2023-2024
Summative Evaluation
Take Stock In College

Take Stock
in College

Success in College, Career & Life
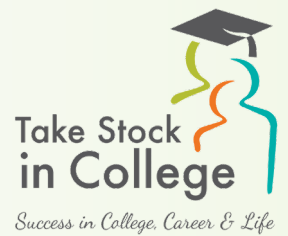
UF | **Lastinger Center for Learning**
     UNIVERSITY *of* FLORIDA

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Executive Summary

Introduction

At its inception, the principal goal of the Take Stock in College program was to offer evidence-based support strategies to assist Take Stock in Children high school graduates to earn postsecondary degrees or Career Technical Education (CTE) certifications (see the Take Stock Support Model, Figure 1). In the United States, attaining a college degree or postsecondary CTE certification is closely associated with lower unemployment rates and higher income levels (Irwin et al., 2023; Ma & Pender, 2023; Schaeffer, 2022). Specifically, individuals who obtain a bachelor's degree experience significantly greater lifetime earnings compared to those who only complete high school, with substantial income differences (Lobo & Burke-Smalley, 2018; Schaeffer, 2022). In addition, parental education levels have been shown to confer financial advantages to subsequent generations, a benefit that can transfer to children of first-generation college graduates (Manzoni & Streib, 2019). This is also true for racially diverse students (Witteveen & Attewell, 2020).

Since Take Stock in Children was founded in 1995, the nonprofit organization has played a pivotal role in the lives of nearly 42,000 students from low-income households across the state of Florida. The program has afforded students transformative opportunities to break the cycle of poverty through participation in high-quality postsecondary preparation initiatives.

> **"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/career certification attainment and achieve success in college, career, and life."**

The firmly established Take Stock model delivers a multi-year support structure uniquely designed for academically qualified students in middle and high school. This comprehensive approach includes key features such as access to a caring adult mentor, comprehensive college readiness and college completion services, and the provision of a Florida Prepaid College Foundation Project STARS Scholarship. The distinct combination of these elements forms an evidence-based framework with a central goal of helping students achieve key milestones, including successful high school graduation, seamless enrollment in postsecondary programs, and degree attainment/career certification. At the writing of this report, 97% of Take Stock students graduate from high school, 92% enroll in a two-or four-year postsecondary program, and 70% of Take Stock students complete their postsecondary programs. This postsecondary completion rate exceeds the national average of 29% based on data from the National Student Clearinghouse (2023) for students from families with low incomes. Expanding on the success of the Take Stock of Children program, the organization proceeded on to the logical next step - the Take Stock in College program—a continuum of support program for Take Stock in Children high school graduates as they strive to pursue their postsecondary educational aspirations.

Acquiring a postsecondary degree or career certification remains elusive for many students, including the populations served by the Take Stock in Children nonprofit organization. In 2018, Take Stock launched the Take Stock in College program to 1) ensure students achieved postsecondary degree attainment or career certification, 2) fulfill Take Stock's promise to its students, and 3) ensure the $291 million scholarship investment from the State of Florida and donors translated into successful postsecondary education completion. Consequently, the Take Stock in College program was established to serve 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 Organizational Model

Take Stock achieves success through an innovative multi-year program model of mentorship, accountability, college success, and a college scholarship.
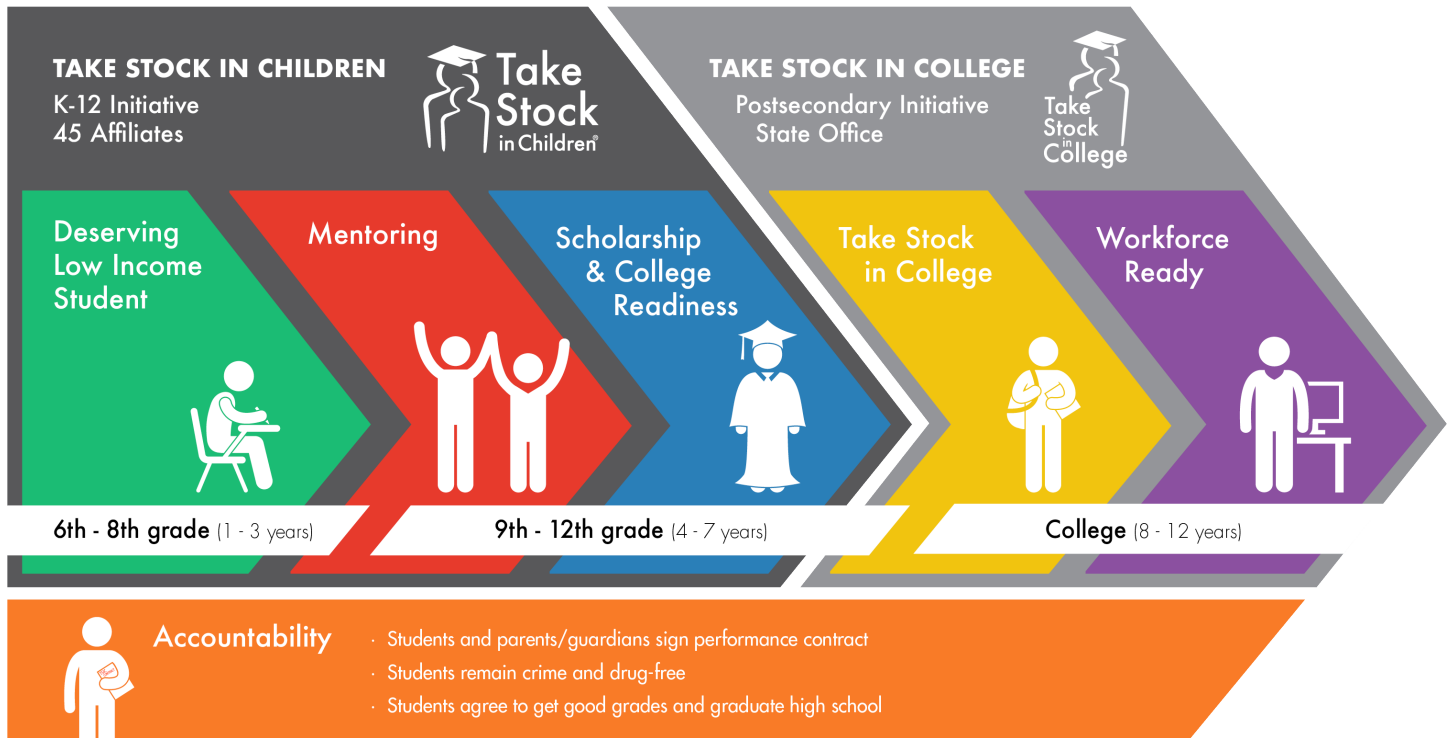
Analysis of data from the National Student Clearinghouse Annual Benchmarks Report (2023) reveals that students enrolled in the Take Stock in College program demonstrate a notably higher graduation rate of 70% which significantly exceeds the national average of 29% that has been observed for low-income, at-risk students. A key focus of the Take Stock in College program is to attain a college completion rate that reflects the same level of success as its high school graduation rate.
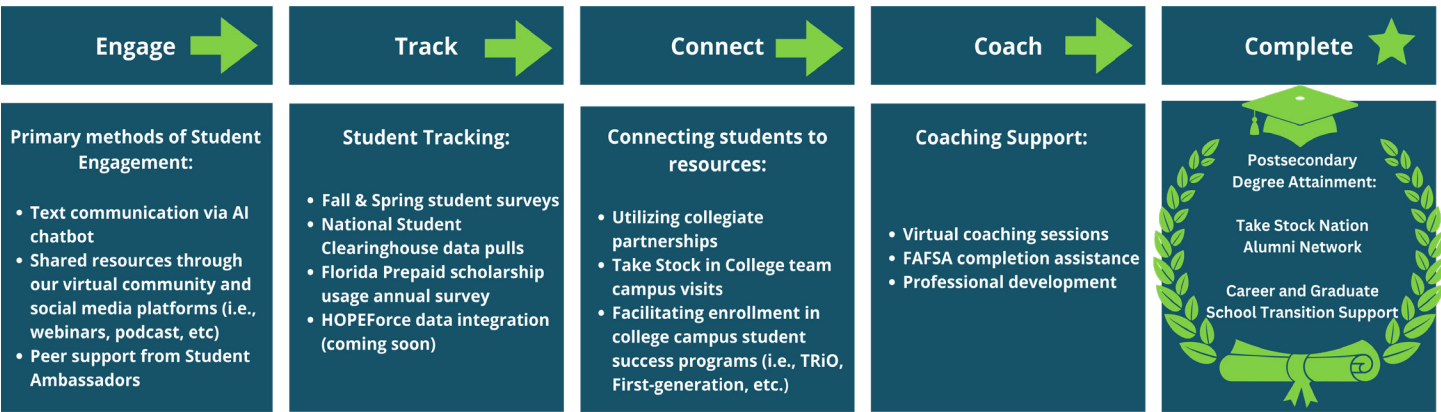
At the core of the Take Stock organization's mission is the aspiration to end poverty through education, aiming to ensure all Florida students have the opportunity to achieve postsecondary success. The Take Stock in College program is one part of the continuum of support designed to lift students out of poverty and provide a pathway to success. The Take Stock in College program model helps students connect with and access tools and resources to successfully navigate through college. Every Take Stock student is provided with a Florida Prepaid College Foundation Project STARS Scholarship to facilitate their access to college or career certification. Yet, promoting and supporting students' sustained persistence towards degree attainment is vital. The Take Stock in College program bridges the gap by providing a much-needed continuum of support with additional resources 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 operates with a strategic approach to avoid duplicating services offered by Florida higher education institutions. Instead, it serves as a facilitator, connecting students to the array of resources and services already available within these institutions.

The Take Stock in College program strategically engages in data-informed 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. The Take Stock in Children program provides 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.

In its inaugural year (2018–2019), the Take Stock in College program prioritized building and refining the program's foundational structure, which was essential for its initial operations and eventual growth. Subsequent years (2019–2020, 2020–2021) focused on building program awareness, constructing and providing a virtual program model due to the pandemic, and delivering tailored and personalized student support. More recently (2021–2022, 2022-2023, 2023-2024), the Take Stock in College program focused on continued program awareness and postsecondary partnerships and provided evidence that the Take Stock in College program impacted student behavior and postsecondary persistence. These supplementary resources and support measures, several of which are delivered in virtual formats, have now been seamlessly integrated into a hybrid in-person and virtual model of the standard programming offered by the Take Stock in College program. This strategic integration serves to enhance operational efficiency and foster deeper engagement with students. To enhance degree/career certification attainment, the Take Stock in College Program employs a comprehensive support model: Engage, Track, Connect, Coach, and Complete.

Figure 2. Take Stock in College Program Model

Engage →	Track →	Connect →	Coach →	Complete ★
Primary methods of Student Engagement:	Student Tracking:	Connecting students to resources:	Coaching Support:	Postsecondary Degree Attainment:
• Text communication via AI chatbot • Shared resources through our virtual community and social media platforms (i.e., webinars, podcast, etc) • Peer support from Student Ambassadors	• Fall & Spring student surveys • National Student Clearinghouse data pulls • Florida Prepaid scholarship usage annual survey • HOPEForce data integration (coming soon)	• Utilizing collegiate partnerships • Take Stock in College team campus visits • Facilitating enrollment in college campus student success programs (i.e., TRiO, First-generation, etc.)	• Virtual coaching sessions • FAFSA completion assistance • Professional development	Take Stock Nation Alumni Network Career and Graduate School Transition Support

Utilizing a hybrid approach, the Take Stock in College program delivers support through a combination of in-person and virtual options to assist students in navigating postsecondary environments and persisting toward degree attainment. Following the Engage, Track, Connect, Coach, and Complete model, the Take Stock in College program promotes student success by providing the following student engagement and support resources:

Engage:

1. Themed Weekly Programming Utilizing PERSIST Curriculum
2. Sunny, the Artificial Intelligence Chatbot – Text Nudging System
3. Take Stock Connect – An Online Community
4. Webinars
5. Take Stock in College Blog
6. Take Stock in College Newsletter
7. Take Stock in College Podcast
8. Success in Seconds
9. Social Media: Student Ambassadors - Postsecondary Degree Attainment Influencers

Track:

1. Sunny, the AI Chatbot - Gathering Data
2. National Student Clearinghouse Data
3. Student Surveys/Florida Prepaid Annual Survey

Connect:

1. 40 College and University Partnerships
2. Sunny, the AI Chatbot - Connecting to Resources
3. On–Campus Resources
4. Off-Campus Resources
5. Campus Visits
6. Resource Materials

Coach:

1. One-On-One Coaching Appointments: Including FAFSA completion assistance, professional development and more.

Complete:

1. Postsecondary Degree Attainment and CTE Certification
2. Postsecondary Degree Attainment: Career and Graduate School Transition Support
3. Take Stock Nation Alumni Network

Evaluation Purpose

The University of Florida Lastinger Center for Learning conducted two evaluations during the 2023–2024 grant year (July 1, 2023, through June 30, 2024).

