



EAB

Making the Most of Your Intake Survey

Monday, July 25, 2022 | 1:00 p.m. – 2:00 p.m. Eastern Time

The webinar will start at 1:02 p.m.
Eastern Time

Zoom Webinar Features

The image shows a Zoom Webinar interface. At the top left is the EAB logo, which consists of a blue circle containing a white building icon, followed by the text "EAB". Below the logo, the text "EAB Virtual Session" is displayed in white and teal, with "2020" underneath. The background is dark blue with a pattern of light blue geometric shapes. At the bottom, there is a dark grey control bar with three buttons: "Audio Settings" with an upward arrow, "Chat" with a speech bubble icon, and "Q&A" with a speech bubble icon. A red "Leave Meeting" button is on the far right. Two callout boxes with orange borders and lines pointing to the "Chat" and "Q&A" buttons contain the following text:

Use the Chat feature to send messages to all panelists or everyone

Use the Q&A feature to ask questions

Join the Conversation!

Using Zoom Chat Features

Use the Chat feature to send messages

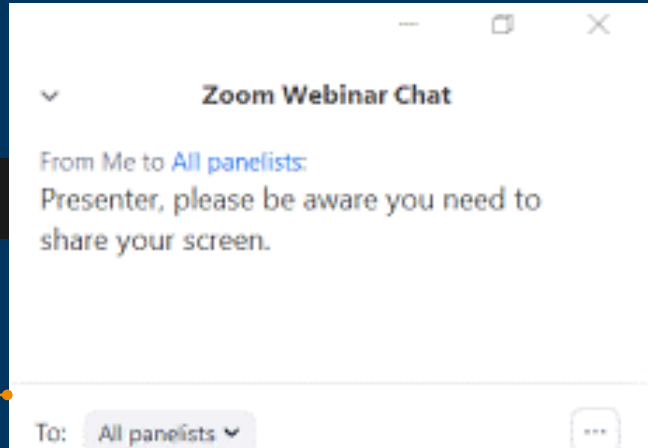
Audio Settings ^



Chat

Click the arrow next to "All Panelists" in the Chat window.

Select "All panelists and attendees" from the drop-down menu to share your thoughts or questions with the audience



All panelists

All panelists and attendees

Meet Your EAB Presenters



Kelly Casperson
*Partner Success Manager,
Starfish*



Lindsay Kubaryk
*Associate Director, Moon Shot
for Equity and Impact Services*

Tell Us About Yourself!

My current role can best be described as:

- Student Success Strategy and Execution
- Navigate or Starfish Platform Administration
- Advisor or other student service provider
- Teaching faculty
- Faculty academic leadership (Dean, chair, etc.)
- IT/Technical Lead
- Other (please share in the chat)

Quick Poll

When it comes to Intake Surveys, I am...

- New to them entirely
- Re-thinking our current intake survey content or strategy
- Use them all the time and love them (so I'll share all my wisdom in the chat! 😊)
- Other (please share in chat)

What Do You Know About Your Students?



And how can it help you support student success?

Often Several Paths to Learning About Our Students

Before they arrive on campus...

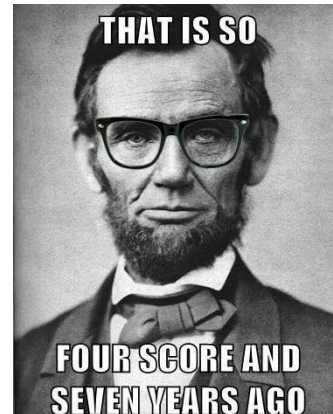
- ✓ Student Information System
- ✓ Application Information
- ✓ Orientation Registration
- ✓ Financial Aid Information

And as the semester persists

- ✓ Advising appointments
- ✓ Alerts

But No Systemic Way to Access or Leverage Info to Support Students

- ✗ Information can't be accessed by student success staff
- ✗ Information learned too late to provide proactive support



