



Take Stock in College

2022-2023 Summative Evaluation

UF | Lastinger Center for Learning
UNIVERSITY of FLORIDA



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Executive Summary

INTRODUCTION

The Take Stock in College program was created to provide evidence-based support strategies to assist the Take Stock in Children program high school graduates attain postsecondary degrees (see the Take Stock Support Model, Figure 1). Receiving a college degree or postsecondary career technical education certification in the United States is associated with lower unemployment rates and higher incomes (Irwin et al., 2021). Specifically, students who earn a bachelor's degree earn significantly more than high school completers over the course of their lifetime, with substantial income differences (Lobo & Burke-Smalley, 2018). Parental education level has also been shown to afford income advantages to subsequent generations, a benefit that can also transfer from first-generation college graduates to their children (Manzoni & Streib, 2018). This finding also holds for racially diverse students (Witteveen & Attewell, 2020).

Since its founding in 1995, the Take Stock in Children nonprofit organization has provided an exceptional opportunity for over 40,000 students from families with low incomes across Florida to escape the cycle of poverty by pursuing high-quality postsecondary preparation programming. The well-established Take Stock model offers multi-year services for deserving academically qualified students in middle and high school. This service approach includes access to a caring adult mentor, college readiness and college completion services, and a Florida Prepaid Scholarship. The unique combination of these components contributes to an evidence-based framework that focuses on helping students successfully graduate from high school, enroll in a postsecondary program, and reach degree attainment.

At the writing of this report, 97% of Take Stock students graduate from high school, 90% enter two- or four-year postsecondary programs, and 72% of Take Stock students complete their postsecondary programs, an increase of 5% since the program's inception. This is a much higher rate compared with the national average of 29% based on data from the National Student Clearinghouse for low-income students. Given the success of the Take Stock model, the organization embarked on the logical next step – a continuum of support for Take Stock graduates as they strive to complete the postsecondary experience.

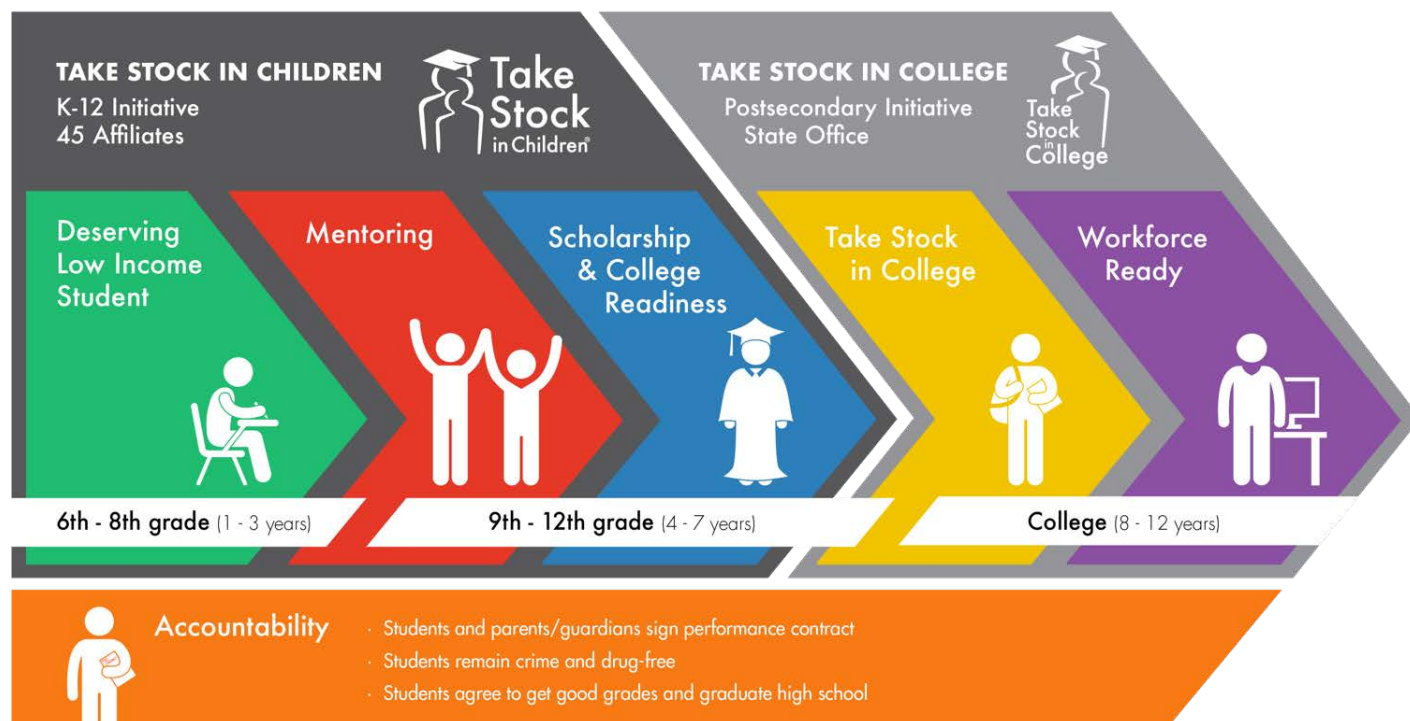
“The mission of the Take Stock in College Program is to break the cycle of poverty through education of underrepresented economically disadvantaged students by ensuring they reach postsecondary degree attainment and achieve success in college, career, and life.”

Yet, despite the positive outcomes of postsecondary degree attainment, achieving degree attainment remains challenging for many students, such as those served by the Take Stock in Children program nonprofit organization. In 2018, Take Stock created the Take Stock in College program to ensure students achieved postsecondary degree attainment or career certification, fulfilled Take Stock’s commitment to student success, and ensured that the \$277 million investment in scholarships translated into successful postsecondary education completion. As a result, the Take Stock in College initiative was created to serve those Take Stock students attending Florida’s 40 public colleges and universities, providing a continuum of support for Take Stock in Children students by connecting them with existing campus resources to support their journey toward postsecondary degree attainment or career certification. This initiative is based on research indicating that contact with student scholars in the first 12-18 months of their postsecondary experience can make the difference between success or failure in postsecondary degree attainment (Florida State University Student Success Team, n.d.).

TAKE STOCK ORGANIZATIONAL MODEL

Figure 1. Take Stock Support Model

Take Stock achieves success through an innovative multi-year program model of mentorship, accountability, college success, and a college scholarship.



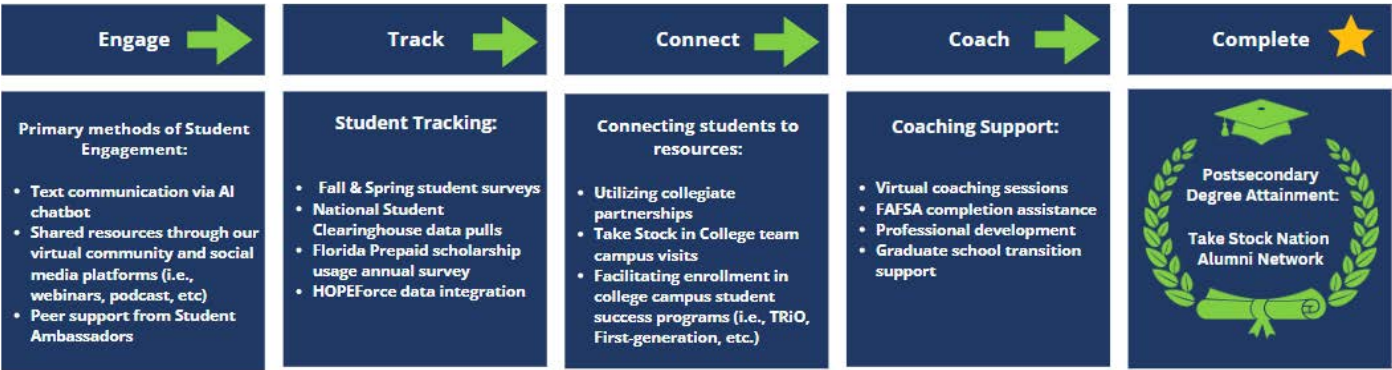
Take Stock in College students graduate college at a 72% completion rate, much higher than the national average of 29% for low-income, at-risk students based on data from the National Student Clearinghouse Annual Benchmarks Report (2021). The Take Stock in College program is working toward a college completion rate that mirrors its high school success rate, which would approximate the high school graduation rate of Take Stock in Children students.

Take Stock’s mission is to end poverty through education, and it aims to ensure all Florida students have the opportunity to achieve postsecondary success. The Take Stock in College program is one part of the continuum of support of lifting students out of poverty and providing a pathway to success in college, career, and life. The Take Stock in College program model provides students access and connects them to tools and resources to help them successfully navigate this pathway through college. Every Take Stock student receives a Florida Prepaid scholarship to enhance their college access. Yet, promoting students’ persistence toward postsecondary degree attainment is vital. The Take Stock in College program provides a much-needed continuum of care with additional support and connections to promote students’ college success. The program works closely with key regional and statewide stakeholders, staff at Florida’s 40 public colleges and universities, and students. This collaboration is the cornerstone of the program. The Take Stock in College program does not duplicate services already provided by Florida higher education institutions but instead acts as a connector to these resources and services.

The Take Stock in College program engages in data-driven decision-making to expand its reach across Florida’s 40 public colleges and universities and to provide personalized, consistent communication with Take Stock in College students. Take Stock in Children has provided trusted support to students beginning in middle school and through high school. The Take Stock in College program is the next step in the continuum of support promoting students’ success in college, career, and life.

To increase degree attainment, the Take Stock in College Program employs a comprehensive support model including five key strategies: **Engage, Track, Connect, Coach, and Complete.**

Figure 2. Take Stock in College Program Model



The inaugural year of the Take Stock in College program (2018–2019) focused on building the program. Subsequent years (2019–2020, 2020–2021, 2021–2022) focused on building program awareness and provided evidence that the Take Stock in College program supported statewide postsecondary initiatives designed to impact student behavior and postsecondary persistence. During this time, the Take Stock in College program responded to the needs of students during the COVID-19 pandemic, providing responsive program adjustments to ensure that students received uninterrupted support. The additional resources and support put into place during the pandemic, many of which were virtual, are now implemented as part of the Take Stock in College program’s regular programming as a way to increase efficiencies and engagement with students. The Take Stock in College program utilizes a hybrid model of support, providing both in-person and virtual options to assist students in navigating postsecondary environments and persisting toward degree attainment. Following the Engage, Track, Connect, Coach, Complete model, the Take Stock in College program engages students by providing the following support resources including:

1. Themed Weekly Student Programming utilizing the PERSIST Curriculum
 - Academic Progression
 - Financial Support
 - Institutional Commitment
 - Social Support
 - Social Involvement
 - Academic Optimism and Self-efficacy
 - Academic-related Skills
2. Sunny, the AI chatbot
3. Take Stock Connect, an online Community for Take Stock College Students
4. Take Stock in College Blog
5. Take Stock in College Corner Weekly Newsletter
6. Take Stock in College Student Ambassador-Peer Support
7. Social Media – Online All Platforms/Student Ambassador Postsecondary Degree Influencer
8. Take Stock in College Corner Podcast
9. Connecting Resources with Students via materials, or off-campus or on-campus resources, offices, meetings
10. One-On-One Coaching w/ Students

Evaluation Purpose

The University of Florida Lastinger Center for Learning conducted two evaluations during the 2022–2023 grant year (July 1, 2022, through June 30, 2023).

The first assessment of the program was a Formative Evaluation, which used both quantitative and qualitative data to determine whether the Take Stock in College program was on target for meeting objectives and metrics.

The Formative Evaluation report provided a description of implementation in the first two quarters of 2022–2023. It detailed the progress made to date and recommendations on improving performance and model fidelity. The Formative Evaluation also described progress in program implementation and identified areas of improvement. Using these data, the Take Stock in College program modified and adapted as needed in the second half of the year to support the accomplishment of all grant objectives.

The second assessment of the program is a Summative Evaluation, which is conducted at the end of the grant year to determine whether the Take Stock in College program has met all objectives. This Summative Evaluation provides a detailed summary of the program and progress toward meeting state objectives. In addition, the Summative Evaluation highlights areas of considerable programmatic strength and areas for growth and refinement.



Evaluation Method

The 2022-2023 Take Stock in College program evaluation is divided into two parts: the Formative Evaluation and the Summative Evaluation. The Formative Evaluation considered evidence of progress towards the end-of-year objectives and overall implementation fidelity from the first two quarters. The function of the Formative Evaluation was to provide a mid-year snapshot of the program's progress toward end-of-year goals and metrics and determine whether the Take Stock in College program was on track to meet the metrics required by the Florida State University System Board of Governors for the grant year 2022-2023. In addition to making observations about mid-year progress, the evaluation also offered suggestions regarding opportunities for growth to help the organization meet year-end goals and improve the overall experiences and outcomes of all program participants.

The evaluation process concludes with this Summative Evaluation. In conducting this evaluation, the Lastinger Center considered evidence from all quarters to determine whether the Take Stock in College program met its yearly objectives. This report details that achievement in addition to highlighting areas of considerable programmatic strength and opportunities for growth.

The purpose of the Take Stock in College program evaluation is to answer the following questions:

1. What evidence supports statewide postsecondary supports as impacting student behavior and postsecondary persistence?
2. Is the Take Stock in College program model being implemented with fidelity?
3. What is the development status of Take Stock in College program activities and how are students engaging in activities?
4. What is the program impact on key indicators of increasing postsecondary graduation rates/ degree attainment?
5. How can the Take Stock in College program improve the effectiveness and the efficiency of implementation to reflect the significant return on investment of the program for the state of Florida?

Evaluation Process and Timeline

Quarters 1 and 2, 2022

Evaluation Plan



In the first phase of the evaluation process, the UF Lastinger Center for Learning and Take Stock in College created an evaluation plan, working together to ensure that the evaluation process and procedures were straightforward and that each team member's role was established. During these initial discussions, the team set clear deadlines and expectations around data collection and analysis.

Literature Review



Next, a thorough review of the latest research in coaching, college readiness, and college success was conducted (see Appendix B). Understanding current literature, including evidence-based practice designed to promote college degree attainment, provides support for the Take Stock in College model and ensures that Take Stock in College updates its programming according to the latest research.

Formative Evaluation



The phase of the Formative Evaluation process focused on the collection and analysis of both quantitative and qualitative program data. Here, the UF Lastinger Center analyzed programmatic statistics for the first two quarters of the 2022 - 2023 grant year, as provided by Take Stock in College staff. In addition, UF Lastinger Center conducted interviews with fourteen Take Stock in College stakeholders.

The Formative Evaluation is based on five types of research/data:

1. **Literature Review:** Search and synthesis of the research literature.
2. **Artifacts:** Documentation generated by the Take Stock in College program, including evidence that performance deliverables were submitted to the Board of Governors.
3. **Qualitative Interviews:** Conversations with students, postsecondary institution staff, and Take Stock in Children affiliates participating in the Take Stock in College program (see interview questions in Appendix C). The UF Lastinger Center team analyzed participants' responses to identify overall patterns and themes that were consistent amongst the majority of participants.
4. **Student Data:** Usage and participation information provided by the Take Stock in College program.
5. **Take Stock in College Student Survey:** The Take Stock in College program administered surveys in the fall semester of 2022 and the spring semester of 2023 (see sample survey questions in Appendix D).

Combined, these data constitute *formative* observations of programmatic progress, execution, and outreach at the mid-year point. The data describe progress on required deliverables for Quarters 1-2 of the 2022–2023 fiscal year and an analysis of data in response to the target evaluation questions. The data also serves as a catalyst for identifying opportunities for growth to further increase the effectiveness of the Take Stock in College program for the remainder of the fiscal year, and in general.

After the completion of the Formative Evaluation, the final phase of the evaluation process begins, culminating in a Summative Evaluation report.

Summative Evaluation

The final phase of the evaluation process is this Summative Report to be delivered at the end of the 2022-2023. This evaluation assesses whether Take Stock in College implemented their programs with fidelity to the model, met grant requirements, and achieved annual targets.

The Summative Evaluation also includes surveys and interviews with stakeholders. It outlines recommendations for how Take Stock in College can continue to develop its areas of strength and includes recommendations for how programming may be improved going forward.

Summary of Observations

UF Lastinger Center reviewed current research literature relevant to aspects of the Take Stock in College program. The evaluator also examined multiple data sources to understand how the Take Stock in College program supports students toward postsecondary degree attainment. Qualitative interviews with Take Stock in College students, postsecondary institutional partners, and Take Stock in College staff were also conducted by UF Lastinger Center to explore ways that the organization is currently supporting students to promote degree attainment. A secondary goal of the interviews was aimed at learning additional ways that the Take Stock in College program could support students to an even greater degree in the future. Evaluation questions, a summary of observations, and recommended opportunities for growth are provided in Table 1.

The results of this evaluation confirm that Take Stock in College has met all deliverables and achieved program goals for 2022-2023. Overall, it is recommended that the Take Stock in College program continue on its current course, implementing evidence-based strategies, sharing information about these opportunities with key stakeholders, and building collaborative partnerships at colleges and universities. Opportunities for growth stemming from the data are also presented briefly. See the Observations and Opportunities for Growth section (page 62) for more detailed information.

Table 1. Evaluation Questions, Observations, and Opportunities for Growth

Evaluation Question 1	
What evidence supports statewide postsecondary supports as impacting student behavior and postsecondary persistence?	
Observations	Opportunities for Growth
A review of the research literature showed the program is aligned with evidence-based strategies to promote postsecondary persistence, retention, and degree completion. Examples of strategies with a strong evidence base include coaching, financial support, and strategies to help students feel more connected. The Take Stock in College program model that supports students in their degree completion is organized into a framework of Engage, Connect, Track, Coach, and Complete. This model aligns with evidence-based strategies to promote postsecondary success.	The Take Stock in College program should continue using research-based strategies. Develop opportunities for peer engagement. Further enhance the use of predictive analytics to better anticipate students’ needs. Based on data, the program can provide students with even more increasingly personalized, targeted, and individualized support. Continued data analysis may also increase understanding of what supports are most predictive of degree attainment.

Evaluation Question 2

Is Take Stock in College's model being implemented with fidelity?

Observations	Opportunities for Growth
The Take Stock in College program has met all of its deliverables for Quarters 1-4, pending approval of this Summative Evaluation by the Board of Governors. In many cases, the program has exceeded expectations.	Continue to exceed expectations by implementing the successful Take Stock in College program model and enhance program implementation by connecting students with additional resources that support degree attainment.

Evaluation Question 3

What is the development status of Take Stock in College program activities, and how are students engaging in activities?

Observations	Opportunities for Growth
<p>To increase degree attainment, the Take Stock in College program employs a comprehensive support model including five key elements: Engage, Track, Connect, Coach, and Complete. The Take Stock in College program is engaging students by providing the following support resources:</p> <ol style="list-style-type: none"> 1. Themed Weekly Student Programming utilizing the PERSIST Curriculum 2. Sunny, the AI chatbot 3. Take Stock Connect 4. Take Stock in College Blog 5. College Corner Weekly Newsletter 6. College Corner Podcast 7. Take Stock in College Student Ambassador-Peer Support program 8. Social Media – All online platforms 9. Connecting Students to Resources 10. One-On-One Coaching <p>Students report financial aid, academic advisement, and academic tutoring as the top three supports most accessed and requested by students.</p>	<p>Both interview and survey data indicate that resources such as financial aid advisement, academic advisement, and academic tutoring are most accessed and requested by students.</p> <p>In addition, students have consistently expressed a desire for support that will help them succeed post-graduation when they launch their careers.</p> <p>The Take Stock in College program should continue to build partnerships and enhance knowledge of available campus and community resources in order to expand the network of service connections available to students. These partnerships are central to Take Stock in College Program efforts to connect students with available resources and not to duplicate services already available.</p>

Evaluation Question 4

What is the program impact on key indicators of increasing postsecondary graduation rates/degree attainment?

Observations	Opportunities for Growth
The Take Stock in College program has built partnerships with Florida's 40 public colleges and universities. In addition, the Take Stock in College program continues to develop and refine the research-informed program components that comprise the Engage, Track, Connect, Coach, and Complete model to promote college persistence and degree attainment. This year, the persistence rate for Take Stock in College scholars who graduated in 2021 was 79% (see Table 14).	The Take Stock in College program may be able to increase its impact by continuing to monitor student persistence to identify strategies that have the most impact on student post-secondary degree attainment for future replication. Additionally, the Take Stock in College program should consider further expansion of interventions to identify students who have not enrolled or dropped out of college/university, providing guidance and assistance with re-enrollment.

Evaluation Question 5

How can Take Stock in College improve the effectiveness and the efficiency of implementation to reflect the significant return on investment of the program for the state of Florida?

Observations	Opportunities for Growth
<p>The Take Stock in College program provides an expanding network of program services where students can connect to specialists and experts in different fields across colleges and universities, thereby supporting improved student outcomes. The financial investment made in Take Stock in College is modest compared to the promise of impact on student outcomes in the form of higher lifetime earnings and, by extension, a reduction in poverty for Take Stock in College students and, subsequently, the potential to positively impact the outcomes for their children.</p> <p>The general sentiment about the effectiveness of the Take Stock in College program is overwhelmingly positive per interviews with students, staff, and institutional partners and student survey data. The program is improving efficiency by leveraging partnerships, AI, and predictive analytics (e.g., Sunny, the AI chatbot).</p>	The Take Stock in College program should continue strengthening partnerships with postsecondary institutions coupled with further development of Sunny, the AI chatbot and data analytics to provide seamless, targeted, timely, effective, and efficient supports, ideally personalized to students' immediate needs.

Deliverables

BOARD OF GOVERNORS (BOG) DELIVERABLES

The Take Stock in College program has achieved or exceeded BOG Deliverables available for review at the time of this report. See Tables 2-5.

Table 2. Quarter 1 BOG Deliverables: Fidelity of Implementation

Quarter 1: July 1 - September 30, 2022			
Quarter 1 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Maintain appropriate staffing, including, but not limited to, identifying, vetting, and hiring: Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Identify, vet, and contract (stipend) at least 20 (Fall Semester) Student Ambassadors attending one of the 40 public colleges and universities. More than one ambassador may support students attending a college or university where the Take Stock in College student enrollment would require additional Student Ambassador services.	✓	✓
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	✓
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	✓

Quarter 1: July 1 - September 30, 2022			
Quarter 1 BOG Deliverables		Submitted to BOG	Approved by BOG
5	<p>Implement an SMS text messaging with high-touch nudging 7 times this quarter.</p> <p>These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.</p>	✓	✓
6	Evaluation Plan Submitted.	✓	✓

Table 3. Quarter 2 BOG Deliverables: Fidelity of Implementation

Quarter 2: October 1 - December 31, 2022			
Quarter 2 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Develop and provide in-service training attended by at least (20) staff and Student Ambassadors; training will be selected based on needs identified to create new or build existing capacity.	✓	✓
3	<p>Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments.</p> <p>These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.</p>	✓	✓

Quarter 2: October 1 - December 31, 2022

Quarter 2 BOG Deliverables		Submitted to BOG	Approved by BOG
4	<p>Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources.</p> <p>These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.</p>	✓	✓
5	<p>Implement an SMS text messaging with high-touch nudging 7 times this quarter.</p> <p>These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.</p>	✓	✓
6	<p>Submit Formative Evaluation of the program that will examine the progress made toward the program goals and provide recommendations on ways to improve implementation. An independent party conducts the evaluation.</p>	✓	✓

Table 4. Quarter 3 BOG Deliverables: Fidelity of Implementation

Quarter 3: January 1 - March 31, 2023			
Quarter 3 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Identify, vet, and contract (stipend) at least 20 (Spring Semester) Student Ambassadors attending one of the 40 public colleges and universities. More than one ambassador may support students attending a college or university where the Take Stock in College student enrollment would require additional Student Ambassador services.	✓	✓
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	✓
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	✓
5	Implement an SMS text messaging with high-touch nudging 7 times this quarter. These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.	✓	✓
6	Summary report of annual student survey results.	✓	✓

Table 5. Quarter 4 BOG Deliverables: Fidelity of Implementation

Quarter 4: April 1 – June 30, 2023			
Quarter 4 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	TBD
2	Develop and provide in-service training attended by at least (20) staff and Student Ambassadors; training will be selected based on needs identified to create new or build existing capacity.	✓	TBD
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/ appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	TBD
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	TBD
5	Implement an SMS text messaging with high-touch nudging 7 times this quarter. These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.	✓	TBD
6	Submit Summative Evaluation of the program to determine if the goals identified in the evaluation plan were met and provide recommendations to improve future implementation.	✓	TBD

Submission and approval of Quarter 4 deliverables by the Board of Governors were pending at the time of production of this report. Having had no issues with submission and approval in previous quarters, approval of Quarter 4 is expected shortly.

Literature Review Summary

The Take Stock in College program is dedicated to supporting Take Stock in Children high school graduates' lifelong success by promoting degree attainment in postsecondary education. The following is a summary of relevant and current research literature. Take Stock in College programming is research-informed, utilizing research-based best practices that include many of the successful methodologies outlined below.

Research has shown that obtaining a postsecondary degree can set a young person on a pathway to greater success in life, yet degree attainment is often challenging for students. Students who have been under-represented, including many of the students served by Take Stock in Children, can face additional barriers to postsecondary success, persistence, and completion of their degree.

UF Lastinger Center conducted an updated review of research findings on the latest advances in the fields of postsecondary success, persistence, and completion. Studies on the impact of COVID-19 in relation to post-secondary enrollment and completion were also reviewed to ensure current perspectives. For the full review, please refer to Appendix B of this report.

WHY IS COLLEGE DEGREE ATTAINMENT IMPORTANT?