The first assessment, the Formative Evaluation, provides a description of implementation in the first two quarters of 2023–2024. It details the progress in program implementation made to date and makes recommendations for improving performance and model fidelity. Using these data, the Take Stock in College program modifies and adapts as needed in the second half of the year to support the accomplishment of all grant objectives. As such, the function of the Formative Evaluation is 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 is on track to meet the metrics required by the Florida State University System Board of Governors for the grant year 2023–2024.

The second assessment, the Summative Evaluation, is conducted at the end of the grant year to determine whether the Take Stock in College program has met all objectives. The Summative Evaluation provides a detailed summary of the program and progress toward meeting state objectives. In conducting the Summative Evaluation, the UF Lastinger Center considers evidence from all quarters to determine whether the Take Stock in College program met its yearly objectives and highlights areas of considerable programmatic strengths and areas for growth and refinement.

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 Method

The 2023-2024 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 2023-2024. 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. The evaluation uses both quantitative and qualitative data to determine whether the Take Stock in College program is on target to meet objectives and metrics. This report highlights not only the program's achievements but also areas of strength and opportunities for growth.

The evaluation is based on existing research and the following data sources and analyses:

1. **Literature Review:** The UF Lastinger Center reviewed current literature on issues relevant to the foundational concepts, primary components, and structure of the Take Stock in College program (see Appendix B).

2. **Artifacts:** The UF Lastinger Center analyzed documentation generated by the Take Stock in College program, including evidence showing performance deliverables which were submitted to the Board of Governors.

3. **Qualitative Interviews:** The UF Lastinger Center conducted qualitative interviews with Take Stock in College students, postsecondary institution staff, and Take Stock in College program staff. (see interview questions in Appendix C). The primary goal was to learn about the ways in which the organization currently promotes, supports, and assists students toward degree attainment. A secondary goal of the interviews was to learn what the Take Stock in College program can do to support students in even more significant ways in the future. Participants' responses were analyzed to identify consistent patterns and themes.

4. **Student Data:** The UF Lastinger Center reviewed usage and participation information provided by the Take Stock in College program.

5. **Take Stock in College Student Survey:** The UF Lastinger Center examined survey data provided by the Take Stock in College program, which administered a survey in the fall semester of 2023 and the spring semester of 2024 (see sample survey questions in Appendix D).

Collectively, these data and analyses constitute observations of the Take Stock in College program's progress, implementation, and outreach at the mid-year point. The Quarter 1 and Quarter 2 data (of the 2023–2024 fiscal year) described progress on required deliverables and an analysis of data in response to the target evaluation questions. The data also served 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 beyond. Following the completion of the Formative Evaluation, the process advanced to its final stage, culminating in the production of this Summative Evaluation report.

Evaluation Process and Timeline

Evaluation Plan

Quarters 1 and 2, 2023

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 clarity of the evaluation process and procedures and to establish each team's roles. During these initial discussions, the teams set clear deadlines and expectations for 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 program model and ensures that the Take Stock in College program updates its programming according to the latest research.

Formative Evaluation

Quarters 3 and 4, 2024

The Formative Evaluation process focused on the collection and analysis of both quantitative and qualitative program data. The UF Lastinger Center analyzed programmatic statistics for the first two quarters of the 2023–2024 grant year, as provided by the Take Stock in College program staff. In addition, the UF Lastinger Center conducted interviews with twelve Take Stock in College program stakeholders.

Summative Evaluation

The final phase of the evaluation process is this Summative Report to be delivered at the end of the 2023–2024 grant year. This evaluation assesses whether the Take Stock in College program implemented the model with fidelity, met grant requirements, and achieved annual targets. The Summative Evaluation also includes surveys and interviews with stakeholders. It outlines recommendations on how the Take Stock in College program can continue to develop its areas of strength and includes recommendations for how programming may be improved in the future.

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 the 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 the Take Stock in College program has met all deliverables and achieved program goals for 2023-2024. Overall, it is recommended that the Take Stock in College program continue 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 (pg. 72) 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 literature supports the alignment of Take Stock's College program with evidence-based strategies proven to support postsecondary persistence, retention, and degree completion. The program utilizes well-supported strategies including coaching, financial support, and initiatives aimed at increasing student engagement and connectedness. The program model for Take Stock in College is structured in phases to Engage, Track, Connect, Coach, and help students Complete postsecondary programs; and mirrors the evidence-based practices designed to enhance positive student outcomes in higher education.	The continuation of research-based strategies within the Take Stock in College program is essential. The program should seek to create more opportunities for peer engagement, which is vital for enhancing student interaction and establishing a connected and supportive student environment. Improving the use of predictive analytics to anticipate student needs more effectively is another critical area for development. With refined data usage, the program can increase its delivery of more adaptive and tailored support to students. Integration between the Artificial Intelligence chatbot, Sunny, and the new Constituent Relationship Management (CRM) database, HOPEforce, will make vast improvements in this area. Additionally, continual data evaluation will likely yield deeper insights into supports that are most indicative of successful degree completion for various student populations.

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 the trend of exceeding expectations through the successful implementation of the Take Stock in College program model and connecting students to resources that support degree attainment/career certification.

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
To increase degree attainment/career certification, the Take Stock in College program employs a comprehensive support model that operationalizes five key components: **Engage**, **Track**, **Connect**, **Coach**, and **Complete**. The model allows the Take Stock in College program to engage students by delivering the following support resources: 1. Themed Weekly Programming Utilizing the PERSIST Curriculum 2. Sunny, the AI Chatbot – Text Nudging System 3. Take Stock Connect 4. Webinars 5. Take Stock in College Blog 6. Take Stock in College Newsletter 7. Take Stock in College Podcast 8. Success in Seconds 9. Social Media: Student Ambassadors – Postsecondary Degree Attainment Influencers Survey results show financial aid, academic advisement, and library services as the top three supports most accessed and requested by students.	Both interview and survey data reveal that the most frequently accessed and requested resources by students are financial aid advisement, academic advisement, and library services. Additionally, feedback from students consistently indicates a strong demand for support programs that facilitate their success as they transition into their professional careers after graduation. The Take Stock in College program should maintain its commitment to forging partnerships and broaden awareness of the resources available both on campus and within the community. This enhances the network of services available to students and preserves the program's objective of leveraging existing resources without duplicating services.

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 initiative has formed collaborative partnerships with Florida's 40 public colleges and universities. The program continues to refine its approach by developing its core components. These components, following the **Engage**, **Track**, **Connect**, **Coach**, and **Complete** framework, aim to enhance student persistence and facilitate degree completion. This approach has resulted in a persistence rate of (81%) for scholars from the high school graduating class of 2022 (see Table 14).	The Take Stock in College program may be able to increase its impact by continuing to monitor student persistence. This monitoring would help identify the strategies that most significantly contribute to postsecondary degree completion, with the aim of scaling successful approaches in future iterations of the program. The program should expand its use of data analytics to identify students who have either not enrolled or withdrawn from college or university and provide them with targeted guidance and support to facilitate their 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
The Take Stock in College program offers a growing network of services, enabling students to connect with a wide range of specialists and experts across colleges and universities. The financial commitment to the program is relatively modest when measured against the potential impact on students' future earnings and the consequent reduction in poverty among Take Stock in College students. This investment not only benefits the students directly but also has the potential to positively influence the outcomes for their future generations. Feedback gathered from interviews with students, staff, and institutional partners, as well as data from student surveys, indicates a highly positive perception of the Take Stock in College program's effectiveness. The program has been enhancing its operational efficiency by utilizing partnerships, artificial intelligence, including 'Sunny', the AI Chatbot, and predictive analytics tools. This integration of technology and collaboration has been instrumental in improving the program's responsiveness and effectiveness in supporting students and in enhancing student outcomes.	To maximize its effectiveness, the Take Stock in College program should continue to build on its existing partnerships with postsecondary institutions and further develop its technological tools, including 'Sunny,' the AI chatbot, and its data analytics capabilities. These enhancements are essential for providing support that is not only seamless and timely but also effectively targeted and efficient, and ideally customized to address the immediate needs of each student.

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, 2023		
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 125 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	Evaluation Plan Submitted.	✓	✓
7	Convene a Take Stock in College Expo at the TSIC Back-to-School Student Success Summit and invite 100% (40 of 40) of Florida public colleges and universities to attend to interact with all 45 Take Stock affiliates and network and engage with the Take Stock in College.	✓	✓
8	Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	✓
9	Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	✓

Table 3. Quarter 2 BOG Deliverables: Fidelity of Implementation

Quarter 2: October 1 - December 31, 2023		
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 125 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.	✓	✓
7	Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	✓
8	Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	✓
9	Take Stock in College will complete at least 10 in-person campus visits to strengthen postsecondary partnerships and/or conduct one-on-one student meetings/appointments per semester.	✓	✓

Table 4. Quarter 3 BOG Deliverables: Fidelity of Implementation

	Quarter 3: January 1 - March 31, 2024		
	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 125 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.	✔	✔
7	Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✔	✔
8	Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✔	✔
9	Big changes in FAFSA outreach campaign to update students and assist with annual FAFSA completion.	✔	✔

Table 5. Quarter 4 BOG Deliverables: Fidelity of Implementation

	Quarter 4: April 1 – June 30, 2024		
	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 125 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
7	Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	TBD
8	Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	TBD
9	Take Stock in College will complete at least 10 in-person campus visits to strengthen postsecondary partnerships and/or conduct one-on-one student meetings/appointments per semester.	✓	TBD

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 underrepresented, including many of the students served by Take Stock in Children, can face additional barriers to postsecondary success, persistence, and completion of their degree.

The UF Lastinger Center conducted an updated review of research findings on the latest advances in the fields of postsecondary success, persistence, and completion. 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.

- Earning a college degree or professional certification in the United States is associated with lower unemployment rates (Irwin et al., 2023; Ma & Pender, 2023; Schaeffer, 2022).

- 76% of employers are more likely to hire candidates who have earned professional certification in their field (Hanover Research, 2023).

- Those who earn a college degree have higher lifetime earnings than individuals with a high school diploma (Lobo & Burke-Smalley, 2018; Ma & Pender, 2023; Paulsen & Perna, 2019; Schaeffer, 2022).

- Individuals who earn an associate degree were more likely to be homeowners (Turk, 2019).

- Parental education level can extend educational and income advantages to future generations, including a benefit from first-generation college graduates to their children (Manzoni & Streib, 2019). This finding also holds for racially diverse students (Fry, 2021; Schaffer, 2022; 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.

- First-generation college students often have limited knowledge about the college-going process and experience financial hardship in efforts to pay for higher education (Caspar, 2015; Falcon, 2015; Moschetti & Hudley, 2014; Pratt et al., 2017).

- Hispanic students from families with low incomes frequently encounter challenges with accessing financial aid information to fund college attendance (de los Reyes et al., 2021; George-Jackson & Gast, 2015; Hurtado et al., 2020; Parker, 2021; Schaeffer, 2022).

- In a recent study, the most frequently cited reason for the cancelling postsecondary enrollment was inability to pay for educational expenses (Irwin et al., 2023; Parker, 2021).

- Research has shown significant correlations between income and enrollment, persistence, and degree attainment. Findings indicate that students from families with lower incomes are less likely to attend and persist in college and attain their degree (Bowne & Michalak, 2017; Parker, 2021).

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

Financial support pays off in degree attainment.

