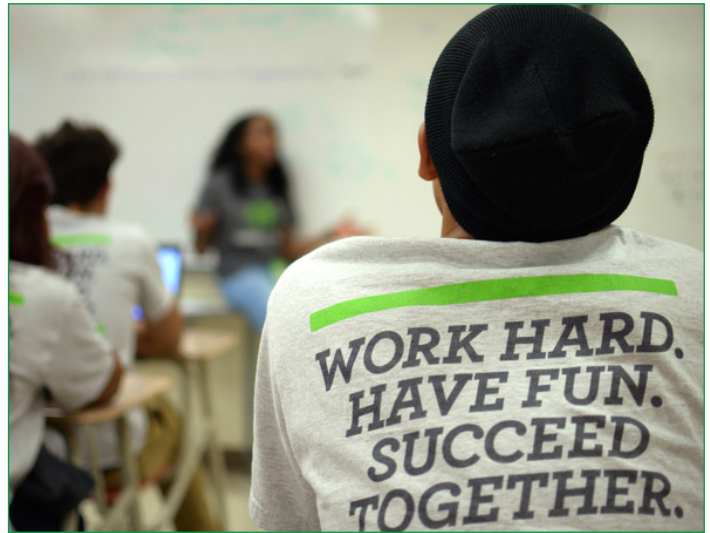# College Forward

collegeforward.org


About This Project

This program-related investment will allow College Forward to invest deeply in a comprehensive student database product, CoPilot, supporting its long-term development, marketing, and sales strategy. Launched in 2014, CoPilot is built on the Salesforce platform and provides nonprofit and education partners a holistic student information system. With CoPilot, users can access and analyze critical student data to deliver targeted interventions that help to ensure college completion. For example, TNAchieves uses CoPilot to track data on its students' FAFSA completion and target reminders to students of upcoming deadlines. It's also planning to use academic data as an early warning system for its coaches to target appropriate interventions when students' grades are slipping.

Why Was This Needed?

Challenge: Many college access and success organizations struggle with identifying high-quality and affordable technology solutions to track student progress. This gap forces organizations to store and manage crucial student data in Excel sheets and other archaic, one-size-fits all systems, making it difficult to obtain a complete and accurate picture of a student.

Response: CoPilot was initially designed to meet internal program management needs, including tracking information on students' financial aid, academic progress, scholarships, and college applications. College Forward soon identified CoPilot's value to a cash-strapped and technology-lacking industry. Within a month of CoPilot's public launch in August 2014, six organization signed up and demand has continued to increase. College Forward is now helping to bridge this gap for nearly 40 organizations in 22 states.

Impacted Location
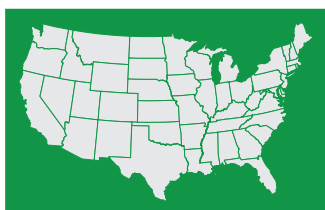
National

Year Approved

2018

Type of Transaction

PRI Loan

Kresge Program

Education Program

Amount of Investment

$600,000

Grant Support

$400,000

Term of Investment

7 years

About the Borrower

College Forward was founded in 2003 and is the largest college access and success service provider in Texas. It supports economically disadvantaged students through intensive mentoring and coaching programs from the beginning of their junior year of high school until they earn a four-year college degree. A central tenet of College Forward's strategy is to build and share effective programs, resources, and tools to serve increasingly more underserved students as they access and succeed in higher education.

Impact Measure

Current CoPilot customers reach 275,000 students.

Key Partners:

ECMC Foundation

Key Considerations

Kim Dempsey
Deputy Director
Social Investment Practice

» Recognizing that College Forward will never reach the millions of underserved students in need, scaling CoPilot is a critical effort to expand the impact of the organization beyond its Texas-only programs and empower other student service providers with this cost-effective data solution.

» CoPilot's recurring licensing and training fees provide valuable unrestricted revenue to support College Forward's coaching and mentoring programs in Texas.

» Salesforce is the premier cloud-based customer relationship management (CRM) system used by more than 150,000 organizations globally. With applications including sales, marketing, fundraising and more, Salesforce is easy-to-use yet highly customizable.

» In 2016, the National College Access Network– a key Education Program partner – awarded College Forward's Executive Director Austin Buchan its prestigious Executive Leadership Award of Excellence.

» Kresge's PRI and social investment team were key to bringing along the co-investment from the ECMC Foundation, marking its second approved PRI and allowing further partnership with a key Education team ally.

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