A college degree is associated with higher lifetime earnings and home ownership.

- Students who earn a college degree have higher lifetime earnings than students with a high school diploma (Barrow & Malamud, 2015; Belfield & Bailey, 2017; Irwin et al., 2021; Lobo & Burke-Smalley, 2018; Paulsen & Perna, 2019).
- Individuals who earned an associate degree were more likely to be homeowners (Turk, 2019).
- Receiving a college degree in the United States is associated with lower unemployment rates (Irwin et al., 2021).
- Parental education level can afford income advantages to subsequent generations, including a benefit from first generation college graduates to their children (Manzoni & Streib, 2018). This finding also holds for racially diverse students (Witteveen & Attewell, 2020).



WHAT ARE THE BARRIERS FOR FIRST-GENERATION STUDENTS AND/OR STUDENTS FROM FAMILIES WITH LOW INCOMES?

Poverty poses barriers to college attendance.

- Hispanic students from families with low incomes often lack access to financial aid information about how to pay for college. (de los Reyes et al., 2021; George-Jackson & Gast, 2005; Zarate & Fabienke, 2007).
- First-generation students often possess limited knowledge about college, including the college application process, and experience financial hardship to pay for higher education. (Falcon, 2015; Moschetti & Hudley, 2014; Pratt et al., 2017).
- There are strong correlations between income and enrollment, persistence, and degree attainment. Students who come from families with lower incomes are less likely to attend and persist in college and attain their degree (Bowne & Michalak, 2017).

COVID-19 had a differential impact on students of color and students from families with low incomes.

- Enrollment during the pandemic declined among all racial groups. However, Native American, Black, and White groups suffered the sharpest drops (Hoover, 2020; National Student Clearinghouse, 2020a, 2020b; Sedmak, 2020).
- The persistence rate dropped by two percentage points since fall 2019 (pre-pandemic), with the first-year persistence rate falling the most among Latino students (National Student Clearinghouse, 2021; Sutton, 2021).
- A nationally representative longitudinal survey found that food insecurity during the pandemic was more likely to impact non-white, first-generation students, and that the issue was associated with a lower likelihood of degree attainment (Wolfson et al., 2022).
- A survey of 3,163 Queens College students found that first-generation students encountered more financial struggles during the pandemic than students with a parent who had completed college (Rodriguez-Planas, 2022).

WHAT KEY FACTORS IMPROVE POSTSECONDARY SUCCESS, PERSISTENCE, AND COMPLETION?

In general, investing in student support services pays off in increased graduation rates.

- Instructional and student support service expenditures are positively associated with increasing graduate rates (Chen, 2011; Hamrick et al., 2004; Webber & Ehrenberg, 2010).
- A recent study of three college mentoring programs showed that the most effective programs have sufficient funding (NORC at the University of Chicago, 2020).

Mentoring/Coaching improves college outcomes, including for specific populations.

- Mentoring/Coaching is generally effective for students in various ethnic/racial groups (Simmons & Smith, 2020; Tam et al., 2022). In one study, mentoring/coaching produced higher levels of enrollment in postsecondary education, persistence, and degree attainment for the intervention group than for the control group (Hallberg et al., 2022).
- Pairing students with a mentor who shares similar backgrounds (such as race/ethnicity, age, gender, or academic interests) has shown benefits to motivation, confidence, and first-year retention (Dennehy & Dasgupta, 2017).
- Personalized support from coaches has been shown to increase GPA.
- Black and Latino students demonstrated increased persistence when they were involved in a peer coaching initiative (Simmons & Smith, 2020).
- Mentoring or coaching interventions increased the academic achievement and persistence of first-year, Black, and Hispanic students (Arco-Tirado et al., 2019; Bettinger & Baker, 2013; Lisberg & Woods, 2017; Mahendra & Kashinath, 2022; Obiomon et al., 2022).

Financial support pays off in degree attainment.

- Scholarships significantly increase college enrollment, college credits attempted, and credential attainment (Bartik et al., 2015).

Connections are important for college success.

- Social integration and engagement were related to student retention among students of color from underrepresented groups (Baker & Robnett, 2012; Rasco et al., 2020).
- First-generation students repeatedly express a desire for connection and engagement outside the classroom (Hutson et al., 2022).

Technology is an effective support tool for increasing connection and engagement that improves college outcomes.

- Text messaging interventions are a cost-efficient (Zick et al., 2022) and effective method for improving persistence (Castleman & Meyer, 2020; Tippetts et al., 2022).
- Text message “nudges” regarding filing the FAFSA resulted in earlier FAFSA re-filing (Page et al., 2022).
- Virtual and hybrid mentoring models are effective for improving persistence and degree attainment (NORC at the University of Chicago, 2021).

Description of the Take Stock in College Program

During the 2022-2023 academic year, the Take Stock in College program served 7,042 students, a student population that is 100% low-income. The Take Stock in College program serves traditionally first-generation and underrepresented student groups attending Florida’s 40 public colleges and universities, and more than 70% of students participating in the Take Stock in College program are students of color.

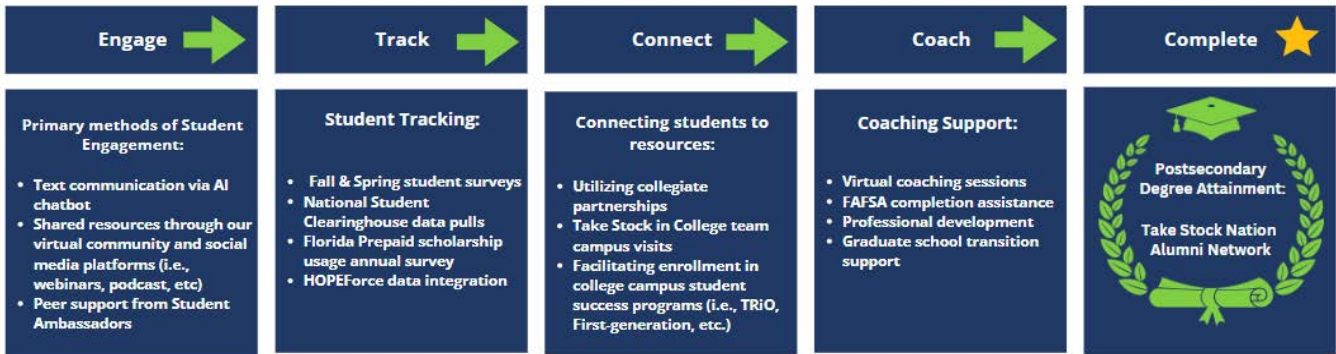
“What makes a student first generation?”

Many institutions have chosen to use the federal definition officially developed for TRIO program acceptance and to determine eligibility for PELL Grants. TRIO indicates that first generation students from families where their biological parents did not complete a four-year college degree. This leaves room for parents who may have attended some college but did not complete their baccalaureate degree, and college-going older siblings to be considered first generation.”

<https://firstgen.naspa.org/blog/defining-first-generation>

The Take Stock in College program aims to increase the postsecondary graduation rate for its economically disadvantaged student population so its students can achieve success in college, careers, and life. One way it achieves this is by connecting Take Stock in Children students with existing resources at each of Florida’s 40 public state colleges and universities. The Take Stock in College program is available to all Take Stock in Children students currently enrolled in Florida’s public postsecondary institutions. The intent of the initiative is not to create or duplicate additional services provided by postsecondary institutions but rather to leverage those already in place by actively connecting students to institutional resources. By doing this, the Take Stock in College program builds the successful continuum of support that students utilize throughout their post-secondary experiences. Figure 3 illustrates the Take Stock in College program model.

Figure 3. Take Stock in College Program Model



TAKE STOCK IN COLLEGE STUDENT SCHOLAR DEMOGRAPHICS

Children experiencing poverty, disproportionately students of color, often face challenges in completing high school and continuing their educational journey into higher education. Reduced opportunities stem from myriad factors, including a history of housing segregation leading to school funding disparities (Orfield, 2013) and limited school resources leading to fewer opportunities for student academic enrichment and growth (Stearns & Glennie, 2010). Without higher education, historically underserved and underrepresented students are prevented from realizing many of the opportunities presented in the current economy. As a result, children may continue experiencing poverty into adulthood.

The Take Stock in College program proudly serves a diverse population of 7,042 scholars. Figure 4 and Tables 6 and 7 detail the scholar population by gender, race, and ethnicity.



Figure 4. Race/Ethnicity of the Take Stock in College program Scholars

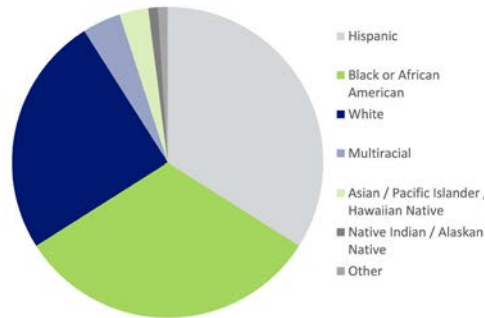


Table 6. Race/Ethnicity of Take Stock in College Scholars

Race / Ethnicity	Percent
Hispanic	34%
Black or African American	32%
White	25%
Multiracial	4%
Asian / Pacific Islander / Hawaiian Native	3%
Native Indian / Alaskan Native	1%
Other	1%

Table 7. Gender of Take Stock in College Scholars

Gender	Percent
Female	66%
Male	34%

The Take Stock in College program focuses its efforts on serving students attending the 40 public colleges and universities in Florida due to the relationship with the Florida Prepaid Project STAR scholarship earned by Take Stock student scholars. Student enrollment is spread throughout the state, with students enrolled at all 40 public colleges and universities in the Spring of 2023 (see Table 8).

Table 8. Colleges and Universities Attended by Take Stock in College Student Scholars

College/University Name	% Students Attended - Spring 2023
UNIVERSITY OF SOUTH FLORIDA	9.15%
UNIVERSITY OF CENTRAL FLORIDA	8.95%
UNIVERSITY OF FLORIDA	6.71%
FLORIDA STATE UNIVERSITY	6.22%
ST. PETERSBURG COLLEGE	6.15%
FLORIDA INTERNATIONAL UNIVERSITY	4.75%
FLORIDA GULF COAST UNIVERSITY	4.23%
VALENCIA COLLEGE	4.16%
MIAMI-DADE COLLEGE	3.86%
FLORIDA ATLANTIC UNIVERSITY	3.84%
UNIVERSITY OF NORTH FLORIDA	3.25%
PALM BEACH STATE COLLEGE	3.22%
FLORIDA A & M UNIVERSITY	3.07%
SANTA FE COLLEGE	3.07%
INDIAN RIVER STATE COLLEGE	2.73%
FLORIDA SOUTHWESTERN STATE COLLEGE	2.56%
FLORIDA ST COLLEGE AT JACKSONVILLE	2.53%
UNIVERSITY OF WEST FLORIDA	2.48%
HILLSBOROUGH COMMUNITY COLLEGE	2.14%
STATE COLLEGE OF FL - MANATEE-SARASOTA	1.82%
TALLAHASSEE COMMUNITY COLLEGE	1.60%
BROWARD COLLEGE	1.57%
DAYTONA STATE COLLEGE	1.13%
COLLEGE OF CENTRAL FLORIDA	1.06%
PENSACOLA STATE COLLEGE	1.03%
SOUTH FLORIDA STATE COLLEGE	1.01%
SEMINOLE STATE COLLEGE	0.93%
EASTERN FLORIDA ST COLLEGE	0.86%
PASCO-HERNANDO STATE COLLEGE	0.86%
LAKE-SUMTER STATE COLLEGE	0.84%
GULF COAST STATE COLLEGE	0.74%
THE COLLEGE OF THE FLORIDA KEYS	0.54%
FLORIDA GATEWAY COLLEGE	0.54%
NORTH FLORIDA COLLEGE	0.47%
POLK STATE COLLEGE	0.39%
ST. JOHNS RIVER STATE COLLEGE	0.39%
FLORIDA POLYTECHNIC UNIVERSITY	0.34%
CHIPOLA COLLEGE	0.34%
NORTHWEST FLORIDA STATE COLLEGE	0.34%
NEW COLLEGE OF FLORIDA	0.12%

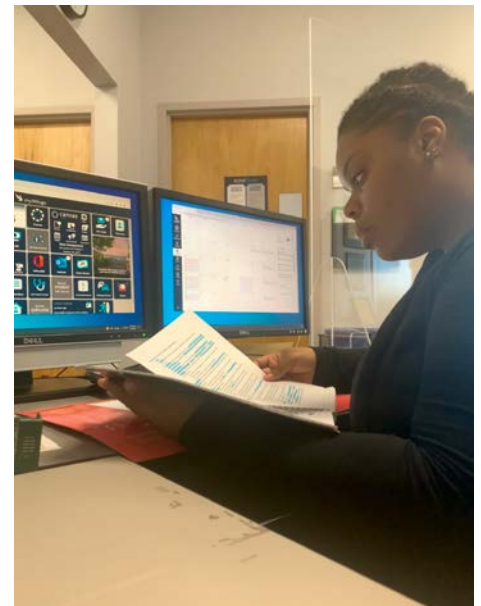
PROGRAM HISTORY

The Take Stock in College program, now in its fifth year, was a logical next step for the Take Stock in Children nonprofit organization. The Take Stock in Children program was founded in 1995 to counter an alarming and persistent high school dropout rate. Initially created by a local education foundation with the support of concerned community leaders, the initiative sought to provide resources to high-potential students from low-income families to graduate from high school, attend college, and transition successfully into careers.

In 1995, the Take Stock in Children program served 500 students. Local businesses soon took notice, recognizing Take Stock in Children's potential as a valuable tool for building a more educated workforce. Among others, Florida's largest bank and largest grocery chain urged the program to expand. One year later, the Take Stock in Children nonprofit organization had affiliate programs in every Florida county. The simplicity of the program and its emphasis on local community involvement helped the organization to thrive in diverse environments statewide. The next logical step was to expand services to support scholars throughout the completion of their postsecondary education through the Take Stock in College program.

The inaugural year of Take Stock in College (2018–2019) focused on building and implementing the program. In the subsequent years (2019–2020, 2020–2021, 2021–2022, 2022–2023), the Take Stock in College program implemented research-based strategies to assist students navigating postsecondary environments and persist toward degree attainment and worked on building awareness of the program.

In 2022–2023, the Take Stock in College program further refined its model, organizing program strategies for supporting students into a framework of **Engage, Track, Connect, Coach, and Complete**. These program strategies are discussed in detail below.



PROGRAM STRATEGIES

The Take Stock in College program has implemented a research-based framework to best connect with its students and assist them with reaching postsecondary certification or degree attainment. This robust model is student-centered, and adjustments are made yearly as the team analyzes outcome data and feedback from student surveys. The Take Stock in College model is organized into five key strategies: **Engage**, **Track**, **Connect**, **Coach**, and **Complete**. Each element encompasses strategies to promote student success throughout their postsecondary journey.

Engage

The Take Stock in College program seeks first to Engage students in their educational endeavors. Engaged students are actively working towards their goal of degree attainment.

The engagement of college-enrolled students is promoted through the use of cutting-edge technologies and innovation channels. Systems like Take Stock Connect and Sunny, Take Stock in College's AI chatbot, are now used to guide students toward successful behaviors. Take Stock Connect is the online community platform available for all Take Stock in college scholars to boost engagement, create connections, and communicate with each other within their institution and the Take Stock in College network statewide. The AI chatbot is building a knowledge base year after year to deploy specific enrollment, advisement, and student success initiatives to each scholar's school of attendance within the 40 public colleges and universities across Florida. Additionally, podcasts, blogs, webinars, newsletters, Student Ambassadors, and social media are utilized to share support resources and increase engagement. To consistently employ best practices and the most up-to-date and pertinent tools available, the Take Stock in College program assesses developing technologies and digital resources and is responsive to them.

Comprehensive postsecondary retention programming is offered through weekly outreach and engagement (see curriculum description for Quarters 1-4 in Appendix A). The programming aims to tackle the biggest issues and challenges facing students. Topics include but are not limited to comprehending course syllabi, using on-campus resources, connecting with their professors, FAFSA completion, and time management and career skills. Much of Take Stock in College's programming includes third-party expertise around financial aid, mental health, and academic success.

The Take Stock in College program uses the ECMC Foundation's PERSIST curriculum as a guide to drive postsecondary retention, persistence, and success. These include 1) Academic Progression, 2) Financial Support, 3) Institutional Commitment, 4) Social Support, 5) Social Involvement, 6) Academic Optimism and Self-Efficacy, and 7) Academic-Related Skills, combined with a model of **Engage**, **Track**, **Connect**, **Coach**, and **Complete**.

The Take Stock in College program utilizes the following engagement tools:

1. Themed Weekly Programming Utilizing PERSIST Curriculum

The Take Stock in College program offers comprehensive postsecondary retention programming through weekly outreach and engagement (see curriculum description for Quarters 1-4 in Appendix A). The themed weekly programming aims to tackle students' biggest issues and challenges to degree completion by providing timely resources and intervention based on key college progression milestones. The curriculum addresses 1) Academic Progression, 2) Financial Support, 3) Institutional Commitment, 4) Social Support, 5) Social Involvement, 6) Academic Optimism and Self-Efficacy, and 7) Academic-Related Skills.

2. Sunny, Artificial Intelligence Targeted Nudging Campaigns

The Take Stock in College program has had a text nudging system in use since the inception of the program and advanced to an AI chatbot system in 2021-2022. The Take Stock in College program continues to develop and refine the AI chatbot, also known as Sunny. The chatbot's purpose is to help students find information and resources exactly when they need it by using artificial intelligence to provide conversational support to strengthen persistence, decrease summer melt, and increase positive student outcomes.

Sunny provides text message “nudges” that direct students toward successful behaviors. Nudging topics include subjects like timely FAFSA completion, participation in informational webinars, and key opportunities for social-emotional connection with the Take Stock in College team. Sunny also has the capacity to check-in with students in real-time to learn about issues that may be impeding the educational success of individual students.

The Take Stock in College program is maximizing the potential of Sunny to provide 1) an increase in student engagement and establish high-touch student services while allowing the team to scale efforts; 2) personalized interactions and suggestions for the 7,042 Take Stock in College student scholars; 3) check-ins with students to learn in real-time about the challenges hindering their educational success and then connect them with needed resources; 4) a way to use data to identify and provide tailored services to postsecondary students to help them achieve certification/degree attainment.

Students can engage with Sunny actively (e.g., Sunny messages a student, and the student responds). Students can also engage with Sunny passively (e.g., Sunny messages a student with information, and the student reads the message, potentially leading to completing a critical activity). There is a growing evidence base supporting the effectiveness of passive engagement. That means that even though Take Stock in College scholars may not always respond to Sunny by messaging back, Sunny can still push them to complete important actions that support their success in school.

3. Take Stock Connect – An Online Community

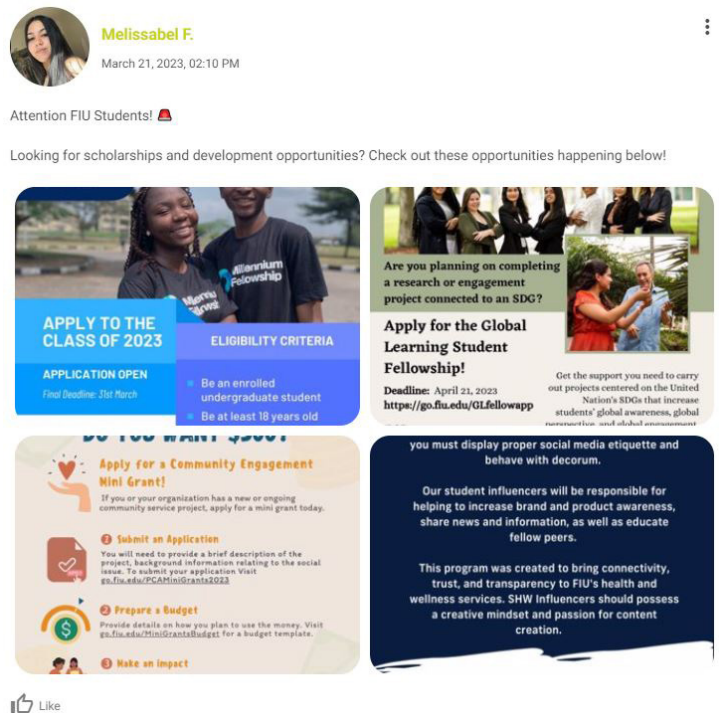
Take Stock Connect, which was introduced during the Take Stock in College program's first year, is an online community where Take Stock in College students can engage, connect, participate, and support one another. Take Stock Connect serves as an internal discussion forum, library of resources, online calendar, and support system. Students can contact the Take Stock in College staff directly, queries can be posted on the mainstream or in college groups, Student Ambassadors can offer guidance, and students can provide peer mentoring and support to each other.

4. Webinars

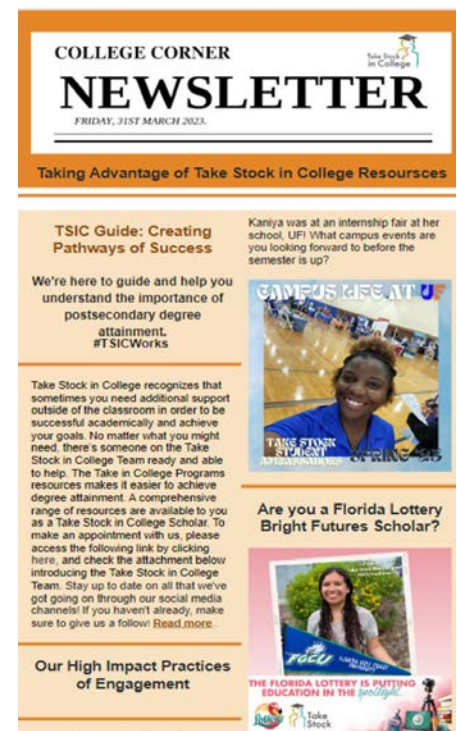
Take Stock in College student scholars can access live and on-demand webinars on a range of themes that adhere to the program's curriculum on the many channels available to Take Stock in College students, such as Instagram, Facebook, Twitter, and Take Stock Connect. Each webinar lasts between thirty minutes to an hour to accommodate students' busy schedules and often includes a guest speaker or presenter. For example, to encourage FAFSA completion, the Take Stock in College program recorded several webinars featuring third-party financial aid knowledge. To provide career planning and professional development, the Take Stock in College program partnered with professionals from Capital One to help with resume building, formatting, and career mentoring.

5. Take Stock in College Newsletter

The "College Corner Newsletters" are periodicals provided digitally through email to Take Stock in College participants. Newsletters are released weekly. Content in the newsletter often includes information regarding Take Stock in College programming, reminders about upcoming events, and important announcements, such as internship opportunities and scholarships. Additional content includes student ambassador highlights and other timely details relevant to Take Stock in College scholars' persistence and degree attainment success.



Sample Take Stock Connect post



Sample College Corner Newsletter

6. Take Stock in College Blog

The Take Stock in College Blog covers a variety of topics to assist students in establishing themselves in college. Students also receive comprehensive guides on topics such as finding cheap textbooks, where to go if they don't have a computer, choosing the best major, and much more. The blog covers topics affecting college life and dispels the myths that bar students from attaining degrees.

7. Take Stock in College Podcast

The College Corner Podcast is the creation of the Take Stock in College program. The podcast was developed to give Take Stock in College student scholars advice on succeeding in college, work, and life. New podcast episodes are released at least monthly through Apple, Spotify, and Google Podcasts. Students can also access the podcast by creating profiles on Instagram, Facebook, and Twitter and participate in podcast discussions on each platform.



The 3 Types of Mentors You Need in College

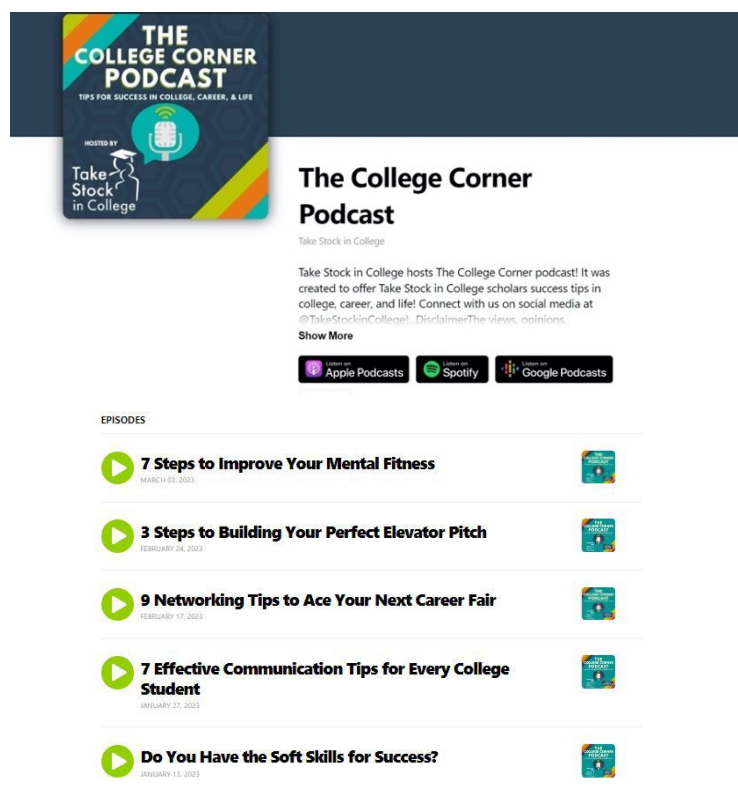
Author: Da'Tshah Collie, M.S.Ed.