- Scholarships significantly increase college enrollment, college credits attempted, retention, and credential attainment (Bartik et al., 2015; Goldrick-Rab et al., 2016).

- The availability of grants and scholarships not only makes college more accessible to a broader range of students but also contributes significantly to their academic progression and successful degree completion (Bartik et al, 2015; Castleman & Long, 2016).

- Integrated approaches that combine financial aid with other forms of support (i.e., a blend of financial and non-financial assistance) greatly increases students' academic performance and the likelihood of graduation (Clotfelter et al., 2017; Page et al., 2016).

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

- Increased spending on instructional and student support services is positively associated with higher graduate rates (Chen, 2011; Hamrick et al., 2004; Webber & Ehrenberg, 2010).

- A study conducted on three college mentoring programs indicated that the programs with the highest effectiveness are those granted sufficient funding (NORC at the University of Chicago, 2021).

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

- The effectiveness of mentoring and coaching initiatives extends across a broad spectrum of ethnic and racial student groups (Simmons & Smith, 2020; Tram et al., 2022). One study demonstrated that mentoring and coaching interventions led to increased postsecondary enrollment, improved persistence rates, and higher degree attainment for participants in the intervention group when compared to those in the control group (Hallberg et al., 2022).

- Recent studies underscore the significance of tailored support and have shown an increase in persistence rates among Black and Hispanic students who participate in peer coaching initiatives (Arco-Tirado et al., 2019; Bettinger & Baker, 2013; Lisberg & Woods, 2017; Mahendra & Kashinath, 2022; Obiomon et al., 2022; Simmons & Smith, 2020).

- Matching students with mentors who share similar backgrounds, including factors such as race/ethnicity, age, gender, or academic interests, has demonstrated positive impacts on motivation, self-assurance, and the retention of first-year students (Dennehy & Dasgupta, 2017).

Connections are important for college success.

- Among underrepresented groups, especially students of color, their retention was significantly associated with their levels of social integration and active engagement in the academic community (Baker & Robnett, 2012; Rasco et al., 2020).

- First-generation students consistently voice a desire for connection and engagement beyond their classroom experiences (Hutson et al., 2022).

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

- Mentoring models that incorporate both virtual and hybrid approaches have proven to be effective in enhancing persistence and increasing degree attainment rates (NORC at the University of Chicago, 2021).

- 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" aimed at prompting FAFSA submission resulted in earlier re-filing of the FAFSA (Page et al., 2022).

Description of the Take Stock in College Program

During the 2023–2024 academic year, the Take Stock in College program served 7,458 students, a student population that is 100% from families with low incomes. 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 students can achieve success in college, careers, and life. One way it achieves these goals is by connecting Take Stock scholars with existing resources at each of Florida's 40 public colleges and universities. The Take Stock in College program is available to all Take Stock in Children program graduates 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 postsecondary experiences. Figure 3 illustrates the Take Stock in College program model.

Figure 3. Take Stock in College Program Model

Engage →	Track →	Connect →	Coach →	Complete ★
Primary methods of Student Engagement: • Text communication via AI chatbot • Shared resources through our virtual community and social media platforms (i.e., webinars, podcast, etc) • Peer support from Student Ambassadors	**Student Tracking:** • Fall & Spring student surveys • National Student Clearinghouse data pulls • Florida Prepaid scholarship usage annual survey • HOPEForce data integration (coming soon)	**Connecting students to resources:** • Utilizing collegiate partnerships • Take Stock in College team campus visits • Facilitating enrollment in college campus student success programs (i.e., TRiO, First-generation, etc.)	**Coaching Support:** • Virtual coaching sessions • FAFSA completion assistance • Professional development	**Postsecondary Degree Attainment:** Take Stock Nation Alumni Network Career and Graduate School Transition Support

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 7,458 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
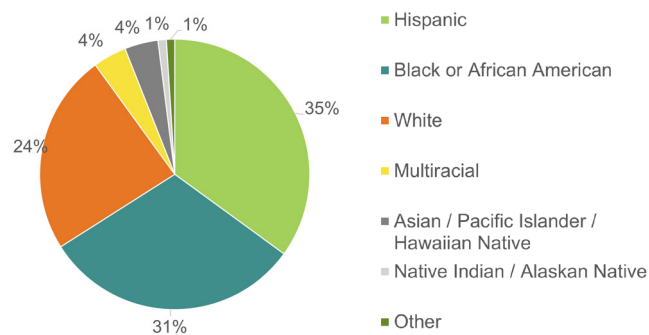
Table 6. Race/Ethnicity of Take Stock in College Scholars

Race / Ethnicity	Percent
Hispanic	35%
Black or African American	31%
White	24%
Multiracial	4%
Asian / Pacific Islander / Hawaiian Native	4%
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 2024 (see Table 8).

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

College/University Name	% Students Attended – Spring 2023
University Of South Florida	5.67%
St Petersburg College	5.62%
University Of Central Florida	5.48%
Valencia College	4.51%
University Of Florida	3.85%
Florida State University	3.59%
Palm Beach State College	3.19%
Miami Dade College	3.10%
Santa Fe College	2.99%
Florida Gulf Coast University	2.96%
Florida International University	2.61%
Florida Atlantic University	2.33%
Indian River State College	2.29%
University Of North Florida	2.24%
State College Of Florida, Manatee-Sarasota	2.21%
Hillsborough Community College	2.09%
Florida State College At Jacksonville	2.02%
Florida Southwestern State College	1.94%
Florida A & M University	1.78%
University Of West Florida	1.42%
Eastern Florida State College	1.37%
Tallahassee Community College	1.35%
College Of Central Florida	1.25%
Broward College	1.21%
Daytona State College	1.18%
Pensacola State College	1.03%

Florida Gateway College	0.90%
Seminole State College Of Florida	0.86%
South Florida State College	0.79%
Pasco-Hernando State College	0.68%
Lake-Sumter State College	0.66%
Gulf Coast State College	0.63%
St. Johns River State College	0.58%
The College Of The Florida Keys	0.46%
Polk State College	0.42%
Chipola College	0.40%
North Florida College	0.40%
Northwest Florida State College	0.31%
Florida Polytechnic University	0.21%
New College Of Florida	0.07%
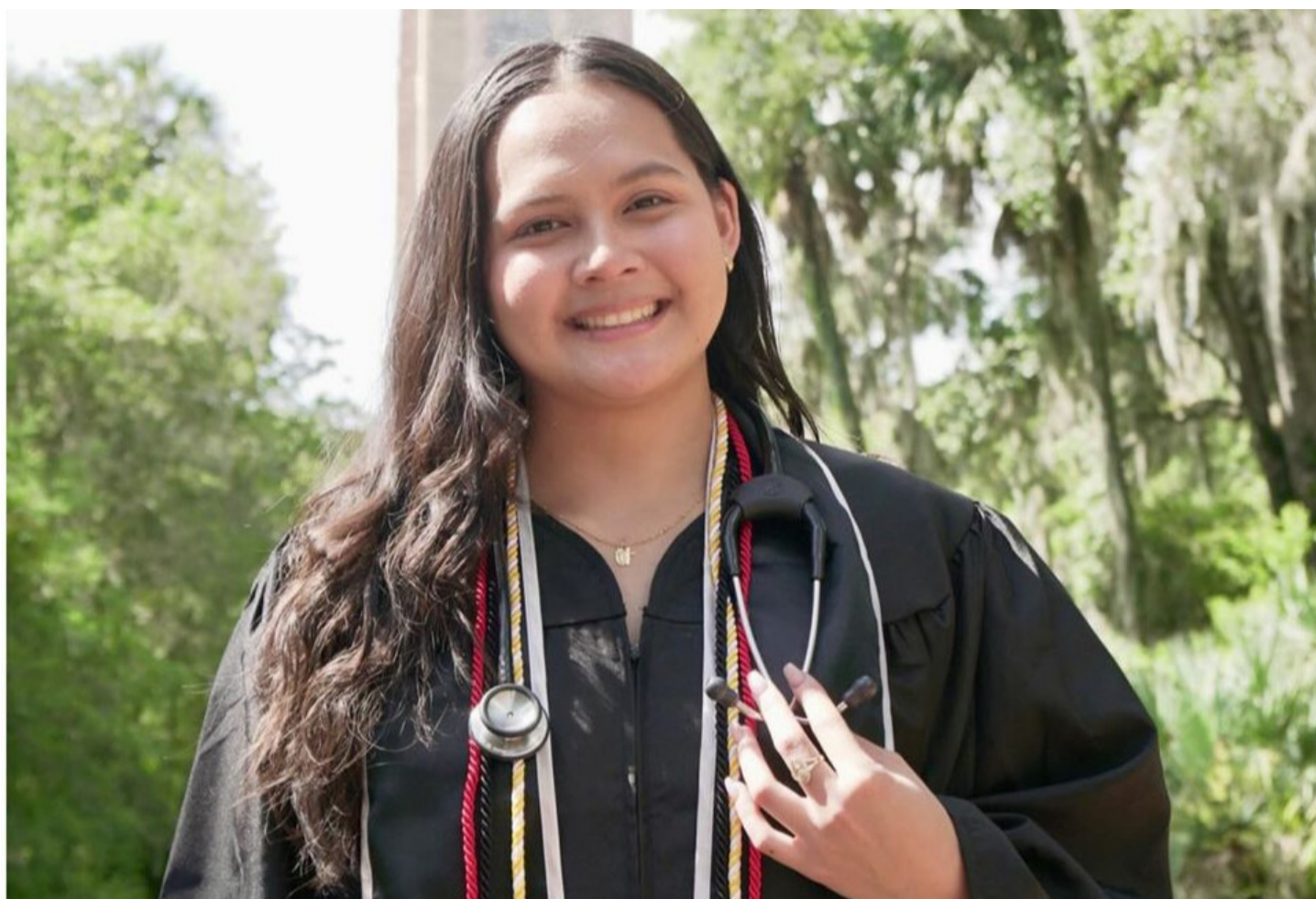
Program History

The Take Stock in College program, now in its sixth year, was a logical next step for the Take Stock in Children nonprofit organization. The Take Stock in Children nonprofit organization and 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, Take Stock in Children served 500 students in its 6th – 12th grade mentoring and scholarship program. 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. In 2018, the organization expanded 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 help students through the pandemic, navigate 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 navigating the campus, adjusting to college life, navigating course syllabi, utilizing on-campus resources, first-generation student success, goal setting, degree mapping, time management, career skills, and FAFSA preparation. Much of Take Stock in College's programming includes third-party expertise around financial aid, mental wellness, resilience, and academic success.

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

1. Themed Weekly Programming Utilizing PERSIST Curriculum

The Take Stock in College program uses the ECMC Foundation's PERSIST curriculum as a guide for programming to drive postsecondary retention, persistence, and success (see curriculum description for Quarters 1-4 in Appendix A). The Take Stock in College program offers comprehensive postsecondary retention programming through weekly outreach and engagement, which 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 the following areas: 1) Academic Progression, 2) Financial Support, 3) Institutional Commitment, 4) Social Involvement, 5) Academic Optimism and Self-Efficacy, and 6) Academic-Related Skills, 7) Social Support/ Interpersonal Skills.

2. Sunny, Artificial Intelligence Chatbot
- Text Nudging System

Since the inception of The Take Stock in College program, the program has utilized a text nudging system. In 2021, this system was advanced to an AI chatbot system. The Take Stock in College program continues to develop and refine the AI chatbot, also known as Sunny. The chatbot aims to move beyond the standard text nudging system to help supply students with targeted information and resources exactly when they need it through artificial intelligence. AI conversational support through Sunny is designed to strengthen persistence, decrease summer melt, and increase positive student outcomes.

> Script

Hey, it's me, Sunny! 😎 Don't forget that I am here to help you successfully get through this semester. Text #timetips if you need assistance with managing your time. You can also schedule a meeting with the Take Stock in College Team at https://mainst.ai/3t6K6cs if you need any other assistance!