Enter: Intake Surveys

The Benefit for Student Success



Make Early Alerts Even Earlier



Provide Context to Inform Student Interactions

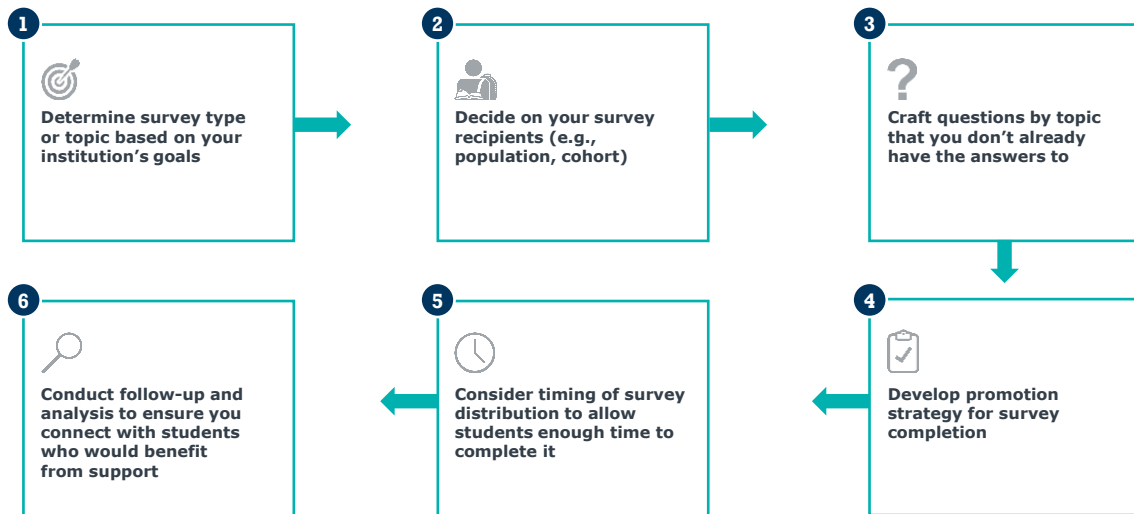


Create More Opportunity to Support Students Holistically



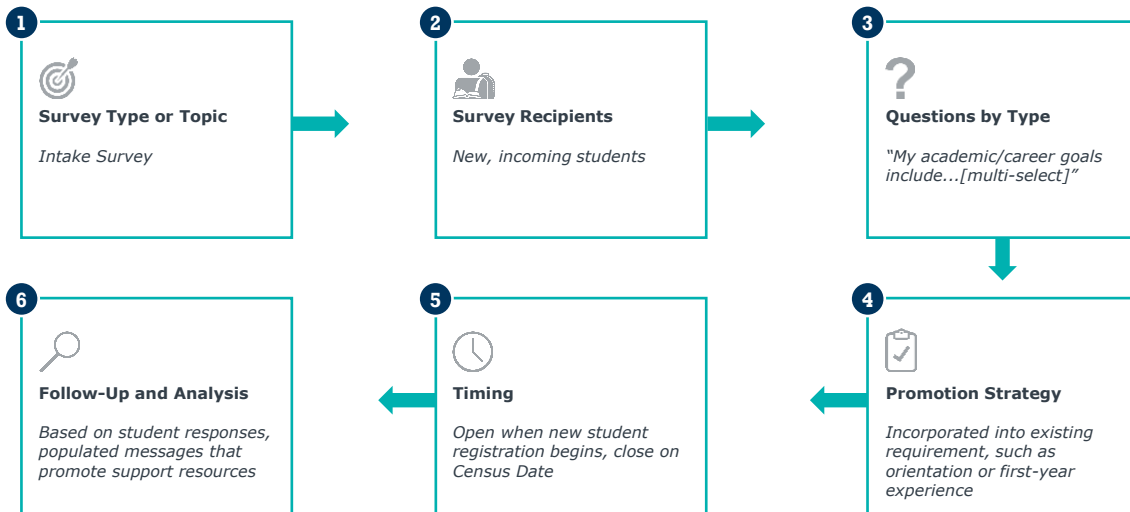
Thoughtful Planning Optimizes Impact

Process for Designing and Launching a Survey



What this Looks Like in Practice

Sample Survey Design and Launch Process



Meet Northeast Wisconsin Technical College



NWTC

3 campuses and 5
regional learning
centers



~7,800 degree-
seeking students



200+ degrees, diplomas
& certificates



Starfish partner
since 2013



Creating the Survey

What You Know, What Barriers Students Face, and Available Support

What Worked at NWTC:

- Created a Cross-Functional Committee
- Researched survey tools and content in the market
- Brainstormed common barriers encountered by NWTC Students
- Wrote survey questions based on barriers



Guiding Questions for Intake Survey Design

Can we consolidate info we already know into Navigate / Starfish?