Do you remember your Take Stock in Children mentor's impact on your high school experience? Your mentor is likely just a phone call away if you need anything now in your collegiate journey. Mentors matter and they play a critical role in your overall success in life. They provide support, motivation, and guidance during your best and worst days. As you encounter the many highs and lows of your college experience, it is best to have a robust support system that you can turn to that will help you meet critical milestones. A part of developing this strong support system is having different mentors with varying levels of expertise. College is the perfect time to do this because you interact with others in various stages of their life and career that can help you reach your goals now or in the future.

There are three (3) types of mentors that you should seek to obtain. Having a peer mentor, academic mentor, and professional mentor is vital to your success!

Sample *Take Stock in College* Blog post



Sample *The College Corner* Podcast

8. Take Stock in College Student Ambassador Peer Support

Student Ambassadors are full-time Take Stock in College students at various Florida public colleges and universities serving as “Postsecondary Degree Attainment Influencers.” Understanding the online world that students engage in regularly, Take Stock in College Student Ambassadors meet students “where they live” on the Take Stock social media platforms, engaging with their peers and sharing approved and relevant student-centered content every day throughout Florida and beyond.

Take Stock in College Student Ambassadors are background checked, trained, and onboarded, signing an attestation of good moral character, and paid a stipend of \$500 per semester to serve as student ambassador. The Take Stock in College program Associate Directors to ensure successful service delivery and work to train the student ambassadors on content and college/professional and career development.



In addition to their formal training, Student Ambassadors have access to additional learning experiences to develop their professional acumen and provide them with leadership experiences to serve them in their future careers. One mechanism for influencing Take Stock in College students is having Student Ambassadors share near-peer advice and engaging students via social media wherever they are in their collegiate and life journey. Content topics of social media posts vary based on the program calendar for each semester (Appendix A), including academic success, financial planning, adjusting to college life, mental fitness, first-generation student success, and more. Through this innovative approach, the Take Stock in College program has elevated its social media reach, increasing the total number of people seeing the content by 563% year-to-date and increasing social media engagement by 173%.

In sum, Student Ambassador outreach through social media and other activities aims to further engage students in campus life at each college or university.

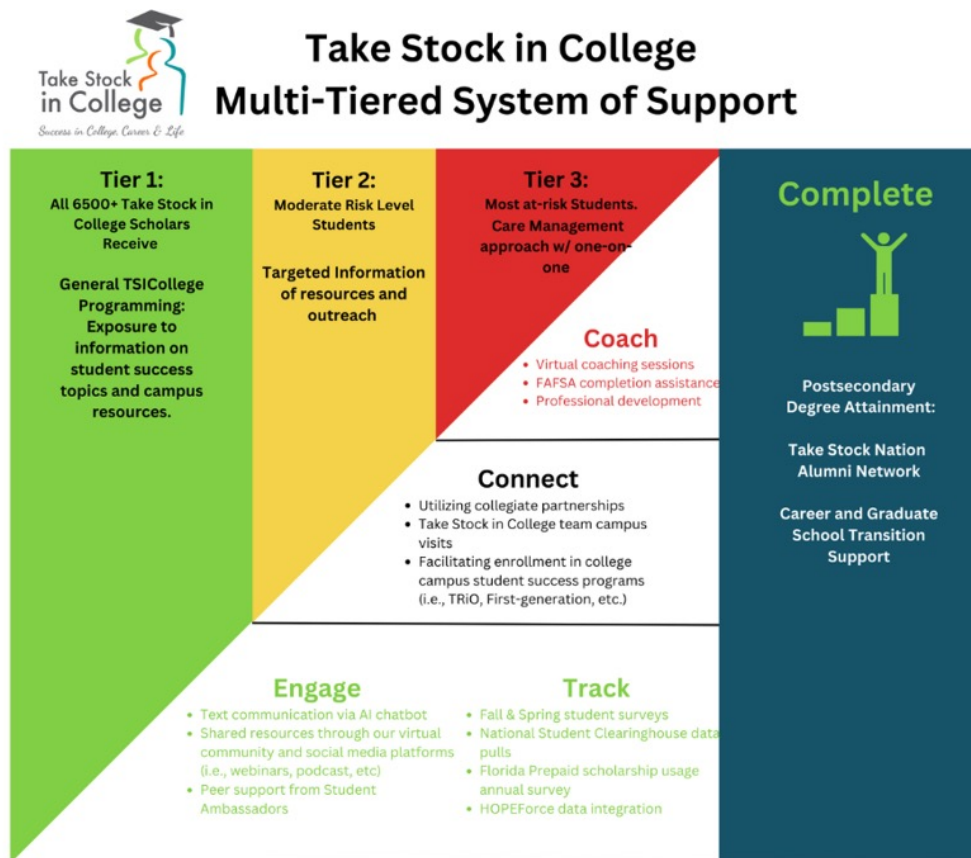
Track

The Take Stock in College program staff tracks each student in the program to ensure that they are engaged and receiving the support and resources they need to achieve their goal of postsecondary degree or career certification attainment.

MULTI-TIERED SYSTEM OF STUDENT SUPPORT

Take Stock in College has begun leveraging the use of predictive analytics, the science of using historical data combined with statistical modeling, data mining, and machine learning to make predictions about future outcomes, in order to better anticipate our students' needs and increase their understanding of what is required to reach degree attainment. Utilizing this tiered system, Take Stock can categorize the risk level of each student and implement targeted intervention strategies (Figure 5). The tracking elements described inform how each student's risk level is assessed and serve as tools to promote student success.

Figure 5. Take Stock in College Multi-Tiered System of Support



Tier 1- Includes all Take Stock in College Students

Tier 2- All Take Stock in College Students but also targeted student populations

Tier 3- All Take Stock in College Students but targeted to the most at risk student populations based on student needs.

The Take Stock in College program utilizes the following tracking tools:

1. Sunny, the AI Chatbot by Mainstay

Sunny, the AI chatbot, helps quickly connect program staff with students at risk of stopping out. Currently, students who require intervention, as shown by Sunny, are forwarded to the Take Stock in College program staff, who then follow up to provide more robust, individualized support to the student and assist them with problem-solving either through connecting the student with the needed resources or with one-on-one coaching support. For example, if a student is not feeling good about things—such as experiencing depression or homesickness - Sunny can help connect the student to the appropriate support resources. This connection, signaled through the virtual mechanism of “Sunny”, helps students work through various obstacles hindering their progression toward postsecondary degree completion.

As the Take Stock in College program evolves, the professional staff have plans to use data collected from the Sunny platform, eventually integrating Sunny, the AI chatbot system, with the new student management system HOPEforce. The merging of these two technology tools will help the Take Stock in College program grow its intervention database to offer real-time solutions and answers for students that are proactive rather than reactive. This strategic use of data (e.g., students’ use patterns; replies to Sunny) will allow the Take Stock in College program to serve students better, more effectively, and efficiently. Another way that this integration will help the team track students is by placing them into a multi-tiered system based on their responses to the texts. Students will receive different interventions based on their risk levels. All students will receive the same programming, but based on responses, some students will get tiered into a green, meaning they need no staff intervention or support; yellow, meaning they need to be connected to some “resources” support which could mean resource materials, on-campus supports or off-campus supports; red, meaning they need more urgent one-on-one coaching support.

2. Data Tracking

The Take Stock in College team currently uses data from the National Student Clearing House to track student persistence and degree attainment pulled two (2) times per year (Fall and Spring). The plan is to increase this to three (3) times a year next year. Information secured through NSCH includes key student data such as institution attended, year/semester attended, college major, and degree attained (including degree type and attainment date). This information is used to monitor student enrollment and retention at all 40 public colleges and universities and to identify students who may have discontinued enrollment before receiving a college degree. Based on this data, the risk level is assessed, and student outreach is planned accordingly.

3. Social Media

The Take Stock in College program tracks students' participation in social media. The Social Media platforms include Instagram, Facebook, Take Stock Connect, Podcast, and more. Social media outreach is one way the college team "meets students where they live" to provide information on navigating their college experience, thus, making it critical for the Take Stock in College team to track students' engagement with each platform to analyze the effectiveness of social media outreach as a student support and intervention tool. This grant year, the Take Stock in College program Instagram page saw a total reach of 18,152 (unique accounts that saw any of the page's posts or stories at least once) and a 181% increase in followers in just one year, and the Facebook page reach increased by 508% compared to the 2021-2022 academic year!

4. College Student Support/Coaching Sessions Database Tracking

One-On-One Virtual College Coaching sessions are useful for tracking students' progress toward and providing support for their degree attainment. During coaching sessions, it is also a good time for the team to get updated information to put into the Take Stock in College database for tracking purposes. This includes information on the student's current college, major/program of study, college level, expected graduation date, and more. Based on this information collected, the team can better connect students with resources based on their needs and unique journey. These one-on-one coaching sessions really allow the team the opportunity to assist students with those most critical barriers to success, whether it is the need for mental health resources, help understanding how to choose a major, or assistance with financial aid, most first-generation students need additional support when they don't have a parent to turn to in understanding many of the complexities involved in the postsecondary journey.

5. Student Surveys

The Take Stock in College team administers Fall and Spring surveys that include questions that pertain to students' persistence throughout their collegiate journey. From the student survey responses, the team can track where students are at mid-semester and identify potential threats to student retention. Interventions are then planned accordingly. The data also identifies areas where the Take Stock in College program is already successful and where services can be enhanced or improved. A sample of selected survey questions can be found in Appendix D.

Connect

The Take Stock in College program identifies and addresses barriers students face in completing their degrees through tracking and data and then connects the students with a range of appropriate resources available from the Take Stock in College program and partner institutions.

40 COLLEGE AND UNIVERSITY PARTNERSHIPS

The Take Stock in College program has developed partnerships with 40 colleges and universities across Florida. These dynamic partnerships are instrumental in providing students with resources and support to promote degree attainment. By working in close partnership, Take Stock in College is able to make efficient use of resources and avoid needless replication of campus programs and support systems already available to students at their respective colleges or university.



ON-CAMPUS RESOURCES

Take Stock in College program staff first aims to leverage available on-campus resources in order to be efficient and avoid replicating support systems that are already in place and available to Take Stock students attending that institution. An example of this is the Take Stock in College program's partnership with TRIO. TRIO is a group of federally funded initiatives to assist low-income Americans in obtaining higher education, succeeding in college, and maintaining their success after graduation. TRiO programming exists on many college campuses throughout the state. Recently, the Take Stock in College program's staff became individual members of TRiO. As a result of these new memberships, Take Stock in College staff will now be able to keep up with statewide TRiO news, resources, and programming and share it with our student scholars through our engagement resources. If appropriate campus resources are unavailable, the Take Stock in College program works with the student to find alternative community resources to meet their needs.

OFF-CAMPUS RESOURCES

In addition to connecting students with on-campus resources, the Take Stock in College team often connects students with off-campus resources to alleviate barriers to their success. For students experiencing housing, childcare, finances, and food insecurity issues, the Take Stock in College program continues developing partnerships with community organizations to connect students with additional support. For example, through their partnership with the Southern Scholarship Foundation, a non-profit organization that offers students rent-free housing, the Take Stock in College team is able to help students apply for housing assistance. And through its partnership with Parker Dewey, a mission-driven organization, the team connects students to paid micro-internships and career exploration opportunities.

RESOURCE MATERIALS

The Take Stock in College team connects students to various resource materials that help them learn the tools to succeed in college and guide them in reaching their unique milestones. Once a week, each Take Stock in College scholar receives resource materials in the form of YouTube videos, informational pamphlets, online activities, and more. The resources are sent out through the weekly newsletter and Take Stock Connect. Through engaging with these materials, scholars can better understand various student success topics such as attending career fairs, degree audits, financial planning, exploring student organizations, studying for exams, and other helpful information. These same resources or more specialized materials can be referenced and shared when students express the need for knowledge or assistance on a specific topic.

Coach

The Take Stock in College program staff uses a variety of methods to provide one-on-one coaching to students as they navigate their way to postsecondary degree/certification attainment. Take Stock in College student scholars have the opportunity to receive coaching in a variety of content areas.

The Take Stock in College program utilizes the following approaches to coaching students:

1. Virtual and In-Person One-On-One Coaching Appointments

The Take Stock in College professional staff provide one-on-one coaching opportunities for Take Stock in College students and are conducted using a hybrid model. Take Stock in College staff can conduct student coaching sessions during face-to-face campus visits as well as online. These one-on-one connections are designed to boost college success factors and connect students with key resources on campus. Comprehensive college coaching appointments are a key component in the Take Stock in College program and help steer college scholars toward success. In an effort to drive students to schedule appointments, the program conducts student outreach initiatives, including engaging with postsecondary partners at public colleges and universities, planning and hosting virtual events, and guiding Student Ambassadors as they engage with students for peer-to-peer support.

Professional College Student Support & Coaching Topics Include, but are not limited to:

- Advising Support
- Childcare Services available on campus
- Class Registration & Orientation
- College Graduation Planning
- College Transfer
- Experiential Learning
- Financial Aid
- FAFSA Renewal
- Financial Literacy & Budgeting
- Florida Prepaid Scholarship Usage and Survey Completion
- Food Insecurity
- Housing
- Life Skills
- Wellness Services
- Mentoring
- Study Edge Platform for Study Support
- Take Stock Connect Support
- Taking Time off from school
- Transportation
- Graduate School Transition
- Career Planning

2. Take Stock in College team Campus visits and In-Person Coaching Sessions

The Take Stock in College program team conducts campus visits to establish relationships with students and postsecondary partners. During these visits, the team is able to learn more about on-campus support services that they can recommend to students who may benefit and hold One-On-One In-Person Coaching sessions with Students.

3. Student Ambassador Online Peer Coaching

In addition to coaching implemented by Take Stock in College staff, scholars receive peer coaching from Student Ambassadors who serve as Postsecondary Degree Attainment Influencers. By engaging their peers through social media, which is where students spend a great deal of their time, Student Ambassadors are supporting their fellow student scholars in navigating the collegiate experience and helping them in their journey to reach degree attainment. Student Ambassadors also serve as “online coaches” to students by addressing topics such as academic success, financial planning, adjusting to college life, mental fitness, first-generation student success, and more.



Complete

The combination of resources provided by the Take Stock in College program supports students in attaining their postsecondary degree or certification. Throughout their undergraduate studies, the team meets with students about various topics that promote postsecondary success and assist with their transition to life after graduation. After achieving the significant accomplishment of obtaining their college degree or certification, Take Stock in College scholars become part of the Take Stock Nation Alumni Network.

In addition to services aimed at assisting students in completing their postsecondary journey, the Take Stock in College program offers the following support to guide student's post-graduation plans:

1. Career Guidance

The Take Stock in College team connects students with resources on their campus that provide support and experiences as they prepare for their future careers. Additionally, the team coordinates and hosts various workshops aimed at teaching students transferable skills that will be helpful beyond their college graduation. For example, the Take Stock in College team hosted workshops and provided resources about securing internships and building one's personal brand.

2. Graduate School Transition Support

The Take Stock in College team has noted a rise in survey responses in the number of students aspiring to obtain graduate degrees. In its most recent spring student survey, 39% of scholars stated they wanted to complete a graduate program. The process of many successful transitions to graduate school begins while students are at the undergraduate level. Professionals on the Take Stock in College team meet with students to offer additional guidance and support on their future academic endeavors and connect them with resources on their campus to help with the graduate school application process.

3. Take Stock Nation Alumni Network

The Take Stock Nation Alumni Network is organized to harness the power of Take Stock graduates. The Network creates a pipeline of mentors for Take Stock students and serves to develop future Take Stock leadership and support for the organization.

Constituent Feedback and Surveys

To monitor program quality and satisfaction, the Take Stock in College program solicits constituent feedback through in-person interviews and surveys conducted biannually.

INTERVIEWS

UF Lastinger Center staff conducted interviews with twenty-one Take Stock in College program constituents: ten students, which includes Take Stock in College scholars and Student Ambassadors, six postsecondary partners, and five participating Take Stock in College staff. The interviewees were invited to a 30-minute Zoom interview to discuss 6-9 questions, which varied based on their role in the Take Stock in College program. The interviews serve as a means of having conversations with different stakeholders to understand program effectiveness. As shown in Appendix C, the interview questions asked for targeted feedback regarding different areas of the program, including but not limited to specific services, program design, implementation, and overall effectiveness.

As shown in Table 9, the following themes emerged from the interviews: (1) Take Stock in College provides important academic guidance and support; (2) College Campus Visits are catalysts for connection and engagement; (3) Take Stock in College helps build financial literacy, along with providing opportunities and support; (4) Take Stock in College scholars want interaction and connection; (5) Take Stock in College scholars sometimes need support for social, emotional, and basic needs; (6) Reminders from Sunny, the AI Chatbot help keep students on track. The Observations and Opportunities for Growth section (later in this report) provide additional details.



Table 9. Themes from Interviews

Theme	Description
Take Stock in College provides important academic guidance and support.	<p>The Take Stock in College program provides important academic guidance and support, which students report they need and appreciate.</p> <p>“[I] know if [I] ever need something or am lost for information, [I] can reach out to Take Stock, and they will connect [me] with the info [I] need.” – Take Stock in College Scholar</p> <p>“Weekly, I always look for resources to give to students and distribute it as useful based on the semester that they are in. For example, during mid-terms: how to take notes, exam preparation. I’m always giving resources so that they are successful and reach degree attainment.” – Take Stock in College Staff</p>




Theme	Description
<p>Take Stock in College Campus Visits are catalysts for connection and engagement.</p>	<p>Take Stock in College staff and college partners communicated that College Campus visits are catalysts for connection and engagement that serve as an enhancement to the many connections made through virtual means. The visits also allow Take Stock in College staff and college partners to share information and opportunities to the ultimate benefit of students.</p> <p>“[College Campus Visits] give a sense of belonging to students ... that they personally have the support and community of Take Stock in College behind them.” – Take Stock in College Staff</p> <p>“I had someone reach out to me one time...and they mentioned how they struggled finding/making friends on campus and finding someone who was also a first-generation student in college. We were able to become friends through that. And I feel like I’ve sort of been a little bit of a mentor to her as well because every time she has a question about how to sign-up for classes or needs advice on mid-terms or finals; she always comes to me.” – Take Stock in College Scholar</p> <p>“I’ve been able to address students in a group and present opportunities to them at Take Stock in College events. Their in-person on-campus events [provide opportunities for] me to establish/build individual relationships with students attending those events in an effort to enhance their educational experience—their quality of life and the quality of their education.” – College Partner</p>

Theme	Description
<p>Take Stock in College helps build financial literacy, along with providing opportunities and support.</p>	<p>Take Stock in College students consistently express financial concerns and needs. Take Stock in College programming helps to build students' financial literacy along with helping to connect them with financial opportunities.</p> <div data-bbox="500 325 1507 562"> <p>“It is so important to understand budgeting. So important to dig deeper into how to save money, invest money and [understand] why that is so important.”</p> <p>– Take Stock in College Scholar</p> </div> <div data-bbox="500 661 1507 940"> <p>“FAFSA webinars were the most helpful. It’s hard to figure out how to pay for college without the proper guidance ... Financial aid can be very confusing and hard to navigate and the webinars helped prepare [me] to hold [my] own.”</p> <p>– Take Stock in College Scholar</p> </div> <div data-bbox="500 1039 1507 1459"> <p>“When we know there are scholarships available for students, we’ll connect with TSIC and the students who’ve expressed an interest and need for those funds. There’s a fairly high success rate with those applications. So, they’re stacking their money—with multiple scholarships that cover more of their attendance costs. So, the less money that has to come out of the family’s pocket, the better it is; and you can see the relief that comes over them just knowing that.”</p> <p>– College Partner</p> </div>

Theme	Description
<p>Take Stock in College scholars want interaction and connection.</p>	<p>Take Stock in College scholars appreciate and want to connect with other Take Stock in College scholars.</p> <p> “[I] appreciate Take Stock Connect so [I] can connect with others through the program- you don’t only get to meet the people from your campus but from all the campuses.” – Take Stock in College Scholar </p> <p> “The information [I’ve] learned from the ambassadors allowed [me] to navigate the college experience.” – Take Stock in College Scholar </p> <p> “[I think I’ve] made a positive impact [as an ambassador] and brought new culture. [I] come from a different country and was able to relate to others and make them feel comfortable. [I’ve] had people reach out to [me] personally and ask for help to connect.” – Take Stock in College Scholar </p>

Theme	Description
<p>Take Stock in College scholars sometimes need support for social, emotional, and basic needs.</p>	<p>Take Stock in College Scholars sometimes need support for social, emotional, and basic needs. Without needed support, these needs can be a barrier to successful degree attainment.</p> <div data-bbox="500 338 1507 657"> <p>“Having people on an external side that I know can support me if I need anything in college if I’m falling behind, need advice...—just knowing that I have support from them is very nice and comforting...just being able to check-in and them checking-in on us—having the support from the TSIC family.”</p> <p>– Take Stock in College Scholar</p> </div> <div data-bbox="500 716 1507 892"> <p>“They [TSIC] can also answer questions...throughout [the] college process. [I] like that [I have] a representative to reach out to.”</p> <p>– Take Stock in College Scholar</p> </div> <div data-bbox="500 947 1507 1276"> <p>“Students encounter a lot of challenges like financial and housing needs. We find out that they are in dire situations. We try to reach out and navigate the resources that we can try to take advantage of. We reach out to partners and see what else can be done. We don’t get off the phone with the student until the problem is fixed.”</p> <p>– Take Stock in College Staff</p> </div>

Theme	Description
Reminders from Sunny, the AI Chatbot, are helpful for keeping students on track.	<p>Sunny, the AI Chatbot provides important “nudges” that help keep students on track. Students most frequently cited reminders about upcoming due dates and events such as FAFSA deadlines and webinars.</p> <p>“Information [from Sunny] is useful ... [it] reminds me of FAFSA ... finals week.” – Take Stock in College Scholar</p> <p>“[Sunny] is user friendly, whenever [I] ask Sunny question it is able to answer.” – Take Stock in College Scholar</p>

Hi,  name_first ! Sunny🧐 here with a mindful tip for self-care. Every now and then, we might not feel our best. Don't worry - it happens to all of us! But don't forget to make time to take care of yourself. There can be a lot going on. Making sure you have time to rest and relax can help you accomplish everything you want. People need different things for self-care, so think about what works best for you.

Contacts without this profile information receive a backup text.

Surveys

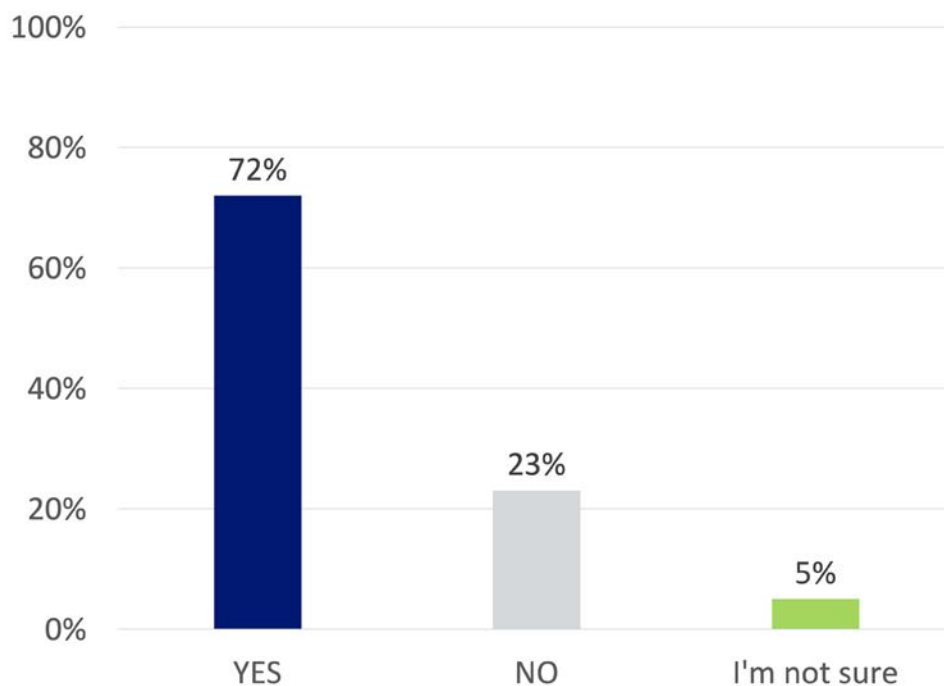
The Take Stock in College program created a brief survey to send to their postsecondary students at the conclusion of the fall 2022 and spring 2023 semesters. The fall survey included nineteen questions, which took students an average of eight minutes to complete. The spring survey included forty-four questions, which took students an average of fifteen minutes to complete. These online surveys were distributed via email and Sunny, the AI chatbot. Survey results serve as a means of eliciting feedback from students to understand program engagement, efficacy, and impact. A sampling of questions from the Spring survey is presented in this evaluation to provide feedback on core program components, including but not limited to overall effectiveness, Sunny engagement, social media outreach, and postsecondary support services (see Appendix D).

Of the 7,042 Take Stock in College students, a total of 1,423 students, or 20%, completed the survey in the spring, compared with 24% who completed the survey in the fall. Student responses from the Spring semester survey are presented below.