4/4/2024 at 2:05pm

Appreciate yall for the help

> Understanding

😎 You're welcome!
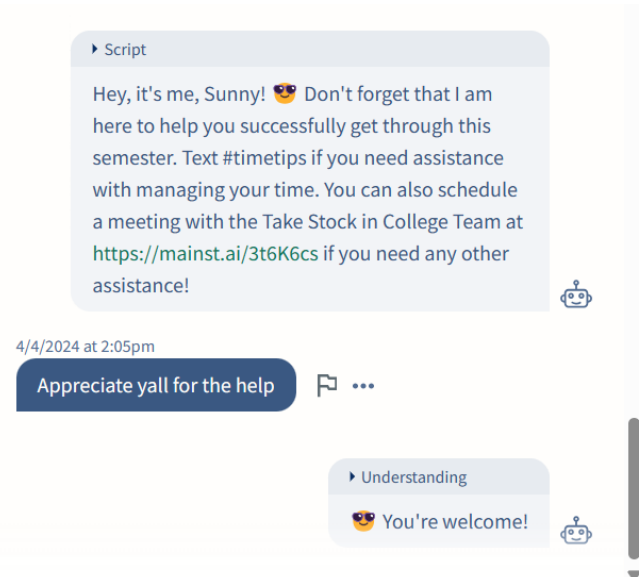
Sample Text Message from Sunny

Designed to promote postsecondary persistence, Sunny provides text message "nudges" that direct students toward successful behaviors. Nudging topics include motivational quotes, study tips, and connecting with on-campus programs and resources. Sunny also has the capacity to check in with students in real time to learn about issues that may impede individual students' educational success and provide vital connections to support resources and opportunities to connect with the Take Stock in College team for assistance with critical needs.

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 7,458 Take Stock in College scholars; 3) check-ins with students to learn in real-time about the challenges hindering their educational success and connections to needed resources; 4) a way to use data to identify needs 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, or the student asks a question to Sunny directly, and Sunny 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 supporting 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 support resources, online calendar, and support system. Students can contact Take Stock in College program 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. Additionally, resource folders are regularly updated with a wealth of newly added college completion support materials available for students to view and utilize. Through Take Stock Connect, students have access to podcasts, blog posts, videos, and archived files where they can review earlier materials.

Sample Take Stock Connect Post

4. Webinars

Take Stock in College 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 and Take Stock Connect. Each webinar lasts approximately ten minutes to an hour to accommodate students' busy schedules and often includes a guest speaker or presenter. For example, the Take Stock in College program shared an on-demand webinar for students to learn about opportunities "Beyond the Classroom." It highlighted experiential learning opportunities such as internships, studying abroad, and apprenticeships.

5. 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 adjusting to college life, learning how to develop and execute goals, financial strategies for college success, and much more. The blog covers topics affecting college life and dispels the myths that bar students from attaining degrees.

6. 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.

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 scholars advice on succeeding in college, career, and life. New podcast episodes are released every two weeks through Apple, Spotify, and Google Podcasts. Students can also access the podcast by creating profiles on Instagram, and participate in podcast discussions on the platform.

8. Success in Seconds

A new initiative in 2023–2024, *Success in Seconds*, was created by the Take Stock in College program to support success in college, career, and life for Take Stock in College scholars. Through "bite-size" video content, scholars are provided with guidance on a variety of topics, including why students should utilize their school's resources, what kinds of on- and off-campus services are accessible to them, and FAFSA prep tips. Take Stock in College releases new episodes every week via Take Stock Connect, the College Newsletter, and social media. In each episode, the program shares campus resources, strategies, and advice for success.
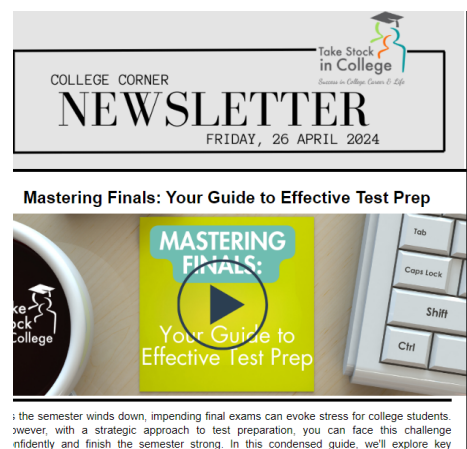
9. **Social Media: Student Ambassadors**
- **Postsecondary Degree Attainment Influencers**

The Take Stock in College program engages with students via social media. Social media platforms include Instagram, 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. The Take Stock in College team analyzes students' engagement with each platform to evaluate the effectiveness of social media outreach as a student support and intervention tool.

Leading the social media efforts for the Take Stock in College program, 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 a Student Ambassador. The Take Stock in College program Associate Directors work together 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 college 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.

In addition to coaching implemented by the Take Stock in College program staff, scholars receive peer coaching from Student Ambassadors who serve as "Postsecondary Degree Attainment Influencers." In sum, Student Ambassador outreach through social media and other activities aims to further engage students in campus life at each college or university.
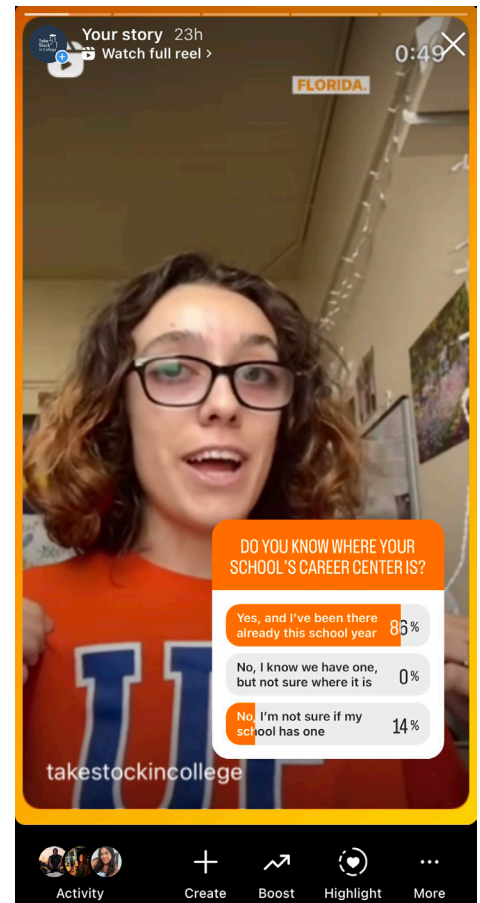
Track

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

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
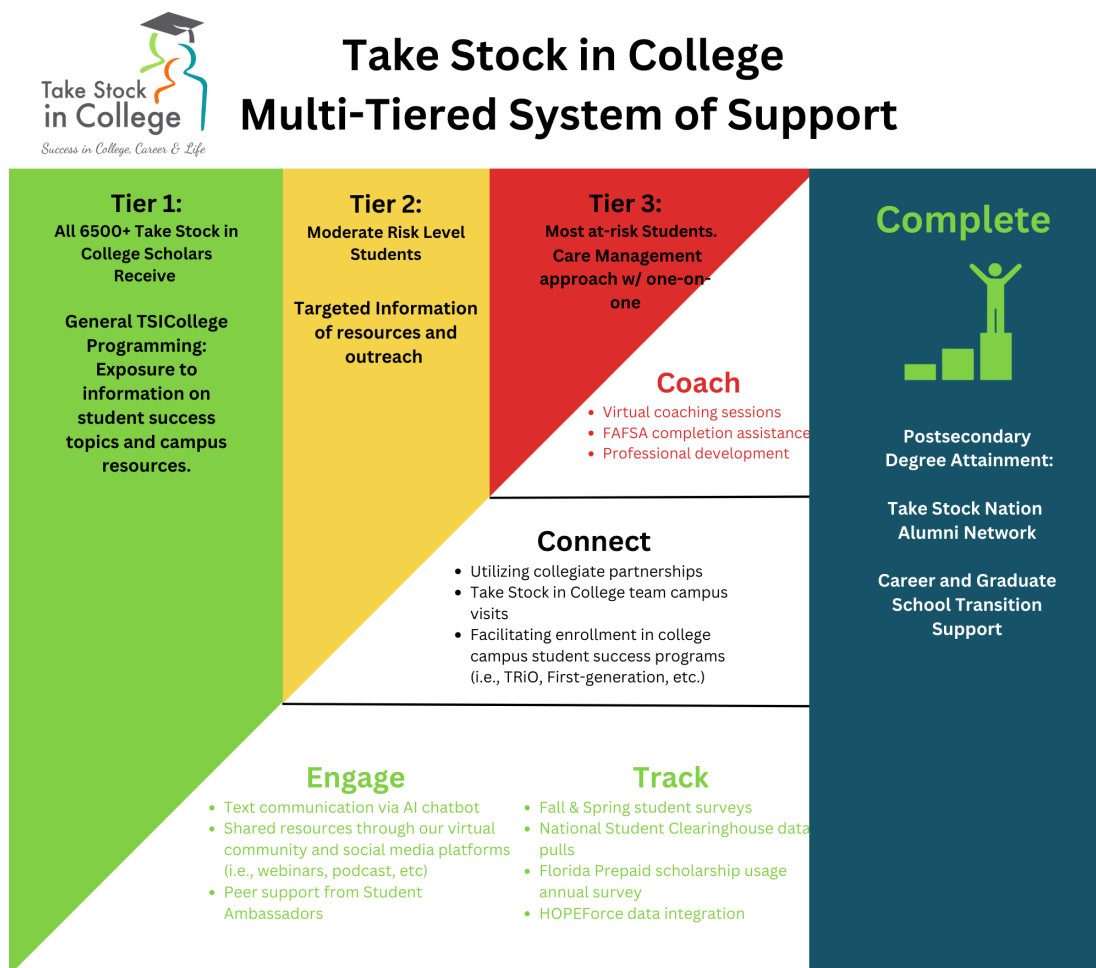
Tier 1- Includes all Take Stock in College Students
Tier 2- All Take Stock in College Students but also targeted student populations
Tier 3- All Take Stock in College Students but targeted to the most at risk student populations based on student needs.

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

1. Sunny, Sunny, the AI Chatbot - Gathering Data

Sunny, the AI chatbot, helps to quickly connect Take Stock in College program staff with students at risk of stopping out. Based on chat responses, Sunny can identify students who require intervention and alert program staff. Program staff can 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 experiencing depression or homesickness - Sunny can help connect the student to the appropriate campus support resources and alert program staff. This connection signaled through the virtual mechanism of "Sunny", helps provide students with personalized support enabling them to work through various obstacles hindering their progression toward postsecondary degree completion.

> **Script**
>
> Hi there Maria! 😎 Getting back to the grind after a long break can be challenging 🥳 It can be a lot to manage - getting back into the groove of classes and, for some of you, being away from friends and family back home. Even though I'm a robot, I love the feeling of being connected 💕 I'm curious, do you feel connected on campus or are you feeling a little homesick? Text back the number that best describes how you feel.
> [1] I'm getting adjusted to the new semester, so far so good!
> [2] Things are going okay, but I'm feeling a little homesick.
> [3] If I'm being honest, I'm struggling, I miss home and I'm feeling overwhelmed with the start of the semester
> [4] I live at home so I'm not homesick, but I'm having a hard time feeling connected to my campus 🤖
>
> **4**

This academic year, program staff created a series of risk assessment questions in alignment with PERSIST guidelines to help gauge student needs allowing program staff to be proactive in providing support. Risk assessment questions address topics such as food insecurity, lack of technology, housing insecurity, and registering for classes. Based on student responses, program staff proactively reach out to provide student assistance. Utilizing these risk assessment questions, Sunny serves as a tool to track student progress and obstacles through their postsecondary journey.

As the Take Stock in College program evolves, the program 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 to support being proactive rather than reactive. This strategic use of data (e.g., students' use patterns; and 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

type of "resources" of support, which could mean sending links to resource materials, or links to on-campus or off-campus supports; red, meaning they need more urgent one-on-one personal coaching support. Since HOPEforce is in the final building stages, program staff have been piloting the tiered system offline through the use of Excel tracking spreadsheets. This will allow the program to refine the implementation of tiered interventions based on risk levels from responses to the PERSIST questions prior to automation.

2. **National Student Clearinghouse Data**

The Take Stock in College team currently uses data from the National Student Clearing House (NSCH) to track student persistence and degree attainment pulled three (3) times a year – Fall, Spring, and Summer terms. 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. **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 each 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. Additionally, the Take Stock in College program receives data from the Florida Prepaid annual survey. Take Stock students must complete this survey each spring semester in order for their Florida Prepaid scholarship to be disbursed for the following fall semester. This survey is another opportunity for the program to receive student data.