What are common barriers or pain points faced by our student population?

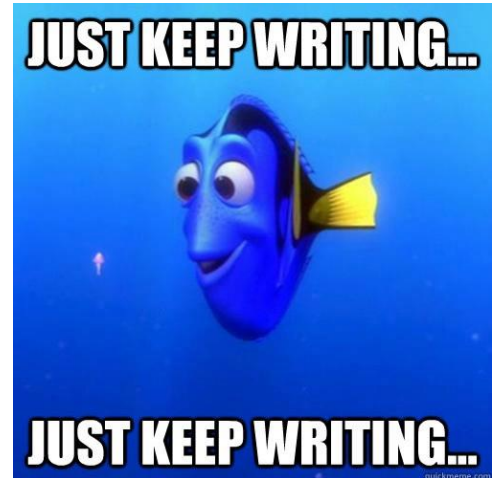
What support is available around key barriers?

How are we going to act on this info once we have it? Who needs to know?

Dos and Don'ts of Writing Survey Questions

Fundamentals to Keep Top-of-Mind

- Don't ask questions you already have the answer to
- Make sure your answers match your question
- Use student language
- Make sure each question has a purpose
- Avoid double-barreled questions
- Try using 5 or 7 answer choices, rather than 3



I am certain of my career goals and program choice.

VS

How certain are you about your career goals?

How certain are you about your program choice?

I worry about having enough money to pay for school

I am confident that I will stick to a spending plan while in college.

VS

How are you planning to pay for college?

- Self-funded (job, savings, etc.) or Parents
- Financial Aid/FAFSA (grants, loans, work study)
- Veterans Education Benefits
- Unsure
- Other (i.e. employer funding, scholarships, etc.)

I am confident using a computer to complete assignments and learn new skills.

- Agree
- Somewhat Agree
- Disagree

VS

How confident are you in your ability to use a computer to complete assignments?

- Very confident
- Moderately confident
- Slightly confident
- Not confident at all

Getting Students to Take the Survey

Most Effective: Embed into Existing Requirement

- Orientation – registration or in-session completion
- FYE or Intro to College course assignment
- Advising appointment
- Course registration

Somewhat Effective: Incentives

- Right-size incentive to length and strategic significance of survey
- Sample incentives:
 - Free beverage or snack from campus café/vendor
 - Weekly entering into drawing for higher-value item such as \$100 Amazon/bookstore gift card, AirPods, etc



Facilitating Referrals

NWTC's Student Intake Survey Workflow



Bi-Weekly



Results filtered & referrals raised

Staff notified

1 Day



1st contact



2nd contact attempt

7 Days



5 Days

Referral cleared



Facilitating Referrals

Make the Most of Student Intake Info with Effective Workflows



Tips for Effective Workflows

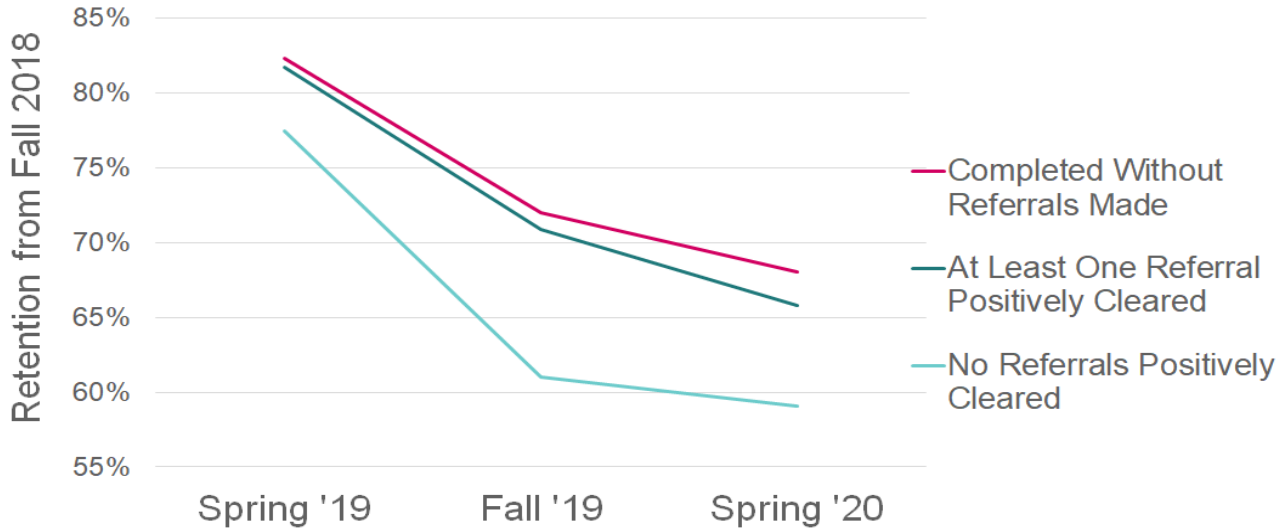
- ✓ Determine your audience: Create technical vs. user-focused workflow
- ✓ Keep it simple and eliminate unnecessary steps
- ✓ Collect input from multiple stakeholders, including students
- ✓ Communicate and publish workflow to maintain transparency
- ✓ Hold users accountable