Survey Question: *Do you identify as a first-generation college student?*

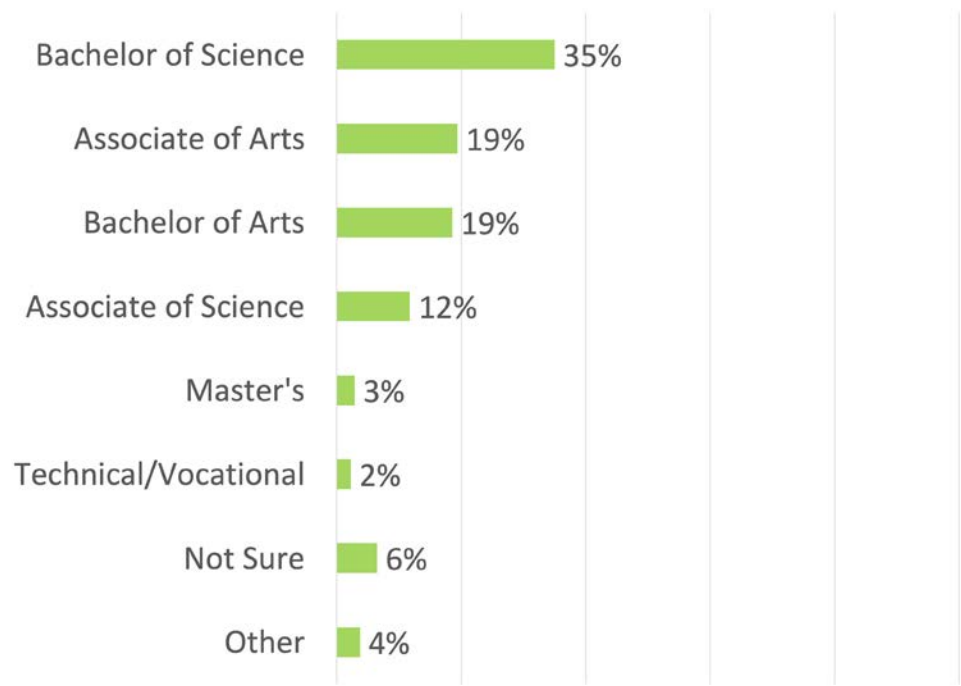
Figure 6.



A first-generation student is a student whose parents or parent did not receive a bachelor's degree. In the survey, 72% of student survey respondents identified as first-generation in college. Throughout the 2022-2023 academic year, the Take Stock in College staff held virtual coaching sessions for these students to connect them with first-generation resources, programs, and departments on their college campuses. Student scholars were able to receive additional academic support, gain access to technology, apply for additional scholarships, and more, utilizing the resources for first-generation students on campuses. Even having the definition of a first-generation college student, a total of 5% of student survey respondents were still unsure if they were "first-gen."

Survey Question: *What type of degree are you pursuing?*

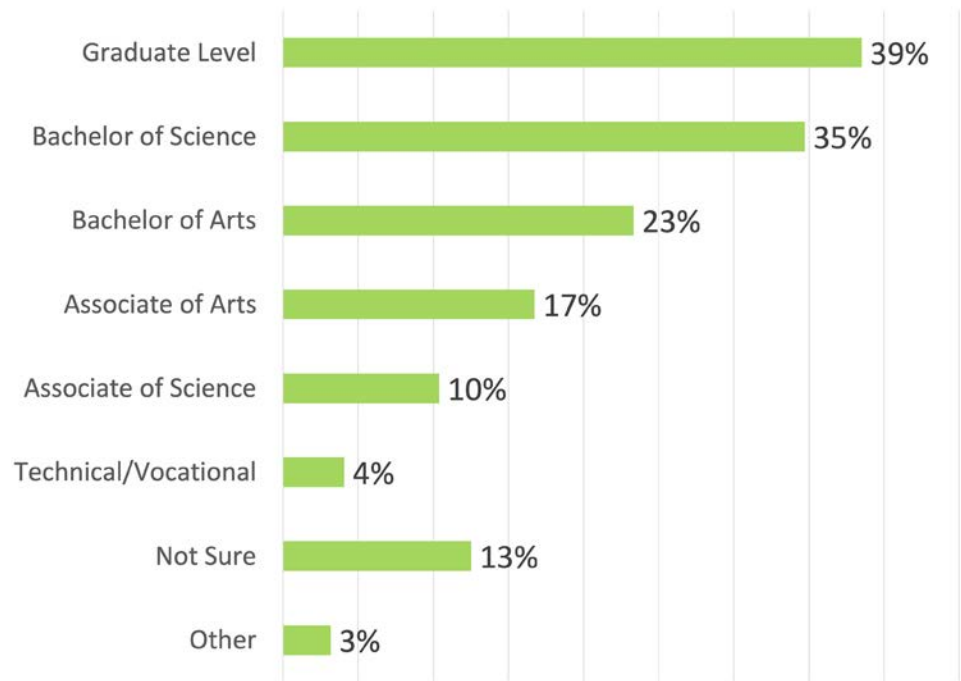
Figure 7.



Of the survey respondents, most underclassmen (54%) indicated they are pursuing a Bachelor’s degree. This is followed by 31% of student survey respondents expressing that they are pursuing an Associate’s degree. During the Spring survey last year, 21% of student survey respondents indicated they were unsure what degree they were pursuing. Only 6% of student respondents expressed being unsure of their degree type this year. During coaching sessions, the Take Stock in College team met with many students to discuss their academic and career goals to assist them and connect them with campus resources to develop their collegiate plans. Although Figure 7 shows the current degree of pursuit, it is important to note that in Figure 8 students indicated their end goal for the level of degree attainment, many of whom intend to move on to graduate school.

Survey Question: *What level(s) of degree attainment are you trying to achieve in the future?*

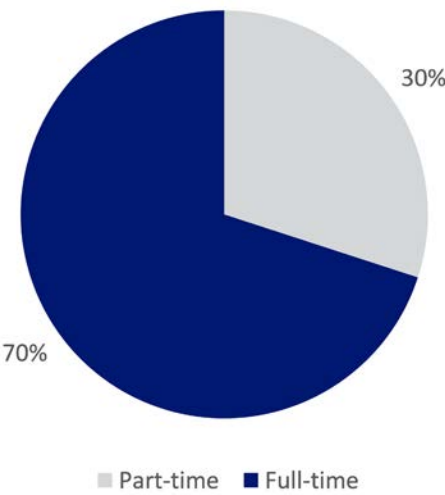
Figure 8.



Over half of the student survey respondents (58%) expressed that they would like to obtain at least a Bachelor’s degree in the future. 39% said they would also like to obtain a graduate degree with master’s level coursework and/or other professional schools. To assist with helping students transition to higher levels of degree attainment, Take Stock in College staff meet virtually with scholars, help them develop transfer plans, and connect them to campus professionals at their schools of interest.

Survey Question: *Are you currently a full-time or part-time student?*

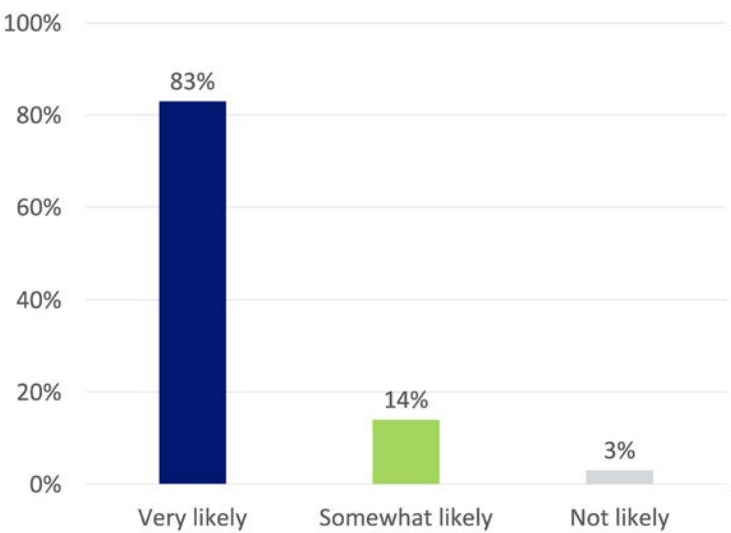
Figure 9.



Of the Take Stock in College student scholars responding to the survey, 70% indicated they are full-time students, and 30% stated they are part-time.

Survey Question: *How likely is it that you will successfully complete this year of study in your college or university program?*

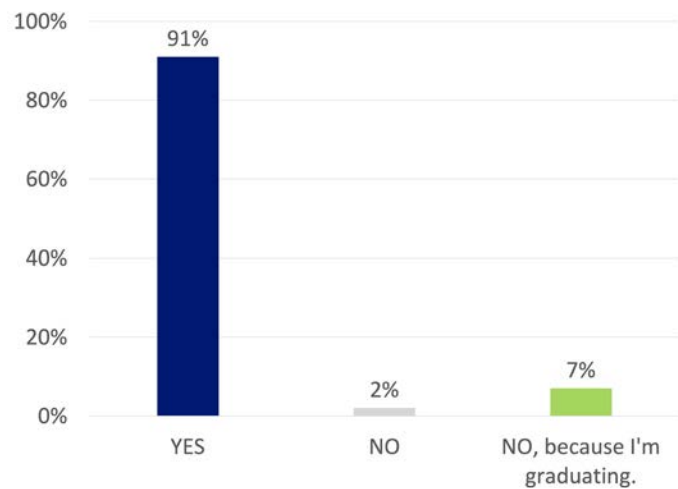
Figure 10.



83% of student survey respondents indicated that it is very likely that they will complete this year of study at their college. This number is followed by 14% of students believing that it is somewhat likely that they will finish and 3% saying that it is not likely. The Take Stock in College team has implemented outreach initiatives to connect with students at risk of not completing the academic year. During these meetings, students are able to discuss the barriers to their success and get connected to campus resources to help alleviate issues they may be facing.

Survey Question: *Are you planning to return to college next year?*

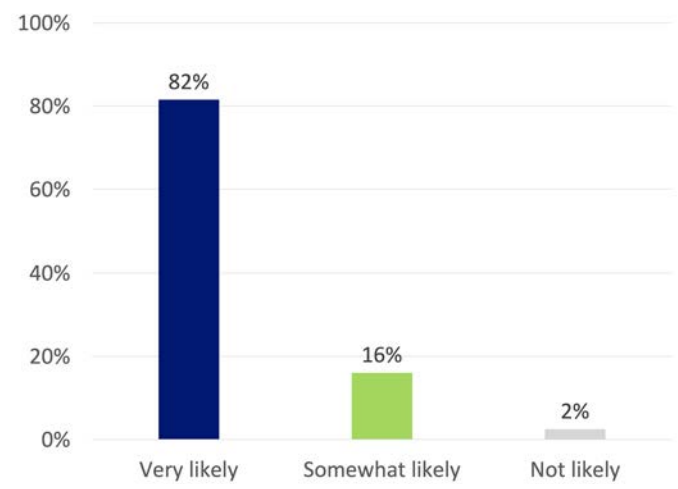
Figure 11.



A key predictor of successful postsecondary degree attainment is the measurement of persistence or the percentage of students that continue to progress through their program of study. The overwhelming majority of first- and second-year students responding to the survey indicated that they planned to return to college next year and continue their studies (91%). Of the students who expressed that they were not returning, over 6% indicated they were graduating this semester.

Survey Question: *How likely is it that you will complete your two- or four-year postsecondary degree?*

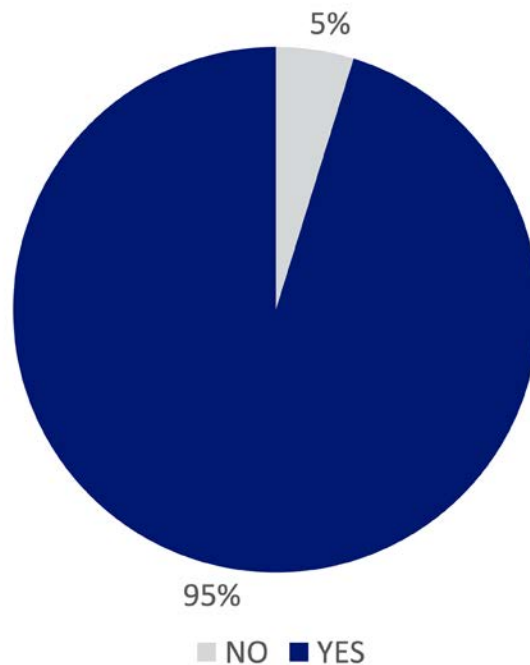
Figure 12.



The Take Stock in College program aims to increase its scholars' postsecondary degree attainment rate. Of the students responding to the survey, 82% of survey scholars indicated that it is very likely that they will complete their two- or four-year degree. 16% expressed that it is somewhat likely that they will complete their degree.

Survey Question: *Are you aware of the Take Stock in College program?*

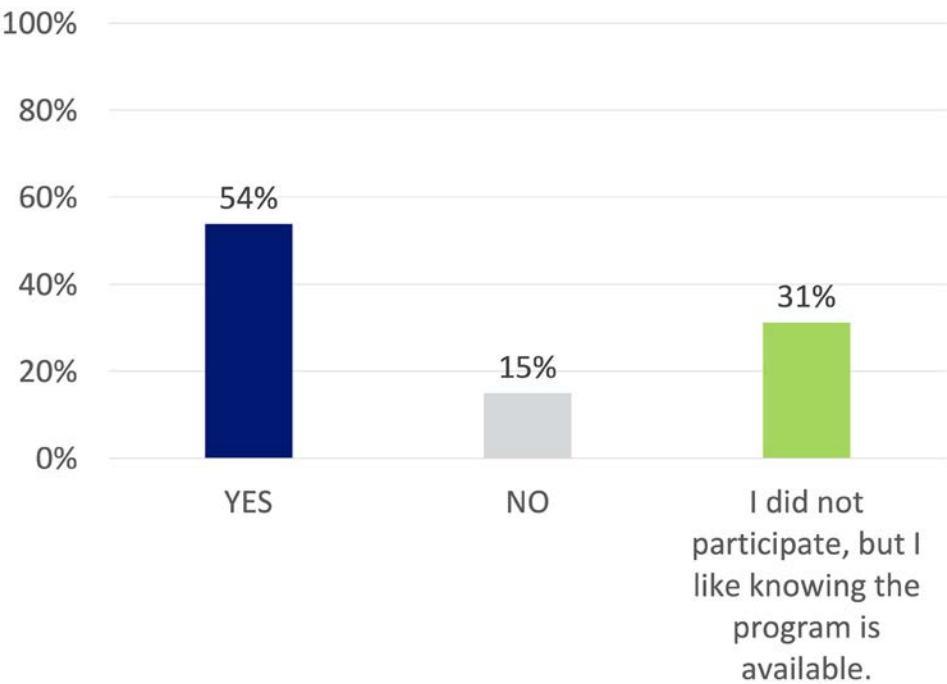
Figure 13.



One of the primary goals for the Take Stock in College team in the 2022-2023 academic year was to continue raising awareness of the Take Stock in College program and the support services offered to scholars. Of the students surveyed, 95% said they were aware of the Take Stock in College program and its role in helping their transition to college and connecting them to on-campus resources. This is a high level of awareness among students considering the program is only five years old.

Survey Question: *Did you participate in any Take Stock in College programming for the 2022-2023 academic year (e.g., Take Stock Connect, webinars, virtual office hours, text messages from Sunny, etc.)?*

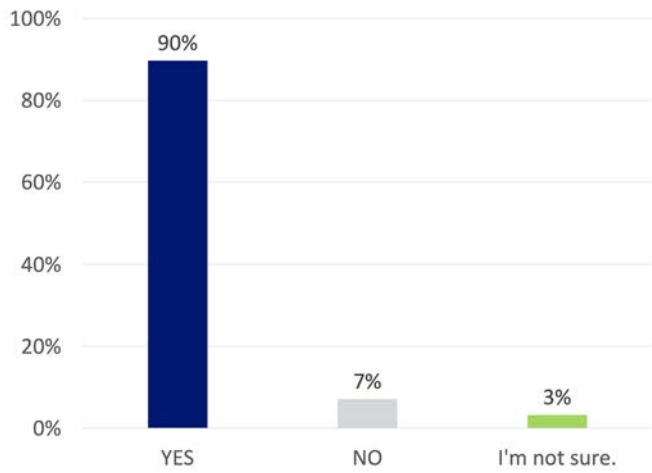
Figure 14.



Take Stock in College provides comprehensive postsecondary persistence programming via a weekly themed outreach curriculum aimed at successfully engaging scholars and meeting students understanding students are mostly connected to their phones and commuters. When asked if they participated in any Take Stock in College Programming for the 2022-2023 academic year, 54% of the survey respondents indicated that they had participated, and 31% indicated that they did not participate but liked knowing the program is available. The Take Stock in College program continues to implement, refine, and provide intentional programming to guide students as they navigate the roadblocks and obstacles critical to reaching degree completion.

Survey Question: *Have you ever received text messages from Take Stock in College’s AI chatbot, Sunny, reminding you about key deadlines, resources, and offering encouragement?*

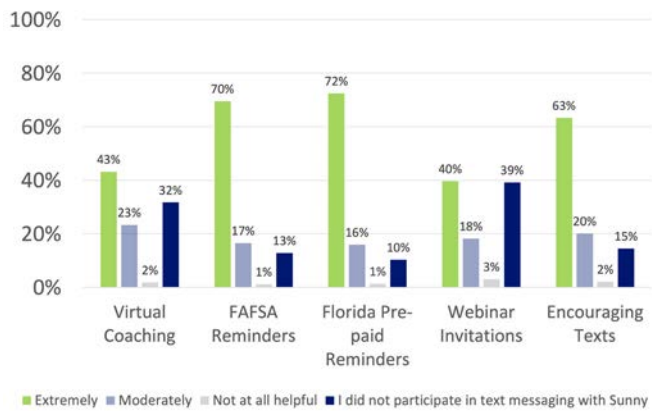
Figure 15.



The Take Stock in College program continues to build out the knowledge base of Sunny, the AI chatbot, through motivational messages, important reminder nudges, and customized information for each college and university. 90% of Take Stock in College survey respondents indicated that they had received text messages from Take Stock in Colleges Sunny, the AI Chatbot, reminding them about key deadlines, resources and offering encouragement. This is an increase from last year, when 86% of students reported engaging with Sunny.

Survey Question: *If you participated in our text messaging with Sunny, please indicate how helpful you found Sunny to be.**

Figure 16.

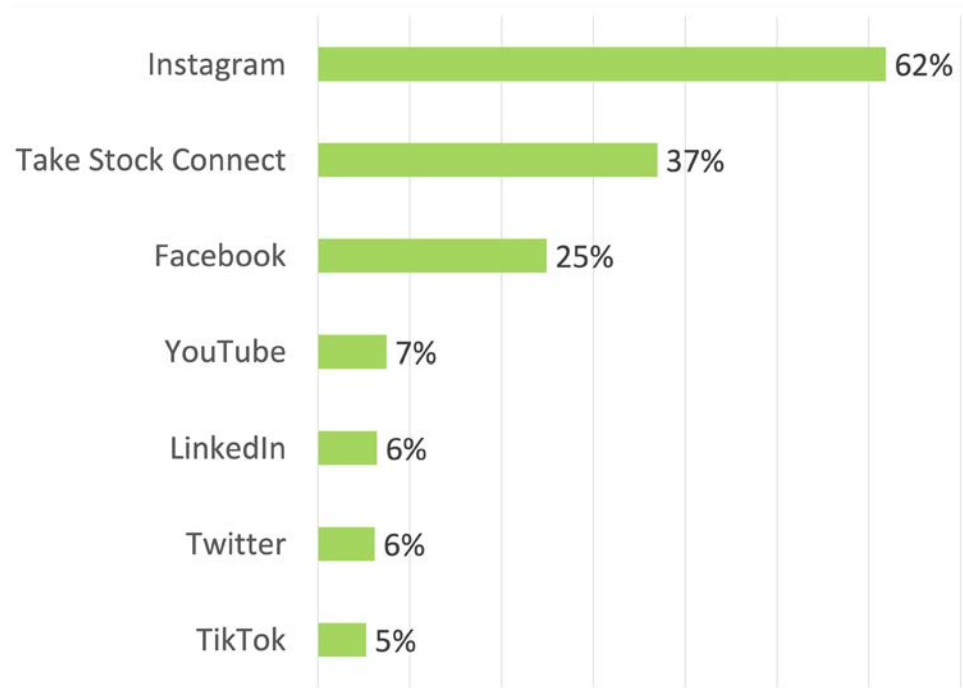


**Numbers may not sum to 100% due to rounding.*

Sunny’s text messaging capabilities are used for a number of things, including FAFSA reminders, encouraging texts, college resources, and virtual office hour invitations. Survey respondents agreed that each type of messaging was helpful, especially the Florida Prepaid Reminders, of which 72% indicated Sunny text messaging as “extremely helpful.”

Survey Question: *Please indicate all platforms, if any, on which you follow Take Stock in College.*

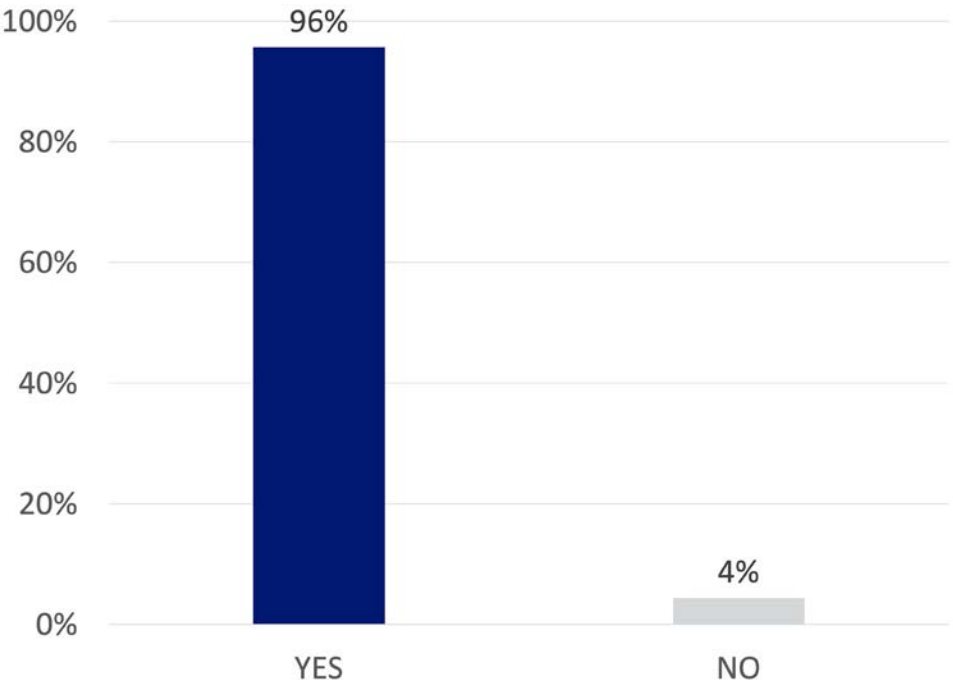
Figure 17.



The Take Stock in College program continues to have an active social media presence on various platforms. Among student scholars responding to the survey, Instagram (62%) and Take Stock Connect (37%) were the most popular social media platforms where students followed Take Stock in College in 2022-2023.

Survey Question: *Do you feel that Take Stock in College has made a difference in your collegiate journey?*

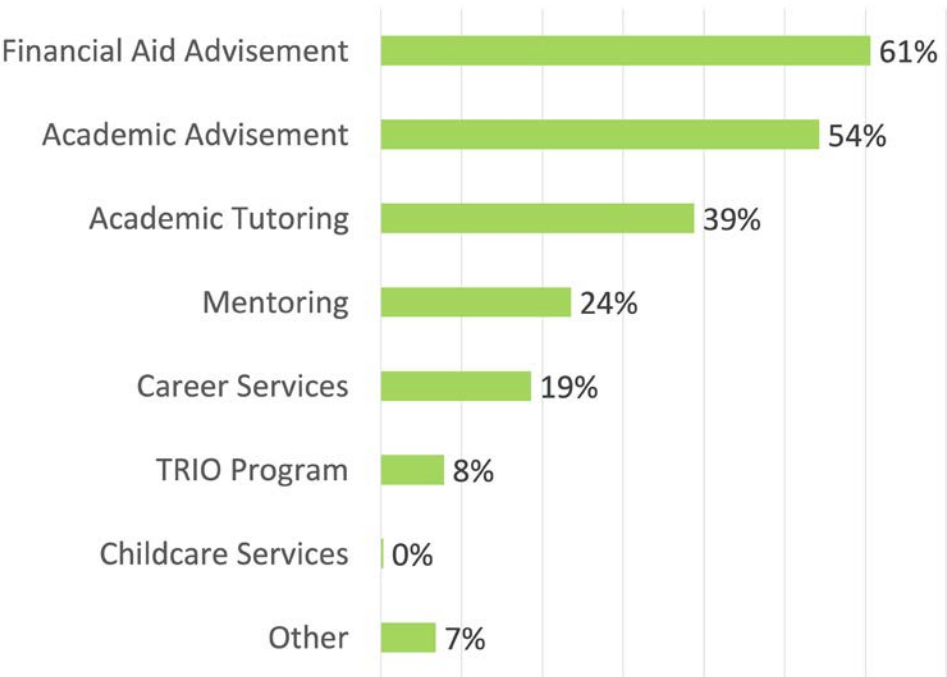
Figure 18.



The Take Stock in College Program intends to continue its efforts to create novel ways to connect and engage Take Stock in College program scholars who are experiencing their first year of college. 96% of survey respondents felt that the Take Stock in College program has made a difference in their collegiate journey. Take Stock in College continues to expand its collaborative partnerships so that students can benefit from these unique efforts to boost their college achievement and impact students’ postsecondary attainment.