Connect

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

1. 40 College and University Partnerships

The Take Stock in College program has developed partnerships with 40 public 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, the Take Stock in College program 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 universities.

2. Sunny, the AI Chatbot - Connecting to Resources

Since the beginning of the 2023–2024 academic year, Sunny's artificial intelligence knowledge base has been enhanced to include data collected from Florida's 40 public colleges and universities. The collected data includes institutional department website links like Financial Aid, Advising, and Career Services, as well as Student Life, and school deadlines. Additionally, the knowledge base is being built to include off-campus support resources such as food pantries and housing shelters. When students indicate a need, artificial intelligence connects students to on-campus resources, off-campus resources, and resource materials. The Take Stock in College program continues to build out the knowledge base to include valuable information to assist students in their postsecondary journey and make Sunny a "go-to" resource for students no matter the institution they attend.

3. 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. The Take Stock in College program's staff became individual members of TRIO. As a result of these memberships, Take Stock in College staff will now be able to keep up with statewide TRIO news, resources, and programming and share it with scholars through engagement and coaching resources. If appropriate campus resources are unavailable, the Take Stock in College program works with the students to find alternative community resources to meet their needs.

4. 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.

5. Take Stock in College Team Campus Visits

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.

6. 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 on-demand videos, informational pamphlets or infographics, activity handouts, and more. The resources are sent out through the weekly newsletter and Take Stock Connect. The program also shares these resources with students through targeted email and text communications. 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 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:

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. 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

College Student Coaching/Updating Student Information

One-on-One College Coaching sessions are useful for assessing 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. 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 journeys. These one-on-one coaching sessions really allow the team the opportunity to assist students with the most critical barriers to success, whether it is the need for mental wellness and resiliency 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.

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. **Postsecondary Degree Attainment: Career and Graduate School Transition Support**

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.

The Take Stock in College team has noted a rise in survey responses in the number of students aspiring to obtain graduate degrees. In the Spring 2024 student survey, 38% 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 coaching and support on their future academic endeavors and connect them with resources on their campus to help with the graduate school application process.

2. **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-two Take Stock in College program constituents: twelve students, which includes Take Stock in College scholars and Student Ambassadors, five 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 served 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. The Take Stock in College program employs evidence-based strategies that improve college persistence, retention, and completion.

2. The program provides opportunities for student engagement, peer learning, service, and support.

3. The Take Stock in College program offers resources to build financial literacy and financial support for continued enrollment and success.

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. Take Stock in College scholars desire structured, formal mentoring support while completing their postsecondary studies.
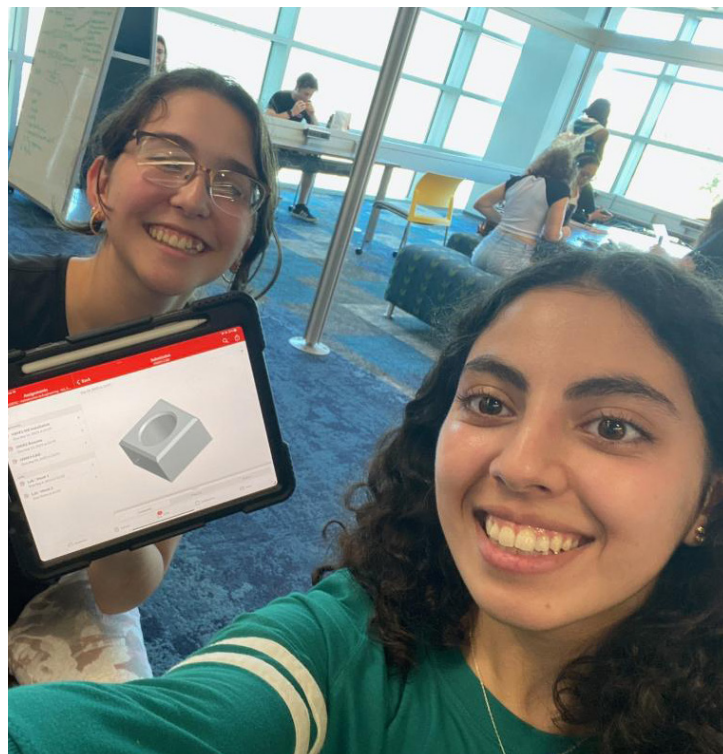
The Observations and Opportunities for Growth section (later in this report) provides additional details.

Table 9. Themes from Interviews

Theme	Description
1. Take Stock in College employs evidence-based strategies that improve college persistence, retention, and completion.	The Take Stock in College program team employs a multifaceted approach grounded in evidence-based best practices to maintain and enhance student retention and persistence. An array of communication methods is utilized, including virtual coaching meetings, text nudges, and other forms of outreach, all designed to engage students effectively and connect them with key resources available on their respective campuses. This proactive approach includes arranging follow-up meetings and maintaining a continuous line of communication to ensure that students have ongoing access to needed support and resources. Take Stock in College scholars shared how the continuous open lines of communication were useful in keeping them on track for graduation in multiple ways, including the following areas: financial aid, study resources, academic and tutoring support, health and wellness resources, and housing. *"They've provided a lot of additional ways to get help or a tutor. So, there was like a math program, writing assistance to check my essays and stuff like that....That [was] available to help me with school."* — **Take Stock in College Scholar** *"In the back of my mind, I always remembered, 'TSIC is there.' I got a text that said, 'If you need counseling or something like that, contact us.' So, I [did] ... I explained the situation and they jumped on it fast, told me what to do, and kept texting, calling, and checking-in on me. I'm now a senior. I'm going to graduate because of them."* — **Take Stock in College Scholar** *"The Take Stock in College office always provides tips and offers resources and says, 'You know, if you ever need to meet with us, or if you ever need professional advice about anything', they're always willing to set up a meeting."* — **Take Stock in College Scholar** Take Stock in College program staff routinely emphasized the importance of maintaining communication with their offices and encouraged students to remain in contact, regardless of their circumstances. Most scholars acknowledged that Sunny, the AI chatbot, was helpful with staying on schedule with important deadlines, including FAFSA submissions, course enrollment deadlines, advisor appointments, and exam week tips and resources.

Theme	Description
2. Take Stock in College provides opportunities for student engagement, peer learning, service, and support.	The Take Stock in College program has implemented a suite of tools and resources to maintain student engagement and foster academic success. These include specialized experts and subject-matter professionals across various fields to ensure students have access to an extensive repository of knowledge. *"As an ambassador, I have access to so many more resources and information that help me develop as I continue and support other Take Stock students."* **— Take Stock in College Scholar** Additionally, through the Student Ambassadors program, students are presented with opportunities to assume significant leadership roles, coupled with financial incentives for their dedicated service. Several Student Ambassadors have become spokespersons and representatives for the Take Stock organization, participating in the organization's campus tours, speaking at the program's annual summit, and sharing their stories at local Take Stock in College events. *"I want to be kind of a role model. I want to show other students that it's possible."* **— Take Stock in College Scholar** *"I want to show students that anybody can get a college degree and succeed, and it doesn't really matter what your background is."* **— Take Stock in College Scholar** *"I hope that my experience as a Take Stock Student Ambassador has motivated other students to kind of push themselves in college and find success."* **— Take Stock in College Scholar** Moreover, participants in the Student Ambassador program are afforded the chance to engage in professional development workshops and praised the practical utility of the information provided in those workshops. *"The advice, tools, and strategies Take Stock provides apply in real life, and I'm an outlet for spreading the word and helping others apply what I've learned."* **— Take Stock in College Scholar** Nearly all scholars who serve as Ambassadors voiced appreciation for the informal peer mentoring that exists among their groups, a result of their sharing information, tips, advice, and guidance with one another as they develop content to share more broadly with other members of the Take Stock community. All of these scholars engaged in ongoing communication with Take Stock staff, who offered guidance, direction, and support to facilitate their work and content development.

Theme	Description
2.Take Stock in College provides opportunities for student engagement, peer learning, service, and support. cont.	*"Honestly, it's really helped being a part of the ambassador program because I'm constantly in contact with like the main people in the Take Stock in College office and [they're] always providing tips and always offering the resources."* — **Take Stock in College Scholar** Ambassadors also reported being highly engaged in their professional development and work activities and spoke favorably of what they learned. Several scholars mentioned that their activities helped them develop important career and academic skills. *"Being an ambassador is like being on the fast-track to success because you learn so much information from researching the topics, explaining it in videos, and watching the videos of your peers."* — **Take Stock in College Scholar** Scholars understand that their research on diverse subjects, creation of electronic media content, roles as speakers, and collaborations with staff are all valuable career skills and that these experiences are instrumental in making them more attractive to potential employers when they are ready to embark on their professional careers.

Theme	Description
3. Take Stock in College helps build financial literacy and provides much needed financial support.	The Take Stock in College program provides a comprehensive suite of financial support measures to students. This support includes the provision of essential financial information, including reminders to complete the FAFSA, as well as the facilitation of informational webinars designed to guide students through managing their finances during college. College staff partners, postsecondary institution collaborators, and the students themselves have consistently emphasized the critical nature of financial considerations, particularly for first-generation students and those hailing from low-income backgrounds. Lack of financial information and resources can result in considerable stressors for students as they strive to complete their degrees or certifications. *"I think a lot of students… don't really set themselves up for financial success. Some of the decisions that we make in college can stick with us for the rest of our lives. And really, because going to college is hard when your financial sense isn't really that high. It's also just a good life skill to have."* —**Take Stock in College Scholar** *"I think financial literacy should be ongoing to avoid being blindsided by an unexpected event."* —**Take Stock in College Scholar**

Theme	Description
3. Take Stock in College helps build financial literacy and provides much needed financial support. cont.	The Take Stock in College program staff also offered financial assistance to scholars facing financial hardships that could impede their progress towards degree attainment. Even when students had stopped attending, staff members would reach out to extend re-enrollment support. *"She emailed me and mentioned that I still had scholarship funds available. At first, I thought it was a scam. The second email provided more information, and I looked into it to see if I might still have scholarship funds available for school. My impression was, once you leave school, you kind of lose a scholarship. She [said], 'No, it's still there.'"* **—Take Stock in College Scholar** *"I got all my financial aid paperwork and application submitted. They walked me through the entire process—as if I was attending for the first time all over again."* **—Take Stock in College Scholar** For some scholars, financial hardship alongside various life challenges made it extremely difficult for them to continue their education without proper guidance. Some scholars mentioned having experienced significant financial challenges along with serious illness or loss of a parent, and that it was not until they reached out to Take Stock in College staff that they experienced relief from those issues. *"Students are afraid to ask for support. So, we advocate for them and let them know we're here to assist with whatever issue they're facing. A lot of the time, it's financial hardship and they're just uncomfortable asking for help."* **— Take Stock in College Program Staff**

Theme	Description
4. Take Stock in College scholars desire for interaction and connection.	Take Stock in College scholars expressed a desire for interaction with their peers and routinely seek opportunities to connect and engage with other scholars in the Take Stock in College program. *"I would just love to participate in an on-campus event. They had an event at Bull Market recently. I wanted to go, but it was announced the day before. I'd have to schedule time off work in advance to attend. But I would love to meet and interact with other TSIC peers."* **—Take Stock in College Scholar** *"Having more of a campus presence would be nice. There's already a huge online presence. An on-campus office where students were welcomed to stop by if they need help would be cool."* **—Take Stock in College Scholar** *"I'm always willing to meet up with people and talk and connect with people who are also in Take Stock in College."* **—Take Stock in College Scholar** Students actively seek out ways to meet and interact with other Take Stock in College scholars on their campuses. Additionally, scholars interact with their statewide Take Stock peers virtually through an online community platform, Take Stock Connect. This platform allows scholars to engage with each other and Take Stock in College program staff.