Deploy Proactive and Informed Support Using Intake Info

- ✓ Identify **pivotal moments in the student lifecycle** based on intake survey info where students may benefit from proactive support
 - Scholarship or job opportunities
 - Emergency grant availability
 - Caretaking support during midterms/finals
 - Wellbeing support
- ✓ **Use Intake Survey data to contextualize other alerts** for informed outreach and support
 - Include **curated resources** in your outreach that may benefit them without stigmatizing their situation



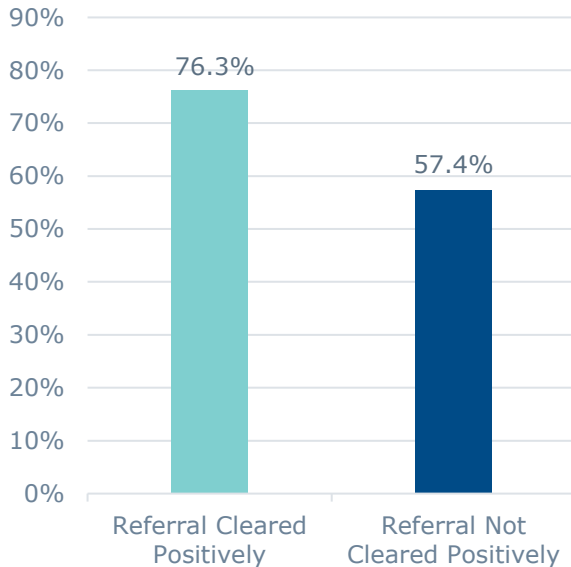
Impact of Referrals on NWTC Retention



Spring 2021 Impact of Referrals at NWTC



Persistence of Students with Intake Survey Referrals, Fall '20 to Spring '21



Data from October 2020-February 2021 Referral receivers:

- 76.3% of students who had at least one intake referral cleared positively enrolled in Spring 2021
- 57.4% of students who had at least one intake referral but NONE cleared positively enrolled in Spring 2021



New Student Welcome Survey

New NWTC program students take our welcome survey because we want to get to know you, your strengths, and any potential challenges to your graduation. It is normal for students to experience challenges and research shows that the most successful students can identify what they need and take advantage of the resources offered. By providing your honest responses on this 3-5 minute survey, we will proactively connect you to the support you need.

Where do you plan to take most of your classes this semester? (Select all that apply)

- Green Bay
- Marinette
- Sturgeon Bay
- Shawano
- Oconto Falls
- Crivitz
- Luxemburg
- Niagara/Aurora
- Online

How certain are you about your career goals?

- Very certain
- Moderately certain
- Slightly certain
- Not certain at all

How many hours per week do you plan to work while enrolled in classes?

- 0
- 1-9
- 10-19
- 20-29
- 30-39
- 40+

Do you provide frequent care for individuals other than yourself (e.g., children, siblings, parents, etc.)?

- Yes
- No

Are you enrolled member of a federally recognized tribe?

- Yes
- No
- Prefer not to disclose

What is the primary language that you speak?