Survey Question: *Please select the on-campus postsecondary student support services you have used.*

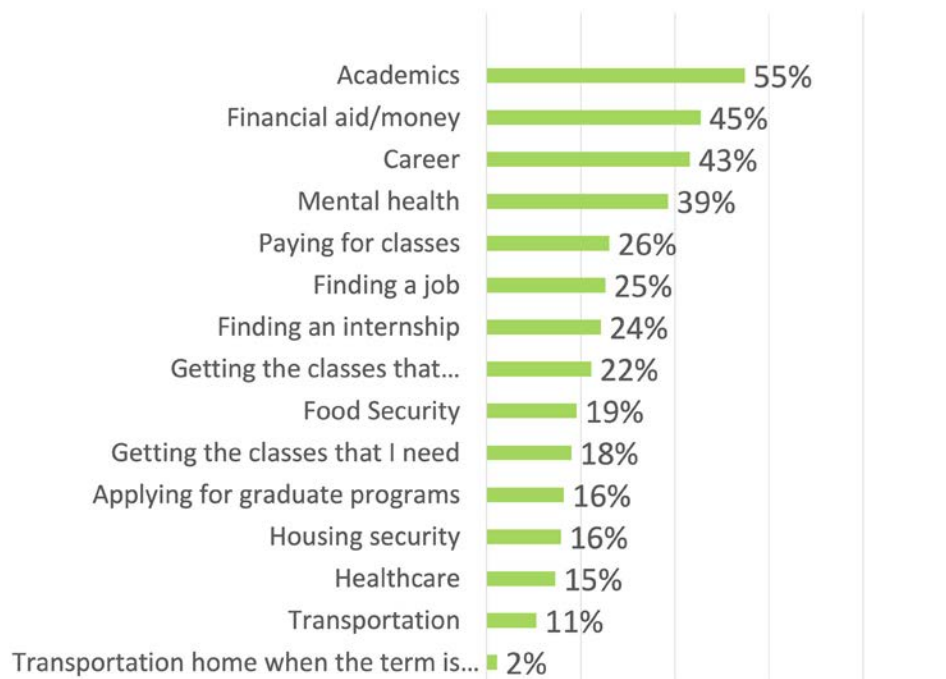
Figure 19.



The Take Stock in College initiative addresses the challenges that students have in completing their degrees by linking them to campus services and resources that are already available to them. Students were asked to list which postsecondary support services they had accessed on their campuses. The most common support service used by students was financial aid advisement at 61%, followed by academic advisement at 54%.

Survey Question: *What are you most concerned about right now?*

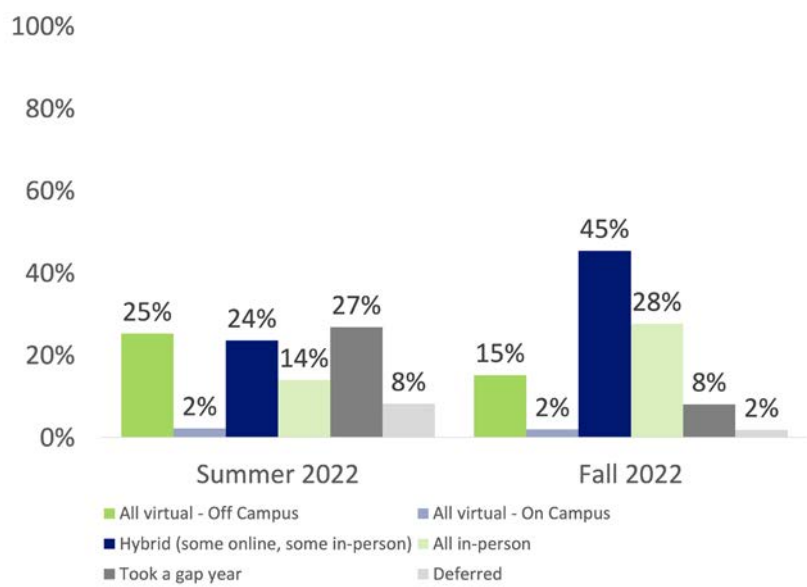
Figure 20.



The survey also elicited responses about what students are most concerned about. Students responded that academics were their biggest concern. Students also responded that they are concerned with Financial Aid/money, mental health, and their career.

Survey Question: *What learning environment did you take classes in over the last two semesters?*

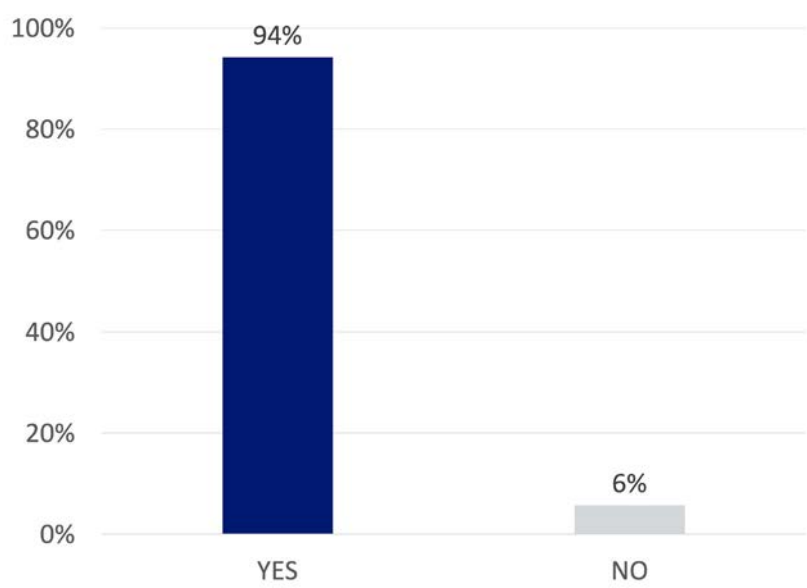
Figure 21.



Responses to the survey indicated that more students participated in all virtual coursework over the summer semester compared to the fall semester, with students reporting 25% and 15%, respectively. For the Fall 2022 semester, more students attend all in-person classes than all virtual classes, and the majority (45%) are engaging in classes in a hybrid modality. In such conditions, access to technology is vital.

Survey Question: *Do you personally have adequate technology for college?*

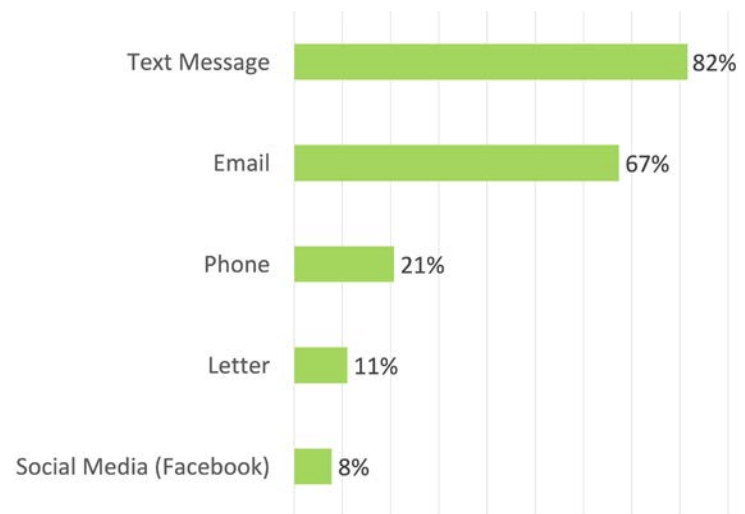
Figure 22.



Fortunately, the majority, or 94% of the survey respondents, indicated they had sufficient technology for college.

Survey Question: *How do you prefer to receive communication from Take Stock in College?*

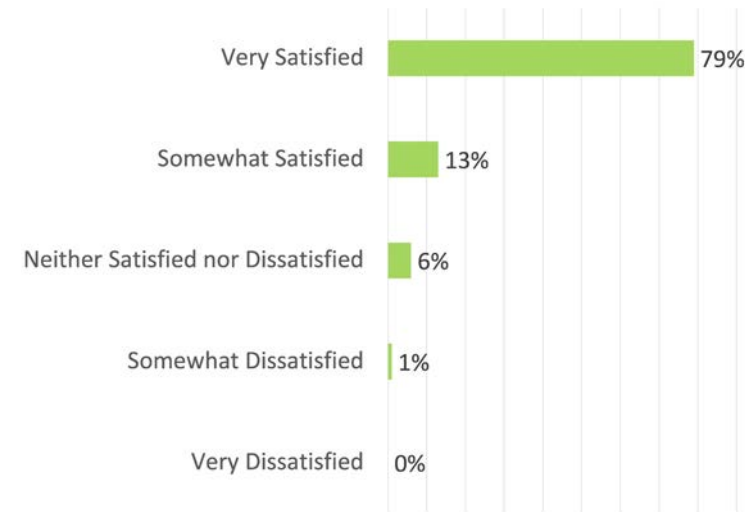
Figure 23.



The Take Stock in College program continues to engage with students by utilizing a multi-faceted communication strategy. Take Stock in College program communication is designed to present information in shorter, more easily consumed portions. Students were asked how they prefer to receive communication, and 82% responded that they prefer to receive text messages, and 67% prefer email.

Survey Question: *Overall, which statement best describes your experience with the Take Stock in College Program?*^{*}

Figure 24.



^{*}Numbers may not sum to 100% due to rounding.

Among the students surveyed, 92% indicated they were very satisfied with their experience with the Take Stock in College Program. This coincides with a Take Stock in College program goal of ensuring all Take Stock students have the opportunity and support to succeed and reach degree attainment or career certification.

Additionally, students completing the survey are given the opportunity to provide additional feedback, including what the Take Stock in College program can do to provide further support.

HOW CAN TAKE STOCK
IN COLLEGE FURTHER
SUPPORT YOU ON
YOUR JOURNEY TO
EARNING A COLLEGE
DEGREE?

Student
FEEDBACK



George M.
★★★★★
Take Stock in College can also help students with career development, providing guidance and resources to help students explore career options, build their resumes, and prepare for job interviews.



Angela S.
★★★★★
By posting more FAFSA webinars. I'm a fan of Take Stock Connect and believe it provides plentiful amounts of information.



Alexis C.
★★★★★
Take Stock in College can continue to support me on my academic journey by continuing to be there for support and to keep providing resources for college students. The social media posts, podcasts, and chatbot are very interactive, and it is nice to be in a community while also receiving tips and advice from others also experiencing college. Thank you for everything!

DO YOU HAVE ANY
ADDITIONAL
FEEDBACK ABOUT
TAKE STOCK IN
COLLEGE THAT YOU
WOULD LIKE TO
SHARE?

Student
FEEDBACK



Sarah W.
★★★★★
Take Stock in College has a myriad of great resources for college students to help through the college journey. Thank you for providing such a space, I am forever grateful to Take Stock for opening the doors of college!



Kristina S.
★★★★★
I appreciate the motivation to continue in my studies, This has been a difficult semester, and there were many times that the only message I received for the week was Sunny's, Thank you.



Helena C.
★★★★★
Take Stock in College has helped me so much. Not just in school but mentally as well to get me through each semester. Everything the team does is amazing, and I truly appreciate everything you guys do for us. It means everything to me, and without you guys. I wouldn't be here.

Observations and Opportunities for Growth

This section reviews the Take Stock in College program summative evaluation results for each evaluation question. Overall, this evaluation validates that the Take Stock in College program provides evidence-based, effective, and transformative services to low-income college students providing a path out of poverty through postsecondary degree attainment.

Evaluation Question 1:

What evidence supports statewide postsecondary supports as impacting student behavior and postsecondary persistence?

OBSERVATIONS

UF Lastinger Center conducted an updated review of research literature describing strategies that promote college enrollment, retention, persistence in pursuing a postsecondary degree, and degree attainment. A brief summary is included below. For the full review, please refer to Appendix B of this report. Based on the findings of this evaluation, the Take Stock in College Program Model incorporates research-based best practices.

KEY INDICATORS TO IMPROVE POSTSECONDARY SUCCESS, PERSISTENCE, AND COMPLETION

Several core factors have been confirmed by current research to play an important role in improving postsecondary success, persistence, and completion.

Instructional and Student Support Expenditures

Institutional factors, such as institutional spending and student support services expenditures, have been associated with an increase in graduation rates. For example, a recent study of three college mentorship programs found that the most effective programs were sufficiently funded.

Involvement and Engagement (Feeling Connected)

Studies have shown that social support and involvement play an important role in college retention of students of color from underrepresented groups, such as Black or Hispanic students.

Connections through Technology

Virtual and hybrid models of mentoring and coaching were implemented out of necessity during the COVID-19 pandemic. However, research has found these methods to be effective in increasing students' persistence and degree attainment. Moreover, technology-driven methods provide additional options for busy students to engage in activities that connect them with others.

Text message communications through applications like Sunny, the AI chatbot, are effective for providing information and access to advice for college students from families with low incomes, and the results of such communication have led to improvements in academic performance. In addition, studies have indicated that sending text messages about financial aid, FAFSA renewal, and reminders of the importance of satisfactory academic progress can lead to higher student persistence and rates of financial aid renewals.

Programs and Courses for Specific Student Populations

- **Coursework:** Targeted coursework to support underprepared students, as well as university-operated STEM programs, have been described as contributing to higher retention rates for female, Black, and Hispanic students.
- **Mentoring and Coaching Programs:** Research has shown that peer mentors can help students adjust to college life, including enrolling in courses and navigating campuses, which can contribute to positive academic outcomes. Faculty mentors have also been shown to provide insights into the fields of study and access to research and career guidance, ultimately leading to college persistence and achievement outcomes. Current research also indicated that coaching, especially for non-traditional students, is more likely to result in higher attendance and persistence. Additionally, research has revealed that peer and personal coaching increase positive academic outcomes.

Family and Student Attributes

Research has suggested that student factors, such as family support and students' motivation and coping strategies, are related to academic success and persistence. Providing supplemental supports to students, particularly first-generation college students and those from low-income families, have been shown to be effective in improving students' persistence and degree attainment.

Comprehensive Supports

According to research, providing a combination of financial support and non-financial support has resulted in substantially higher rates of credit accumulation, academic improvement, degree completion, and higher GPAs.

Financial Support

Research has demonstrated the importance of providing support, including scholarships, grants, and incentives. These resources have a positive impact on college enrollment and completion.

1. **Scholarships:** Scholarships have had a positive impact on attendance. As one example, the Florida Student Assistance Grant (FSAG) increased the rate of credit accumulation and bachelor's degree completion within six years.
2. **Grants:** Offering students additional aid has increased their GPA and their odds of bachelor's degree attainment.
3. **Incentives:** Providing incentives for non-traditional students and/or students from families with low incomes has had positive effects on enrollment, full-time enrollment, and credits earned.

OPPORTUNITIES FOR GROWTH

The Take Stock in College program provides a menu of supports designed to encourage students' persistence, well-being, and degree attainment. Examples of strategies with a strong evidence base include coaching, financial support, and strategies to help students feel more connected. The Take Stock in College program may further strengthen program outcomes by expanding opportunities for peer-to-peer interactions and support, which may lead to better academic outcomes and college retention rates.

In addition, the Take Stock in College program is working to leverage the use of predictive analytics, the science of using historical data combined with statistical modeling, data collection, and machine learning to make predictions about future outcomes in order to better anticipate students' needs. A desire for increased personalization was also expressed during constituent interviews. Data from those interviews indicate that while scholars find text nudges from Sunny helpful (e.g., reminders to apply for FAFSA), Sunny is optimally effective when reminders are targeted to students personally based on their own needs, as indicated by data. The knowledge base of Sunny, the AI chatbot, continues to develop to offer this personalization. There is potential for further enhancement of Sunny to more effectively provide individualized supports to closely align with students' particular needs, thereby increasing their likelihood of college success and achieving postsecondary degree attainment. Continued data analysis may also increase understanding of what supports are most predictive of degree attainment.



Evaluation Question 2:

Is Take Stock in College's model being implemented with fidelity?

OBSERVATIONS

Take Stock in College implemented all Board of Governors (BOG) deliverables with fidelity for Quarters 1-4 (see Tables 10-13).

Table 10. Quarter 1 Deliverables: Fidelity of Implementation

Quarter 1: July 1 - September 30, 2022			
Quarter 1 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Maintain appropriate staffing, including, but not limited to, identifying, vetting, and hiring: Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Identify, vet, and contract (stipend) at least 20 (Fall Semester) Student Ambassadors attending one of the 40 public colleges and universities. More than one ambassador may support students attending a college or university where the Take Stock in College student enrollment would require additional Student Ambassador services.	✓	✓
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	✓

Quarter 1: July 1 - September 30, 2022

Quarter 1 BOG Deliverables		Submitted to BOG	Approved by BOG
4	<p>Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources.</p> <p>These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.</p>	✓	✓
5	<p>Implement an SMS text messaging with high-touch nudging 7 times this quarter.</p> <p>These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.</p>	✓	✓
6	Evaluation Plan Submitted.	✓	✓

Table 11. Quarter 2 Deliverables: Fidelity of Implementation

Quarter 2: October 1 - December 31, 2022			
Quarter 2 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Develop and provide in-service training attended by at least (20) staff and Student Ambassadors; training will be selected based on needs identified to create new or build existing capacity.	✓	✓
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	✓
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	✓
5	Implement an SMS text messaging with high-touch nudging 7 times this quarter. These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.	✓	✓
6	Submit Formative Evaluation of the program that will examine the progress made toward the program goals and provide recommendations on ways to improve implementation. An independent party conducts the evaluation.	✓	✓

Table 12. Quarter 3 Deliverables: Fidelity of Implementation

Quarter 3: January 1 - March 31, 2023			
Quarter 3 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	✓
2	Identify, vet, and contract (stipend) at least 20 (Spring Semester) Student Ambassadors attending one of the 40 public colleges and universities. More than one ambassador may support students attending a college or university where the Take Stock in College student enrollment would require additional Student Ambassador services.	✓	✓
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	✓
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	✓
5	Implement an SMS text messaging with high-touch nudging 7 times this quarter. These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.	✓	✓
6	Summary report of annual student survey results.	✓	✓

Table 13. Quarter 4 Deliverables: Fidelity of Implementation

Quarter 4: April 1 – June 30, 2023			
Quarter 4 BOG Deliverables		Submitted to BOG	Approved by BOG
1	Replace positions as needed by identifying, selecting, and onboarding staff members including, but not limited to, Postsecondary resource specialists, and Communications and Social Media Manager.	✓	TBD
2	Develop and provide in-service training attended by at least (20) staff and Student Ambassadors; training will be selected based on needs identified to create new or build existing capacity.	✓	TBD
3	Take Stock in College will complete at least 75 virtual one-on-one student meetings/appointments. These meetings are individual advising opportunities for Take Stock in College students that boost college success factors and connect students with key resources on campus.	✓	TBD
4	Expose Take Stock in College students to a minimum of 3 multimedia College Success Learning Resources. These resources are designed to help increase postsecondary degree attainment by boosting first-generation student performance, increasing self-efficacy, and navigating campus resources. These Learning Resources vary in form to increase student engagement and include the following touchpoints: webinars, informational videos, and bespoke podcasts.	✓	TBD
5	Implement an SMS text messaging with high-touch nudging 7 times this quarter. These texts “nudge” students towards success behaviors such as timely FAFSA completion, participation in informational webinars, and key opportunities for socio-emotional connection with the Take Stock in College Postsecondary Resource Specialists. This text nudging system is implemented as part of a more extensive artificial intelligence chatbot system that will capture students’ academic performance to help the Take Stock in College program provide student interventions to increase degree attainment.	✓	TBD
6	Submit Summative Evaluation of the program to determine if the goals identified in the evaluation plan were met and provide recommendations to improve future implementation.	✓	TBD

Submission and approval of Quarter 4 deliverables by the Board of Governors were pending at the time of production of this report. Having had no issues with submission and approval in previous quarters, approval of Quarter 4 is expected shortly.

OPPORTUNITIES FOR GROWTH

The Take Stock in College program has met all of its Quarters 1-4 BOG deliverables, pending approval of this Summative Evaluation by the Board of Governors. In many cases, the program has exceeded expectations. Take Stock in College staff should consider additional recommendations outlined in this report.



Evaluation Question 3:

What is the development status of Take Stock in College program activities, and how are students engaging in activities?

OBSERVATIONS

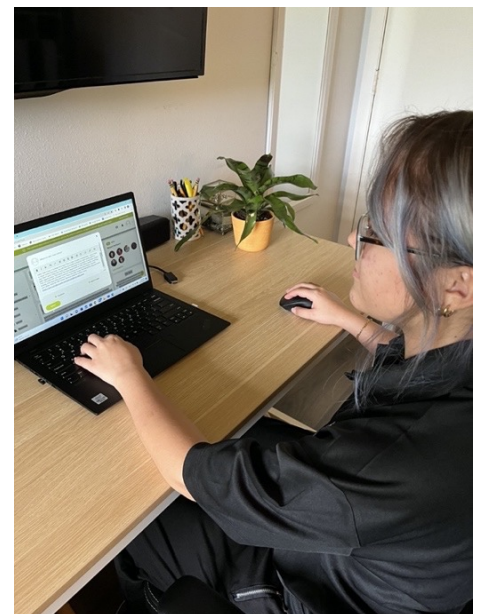
In 2022-2023, the Take Stock in College program staff worked to further refine the program's model, organizing program components for supporting students into five key categories: **Engage, Track, Connect, Coach, and Complete**. Key program components are presented and described below and in the Program Strategies section (page 26). Each one fills unique needs to support students as they navigate the postsecondary environment in their journey towards degree attainment.

PROGRAM COMPONENTS: SUPPORTING STUDENTS IN THEIR JOURNEY TOWARDS DEGREE ATTAINMENT

Themed Weekly Curriculum

The Take Stock in College program offers comprehensive postsecondary retention programming through weekly outreach and engagement (see curriculum description for Quarters 1-4 in Appendix A). The themed weekly programming aims to tackle students' biggest issues and challenges to degree completion by providing timely resources and intervention based on key college progression milestones. Take Stock in College's themed weekly curriculum uses the ECMC Foundation's PERSIST curriculum as a guide to ensure postsecondary retention, persistence, and success. The curriculum addresses 1) Academic Progression, 2) Financial Support, 3) Institutional Commitment, 4) Social Support, 5) Social Involvement, 6) Academic Optimism and Self-Efficacy, and 7) Academic-Related Skills. Much of Take Stock in College's programming includes engaging third-party expertise around financial aid, mental health, and academic success.

Topics addressed in Q1 and Q2 included comprehending course syllabi, using on-campus resources, connecting with their professors, FAFSA completion, and Time Management and Career skills. Topics addressed in Q3 and Q4 included Personal Branding, Post Baccalaureate (Life after Undergraduate), Next Semester Goal Setting (The Importance of Summer Sessions), and Career Research.



TSIC Scholar using Take Stock Connect

Quarterly topics are designed to align with what the student needs at that point in the school year and in their collegiate journey providing timely and needed resources and support to promote student success. Themed weekly curriculum topics are shared through multiple Take Stock in College engagement tools, including Take Stock Connect, the Take Stock in College Blog, the College Corner Podcast, the Take Stock in College Newsletter, via recorded webinar, and through Sunny, the AI chatbot, providing students with many opportunities to access important support material.

Multimedia Learning Resources

The Take Stock in College program provides its scholars with numerous multimedia materials to enhance postsecondary degree achievement by improving first-generation student performance, developing self-efficacy, and accessing campus resources. The various multimedia offerings, including informational YouTube videos, College Corner podcasts, social media content provided by our Take Stock in College Student Ambassadors, the Take Stock in College blog, the weekly newsletter, and webinars, are all intended to encourage student involvement and to provide students with helpful information and resources.

In Quarter 3, the multimedia learning resources and thematic programming for the Taking Stock in College program featured the following: 1) Creating a sense of belonging; 2) Employer Interactions-Career Fairs and Networking Receptions; 3) Mental Fitness and Focus; and 4) Setting long- and short-term goals. The Take Stock in College program used recorded webinars featuring third-party experts to outline issues and solutions that might aid students as a typical component of the multimedia resource offerings in Quarter 4. Personal Branding, Next Semester Goal Planning (The Significance of Summer Sessions), Academic & Career Advising Part II, and Overcoming Obstacles were just a few of the topics covered in Quarter 4. In addition, The College Corner Podcast delivered brand-new episodes focused on the fundamental theme of each quarter: Q3- Career Exploration/Career Planning and Q4- Academic and Career Advice.

To compete for students' attention in today's face-paced digital world, the Take Stock in College program has prioritized reaching and engaging students through a variety of multimedia platforms. The program employed a total of six (6) different kinds of multimedia learning resources throughout the academic year to engage and connect with our students providing a total of over 350 unique connections to our entire student population.

Student Ambassadors

Take Stock in College program Student Ambassadors serve as Postsecondary Degree Attainment Influencers. Student Ambassadors meet students where they live by engaging their peers through social media to support students in navigating the collegiate experience and reaching degree attainment. The topics covered through Student Ambassadors address academic success, financial planning, adjusting to college life, mental fitness, first-generation student success, and more.

During quarter 3, the new cohort of Take Stock in College Student Ambassadors were background checked, trained, and onboarded, signing an attestation of good moral character, and paid a stipend of \$500 to serve as Student Ambassadors for the 2023 Spring Semester.