Theme	Description
5. Take Stock in College scholars sometimes need support for social, emotional, and basic needs.	At times, Take Stock in College Scholars require assistance with social, emotional, and essential needs. Without support, their progress toward degree completion can be severely hampered. Several scholars mentioned having needed motivational support while completing their studies. *"I lost my mom a couple of months after I graduated high school. School slowly became less of a priority for me. I just wasn't myself. I got a call from Take Stock in College. [The staff member] said, 'I know you [experienced] family issues. I wanted to find out how you were and if you still had plans for school? So that moment, that call, motivated me to get started again. The fact that they're still there for me and willing to assist me. That goes a long way. It's just a grateful feeling. I took all this time off and they were still [there] to support me, instead of just … just giving up on me."* **— Take Stock in College Scholar** Some students encountered illness, family loss, home and food insecurity, and associated financial concerns. It was only when Take Stock in College staff reached out to them that they were able to pivot and restart their postsecondary journeys.

| Theme	Description
6. Take Stock in College scholars desire formal / regular mentoring support.	Having participated in the Take Stock in Children program in their youth, several Take Stock in College Scholars expressed a longing to have a formal mentoring program at the college level.
	"When you're in Take Stock in Children, you have to meet your mentor like once a week…There's nothing like that…. There's not like routine meetings unless you have specific questions." **— Take Stock in College Scholar**
	"If we got another mentor as we went on to college would be [useful] because we go into college and then we have all these questions. And I feel like having a mentor in college would help." **— Take Stock in College Scholar**
	"[TSIC does] the mentor program only [through] high school. But I'm pretty sure I'm not the only one that's [out] of high school [and] still [utilizing] the Take Stock mentor in college. Maybe they [could extend] the mentor program for adults." **— Take Stock in College Scholar**

Surveys

The Take Stock in College program created a survey to send to their postsecondary students at the conclusion of the Fall 2023 and Spring 2024 Semesters. The Fall survey included twenty questions, which took students an average of eight minutes to complete. The spring survey included forty-five 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 elicit student feedback 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, the likeliness of completion, and postsecondary support services (see Appendix D).

Of the 7,458 Take Stock in College scholars, a total of 1,298 scholars, or 17%, completed the survey in the spring. Student responses from the Spring Semester survey are presented below.

Survey Question: *Are you a first-generation college student, as defined as a student whose parents or parent did not receive a bachelor's degree?*

Figure 6.
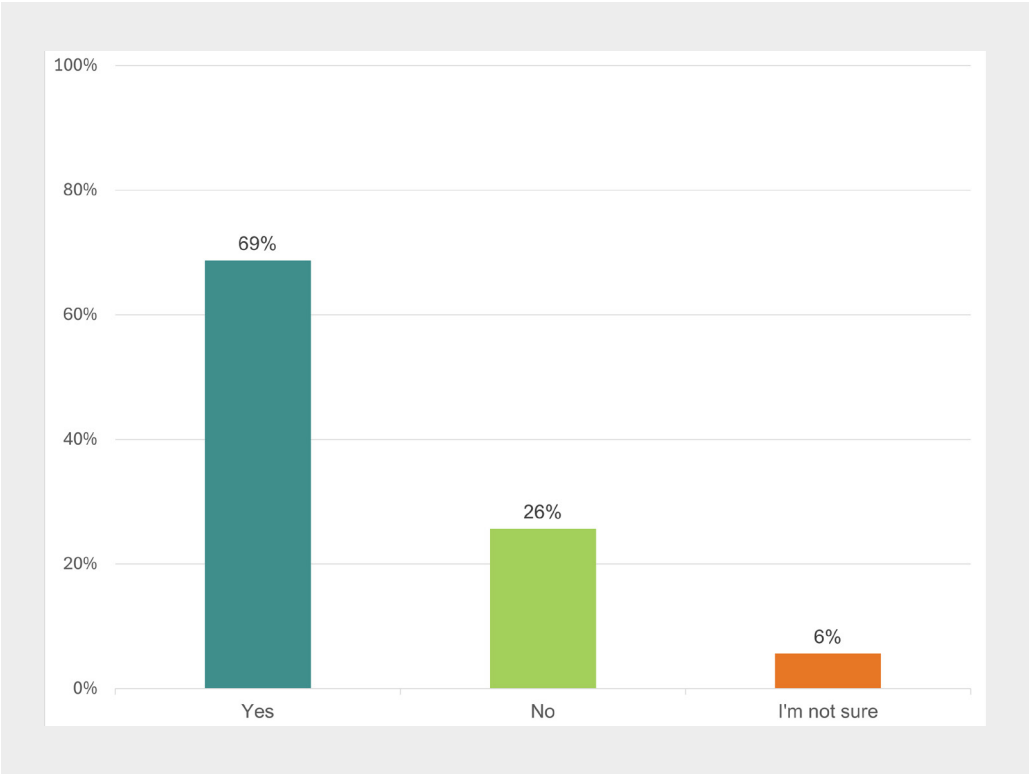
*Numbers may not sum to 100% due to rounding

A first-generation student is a student whose parents did not receive a bachelor's degree. In the survey, 69% of student survey respondents identified as first-generation in college. Throughout the 2023-2024 academic year, the Take Stock in College program staff held virtual coaching sessions for these students to connect them with first-generation resources, programs, and support departments on their college campuses. As a result of this support, these scholars utilized the resources for first-generation students on campuses, received additional academic support and tutoring, applied for additional scholarships and financial aid, and more. Even after being provided the definition of a first-generation college student, 6% of student survey respondents were still unsure if they were "first-gen."

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

Figure 7.
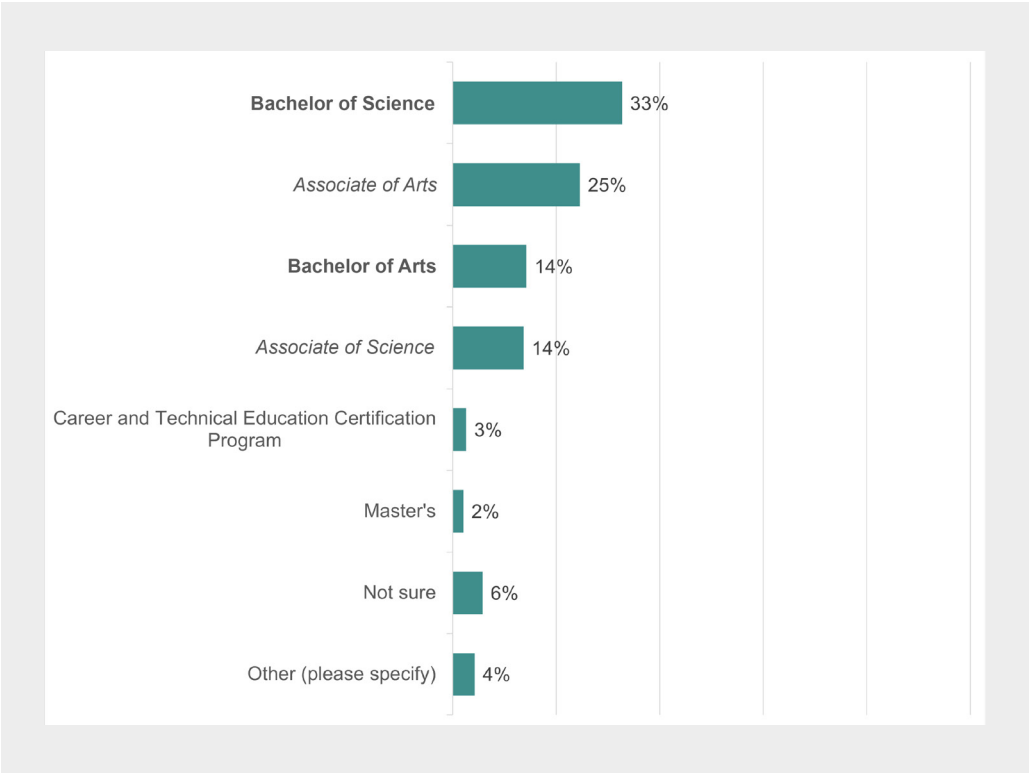
Numbers may not sum to 100% due to rounding

Of the survey respondents, most students (47%) indicated they are pursuing a bachelor's degree. This is followed by 39% of student survey respondents expressing that they are pursuing an associate's degree. This is a slight increase compared to last spring's survey data, where the number of students pursuing an associate's degree was 31%. In comparison, 6% of student survey respondents indicated they were unsure what degree they were pursuing. During coaching sessions, the Take Stock in College team met with many students to assist with their academic and career goals and connect them with campus resources to develop their educational plans. Whereas Figure 7 shows the degree a student is currently pursuing, it is important to mention that in Figure 8, students show the level of degree attainment they are looking to achieve, many of whom intend to move on to graduate school (38%).

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

Figure 8.
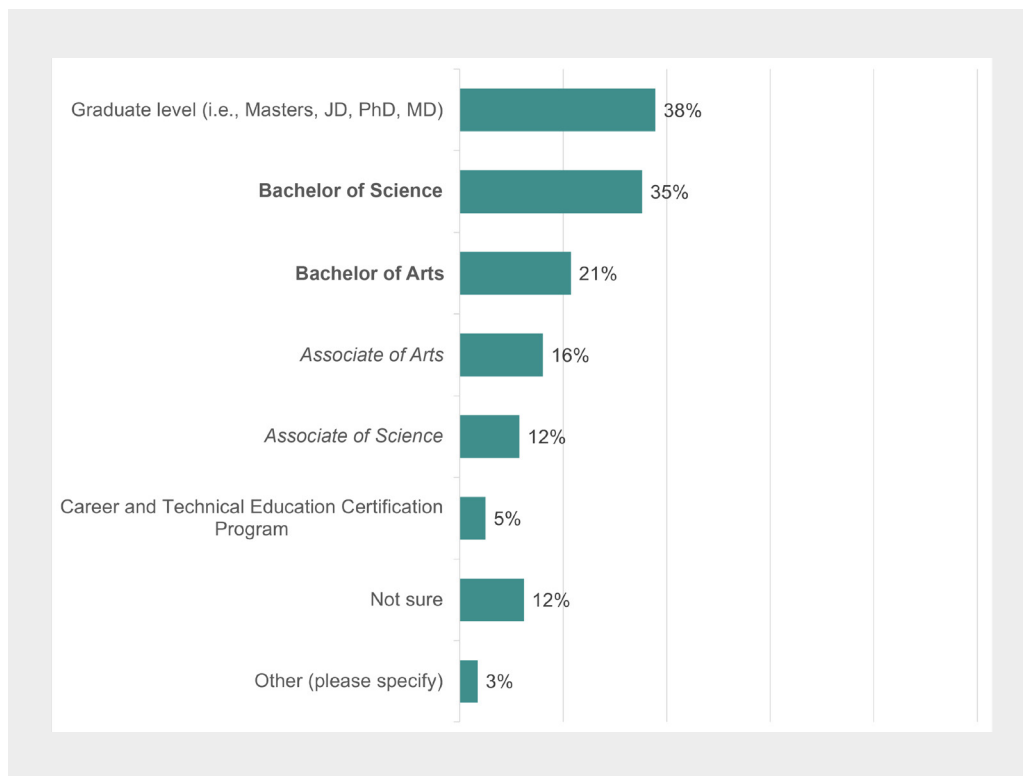
The student survey indicated respondents would like to obtain at least a bachelor's degree in the future (56%). About 38% expressed they would also like to obtain a graduate degree with master's level coursework and/or other professional degrees. Take Stock in College program staff meet virtually with scholars to assist with exploring educational options and helping students transition to higher levels of degree attainment, including helping to develop transfer plans, ensuring they are aware of requirements, and connecting them to campus professionals at their current schools and schools of interest.

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

Figure 9.