How would you rate your past experience in Math?

- Not challenging at all
- Slightly challenging
- Moderately challenging
- Very challenging

How would you rate your past experience in Reading?

- Not challenging at all
- Slightly challenging
- Moderately challenging
- Very challenging

How would you rate your past experience in Writing?

- Not challenging at all
- Slightly challenging
- Moderately challenging
- Very challenging

How would you rate your past experience in Science?

- Not challenging at all
- Slightly challenging
- Moderately challenging
- Very challenging

How confident are you in your ability to use a computer to complete assignments?

- Very confident
- Moderately confident
- Slightly confident
- Not confident at all

How often do you have access to a computer that you can use to complete school-related work away from an NWTC campus?

- Always
- Most of the Time
- Rarely
- Never

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How are you planning to pay for college? (Select all that apply)

- Self-funded (job, savings, etc.) or Parents
- Financial Aid / FAFSA (grants, loans, work study)
- Veterans Education Benefits
- Unsure
- Other (i.e., Employer Funding, Scholarships, etc.)

Do you and your family have access to enough food every day?

- Yes
- No

Do you and your family have safe and dependable housing?

- Yes
- No

Which of the following services would you like information about before you begin classes at NWTC? (Select all that apply)

- Academic Coaching/Tutoring
- Disability Services
- Assistance to pay for childcare
- Community Resources (e.g., housing, food share, social service agency information, or referrals)
- Extracurricular Activities (e.g., student organizations, student government, intramural athletics, etc.)
- Financial Coaching and Budgeting
- Personal Counseling (e.g., anxiety, depression, ADHD, etc.)
- Study Abroad
- Veterans' Services
- Computer Help Videos (using NWTC systems and common computer tasks)
- Help with Home Internet Access
- Career Services - Help finding a job while in college

I know I will succeed in college because:

|

Thank you! We're glad you're at NWTC and believe that you can achieve your goals here. Your responses on this survey will be shared with appropriate staff who may connect with you to provide assistance and resources. Your conversations with us are an important step in your success and achieving your goals.

Questions? Contact:

John Grant, NWTC Dean of Student Development, at john.grant@nwtc.edu or 920-498-6984

Matt Petersen, NWTC Manager of Student Retention, at matthew.petersen@nwtc.edu or 920-498-6886



Download NWTC's Survey Text
in the Chat or Event Page!



PRINCE GEORGE'S
COMMUNITY COLLEGE

Created an **Intervention Response Plan** to ensure survey-takers received support using Navigate



Creating an Intervention Response Plan

Comprehensive Plan to Ensure Students Received Needed Support

I am: (mark all that apply)	Owner and Office/Dept	Action Plan	Message
First in my family to attend college	John Smith SS&E-TRIO	Connect students to the TRIO program	Congratulations on being the first in your family to attend college! TRIO Student Support Services (SSS), is dedicated to helping first-generation college students like yourself succeed. Please visit our web site at https://bit.ly/triosshomepage or contact sss@pgcc.edu for more information.
Returning after a semester or more away from college	Jane Smith SAPCR	Re/introduce students to their advisor	We missed you! Welcome back to Prince George's Community College. As a student who has been away from campus for one or more semesters, your advisor would love to meet with you to make sure you are taking the right classes. Please schedule an appointment with your advisors as soon as possible.

Key Factors Included

- ✓ Thoughtful questions
- ✓ Designated owners for follow-up
- ✓ Clear actions
- ✓ Pre-populated messages based on student's responses



Download PGCC's Intervention Response Plan in the Chat or Event Page!

Measuring Survey and Intervention Plan Impact



Casting a Wide Net to Best Capture Impact

Students Self-Identifying Needs

12K+

Students
responded to
Intake Survey

Data was accessed through
Navigate's Milestone
Analytics Dashboard

Enhancing Institutional Capacity to Support

\$3M

Grant
awarded to
PGCC

Data from the Intake Survey
was included in grant
application, highlighting the
added benefits of student
support services

Student Engagement

Increased Interest in
Clubs/Organizations
and Departments

- Women of Wisdom: Enrollment doubled; some students were even turned away
- Financial Aid Office inquiries



Staff Accountability

- Survey Builder was used to follow up with students who completed the survey
- Results were used to ensure students received the support they need