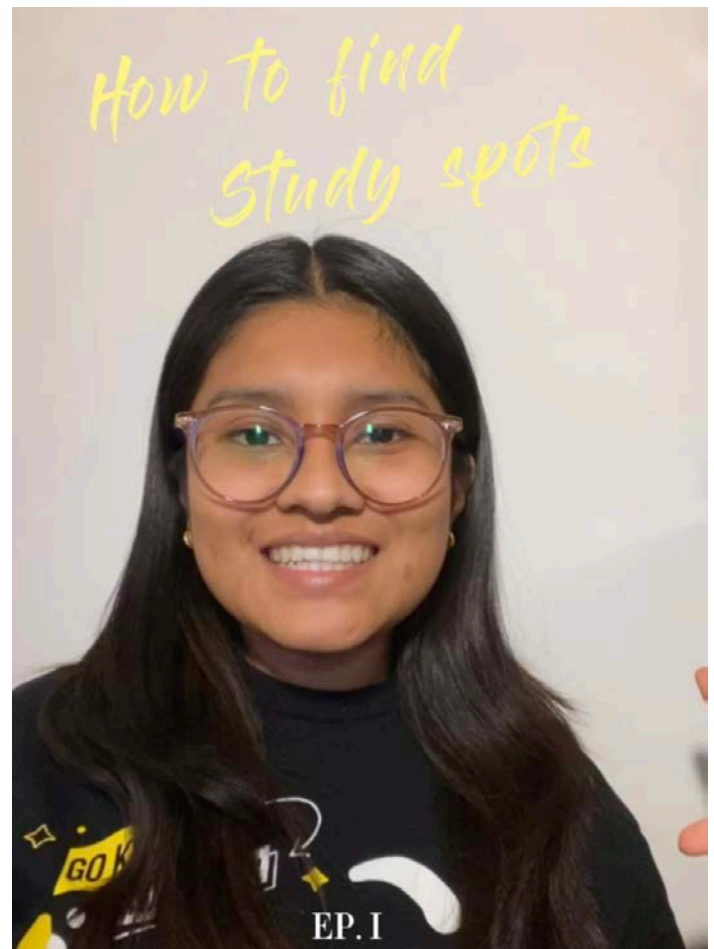
The Take Stock in College ambassadors participated in 1-on-1 training sessions to discuss their social media videos and Take Stock Connect posts. They received tips on using creativity to enhance their content and amplify their voices to connect with more students. Student ambassadors attended one group training where they learned about the job/internship search process and how to use their transferrable skills learned in the student ambassador role to help them secure future opportunities. There was also a great emphasis on professional and career development in the content the student ambassadors shared. They made social media posts and videos encouraging their peers to attend job fairs, sharing how to prepare for career fairs, having conversations with employers, and giving elevator pitches.

Student ambassadors created over 300 Postsecondary Student Success Content social media video communication posts throughout the academic year, supporting their peers through communication aimed at the general population of Take Stock in College scholars, including first-generation and first-time-in-college students. In addition, Ambassadors wrote over 150 posts on Take Stock Connect to share campus resources to assist their peers in obtaining a college degree or certification.

Reach and engagement data is critical, given the goal is to support all Take Stock in College scholars

to ensure they receive the helpful information the student ambassadors share. For this grant year, the Take Stock in College Instagram saw a total reach of 18,152 (unique accounts that saw any of the page's posts or stories at least once) and a 181% increase in followers in just one year! The Take Stock in College page reach on Facebook increased by 508.5% compared to the 2021-2022 academic year!

Additionally, Take Stock in College Student Ambassadors wrote over 150 posts on Take Stock Connect to share their knowledge and experiences with campus resources at their postsecondary institutions and general college life wisdom for their fellow Take Stock in College student scholars. In virtual coaching sessions and annual survey feedback,



Take Stock in College students have expressed that they enjoy seeing the content created by the student ambassadors and feel encouraged to continue in their studies. Some student scholars also expressed that seeing the posts from the Take Stock in College student ambassadors influenced them to want to serve in the role or similar roles on their campus so that they can give back to their community and help other students to navigate college life.

Virtual Coaching Sessions

Individual coaching opportunities are provided for Take Stock in College students. These one-on-one connections are designed to boost college success factors and connect students with key resources on campus. Comprehensive college coaching appointments drive the Take Stock in College program model, which helps steer college scholars toward success. To drive students to schedule appointments, the program conducts student outreach initiatives, including engaging with postsecondary partners at public colleges and universities, planning and hosting virtual events, and guiding Student Ambassadors as they engage with students for peer-to-peer support. Take Stock in College uses a range of resources to address the barriers students face in completing their degrees and aids in helping students engage with campus services and resources already available to them. The Take Stock in College program completes at least 75 virtual student appointments each quarter. The team uses a variety of methods to reach students, including connecting via Teams, Zoom, and telephone.

During quarter 3, the Take Stock in College staff conducted more than 120 one-on-one virtual coaching sessions with students. One of the coaching

campaigns was meeting with students who have taken time off from school and those that graduated high school but have not enrolled in a college. The Take Stock in College staff were able to help students develop plans to re-enroll in college for next semester and connect students to resources where they could receive additional help with class registration and financial aid questions.

Based on responses to the Spring student survey, students receive targeted information and appointment requests throughout the year and in quarter 4. Virtual coaching sessions act as an intervention for students who have expressed that they need one-on-one support or who have provided a response that indicates they are struggling and it may not be likely for them to finish out the academic year and/or their degree. In addition to sessions based on their survey responses, students can schedule meetings to get assistance as needed to support their persistence toward postsecondary degree attainment.

Throughout the academic year, the Take Stock in College team has conducted over 370 virtual coaching sessions, well over the required 75 per quarter, to assist students with reaching college degree or certification attainment.

Cultivating Postsecondary Partnerships

An ongoing initiative with the Take Stock in College program is building and cultivating partnerships with all of Florida's 40 public colleges and universities. The Take Stock in College program's goal is not to duplicate services but to connect students to the resources and services already provided at their postsecondary institution of enrollment. Because the Take Stock in College program serves as a connector

for its underrepresented, economically disadvantaged student populations, it tries to stay consistently informed about the resources and programs the colleges and universities provide. To do this, the program continues to establish and build on relationships with partners in multiple departments in the colleges and universities to work together to help the student scholar succeed in their postsecondary studies.



During the Fall Semester of the 2022-2023 grant year, the Take Stock in College program hosted a College Expo at the Take Stock Student Success Summit and invited their college and university partners to attend. Take Stock provided each attending college and university a booth to share information with Take Stock's statewide network, which represents 8,500 students and a graduating class of approximately 1,800 high school seniors. Every attending college and university also had an opportunity to speak on the college panel during the evening reception. This expo allowed everyone to learn more about Florida colleges and universities and the services and resources they provide to students. The information shared throughout the Take Stock network will better assist Take Stock students in transitioning from high school to college. It also provided our Take Stock in College staff members and postsecondary partners to develop and build stronger relationships and collaboration to advance the work in support of our student scholars. Fourteen of Florida's colleges and universities attended, expressing gratitude for participating in the Student Success Summit.

One of the partners participating in the College Expo was TRiO Connections for Central Florida. Because many Take Stock students are first-generation, exposing the Take Stock network to the TRiO program provides an important link to campus support services. TRiO is a key partnership supporting Take Stock students' postsecondary enrollment and degree attainment. Take Stock in College has greatly advanced its postsecondary partnership with TRiO during the 2022-2023 grant year. The Take Stock in College program staff recently joined TRiO as individual members. These memberships will allow staff to stay updated on news and programming within Florida's network of TRiO programs. Additionally, these memberships will aid Take Stock in College with making connections, building future partnerships, and engaging in collaborative programming that Take Stock in College students can benefit from.

The Take Stock in College program connects its students with on-campus programs like TRiO Student Support Services and other first-generation resources. These on-campus programs provide students with the additional support they may need, like advising, tutoring, and a peer campus community. They provide a sense of belonging as students navigate their postsecondary journey while increasing student engagement

and persistence. In the Take Stock in College 2023 Spring survey, 72% of the respondents stated they are first-generation, making it essential to connect eligible students with programs like TRiO.

The Take Stock in College program has also collaborated with the TRiO Educational Opportunity Centers (EOC) program, which provides counseling and information on college admissions to qualified adults who want to enter or continue their postsecondary education. The TRiO EOC program also offers services to improve financial literacy. The Take Stock in College program is combining its efforts and working with TRiO EOC to re-engage students not currently in college. The initiative focuses on those Take Stock students who did not enroll in a postsecondary institution after high school graduation or started and dropped out before receiving their degree or certification. This partnership enables both programs to work together towards a unified goal of getting Take Stock students reenrolled in a postsecondary institution to complete their degrees.

The Take Stock in College program has cultivated over 380 key contacts across Florida's college and university system. These contacts are partners within varying and distinctive departments such as Financial Aid, Student Success, TRiO, First Generation Offices, and Career Services. In the Take Stock in College 2023 Spring survey, Financial Aid Advisement was the highest-demand on-campus postsecondary student support service, indicated by 61% of student respondents. This data validates the efforts of the Take Stock in College program to collaborate and connect with postsecondary Financial Aid Offices among the top priority as valuable partners to our program and students. The Take Stock in College program continues to build contacts, creating connections that form an ecosystem of support for the students. These departmental connections are vital to the success of postsecondary persistence and completion.



Take Stock in College program staff also incorporated in-person campus visits during this 2022-2023 academic year. Campus visits with postsecondary partners and students were re-introduced this year, as the program saw a need for students to engage in more in-person social interaction. The Take Stock in College program services focused on virtual support services during the pandemic but have resumed in-person meetings and events for students and partners. The Take Stock in College program staff visited 21 college and university campuses during this academic year. These on-campus visits allowed the program to strengthen relationships with postsecondary partners and students and form new relationships. It also allowed the Take Stock in College program to learn more about on-campus services such as the St. Petersburg College food pantry for students and Miami-Dade College's two TRiO Student Support Services programs for their North Campus and Homestead Campus locations. The Take Stock in College program plans to continue to conduct collaborative meetings with college partners and co-host student events, whether virtual or in-person, as part of future year grant activities.

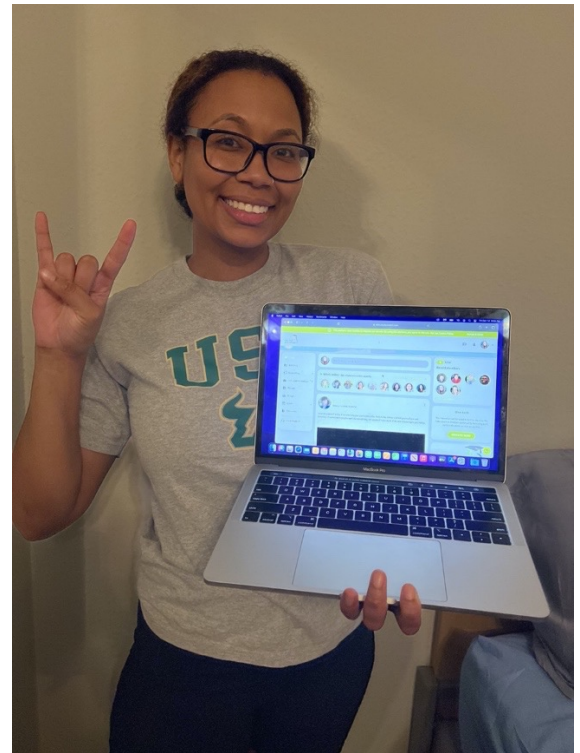
During visits and coaching sessions with students, the Take Stock in College staff members report that students lack knowledge about programs and resources offered by their collegiate institution because they do not come from a background and family familiar with the postsecondary process and experience. Take Stock has maintained a trusted relationship with Take Stock student scholars, having been in the students' lives as early as 6th grade. The Take Stock in College program is the connector, a door opener, and a navigator for Take Stock students, who usually contact a trusted Take Stock Coach before they reach out to their college or university. By exposing students to the opportunities and resources for them through our postsecondary partnerships, the Take Stock in College program is giving students the information they need to take advantage of these much-needed services to provide additional support and assistance for postsecondary degree attainment. There is power in partnerships, and the Take Stock in College program has and continues to expand on the partnerships established to enhance the college experience for Take Stock student scholars, promoting persistence and completion.



Use of Technology and Innovation

The Take Stock in College program encourages using cutting-edge technologies and innovation channels for communication with college-enrolled students, including disseminating scholarship opportunities and other resources related to degree or certification completion. Platforms like Take Stock Connect and Sunny, Take Stock in College's AI chatbot, are now in use to guide students toward successful behaviors.

Take Stock Connect is the online community platform available for all Take Stock college scholars to boost engagement, create connections, and communicate with each other within their institution and the Take Stock in College network statewide. Take Stock Connect is becoming a more robust community where students can go to share information and support each other.



Sunny, the AI chatbot, is building a knowledge base year after year to deploy specific enrollment, advisement, and student success initiatives to each scholar's school of attendance within the 40 public colleges and universities across Florida. Sunny provides 1) an increase in student engagement and establishes high-touch student services while allowing the team to scale efforts; 2) personalized interactions and suggestions for the entire 6,500+ student population of Take Stock in College student scholars; 3) check-ins with students to learn in real-time about the challenges hindering their educational success and then connect them with needed resources; 4) a way to use data to identify and provide tailored services to postsecondary students to help them achieve certification/degree attainment. The Take Stock in College program continues to work to build out the persona of Sunny and its knowledge base.

To consistently employ best practices and the most up-to-date and pertinent tools available, the Take Stock in College program assesses developing technologies and digital resources implementing new resources as applicable. Through promoting and utilizing technology and innovation throughout the grant year, students are more aware that Sunny is available 24/7 to answer their questions or connect them to resources. Students are also more aware that Take Stock Connect allows them to engage with their college and/or university peers regarding campus events and outside resources related to scholarship and internship opportunities. This increase in awareness is evidenced by a significant increase (35%) in the number of students who have interacted with Sunny and an 8% increase in Take Stock Connect engagement over the last year, signaling increased engagement on both platforms. Through innovative technology services, the Take Stock in College program has connected with 7,042 scholars, including students who stopped out and are not enrolled in

college, during the 2022-2023 grant year, providing timely and essential college completion support.

Take Stock Connect an Online Community

Take Stock Connect, which was introduced during the Take Stock in College program's first year in 2018, is an online community where Take Stock in College students can engage, connect, participate, and support one another. Take Stock Connect serves as an internal discussion forum, library of resources, online calendar, and student community support system. Through the Take Stock Connect platform, students can communicate in a variety of ways, including contacting Take Stock in College staff directly, posting student queries on the mainstream or in college groups, Student Ambassadors can offer guidance, and students can provide peer mentoring and support to each other.

In the 2022-2023 grant year, Take Stock Connect engagement increased by 8% from the previous year. Additionally, in our most recent assessment, nearly 40% (37%) of students indicated they are “active users” of this platform. We anticipate use (or engagement) to continue to increase as Take Stock in College expands Sunny’s knowledge base and promotes and expands resources offered through the Take Stock Connect platform.

Take Stock in College Podcast

The College Corner, the podcast creation of the Take Stock in College program, was developed to give Take Stock in College scholars and incoming Take Stock in Children students transitioning into college advice on succeeding in school, work, and life. New podcast episodes are released monthly through Apple, Spotify, and Google Podcasts, providing multiple sources for listeners to stay up-to-date with the College Corner Podcast. Additionally, students can access the podcast and participate in podcast discussions by creating profiles on Instagram, Facebook, and/or Twitter.

Take Stock in College has created 50 podcasts during the 2022-2023 grant year providing essential “how to” college completion and career readiness support through topics including how to make the most out of your internship, how to prepare for a new semester, and how to network to ace your next career fair. During the 2022-2023 grant year, Take Stock in College Podcasts reached 6,199 students. Podcast engagement has increased dramatically since our last grant year, as evidenced by a 29% increase in downloaded episodes, with the number of followers increasing on Apple Podcast by 88%. Due to the minimum technology requirements



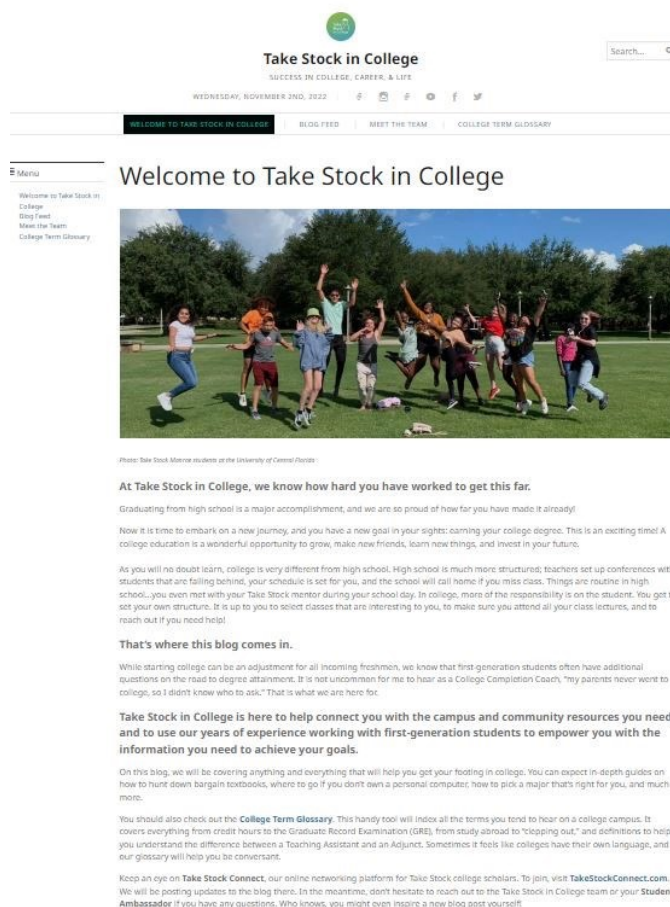
Sample *Take Stock Connect* Post

and wide range of access platforms, the accessibility and availability of podcasts are widespread. With the rapid increase in listeners, there is a strong indication that students are engaged and interested in podcast content and learning and reaping the benefits of their knowledge gained.

Take Stock in College Blog

The Take Stock in College Blog covers a variety of topics to assist students in establishing themselves in college. Students also receive comprehensive guides on topics such as finding cheap textbooks, where to go if they don't have a computer at home, choosing the best major, and much more. The blog covers anything and everything that can affect college life and dispels the myths that bar students from reaching degree attainment. Blog content is shared through Take Stock Connect and the Take Stock in College weekly newsletter.

The Take Stock in College program has created blog content on 12 college completion and career readiness topics during the 2022-2023 grant year, including college budgeting 101, overcoming college burnout, transferable skills, and three types of mentors you need in college. During the 2022-2023 grant year, the Take Stock in College blog had a 125% increase in subscriber engagement.



Sample *Take Stock In College* Blog post

Recorded Webinars

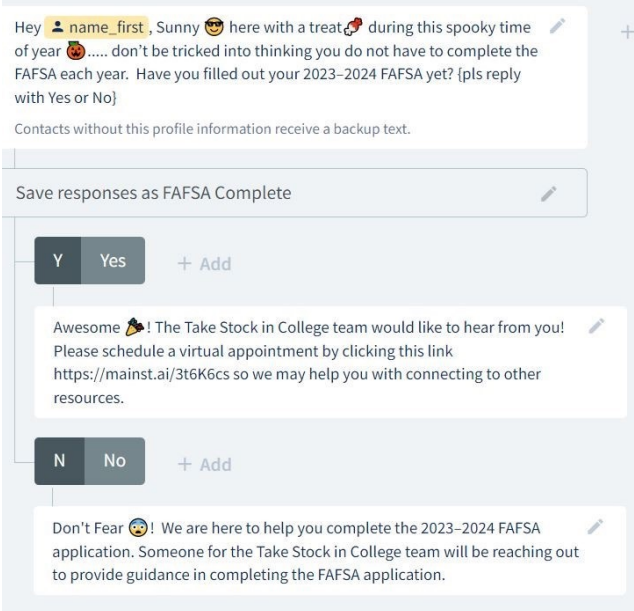
Take Stock in College student scholars can access recordings of webinars on a range of themes that adhere to the program's curriculum on the many channels available to Take Stock in College students, such as Instagram, Facebook, Twitter, and Take Stock Connect. Each webinar lasts between thirty minutes to an hour to accommodate students' busy schedules and often includes a guest speaker or presenter. For example, to encourage FAFSA completion, the Take Stock in College program solicited support from community partners to record several webinars featuring third-party financial aid experts. And for career planning and professional development, the Take Stock in College program partnered with professionals from Capital One to help with resume building, formatting, and career mentoring.

The Take Stock in College program provided ten (10) webinars (1 per month) to student scholars during the 2022-2023 grant year, including college completion and career readiness topics such as SMART Goals, How to Read Your Degree Audit, and Financial Frenzy-Options to Help You Pay for College.

Sunny, AI Chatbot

The Take Stock in College program continues to expand the knowledge base of Sunny, the AI chatbot, throughout the grant year by increasing its data collection process from the 40 public colleges and universities, which will help improve student engagement and interaction with Sunny. Throughout the 2022-2023 grant year, interactive messages and nudges from Sunny improved student engagement and instilled a sense of belonging among Take Stock in College students. Common Sunny student responses were used to formulate survey questions that helped the Take Stock in College program better identify other students with similar issues/needs and provide interventions to meet those student needs. These interventions prompted through Sunny engagement, have allowed the Take Stock in College team to leverage resources and provide students with the support needed to help them achieve degree attainment. While Sunny has always been used to collect student input, the program continuously seeks ways better use Sunny data, such as utilizing data to provide targeted calling and one-on-one coaching campaigns with students whose Sunny responses indicate the need for additional support.

Throughout the year, the Take Stock in College team sent over 100 strategically targeted messages to all 7,042 student scholars through Sunny, the AI chatbot, to help improve student engagement and provide students with resources and information. These directed text message topics included Motivation Mondays, Career Services information, Volunteering, Internships, Networking opportunities, and other postsecondary persistence message topics utilizing the PERSIST Curriculum. Sunny engagement rose throughout the year, with Quarters 3 and 4 logging an increase of 17% of those students “Actively Engaged” (i.e., Sunny messaging a student and the student answering) compared to last year’s rate of 43%. Sunny now actively engages with 60% of Take Stock in College students. Moreover, students “Passively Engaged” (students who viewed beneficial Sunny messaging but did not engage) have reduced from 48% to 32%, comparing last year to this year, as students have become more actively engaged with the platform. Another positive indicator of Sunny’s success was a 2% reduction in the opt-out rate this grant year. Finally, survey data show that the majority, or 82%, of students engaging with Sunny report that the texts are helpful for them.



Sample text message from *Sunny, the AI Chatbot*

In response to Sunny's increasing student engagement rates, the Take Stock in College program is utilizing student responses to identify student cohorts for customized and strategically targeted Sunny messages specific to that cohort's needs. These cohorts include First Generation students, first-time college students, students attending summer school, students by class level, and/or school-specific cohorts. The program uses various texting methodologies to maximize outcomes, and Sunny's responses to students, using a growing knowledge base, proved to be a successful engagement strategy. Through Sunny, the Take Stock in College program analyzed and responded to all types of communications to ensure that students receive the information and coaching needed for success. As the Take Stock in College program continues to use Sunny, the AI chatbot, as a key strategy to reach its 6,500+ approximate student population each year, "Active Engagement" involvement and "Passive Engagement" participation continue to be monitored. Increased response rates have shown that using Artificial Intelligence Chatbot messaging is key to increasing students' involvement in accessing resources and services.

As the Take Stock in College program looks toward the future, it is working to enhance Sunny with expanded data collected from Florida's 40 public colleges providing students with a more robust knowledge base that provides automated access to college-specific information and resources. Increased Sunny engagement indicates that being intentional in how messaging is deployed is key to influencing students' involvement in accessing resources and services.

The Take Stock in College program is maximizing the use of student success platforms, artificial intelligence, research-based frameworks of success, predictive analytics, and student engagement models leading the way in meeting students where they are to increase the likelihood of degree attainment.



snippets

Hi RaNiyah, Sunny 🤗 here with your Monday motivational quote, "Be bold enough to use your voice, brave enough to listen to your heart and strong enough to live the life you've always imagined." – Anonymous. Let's make it a great week!"



Thanks for the the motivational quote Sunny!

Sample text message from *Sunny, the AI Chatbot*

"I love Sunny! I see/read all of [the] messages and reminders. They [the text messages] help keep you informed and remind you of what you need to get done, in terms of filling-out and submitting the FAFSA, meeting with your academic advisor, and stuff like that. I think [Sunny's] great ... with the reminders and the regular check-ins! I've come to look forward to them—especially Motivational Mondays."

Take Stock in College Student

OPPORTUNITIES FOR GROWTH

According to survey results, the vast majority of Take Stock in College students (96%) feel supported by the program and believe that the Take Stock in College program has made a difference in their collegiate journey. Meanwhile, survey results also illuminate that students are feeling challenged by many factors, such as finances and mental health (among others), and are seeking out support for these challenges. For example, the top three supports responding students consistently report seeking out are (1) financial advisement, (2) academic advisement, and (3) academic tutoring. It is clear that students desire to succeed in the postsecondary environment and are motivated to attain their degrees. The engagement rates with various aspects of the Take Stock in College program also show that the program plays a pivotal role in promoting student success.

When constituents were asked about what the Take Stock in College program could do in the future to help students, answers varied. However, a consistent theme expressed by students centered around supports that would help them succeed at their postsecondary institution (e.g., tutoring support remained one of the top three supports accessed by students). In addition, students were also looking forward, thinking about supports that would help jump-start their careers post-graduation. For example, one student shared that he would be interested in a webinar on the career he is pursuing. Other students mentioned that they would be interested in opportunities for internships. Most, if not all, of these support services, are available on college campuses. Looking forward, the Take Stock in College program should continue to build partnerships and expand knowledge of available campus and community resources in order to expand the network of service connections available to students.

Postsecondary institution partners mentioned variations on the theme of wanting even more partnerships with the Take Stock in College program. For example, one partner wanted to know how they could connect Student Ambassadors with their first-generation office to support students; another asked about leveraging communication modalities used by the Take Stock in College program to help their own institution better connect with students; still, another partner asked about doing presentations together when they do recruitment visits with high school students.