Full-time (12 credit hours or more each semester)
Part-time (11 credit hours or less each semester)
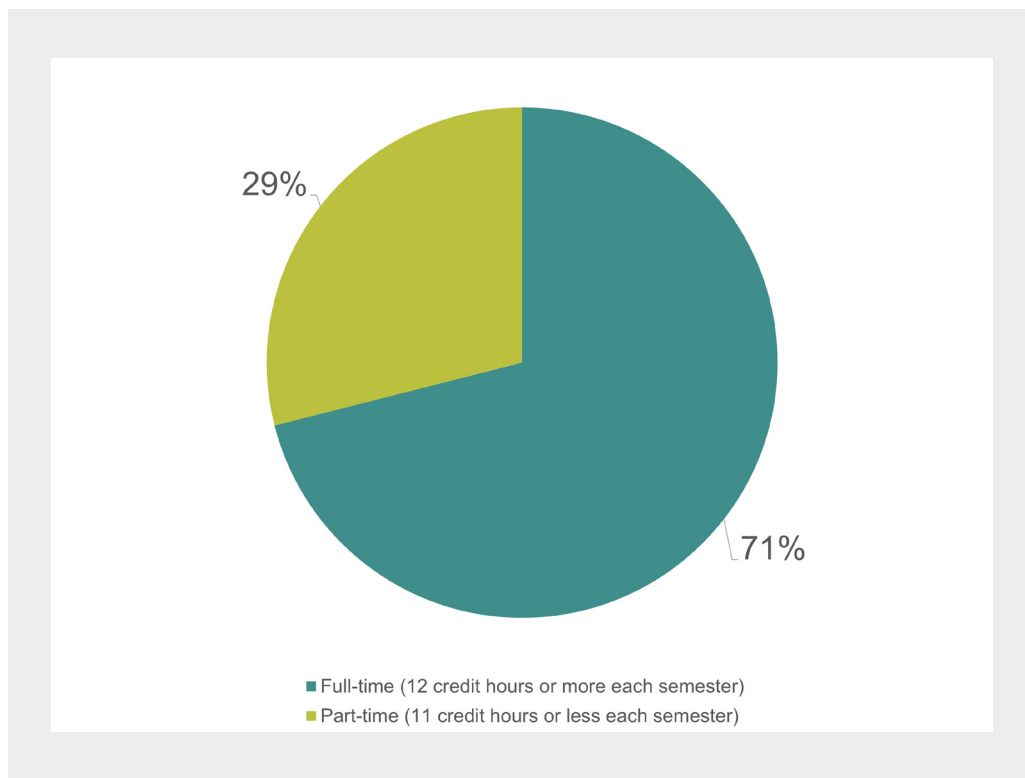
As Take Stock in College evaluates programming from year to year, the program needs to understand the number of full-time and part-time scholars. The survey provides a proper representation of Take Stock in College scholars, and of the respondents, 71% of students indicated they are full-time students having at least 12 credit hours or more a semester, and 29% stated they are part-time, which is 11 credit hours or less each semester. This represents a slight increase (1%) compared to last year's summative evaluation responses where 70% of students indicated full-time enrollment status.

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

Figure 10.
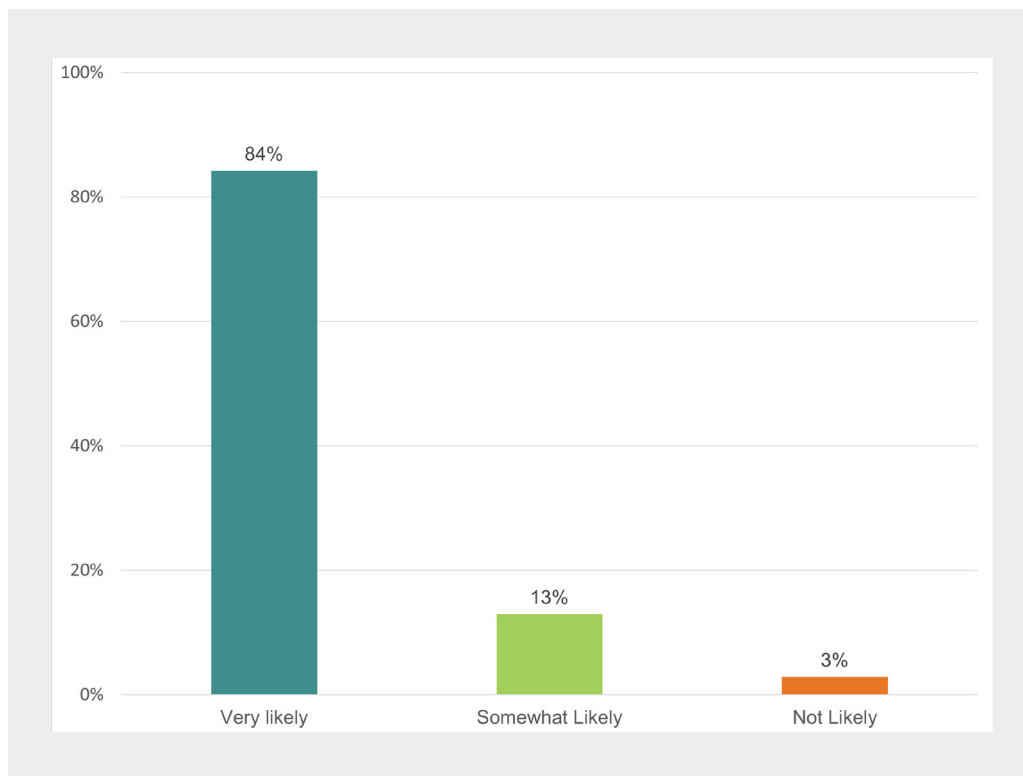
The great majority of student respondents (84%) indicated that it is very likely that they will successfully complete this year of study at their college or university. This spring survey reflected a small increase (1%) compared to last year's survey respondents. Fewer survey respondents (13%) indicated that they are somewhat likely to complete this year of study, a slight decrease (1%) compared to survey respondents last spring. The Take Stock in College team has implemented outreach initiatives to connect with students at risk of not completing the academic year, specifically the 3% indicating that they are not likely to complete the year of study. This one-on-one support is aimed at assisting students in completing the academic year and, for some, persisting to the next academic year. During these coaching meetings, students can discuss the barriers to their success and connect to campus resources to help alleviate issues they may be facing.

Survey Question: *Are you planning to return to college next semester (Summer or Fall 2024)?*

Figure 11.
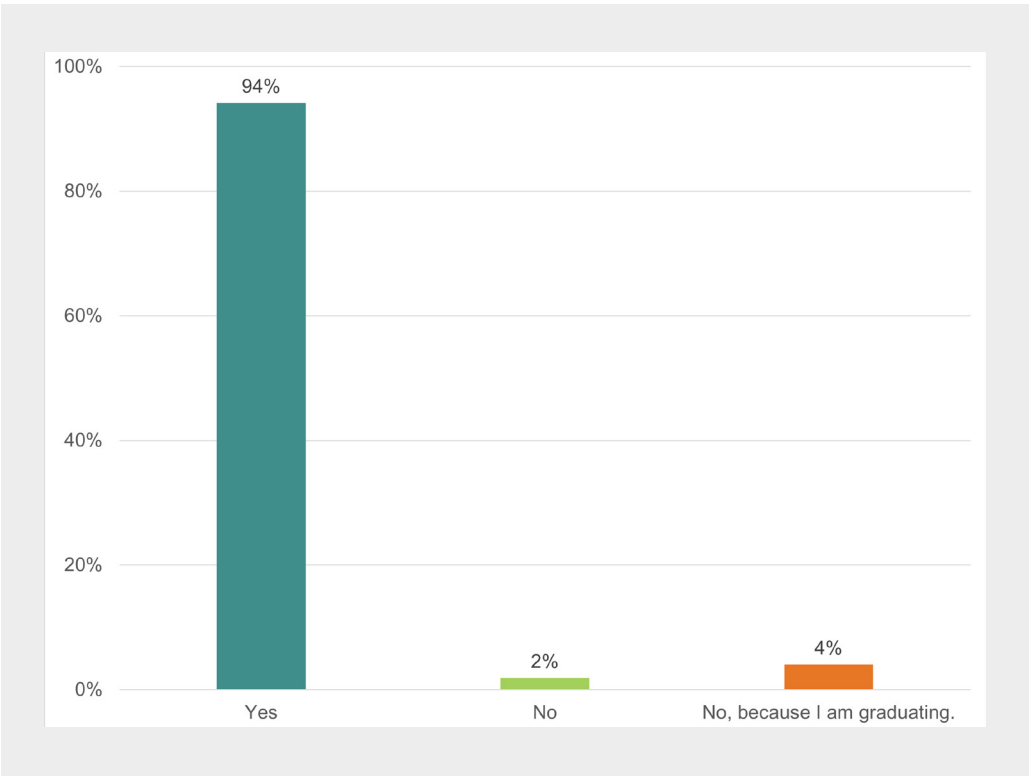
A key predictor of successful postsecondary degree attainment is the measurement of persistence, the percentage of students who continue to progress through their program of study. The overwhelming majority of students responding to the survey indicated that they planned to return to college next semester, whether in the Summer or Fall Semesters, to continue their studies (94%). Of the students who said they were not returning, 4% indicated they were graduating this semester. Again, the Take Stock in College team used the results of this survey question to provide targeted outreach in the form of one-on-one support to the 2% of respondents who indicated that they were not planning to return.

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

Figure 12.
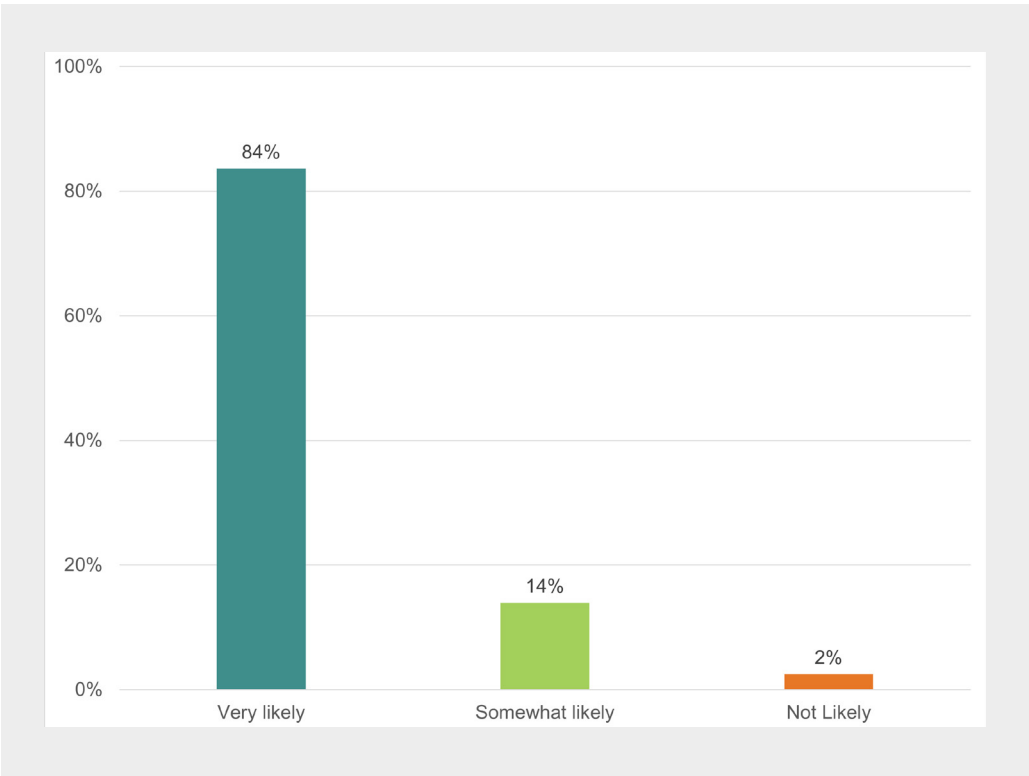
Moreover, in an effort to close the academic achievement gap, the Take Stock in College program aims to increase its scholars' postsecondary degree attainment rate. Of the students responding to the survey, 84% indicated that it is very likely that they will complete their two or four-year degree, an increase of 2% as compared to prior year respondents. Respondents indicating that they are somewhat likely to complete their degree declined from 16% to 14% when compared to prior year respondents. These are promising results as responses indicate that the Take Stock in College program is promoting a positive trend towards degree completion.

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

Figure 13.