Instilling Ownership and Accountability



Connecting Students with Resources and Support

Ownership

- Tasks were assigned to owners in every student success area (e.g., TRIO, SAPCR)
- Central contacts triaged survey results to relevant owners to ensure each received timely information



Staff and Student Accountability Methods

- Provided student-facing scripting to owners for each potential student response
- Sent reminder emails one week after launch and two weeks later
- Used Survey Builder to send follow-up email from Vice President's office to students 4 to 6 weeks after they completed it:
 - Did anyone reach out to you from the Intake Survey? Y/N
 - Do you have any other questions or concerns? Y/N
- Reached out to departments that did not conduct proper follow-up



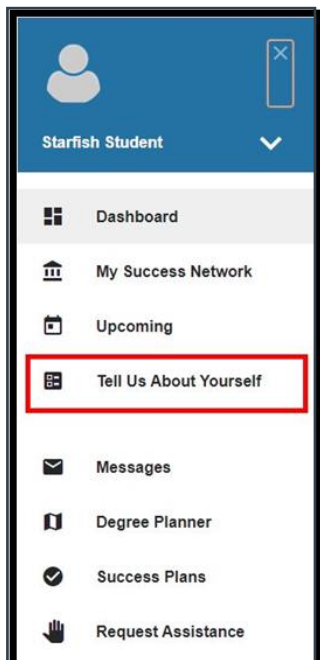
Used **Starfish Intake Survey** to identify students in need of basic needs support



Simple Intake Questions Identify Students to Support

28

“Tell Us About Yourself” Intake Survey



Two-Part Survey

1 Hope Survey: #RealCollege Questionnaire

- Students are asked to complete this once
- Automatically raised flags and a DW Triage process guides follow-up with students

2 SCCCD Student Intake Questions

- Answers can be updated each semester
- Questions were designed to be simple and provide information staff could use strategically to help students
- Colleges can use student answers and college/cohort/organization filters for strategic intervention and student outreach

Marketing Plan

Campus-Based Marketing in Fall 2021, District-Wide Marketing in Spring 2022

Flyers



Social Media Posts



Download Reedley's Flyers and Social Media Posts in the Chat or Event Page!

Intake Survey Marketing

Item Detail	Start Date	End Date
Fall 2021 Open Dates	7/26/2021 1	8/27/2021
Website Banner	8/2/2021	8/26/21
Email to Students	8/4/2021	
Flyer Distribution to Faculty	Opening Day	
Social media Post	8/16/2021 1	
Last Call Email To Students	8/23/2021 1	

District-Wide Triage - Hope Survey	Total
Food Insecure	49
Food Insecure and Housing Insecure or Homelessness	154
Homelessness	7
Housing Insecure	74
Housing Insecure and Homelessness	18
Food Insecure, Housing Insecure, and Homelessness	85
Total	387

Evaluate Your Intake Survey Annually



Questions to Consider

1

What new initiatives or supports have been developed in the past year that could use Intake Survey data for student referrals? What initiatives or support have stopped that you can remove?

2

Is there anything going on in the community or globally that you want to be able to support students around?

3

How did referrals based on Intake Survey data go this past year? Is there new or different-in-kind info that you should collect to make those referrals more effective?



Student Success Collaborative

Survey Build Worksheet

PART I: Survey Planning

This portion of the worksheet will help you design and outline decisions around launching a Survey with students in your institution's Navigate or Starfish platform.

1. What type of survey will you send to students?

- First Year Persistence Advising & Registration Satisfaction Midterm Grade Check-In
 Online/Hybrid Learning Other (write in):

2. Who will be crafting and approving questions and choices?

Name 1:
Name 2:

3. Who will be building the Survey?

Name 1:
Name 2:

Content Administrator Permissions are required to build and send Surveys. If permissions are needed, email NavigateTechSupport@eab.com or StarfishSupport@eab.com.

4. Which cohort of current students will receive the survey?

5. What are the start and end dates for your survey?

Start Date:
End Date:



Download our Survey Planning Worksheet in the Chat or Event Page!

Final Thoughts

Please take a moment to answer this final poll question to provide your overall experience on today's session.

We have also shared a link to a short online evaluation in the **Chat** and we would appreciate if you could take 2-3 minutes to give us additional feedback on your experience today.