Given these responses, it is recommended that program staff continue to build and strengthen collaboration and coordination efforts with postsecondary institutions that clearly see the value of the work being done and the power of partnership. By joining forces, the Take Stock in College program supports its institution partners to get the institution's existing services into the hands of students who need them. Expanding the use of data analytics and Sunny, the AI chatbot holds promise for providing such resources "just in time." In addition, the Take Stock in College program should continue to identify community resources and build community partnerships to provide support that is not available on the student's college campus. These partnerships

are central to the Take Stock in College Program efforts to connect students with available resources and not duplicate existing services.

In sum, all constituents—Take Stock in College students, program staff, and postsecondary institution partners see the value and potential of the program to support students in successful degree attainment and are engaged in accessing and supporting impactful Take Stock in College program activities.



Evaluation Question 4:

What is the program impact on key indicators of increasing postsecondary graduation rates / degree attainment?

OBSERVATIONS

As shown throughout this report, the Take Stock in College program has developed multiple and varied methods for communicating with students to support their participation in the program on their journey to postsecondary degree attainment. This includes data on the first- to second-year persistence rate, a key indicator of student progression toward postsecondary graduation. Persistence rates were examined for 2021 Take Stock in College Scholars high school graduates:

- 86% of Take Stock in College Scholars (1,326) started a postsecondary program after graduating in the Spring of 2021.
- By Spring 2023, 79% of those students either continued in their program or had obtained a postsecondary degree (see Table 14).

Table 14. Persistence Rates for Take Stock 2021 High School Graduates

	# of Students	Percent
Continued in a postsecondary program by Spring, 2023	1,030	78%
Graduated with a degree by Spring 2023	19	1%
Total Persistence Rate	1,049	79%

Take Stock in College scholars are persisting at a rate above their low-income peers (100% of Take Stock in College scholars are low-income) and well above other students of color (72% of Take Stock in College scholars are students of color). In comparison, National Student Clearinghouse research indicates that only 76% of students from low-income schools persist, and only 65% of students of color persist.

Take Stock in College program students are usually first-generation college students who face challenges throughout their college careers. The program often provides these students with support in areas that lay outside the parameters of academics but helps students increase their chances of success in attaining

postsecondary degrees. The kinds of non-academic issues students face can include a lack of transportation, sickness, death of family, and complications with housing and finances. Support for these issues is critical to many students' success.

Despite the challenges students may face, survey results confirm that Take Stock in College students are focused on progressing towards their degree. Of those students responding to the survey, 83% believe they will complete this year of study at their postsecondary institution, 91% plan to return to college in the fall, and 82% are confident they will complete their two- or four-year degree program. Additionally, the fact that students are pursuing financial guidance at such a high rate is encouraging and a meaningful indicator of postsecondary graduation rates and degree attainment. Specifically, research consistently confirms that finances pose a particularly significant barrier to degree attainment when unaddressed, particularly for first-generation students and those who come from families with low incomes. In relation to this issue, it was mentioned previously in this report that FAFSA completion is an indicator of postsecondary perseverance, most likely because it helps secure for those students the financial resources they need to continue their journey toward obtaining their degree. According to survey results respondents, 65% of Take Stock in College students sought financial advisement, and 61% sought academic advisement. Moreover, students who were interviewed mentioned their interest in (or use of) support resources to help them navigate the financial aspects of college attendance.

The partnerships generated with postsecondary institutions have also resulted in some creative solutions for increased student support. One example is a “pre-orientation program” for first-generation students at a partnering institution. Another partner noted that involvement in the 2022 Student Success Summit and College Expo/Forum was “eye-opening for him and his team.” Participating in the conference helped illuminate what students need and has challenged him and his team to develop programming that is more proactive. For example, a First-Generation Day that was attended by over 300 students.

These and other supports that students receive both inside and outside of academic advising provide direct assistance on their path towards graduation and higher education achievements and help to ensure the overall well-being of the student.

OPPORTUNITIES FOR GROWTH

The Take Stock in College program effectively supported students in multiple areas of need during all Quarters of the 2022-2023 year. The program has been successful at nurturing strong collaborative partnerships at the 40 public colleges and universities with whom they partner. In spite of its demonstrated success, the Take Stock in College program may be able to increase its impact by continuing to monitor student persistence to identify strategies that have the most impact on student post-secondary degree attainment for future replication. Additionally, the Take Stock in College program should consider further expansion of interventions aimed at identifying students who have not enrolled or dropped out of college/university, providing guidance and assistance with re-enrollment.



Evaluation Question 5:

How can Take Stock in College improve the effectiveness and the efficiency of implementation to reflect the significant return on investment of the program for the state of Florida?

OBSERVATIONS

The Take Stock in College program provides services that positively impact post-secondary degree attainment for low-income students, breaking the cycle of poverty and creating a significant return on investment for the state of Florida. Research continues to confirm that earning a college degree leads to higher lifetime earnings for both two-year and four-year degrees, underscoring the importance of the work done by the Take Stock in College program. Research examining relations between earning an associate degree and outcomes, such as employment status, wages, and homeownership, showed that individuals who earned an associate degree were 9.3 percentage points more likely to be employed, compared to individuals who had no college enrollment history.

In terms of wages, individuals who earned an associate degree increased their hourly wages by 13.4% compared to those who had no college enrollment history. In addition, individuals who earned an associate degree were nearly 12 percentage points more likely to be homeowners (Turk, 2019). Attaining a four-year degree provides these and even more substantial benefits, with persistent positive effects of higher education on earnings over one's lifetime. The modest investment made in the Take Stock in College program has the potential to pull thousands of individuals out of poverty and set them on a path for lifelong success.

General sentiment about the effectiveness of the Take Stock in College program is overwhelmingly positive. Interviewed constituents from partnering postsecondary institutions were uniformly enthusiastic, with one individual remarking that “at this point, we cannot identify any area [for improvement] because we have done everything together.” This testimony speaks volumes about the nature of the collaborations. One aspect that stood out among the responses of all postsecondary partners who were interviewed is the degree to which they saw the program as a partner who can help them accomplish their goals and ensure that programming and information get into the hands of students who need it. Several quotes constitute evidence in support of this assertion.

Partners expressed positive sentiments such as:

- “This partnership is the pipeline for our Scholars Program.”
- “We were able to reach our own constituents, and this was facilitated by Take Stock’s professionalism.”
- “Conversation with Take Stock in College helped [us] be more proactive.”

Students also expressed positive sentiments, such as:

- “[Take Stock in College provides] a family and a sense of community.”
- “[I] can reach out to Take Stock, and they will connect [me] with the information [I] need.”
- “[I] appreciate all the information, resources, and emotional support.”

Although these are words from just a handful of students, they echo survey results where 96% of students feel like the Take Stock in College program is supporting them and believe that the Take Stock in College program has made a difference in their collegiate journey.

Meanwhile, the Take Stock in College program is working to improve effectiveness by striving to increase the college graduation rate for Take Stock students from a current level of 72%--which is already much higher than the national rate of 29% for students from low-income high schools—to an even loftier goal of 95% (see National Student Clearinghouse Annual High School Benchmarks Report, 2022).

Achieving the goal of a 95% college graduation rate will require increasing Take Stock in College program efficiency as well as effectiveness. This can be attained by an increased understanding of what students need at any given time in order to provide targeted supports that help them meet challenges on their journey towards degree attainment. The development of strong collaborative partnerships with postsecondary institutions supports this goal by helping to ensure that service provision is both timely and non-duplicative. In addition, the Take Stock in College program can identify exactly what students need when they need it through continued progress towards ensuring that students engage with Sunny, the AI chatbot, along with increased use of sophisticated data analytics. For example, a large percentage of students (90%) reported receiving communication from Sunny, and interviewed students have stated that they have benefitted from reminders such as deadlines for FAFSA or upcoming events. However, message effectiveness can be enhanced through the continued expansion of messaging and interventions personalized to students’ needs. Once needs are identified, students can then be connected to relevant programs, information, or other supports available at their school and/or in their community.

OPPORTUNITIES FOR GROWTH

The Take Stock in College program provides an excellent return on investment, working closely with colleges and universities to connect with and support students who may otherwise not be able to attain postsecondary success. The Take Stock in College program should continue strengthening partnerships with postsecondary institutions and further development of Sunny, the AI chatbot, and data analytics to provide seamless, targeted, timely, effective, and efficient supports, ideally personalized to students’ immediate needs.

OPPORTUNITIES FOR GROWTH SUMMARY

The menu of supports provided by the Take Stock in College program support students' persistence, well-being, and degree attainment. The vast majority of Take Stock students (96%) feel that the program is effectively supporting them in this endeavor and has made a difference in their collegiate journey.

The Take Stock in College program has met all of its Quarters 1-4 BOG deliverables and, in many cases, exceeded expectations. Take Stock in College staff may consider additional opportunities for growth outlined in this report and summarized below.

- Consider expanding opportunities for peer support and interaction to further improve students' experiences and potentially lead to even better academic outcomes and college retention rates.
- Continue developing the use of Sunny, the AI chatbot, and predictive analytics. These efforts hold the potential for better-anticipating students' needs, increasing understanding of effective support for promoting degree attainment, and providing data-based, individualized supports. Moreover, interview data indicate that the personalization of Sunny communication (closely targeting messages to the data-based needs of individual students) enhances the relevance and effectiveness of this resource. These developments not only support students to make Take Stock in College more effective, but they also can help make the program more efficient regarding resource use and allocation.
- Both interview and survey data indicate that the resources of financial aid advisement, academic advisement, and academic tutoring remain the top three supports accessed by students. These and other resources are likely necessary for supporting degree attainment. In addition, students have consistently expressed a desire for support and resources to help them succeed post-graduation when they launch their careers. As many resources to meet these needs are already available on most college campuses, it is recommended that program staff continue to build and strengthen collaboration and coordination efforts with postsecondary institutions to link students to resources already available on campus. Additionally, the Take Stock in College program should continue to identify community resources and build community partnerships to provide support that is not available on the student's college campus. These partnerships are central to the Take Stock in College Program efforts to connect students with available resources and not duplicate services already available.
- The Take Stock in College program may be able to increase its impact by continuing to monitor student persistence to identify strategies that have the most impact on student post-secondary degree attainment for future replication. Additionally, the Take Stock in College program should consider further expansion of interventions aimed at identifying students who have not enrolled or dropped out of college/university, providing guidance and assistance with re-enrollment.

Conclusion

The mission of the Take Stock in College program is to break the cycle of poverty through education for underrepresented, economically disadvantaged students by ensuring they reach postsecondary degree attainment or career certification and achieve success in college, career, and life. Although only in its fifth year, the Take Stock in College program has developed a robust model to organize an array of program components for supporting students into five key strategies: **Engage, Track, Connect, Coach, and Complete**. The results of this evaluation find that the Take Stock in College program has achieved its mission for Take Stock in College scholars across Florida during 2022-2023.

The program has successfully fulfilled, and in some cases exceeded, all Board of Governor deliverables, which have been selected as critical indicators of program success. The observations collected in the course of this evaluation suggest that the Take Stock in College program is providing, and should continue providing, critical resources that support degree attainment such as financial aid (e.g., FAFSA), academic advisement and support, students' mental health, and social-emotional well-being.

Opportunities for growth have been identified that will further strengthen the program. Key examples include: (1) continuing to build the program's use of sophisticated data analytics (collected by the Sunny, the AI chatbot text nudging system) to predict individual student needs and provide seamless, targeted, effective, and efficient, "just in time" supports; (2) consider developing additional partnerships and collaborations with colleges and community organizations to support student needs including help to jump-start students' careers post-graduation; and (3) continue to connect students with resources that support degree attainment, including the three resources consistently accessed by a large proportion of Take Stock in College scholars: financial aid advisement, academic advisement, and academic tutoring.

The program has successfully fulfilled, and in some cases exceeded, all Board of Governor deliverables, which have been selected as critical indicators of program success. The observations collected in the course of this evaluation suggest that the Take Stock in College program is providing, and should continue providing, critical resources that support degree attainment such as financial aid (e.g., FAFSA), academic advisement and support, students' mental health, and social-emotional well-being.

The Take Stock in College program makes robust use of many evidence-based strategies shown to improve college persistence and degree attainment and consistently uses data to inform program implementation and development. Through this work, the Take Stock in College program is changing the trajectory of many students' lives across the state of Florida.

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Appendices

APPENDIX A: GENERAL TAKE STOCK IN COLLEGE PROGRAMMING

2022 Summer Melt			
Summer Melt I	Theme	Resources	Dates
Week 1	<i>Regular Programming</i> (Mindset Matters)	<ul style="list-style-type: none"> • Internal vs External Motivation.pdf • Extrinsic vs Intrinsic: https://youtu.be/kUNE4RtZnbk 	May 29th-June 2nd
Week 2	<i>Regular Programming</i> (Overcoming Obstacles)	<ul style="list-style-type: none"> • How to deal with student burnout - https://youtu.be/qd_mRapoPtg • Overcoming Barriers.pdf 	June 5th-9th
Week 3 <i>Launch of Summer Melt</i>	Welcome to Take Stock in College	Email (Sent via Constant Contact): Virtual Freshmen Welcome packet including: <ul style="list-style-type: none"> • A description of program services • Business e-card • Invitation to Take Stock Connect • Social media advertisement, • Welcome webinar • College Success Guide Link • Take Stock in College Flyer • Bright Futures Webinar 	June 12th-16th
Week 4	Orientation & Course Registration	<ul style="list-style-type: none"> • How to Register for College Classes https://youtu.be/KhR2_h0dI-s • College Course Types.pdf • Types of Courses.JPG 	June 19th-23rd
Week 5	Financial Aid	<ul style="list-style-type: none"> • Money Management Checklist.pdf • https://youtu.be/uBWB8zjWZvA 	June 26th-30th

2022 Summer Melt

July 2022

Summer Melt II	Theme	Resources	Dates
Week 1		Office Closure	July 4th-8th
Week 2	Family Pressures	<ul style="list-style-type: none"> Lifestyle and Education: How to Maintain a Thriving Social Circle While in College MIKOL (mikolmarmi.com) Relationship Circle.pdf 	July 11th-15th
Week 3	Book Buying	<ul style="list-style-type: none"> Textbooks (Buy or Rent).png 	July 19th-22nd
Week 4	Communicating w/your Professors	<ul style="list-style-type: none"> Understanding Your Professor's Expectations.pdf 	July 25th-29th

August 2022

Navigating the Campus	Theme	Resources	Dates
Week 1	Campus Resources	<ul style="list-style-type: none"> Resolving Issues on Campus Resource.pdf 	August 1st-5th
Week 2	What is a Syllabus & How can it Help me?	<ul style="list-style-type: none"> Video Resource: What is a Syllabus? https://youtu.be/qnYuXmujYR Semester at a Glance.pdf 	August 8th-12th

August 2022			
Navigating the Campus	Theme	Resources	Dates
Week 3	Utilizing Campus Resources	<ul style="list-style-type: none"> • Resolving Issues on Campus Resource.pdf 	August 15th-19th
Week 4	How to get connected to your College or University	<ul style="list-style-type: none"> • How to Connect to your College Community https://youtu.be/MecPj_yoVWA • How to Get Involved on Campus CollegeData 	August 22nd-26th
Week 5	Building Relationships with Faculty and Staff (Professors & Departments)	<ul style="list-style-type: none"> • The Importance of Building a Professional Relationship with Your Professor (fnu.edu) 	August 29th-September 2
September 2022			
Adjusting to College Life	Theme	Resources	Dates
Week 1	Time Management	<ul style="list-style-type: none"> • Time Management Worksheet.pdf • How to Manage your Time better. https://youtu.be/VUk6LXRZMMk 	September 5th-9th
Week 2	Stress Management	<ul style="list-style-type: none"> • stress management strategies.pdf • Tips for managing Stress https://youtu.be/Wh5HyJ1rxzk 	September 12th-16th
Week 3	Campus Clubs & Organizations	<ul style="list-style-type: none"> • Why Campus Clubs and Organization Matter.pdf • The 6 main types of College Clubs and the skills you will develop from each: https://youtu.be/qMD7lj37XbA 	September 19th-23rd
Week 4	Healthy Living & Food Preparation (Food Insecurities, Food Banks, Campus Food Pantry)	<ul style="list-style-type: none"> • Why Wellness Matters for Student Success: How to Eat Healthy in College: Food Hacks, Tips, and Expert Advice Why Wellness Matters for Student Success.pdf • Create a Grocery Game Plan Grocery List.pdf 	September 26th-30th

October 2022			
Financial Frenzy (Financial Literacy)	Theme	Resources	Dates
Week 1	Budgeting 101	<ul style="list-style-type: none"> Budgeting Basics https://youtu.be/iHA5mTYL-1I Monthly Budget Worksheet.pdf Mindful Spending Worksheet.pdf 	October 3rd-7th
Week 2	Grants, Loans, and Scholarships	<ul style="list-style-type: none"> What's the Difference Between Grants, Scholarships, and Loans.pdf Student Loan Comparison Chart.pdf 	October 10th-14th
Week 3	FAFSA Myths	<ul style="list-style-type: none"> 9 Myths about the FSA ID.pdf 	October 17th-21st
Week 4	Adulting 101 (Life after Graduation)	<ul style="list-style-type: none"> Budgeting for Life After College Worksheet (1).pdf 	October 24th-28th
November 2022			
Academic Success	Theme	Resources	Dates
Week 1	Note Taking Study Habits & Test Preparation (Final Exams)	<ul style="list-style-type: none"> Study Skills and Test Preparation https://youtu.be/k-gxVxMf-Ik Note Taking 101.pdf 	October 31st -November 4th
Week 2	First Generation Student Success-(First Generation Awareness Week of November 8th)	<ul style="list-style-type: none"> College-Success-Roadmap Rise-First.pdf Being Successful as a First Generation College Student.pdf 	November 7th-11th
Week 3	Major Exploration (Academic Blueprint)	<ul style="list-style-type: none"> Tracking Degree Requirements.pdf grade calc fill 20 (1).pdf 	November 14th-18th
Week 4	Experiential & Service Learning	<ul style="list-style-type: none"> Experiential Learning.pdf 	November 22nd-25th

December 2022			
Finishing the Semester Strong	Theme	Resources	Dates
Week 1	Calculating your GPA (GPA Calculator-Student Portal) / Credit Evaluation	<ul style="list-style-type: none"> • Calculating your GPA.pdf • How to calculate GPA: https://youtu.be/0p4rEImJqZU 	December 5th-9th
Week 2	Next Semester Planning	<ul style="list-style-type: none"> • How to Prepare for a New Semester.pdf • Course Planning Worksheet.pdf • How to start a new semester: https://youtu.be/Ey-cAHDme2s 	December 12th-16th

Spring Semester

January 2023			
The Leader in Me	Theme	Resources	Dates
Week 1	Myers Briggs Personality Type	<ul style="list-style-type: none"> • What's your Personality Type.pdf • Intro to Myers Briggs Personality Types and Why it matters for degree attainment and career success https://youtu.be/3C-4vP05zV0 	January 2nd-6th
Week 2	Transferable Soft Skills	<ul style="list-style-type: none"> • Transferable Skills Checklist.pdf 	January 9th-13th
Week 3	Goal Setting	<ul style="list-style-type: none"> • Goal Setting Worksheet.pdf • Goal Setting.pdf 	January 16th-20th
Week 4	Effective Communication	<ul style="list-style-type: none"> • Communication- Basics and Importance https://youtu.be/2Lkb7OSRdGE 	January 23rd-27th

February 2023

Mentoring and Networking	Theme	Resources	Dates
Week 1	Establishing and following short- and long-term career goals (Career Mapping)	<ul style="list-style-type: none"> • Career Mapping Worksheet.pdf • four-year-career-map-for-undergrads.pdf 	January 30th-February 3rd
Week 2	Community Service	<ul style="list-style-type: none"> • Community Service.pdf 	February 6th-10th
Week 3	Employer Interaction (Career Fairs/Networking Receptions)	<ul style="list-style-type: none"> • Career Fair Networking Guide.pdf 	February 13th-17th
Week 4	Interview Skills (Elevator Pitch)	<ul style="list-style-type: none"> • Elevator Pitch.pdf • Interviewing Skills.pdf 	February 20th-24th

March 2023

Self-Advocacy	Theme	Resources	Dates
Week 1	Mental Fitness and Focus	<ul style="list-style-type: none"> • Wellness Wheel.pdf • The 7 Steps to Mental Fitness.jfif 	February 27th- March 3rd
Week 2	Developing a Sense of Belonging on Campus	<ul style="list-style-type: none"> • How to cultivate a sense of belonging on your campus - CampusWell • https://youtu.be/3EXsrYmKYQQ 	March 6th-10th
Week 3	Imposter Syndrome	<ul style="list-style-type: none"> • What is Imposter Syndrome, and how can you combat it? https://youtu.be/ZQUxL4Jm1Lo 	March 13th-17th
Week 4	Self Determination	<ul style="list-style-type: none"> • Building Motivation Worksheet.pdf • Understanding & Managing Procrastination.pdf 	March 20th-24th
Week 5	Awareness of Take Stock in College Resources	<ul style="list-style-type: none"> • The Importance of Take Stock in College Program Resources: Support to Degree Attainment 	March 27th- 31st

April 2023

Career Exploration/ Career Planning	Theme	Resources	Dates
Week 1	My Plan Assessment	<ul style="list-style-type: none"> MyPlan Assessments.pdf 	April 3rd-7th
Week 2	Personal Branding	<ul style="list-style-type: none"> 6 Tips for Building your Personal Brand https://youtu.be/o2WC5uIhPU Personal Branding.pdf 	April 10th-14th
Week 3	Career Research- Informational Interview	<ul style="list-style-type: none"> Career Research- Informational Interviewing.pdf 	April 17th-21st
Week 4	Post Baccalaureate (Life after Undergraduate)	<ul style="list-style-type: none"> Life After College Checklist.pdf Life After Graduation: A Beginner's Guide [2022] College Life [NL] How to Use Your Senior Year to Prepare for Life After College TopResume 	April 24th-28th

May 2023

Getting Ahead	Theme	Resources	Dates
Week 1	Degree Audits	<ul style="list-style-type: none"> Degree Planning Worksheet.pdf Know your Degree Audit.MOV 	May 1st-5th
Week 2	Reflect, Recharge, Refocus	<ul style="list-style-type: none"> SMART Goal Worksheet.pdf Encouraging Self Reflection Worksheet.pdf 	May 8th-12th
Week 3	Next Semester Goal Setting (The Importance of Summer Sessions)	<ul style="list-style-type: none"> Next Semester Goal Setting.pdf 6 Ways to have a productive summer: https://youtu.be/BqqQwFQyJr8 	May 15th-19th
Week 4	Academic & Career Advising Part II	<ul style="list-style-type: none"> Degree Planning Worksheet.pdf Career Planning Checklist.pdf 	May 22nd-26th

APPENDIX B: LITERATURE REVIEW

To provide context for Take Stock in College's work and a benchmark for its evaluation, a review of research literature was conducted on the latest advances in the fields of postsecondary success, persistence, and completion. Studies on postsecondary enrollment and persistence during COVID-19 were also reviewed to ensure current perspectives. Furthermore, studies regarding returning to college from the labor market were reviewed. This literature review was conducted to ensure that a comprehensive perspective, with an understanding of current dynamics, was applied to the evaluation.

What are the Financial Benefits of College Degree Attainment?

Analyzing relations between degree completion and earning gains and estimating economic benefits of college degrees to students, families, states, and society is critical to understanding a program's efficiency and sustainability.

Given the rapid increase in costs, including college tuition, there are many who question whether the benefits of college justify the cost and whether college is a worthwhile investment; however, research continues to show that college is a good investment and that the value of a college education is significant on average. A recent meta-analysis study based on nine independent studies calculated the value earnings gains for a bachelor's degree over a high school diploma and suggested that the expected lifetime earnings gained for a bachelor's degree is \$423,800 on average (Barrow & Malamud, 2015; Paulsen & Perna, 2019).

A study of labor market outcomes also demonstrates that state-level financial reforms since 1990 that support education correspond with increased high school completion and college attendance among women and Black students and raised annual earnings among those populations (Rothstein & Schanzenbach, 2022). These results complement another paper reviewed recent evidence on labor market returns for an associate degree and affirmed that association degree completion yielded strongly positive, persistent, and consistent gains in earnings. Specifically, completing an associate degree yielded \$4,640-\$7,160 per year in extra earnings compared to high school graduates (Belfield & Bailey, 2017).

Research examining relations between earning an associate degree and outcomes, such as employment status, wages, and homeownership, showed that individuals who earned an associate degree were 9.3 percentage points more likely to be employed, compared to individuals who had no college enrollment history. In terms of wages, individuals who earned an associate degree increased their hourly wages by 13.4% compared to those who had no college enrollment history. In addition, individuals who earned an associate degree were nearly 12 percentage points more likely to be homeowners (Turk, 2019).

What Key Factors Improve Postsecondary Success, Persistence, and Completion?

Numerous studies have shown that several support factors, described below, play an important role in improving postsecondary success, persistence, and completion.

Instructional and Student Support Expenditures

Studies have shown that instructional and student support service expenditures are positively associated with increasing graduate rates, especially at four-year colleges and universities (Chen, 2011; Hamrick et al., 2004; Webber & Ehrenberg, 2010). For example, as the population of Hispanic students increases in colleges, studies that have focused on factors that contribute to graduation rates for Hispanic students have shown that instructional expenditures, academic support expenditures, and student support expenditures must be maintained and/or increased to increase graduation rates (Garcia, 2013). In addition, a recent study of three college mentoring programs showed that the most effective programs have sufficient funding (NORC at the University of Chicago, 2020).

