Aid**

In Milestone #3, your family determined the EFC and set a financial strategy in motion. A clear threshold of "affordability" was established and you applied to colleges that had a high

probability of meeting your financial objectives. Now it's time to take a close look at the offers of financial aid. Start by determining which offers result in the lowest "net cost" to your family. Look at each offer in detail. The lowest net cost is determined by subtracting the grants and scholarships you have been awarded from the total cost of attendance at each college. Do not subtract student loans and work study from the total cost, because these come with strings attached. You want to know the true cost. Determine which of these is "best" for you, and sleep on it for a few days. Visit the college(s) again if needed. This is no time to act hastily. If your top college has not offered enough aid to be affordable, call the financial aid office or your contact in the admissions office and politely let them know how much more money you will need to attend. The response may be indicative of how you might be treated in the future if you enroll, so pay attention. And don't be bashful!

### **Milestone #17 – Make Your Final Decision & Send in Your Deposit**

On or before May 1<sup>st</sup>, you will need to make your final decision. After doing so, be sure to mail the "Candidate's Reply Card" with your required deposit. We recommend that you use "Certified Mail – Return Receipt Requested", FedEx or UPS to make sure your deposit is received. In addition, it would be a good idea to call the college you have chosen and inform the admissions office that your deposit is on the way. As a courtesy, you should call the other colleges to which you were accepted and let them know you have decided to enroll elsewhere. They may be able to admit somebody from their wait list as a result of your courtesy.

### **Milestone #18 – The Final Paperwork**

Finally, remember to watch your mail for additional paperwork that will be required for you to enroll. This will range from student (and/or parent) loan instructions, to surveys about potential roommates. Pay attention to these things and get them done right away. This will prevent needless anxiety and stress during the first week of college.

**For additional information** on how to plan your college admissions and cost management campaigns using our first-of-a-kind online membership portal, visit us at [www.collegesearchgameplan.com](http://www.collegesearchgameplan.com). Become a member of our growing online community and get first hand help from me and my team of experts. Inside the member web site you will find 14 modules that walk you through each of the milestones. You can use these for reference again and again. You will also be able to participate in our members only forum AND get questions answered by me and other members of our professional team through our private Q&A area. Try it free for seven days. Trust me, you won't find this type of service anywhere else.

Thanks for reading. I hope to meet you again in our member community.

Best regards,



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## RECOMMENDED PLANNING & MILESTONE CHART FOR COLLEGE BOUND STUDENTS