Programs for Specific Student Populations

Empirical studies have demonstrated that mentoring or coaching interventions among college students have statistically significant and positive average effects on academic achievement and college degree attainment (Bettinger & Baker, 2013). In particular, studies that focused on specific populations, such as first-year students, non-traditional students, or Black or Hispanic students, showed that their academic achievement significantly increased and that mentoring or coaching interventions had a positive impact on persistence (Arco-Tirado et al., 2019; Bettinger & Baker, 2013; Lisberg & Woods, 2017; Mahendra & Kashinath, 2022; Obiomon et al., 2022). Furthermore, research shows that structured advising is advantageous to students, especially for first-generation college students and those from low-socioeconomic backgrounds.

Mentoring Programs

Mentoring programs, including peer mentors and faculty mentors, have been shown to be beneficial to college students. For example, peer mentors can help students enroll in courses and adjust to college, which can lead to academic achievement. Studies demonstrate that a peer mentor has a positive and significant impact on first-year students' academic performance (Arco-Tirado et al., 2019).

Furthermore, while mentoring is generally effective for students in various ethnic/racial groups (Tam et al., 2022), studies suggest that pairing students with a mentor who shares similar backgrounds (such as race/ethnicity, age, gender, or academic interests) can be beneficial. In one case, a peer program where female students were paired with a female mentor in the same STEM program, students experienced more motivation and confidence in their academic field and showed more retention in the first year of college (Dennehy & Dasgupta, 2017). A recent review of nursing education studies found that all studies cited quality mentorship and the general importance of mentors as a factor that facilitated success in the program (Osakwe et al., 2022).

Faculty mentors also can provide insights into their fields of study, access to research, and career guidance. A study that focused on women underrepresented in STEM disciplines showed that faculty mentoring support impacted students' motivation and persistence intentions (Hernandez et al., 2017), which may lead to longer-term persistence and achievement outcomes. Furthermore, intervention studies have suggested that when outside professionals serve as mentors, students should be matched with a mentor based on academic interests.

Coaching Programs

Coaching programs, as well as mentoring programs, have been illustrated to be advantageous to college students. Literature suggests that, especially for non-traditional students, individualized student coaching, such as helping students develop a vision of their goals, time management, and study skills, can result in greater persistence (Bettinger & Baker, 2013).

Recent studies continue to illustrate the importance of personalized support. Students who were matched with upper-year student coaches demonstrated an increased average course grade and GPA (Koke et al., 2022; Oreopoulos & Petronijevic, 2017). In a randomized controlled trial of a program that included coaching, results showed that participants had high levels of enrollment in postsecondary education, persistence, and degree attainment than those in the control group (Hallberg et al., 2022). Other recent studies that focused on the persistence of Black and Hispanic students demonstrated that their persistence rate increases when they were involved in a peer coaching initiative. In addition, research emphasizes that structured coaching leads to improved outcomes among college students (Simmons & Smith, 2020).

Preparatory Coursework

Students who may arrive at college underprepared in some content areas have been shown to benefit from programs that offer preparatory coursework. One study conducted at a historically Black institution showed that offering online mathematics courses for STEM majors helped students start their academic programs in a better position and also indicated that these students demonstrated better retention in their majors and a higher GPA (Harrington et al., 2016).

Furthermore, a study that focused on an institutionalized program that helped first-year STEM students hone their math skills illustrated that students' retention and graduation rates were increased and that female, Black, and Latino students, in particular, had higher retention and graduation rates (Dagley et al., 2015).

Involvement and Engagement (Feeling Connected)

Another important factor, especially for students of color from underrepresented groups, such as Black or Hispanic students, is social support/ integration. Recent research shows that social integration and engagement were related to student retention among students of color from underrepresented groups (Rasco et al., 2020).

Additionally, a case study that examined the different retention rates among Black and Latino students revealed that social support seemed to play an important role in retention. This study also suggested that regardless of the differences in academic preparation for college, social support was a vital factor in the success of students (Baker & Robnett, 2012). In another study that examined predictors of persistence, retention, and completion for first-generation graduate students, participants repeatedly expressed a desire for connection and engagement in and out of the classroom (Hutson et al., 2022)

Connections through Technology

Although socioeconomic disparities in college enrollment have declined, socioeconomic inequalities in college completion have widened over the years. Recently, researchers have examined how informational barriers and behavioral obstacles contribute to socioeconomic disparities in college success and have investigated the effectiveness of text message communications for students from families with low incomes (Castleman & Page, 2015; Castleman & Meyer, 2020). For example, one study that focused on text messaging, such as providing simplified information, encouragement, and access to individualized advising, showed that students who received these messages were more likely to remain throughout their first year of college and to complete more course credits (Castleman & Meyer, 2020). Another study examined the effects on persistence of a mixture of both automated and personalized text messages from advisors to advisees. Results were robust for underclass students, with persistence rates moving from 87% to 93%. The researchers noted that students who did not engage with the text messaging attempts were less likely to seek an appointment with their advisor; thus, there is a need for additional research to better understand what motivates a student to engage with texting software (Tippets et al., 2022).

The use of text messaging is a relatively new methodology, and understanding how this technology can be used effectively to promote persistence is a developing area of study. Jabbari and colleagues found that text messages increased FAFSA application rates. Specifically, participants receiving the text messages were 87% more likely to make a FAFSA appointment than participants in the control group (Jabbari et al., 2022). A similar study examined the impact of “financial aid nudges” sent via text message. The campaign resulted in earlier FAFSA re-filing for some students, but the results were not maintained once the campaign ended. In other words, there was not a permanent change in FAFSA filing behavior, which suggests that ongoing nudging campaigns may be necessary (Page et al., 2022). Text messaging is a cost-effective strategy (Zick et al., 2022), and more research is needed to understand its effectiveness and where such efforts are best used.

Family and Student Attributes

Research examining the role of family support suggests that it promotes students’ social wellbeing, student engagement, and positive academic outcomes, especially for students from families with low incomes (Roksa & Kinsley, 2018).

In addition to family support, longitudinal studies have shown that students' psychosocial factors, including motivation and coping strategies, are significant predictors of academic success and college retention (DeBerard et al., 2004; Slinger et al., 2015).

Financial Support

Numerous studies have shown that financial challenges, such as college affordability, are one of the major reasons that students from families with low incomes do not pursue a college degree. Financial challenges can be magnified for first-generation students (e.g., Hispanic students) whose families may not have sufficient wealth to support their college attendance (e.g., Genthe & Harrington, 2022). This trend has accelerated since costs, such as tuition fees, have rapidly increased each year. Therefore, offering financial support (e.g., through grants, scholarships, and incentives) can result in college enrollment, persistence, and completion.

Grants

Grant eligibility had a positive impact on attendance and led to an increased rate of credit accumulation and degree completion within six years, based on a study that investigated the effects of the Florida Student Access Grant (Castleman & Long, 2016). This type of grant aid has been shown to be an effective way to increase retention (Goldrick-Rab et al., 2016) and can be instrumental in supporting degree attainment. In a study that was similar to the Florida Student Access Grant study referenced above, minority graduates in first-generation, low-income households were randomly assigned grant awards. The awards were effective for increasing degree completion by approximately 8 percentage points, and the lifetime earnings effect exceeded the cost of the grants (Angrist et al., 2022).

Scholarships

Studies show that scholarships significantly increase college enrollment, college credits attempted, and credential attainment (Bartik et al., 2015).

Financial Incentives

A study targeting first-year students from families with low incomes demonstrated that providing incentives based on academic performance and a minimum number of credit hours led to an increase in credit-hour accumulation, resulting in a notable increase in the graduation rate after five years (Binder et al., 2015).

Comprehensive Supports

Several studies investigating ways to support first-generation students, including those from families with low incomes, regarding college success have shown that providing a combination of financial support and non-financial support leads to substantially higher rates of degree completion and academic improvement (Clotfelter et al., 2017; Page et al., 2016).

How did COVID-19 Impact College Enrollment and Persistence, Including Lingering and Differential Effects?

Effects of COVID-19

In the fall of 2020, first-year enrollment was down by 16% at four-year universities and by 23% at community colleges compared with 2019 (National Student Clearinghouse, 2020a). Enrollment by students from families with low incomes was down by 33% compared with 2019 (National Student Clearinghouse, 2020a). Overall, compared with 2020, the enrollment continued to drop by 2.3% in the fall of 2021, and first-year student enrollment declined by 3.1%. Although enrollment declined among all racial groups, Native American, Black, and White groups suffered the sharpest drops, ranging from -10% to -12% (Hoover, 2020; National Student Clearinghouse, 2020a, 2020b; Sedmak, 2020).

Based on reports released in July 2021, the persistence rate dropped by two percentage points since fall 2019. The first-year persistence rate fell most among Latino students at -3.2 percentage points (National Student Clearinghouse, 2021; Sutton, 2021).

Other differential effects of COVID-19 include experiences with financial struggles and food security. For example, a nationally representative longitudinal survey found that food insecurity during the pandemic was more likely to impact non-white, first-generation students, and that the issue was associated with a lower likelihood of degree attainment (Wolfson et al., 2022). Another study examined the survey results of 3,163 students attending Queens College and found that first-generation students encountered more financial struggles than students with a parent who had completed college (Rodriguez-Planas, 2022).

The COVID-19 enrollment decline slowed in 2022

A recent report by the National Student Clearinghouse Research Center shows an enrollment decline of 1.1% in fall, 2022 compared to a decline of 2.1% in 2021. Moreover, undergraduate enrollment has grown by 2.5% this fall at Historically Black Colleges and Universities, although there has been a general decline in enrollment for most racial/ethnic groups except for Latino students, who saw a 1.2% increase (Nietzel, 2022).

Interventions

To mitigate declining enrollment and/or persistence, universities and/or states have attempted to implement intervention programs. For example, one university's peer mentoring program that matches first-year students with upper-year students helps first-year students become involved in college by providing personalized attention and academic and extracurricular advice until they complete their first year. Mentors are trained to pay extra attention to students from low-income backgrounds. Although this mentoring program began before the COVID-19 pandemic, personalized and continuous mentoring throughout the year resulted in the university's enrollment increasing by about 15%, and the freshman retention rate increased in 2020 (Patel, 2020).

Another university designed a personalized coaching/mentoring program remotely for first-year students to provide necessary support and information, especially related to mental health and wellbeing, which is expected to increase student connectedness and support and ultimately increase retention during COVID-19 (Kwan et al., 2021). Because in-person services/advising was not feasible due to the COVID-19 pandemic, various types of virtual advising have been implemented statewide to address low- enrollment and low-retention issues. For example, the state of Washington created a statewide texting chatbot that helps high school seniors apply for financial aid, and Arizona created a similar technological tool that focuses on financial aid. In addition, Illinois provides near-peer mentors to help guide high school seniors through the college application process (Keller, 2020; Kuhfield, 2020; Roybal et al., 2021; Stiffler, 2020).

Conclusion

A general review of the research literature in general and examination of recent studies provide support for the framework of the Take Stock in College model and offer supporting evidence regarding the validity and relevance of the model's elements in the fields of postsecondary success, persistence, and completion.

Peer mentorship and coaching continue to be powerful components of the program that can have a positive and significant impact on first-year students' academic performance. Studies confirmed that coaching leads to improved academic outcomes. In particular, recent studies demonstrated that Black and Hispanic students who were involved in coaching interventions had improved graduate rates. Studies also suggest that when peer mentors and mentees share similar backgrounds, mentees experience more motivation in their academic field and have better retention rates. In consideration of these findings, efforts to match peer students who share similar backgrounds are likely well placed. In addition, individualized and personalized mentoring or coaching is likely to better meet students' needs and increase success in college and graduation rates than more general interventions.

Research confirmed that technology is an effective supplement to models like the Take Stock in College program. A recent study of college mentoring models found that virtual and hybrid models of mentorship all improved degree attainment and persistence rates (NORC at the University of Chicago, 2021). Other technology-delivered communications, such as text messaging campaigns, also encourage students to remain in college throughout their first year and to complete more course credits, especially for students from families with low incomes. In addition, studies showed that text messages about financial aid, FAFSA renewal, and reminders of the importance of satisfactory academic process led to higher student persistence and financial aid renewals. The benefits of individualization (described in the previous paragraph) provide support for continued development of Sunny, the AI chatbot—especially with regard to development that results in more personalized, targeted interactions with students that are based on data and designed to address their individual needs.

Meanwhile, technology, though it can be powerful, should be seen as a tool, not a panacea or substitute for personal connection. Some studies indicated that not all interventions that used text messages or technology-based advice improved students' grades or credit completion. Text messaging is a cost-effective strategy for communicating with students, and combined with AI, has the potential to be connect students with “just in time” supports. Yet, as with any program component, it should be monitored for its effectiveness for producing desired outcomes generally, and for individual students.

Lastly, the decline in enrollment and persistence rates witnessed during the initial years of the COVID-19 pandemic is slowing. The Take Stock in College program has introduced, developed, extended use of, and incorporated a variety of strategies and interventions designed to increase enrollment and retention into their programming. One example is personalized coaching and mentoring focused on students' social- emotional wellbeing because feeling connected has become a significant factor in college success and persistence, especially for students of color and students from families with low incomes who experiences disproportional and lingering impact of COVID-19. While these supports were initially established as a response to the pandemic, Take Stock in College continues to provide support and resources that focus on students' mental health and social-emotional wellbeing.

In sum, research on postsecondary success, persistence, and completion is constantly evolving. Additional research directly with Take Stock in College students would improve the understanding of the specific impacts this program is having on students. College success and college completion programs could then use this new knowledge to ensure that their models and services have the most positive impact possible on the college students they serve.

APPENDIX C: INTERVIEW QUESTIONS

Questions for Take Stock in College Scholars:

- Tell us about the impact of programming you've seen featuring Take Stock in College Student Ambassadors through Take Stock's social media.
- Tell us how the Take Stock in College program supports you in reaching degree attainment.
- How have you interacted with the Take Stock in College program or staff?
- What Take Stock in College program events/webinars/special speakers have you participated in?
 - Of those, what have you found to be the most helpful? And what kind of impact did it have on you and your college experience?
- Do you know any other Take Stock Scholars on your campus or from the Take Stock Connect Community? Would you be interested in getting to know any? Would you prefer in-person or virtual events?
- If there was one area of support that the Take Stock in College program could provide more focus on, what would it be? (ex. Financial Aid, Career Exploration, etc.)
- Have you interacted with Sunny, the AI Chatbot? How have you found Sunny to be most helpful?
- What could Take Stock in College do in the future to help students?

Questions for Take Stock in College Student Ambassadors:

- Tell us how the Take Stock in College program supports you in reaching degree attainment?
- As a Take Stock in College Student Ambassador, how do you feel you have supported other Take Stock in College students in their journey to degree attainment? What impact do you feel you've made?
- How have you interacted with the Take Stock in College program staff?
- What Take Stock in College program events/webinars/special speakers have you participated in? Of those, what have you found to be the most helpful? And what kind of impact did it have on you and your college experience?
- Do you know any other Take Stock Scholars on your campus or from the Take Stock Connect Community? Would you be interested in getting to know any? Would you prefer in-person or virtual events?
- If there was one area of support that the Take Stock in College program could provide more focus on, what would it be? (ex. Financial Aid, Career Exploration, etc.)
- Have you interacted with Sunny, the AI Chatbot? How have you found Sunny to be most helpful?
- What could Take Stock in College do in the future to help students?
- What could Take Stock in College do in the future to support the Take Stock in College Student Ambassador program?

Questions for Take Stock in College Staff:

- How does the Take Stock in College program impact the continuum of support for Take Stock students?
- How have you been able to contribute to the Take Stock in College program goals of assisting students in reaching degree attainment?
- What programmatic resources have you found to be most helpful when working with the Take Stock in College program students?
- What, if any, student challenges have you encountered? How has the team addressed these challenges?
- What partnerships, initiatives, or innovations do you think could be implemented in the future to assist Take Stock in College scholars?
- How have the college/university visits made a difference in developing more meaningful engagements with students, staff, and building postsecondary partnerships?
- What project or goal would you like to see the Take Stock in College program focus on? And personally, what project or goal do you have personally for your work at Take Stock in College for the quarter/semester/year?
- How do you view student feedback as a means to improve individual work as well as collaborative work?

Questions for Post-Secondary Institution Partners:

- What is your general perception of the Take Stock in College program?
 - How would you describe a “successful” partnership between your institution and programs like the Take Stock in College?
 - How has the partnership with the Take Stock in College program contributed to your work? (i.e., college tours, scholarship programs, improved engagement, developed outreach strategies, etc.)
 - What experiences with Take Stock in College have you found to have supported your work?
 - How can Take Stock in College better support you in your work and our students, as well as develop a more successful partnership?
 - Is there anything you would like us to consider as we continue the Take Stock in College program?
-

APPENDIX D: SELECTED SURVEY QUESTIONS

Fall 2022 Student Feedback Survey Questions

(Response data can be found on pp. 30-41 in the 2022 Formative Evaluation)

Do you feel the Take Stock in College program is effectively supporting you?

Choices:

- Yes
- No

Please select all of the on-campus student support services that you have used. Please select as many options that pertain to you.

Choices:

- Academic Advisement
- Financial Aid Advisement
- Academic Tutoring
- Career Services
- Mentoring
- Child Care Services
- None of These
- Other

How has the Take Stock in College program helped you so far in your college journey?

Choices:

- Open-ended response

How has the COVID-19 pandemic impacted your academic journey? Please select as many option that pertain to you.

Choices:

- Struggled financially
- Missed time in school
- Personal health issues
- Family health issues
- Struggled with virtual learning
- Fell behind in school
- Mental health
- Struggled with a changing campus environment
- Not being able to engage with peers socially
- Missing out on the college experience
- Grades were impacted
- Loss of employment
- Family loss of employment
- Housing issues
- Ability to regularly secure food/meals
- Transportation issues

Have you set up a one-on-one virtual appointment with a Take Stock in College team member?

Choices:

- Yes
- No

Have you seen any social media posts from the Take Stock in College Student Ambassadors?

Choices:

- Yes
- No

Have you engaged with Sunny, the AI chatbot?

Choices:

- Yes
- No

Are you enrolled for next semester?

Choices:

- Yes
- No

How can the Take Stock in College program support you in the future on your journey to earning a college degree?

Choices:

- Open-ended response

How likely is it that you will successfully complete this year of study in your college or university program?

Choices:

- Very likely
- Somewhat likely
- Not likely

How likely is it that you will complete your two- or four-year postsecondary degree?

Choices:

- Very likely
- Somewhat likely
- Not likely

Spring 2023 Student Feedback Survey Questions

(Response data can be found on pp. 43-62 of this Summative Evaluation)

Do you identify as a first-generation college student?

Choices:

- Yes
- No
- Not Sure

What college/university are you currently attending?

Choices:

- Select your answer (LIST OF SCHOOLS)

Are you aware of the Take Stock in College program? (The Take Stock in Children program provides a mentor, scholarship, and college readiness services for middle and high school students. Graduates of Take Stock in Children transition into the Take Stock in College program, which helps connect Take Stock students to on-campus resources at Florida public colleges and universities).

Choices:

- Yes
- No

Are you currently a part-time or a full-time student?

Choices:

- Full-time (12 credit hours or more each semester)
- Part-time (11 credit hours or less each semester)

How likely is it that you will successfully complete this year of study in your college or university program?

Choices:

- Not Likely
- Somewhat Likely
- Very Likely

Are you planning to return to college next year?

Choices:

- Yes
- No
- No, because I am graduating.

How likely is it that you will complete your two- or four-year post-secondary degree?

Choices:

- Not Likely
- Somewhat Likely
- Very Likely

What type of degree are you pursuing?

Choices:

- Associate of Arts
- Associate of Science
- Technical/Vocational Certificate Program?
- Bachelor's of Arts
- Bachelor's of Science
- Master's
- Not sure
- Other (please specify)

What level (s) of degree attainment are you trying to achieve in the future?

Choices:

- Associate of Arts
- Associate of Science
- Technical/Vocational Certificate Program?
- Bachelor's of Arts
- Bachelor's of Science
- Graduate Level (i.e., Masters, JD, PhD, etc.)

Did you participate in any Take Stock in College programming for 2022-23 academic year (ex: Take Stock Connect, webinars, virtual office hours, text messages from Sunny, etc.)?

Choices:

- Yes
- No
- I did not participate, but I like knowing the program is available.

Overall, which statement best describes your experience with the Take Stock in College program?

Choices:

- Very Satisfied
- Somewhat Satisfied
- Neither Satisfied nor Dissatisfied
- Somewhat Dissatisfied
- Very Dissatisfied

Have you ever received text messages from Take Stock in College's AI chatbot, Sunny, reminding you about key deadlines, resources, and offering encouragement?

Choices:

- Yes
- No
- I'm not sure

If you participated in our text messaging with Sunny, please indicate how helpful you found Sunny to be.

Choices:

- Extremely Helpful
- Moderately Helpful
- Not at all Helpful
- I did not Participate

Please indicate all platforms on which you follow Take Stock in College.

Choices:

- Facebook
- Instagram
- Twitter
- LinkedIn
- Youtube
- Take Stock Connect
- TikTok

Do you feel that Take Stock in College has made a difference in your collegiate journey?

Choices:

- Yes
- No

Please select the on-campus postsecondary student support services that you have used.

Choices:

- Academic tutoring
- Academic advisement
- Financial aid advisement
- Career services
- TRiO program
- Mentoring
- Childcare services
- Other (please specify)

What are you most concerned about right now?

Choices:

- Academics
- Career
- Healthcare
- Mental health
- Transportation
- Housing Security/having a place to stay
- Food security/paying for groceries
- Paying for classes
- Financial Aid/money
- Finding a job
- Finding an internship
- Getting the classes that I need for the summer semester
- Getting the classes that I need for the fall semester
- Transportation home when the semester ends
- Applying for graduate/professional school

What learning environment did you take classes in over the last two semesters?

Choices:

- All virtual, off campus
- All virtual, on campus
- Hybrid (some in person and virtual classes)
- All in person
- Took a gap semester
- Deferred Admission

Do you personally have adequate technology for college?

Choices:

- Yes
- No

How do you prefer to receive communication from Take Stock in College?

Choices:

- E-mail
- Phone
- Letter
- Text Message
- Social Media (Facebook, Twitter, etc.)

How can Take Stock in College further support you on your journey to earning a college degree?

Choices:

- Open-ended response

Do you have any additional feedback about Take Stock in College that you would like to share?

Choices:

- Open-ended response
-

APPENDIX E: ABOUT THE EVALUATOR

University of Florida Lastinger Center for Learning

UF Lastinger Center for Learning provides high-quality evaluation services. With deep roots in Florida, Lastinger Center's mission is to create and evaluate equitable educational systems where every child and educator, regardless of circumstances, experiences high-quality learning every day to support the achievement of critical milestones that are predictive of success in life. UF Lastinger Center employs a robust research and evaluation team, led by Dr. Mary Bratsch-Hines, Lastinger. The research and evaluation team provides measurement and evaluation support to educational organizations as they serve children, families, educators, and communities. Former evaluations conducted by Lastinger Center have included the Whole School Improvement Model, Teacher Leadership for School Improvement, Algebra Nation, and the Palm Beach STEM Initiative.



Dr. Stephanie Snidarich, Research Coordinator for the Research and Evaluation at Lastinger Center, has a deep background in special education and the research and evaluation of evidence-based educational practices. Dr. Snidarich holds both general and special educator teaching licenses and has over 20 years of classroom experience. She received her Ph.D. in Educational Psychology, Special Education from the University of Minnesota, and has applied her expertise to the research and development of reading interventions, technology-based reading applications, and

professional learning experiences for educators. Dr. Snidarich has designed, conducted, and overseen data collection for multiple studies incorporating various methodologies (randomized controlled trials, single case, and qualitative methods). Prior to her work at the Lastinger Center, Dr. Snidarich was the Assistant Director of Innovative Programming for ServeMinnesota (state commission for AmeriCorps) and a Researcher for the Formative Assessment System for Teachers (FAST) research lab at the University of Minnesota.



Dr. Mary Bratsch-Hines, Senior Manager for Research and Evaluation at Lastinger Center, has an extensive research background. At UF and formerly at the University of North Carolina at Chapel Hill (UNC), Dr. Bratsch-Hines has been project director and/or principal investigator for multiple federally funded grants. She has designed and conducted randomized controlled trials of reading interventions and has overseen data collection for observational studies of children from infancy through high school. Prior to her work at UNC, she was a senior research associate

for Triangle Research and Evaluation Associates, where she conducted evaluations of educational programs for children from underserved populations. She currently guides fidelity, observation, and outcome data collection, management, and reporting for multiple projects at Lastinger Center, including the Massachusetts Early Care and Support Organization, Flamingo Literacy Matrix, Flamingo Early Learning, and the Gates Foundation COVID-19 Deep Dive Study.

Julianna Banks serves as a research coordinator for the Lastinger Center's Research and Evaluation Team. Her work supports the Center's external research and evaluations initiatives. Before joining the Lastinger team in 2023, she conducted research aimed at leveraging technology to broaden minority and nontraditional student access, and improving their achievement and retention in STEM disciplines. Dr. Banks also served as a Project Director for the Center for Urban and Multicultural Education in Indianapolis. She has conducted mixed methods research on an array of social and educational issues with private, non-profit, and government organizations for more than 15 years and has been recognized for her contributions and work toward equity for women in higher education. While much of her work has centered on examining and improving the health, social, and economic well-being of diverse populations; her primary research focuses on access and equity in education, and faculty and student socialization/engagement. Dr. Banks holds a bachelor's and master's degree in English; and earned a PhD in the field of higher education leadership and policy studies from Indiana University.



Marissa Balbuena serves as the Graphic Design Specialist at the UF Lastinger Center for Learning. In this role, Marissa influences and maintains all visual identities of our products and projects; ensures all out-going materials follow the appropriate identity and meets accessibility standards while still being inventive in their execution; and supports student staff through mentorship and feedback. Marissa holds a Bachelor of Fine Arts in Graphic Design and a Master of Science in Management both from the University of Florida.