5%

95%

■ Yes ■ No
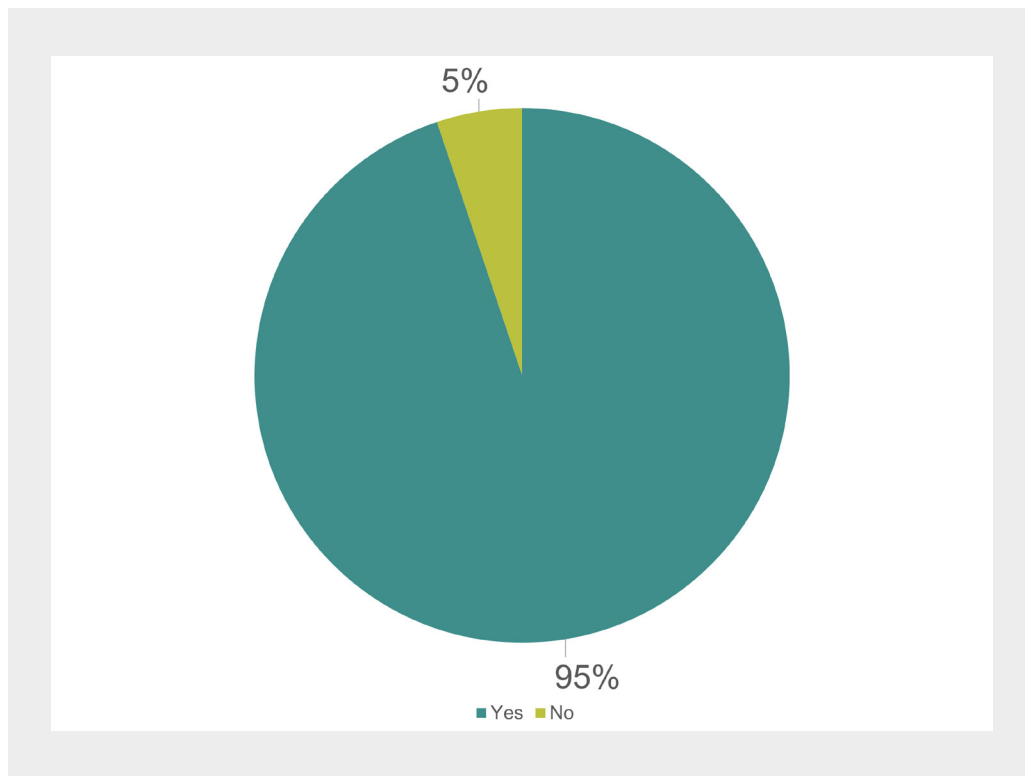
As an essential part of the Take Stock Continuum of Support model, the Take Stock in College program emphasizes the awareness of the program to students, especially during the transition from high school to college. The program continues to raise awareness of Take Stock in College support services and connections to campus resources offered to scholars. Of the scholars surveyed, 95% said they were aware of the Take Stock in College program and its role in helping their transition to college, support while in college, and connecting them to on-campus services. This is a high level of awareness among students, given that the program is only six years old.

Survey Question: *Did you participate in any Take Stock in College programming for the 2023-2024 academic year (ex: Take Stock Connect, podcasts, webinars, virtual coaching appointments, blogs, text messages from Sunny, etc.)?*
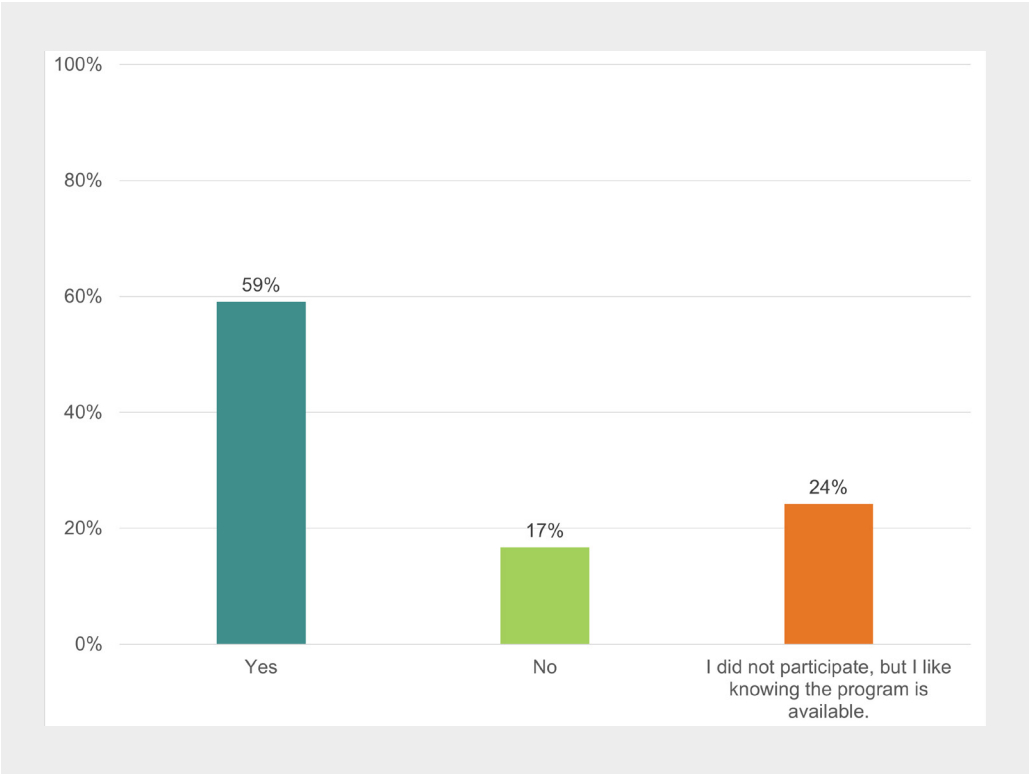
The Take Stock in College program provides comprehensive postsecondary persistence programming via a weekly themed outreach curriculum aimed at successfully engaging scholars. The program understands that its students mainly connect through their phones and virtually through email and social media platforms. When students were asked if they participated in any Take Stock in College programming for the 2023-2024 academic year, 59% of survey respondents indicated that they had participated in programming, and 24% stated that they did not participate but liked knowing the program was available. These responses show an increase of 5% in the students who participated when compared to last year's respondents. The Take Stock in College program continues to implement, refine, and provide intentional programming to guide students through their postsecondary journey and any obstacles they face in reaching degree or certification 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.
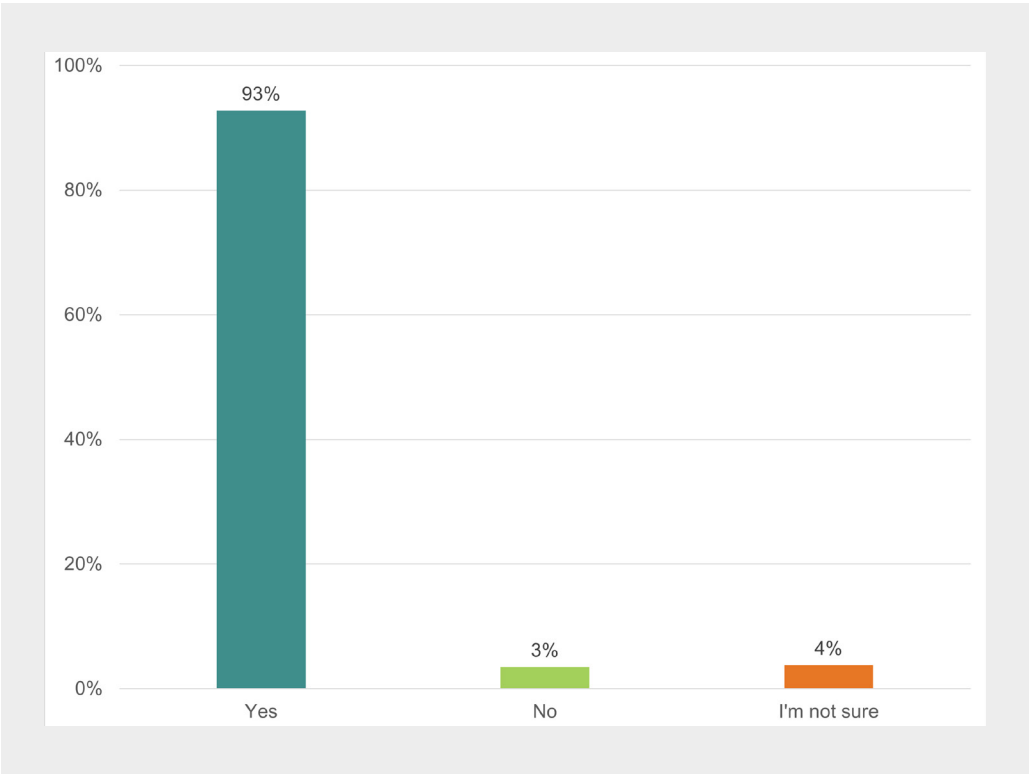
This academic year, the Take Stock in College program enhanced Sunny, the AI chatbot, by building out the knowledge base and developing the AI chatbot's persona, or Sunny's personality. Sunny can now connect students directly to important customized on-campus departments and services for each college and university via text, handing students a one-stop shop of information at their fingertips. Sunny also shares motivational and encouraging messages, important reminder nudges, and interactions to gauge student barriers and is available to students 24/7. Based on the survey, 93% of respondents stated they had received text messages from Sunny, the AI chatbot. The survey results have continued to increase year after year, showcasing expanded student engagement with Sunny, including a 3% increase from last year.

Survey Question: *If you participated in our text messaging with Sunny, please indicate how helpful you found Sunny to be.**
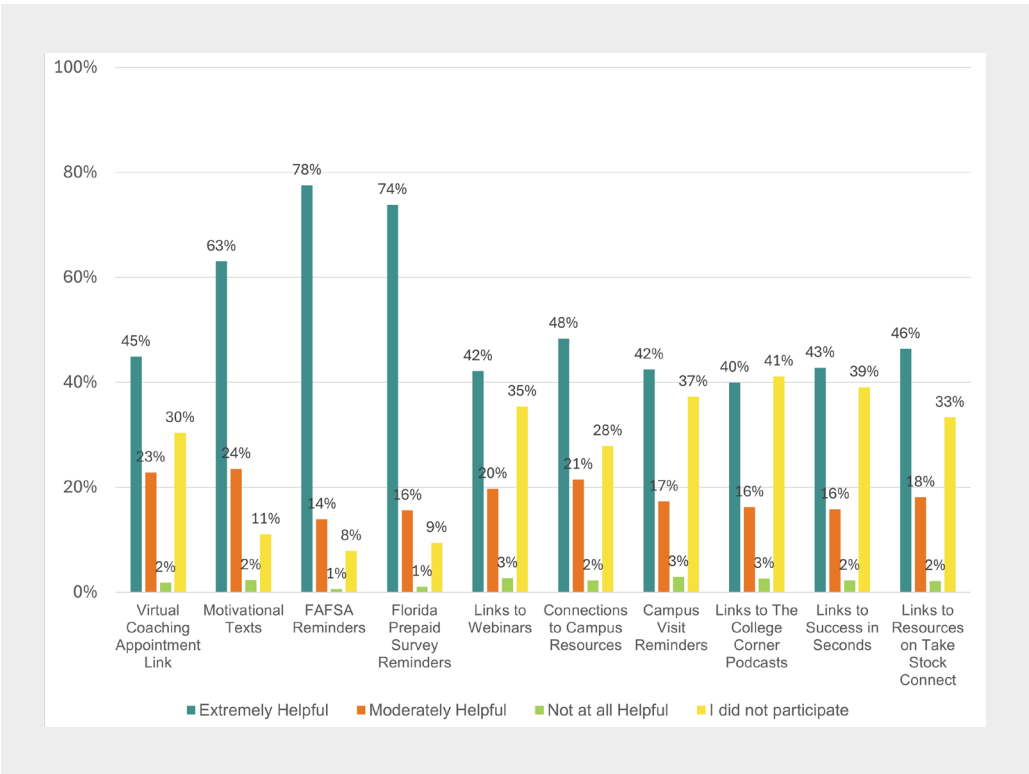
Sunny's text messaging capabilities are used for several forms of engagement with scholars, including FAFSA reminders, motivational texts, connections to campus resources, the link to book virtual coaching appointments, and links to different Take Stock in College resources like The College Corner Podcast, Success in Seconds, Webinars, and Take Stock Connect resources. Survey respondents indicated that each type of messaging was helpful, and many were extremely helpful. There was a noticeable appreciation around FAFSA Reminders (78%), Florida Prepaid Survey Reminders (74%), and Motivational Texts (63%).

Survey Question: *Please indicate all platforms, if any, on which you follow Take Stock in College.*
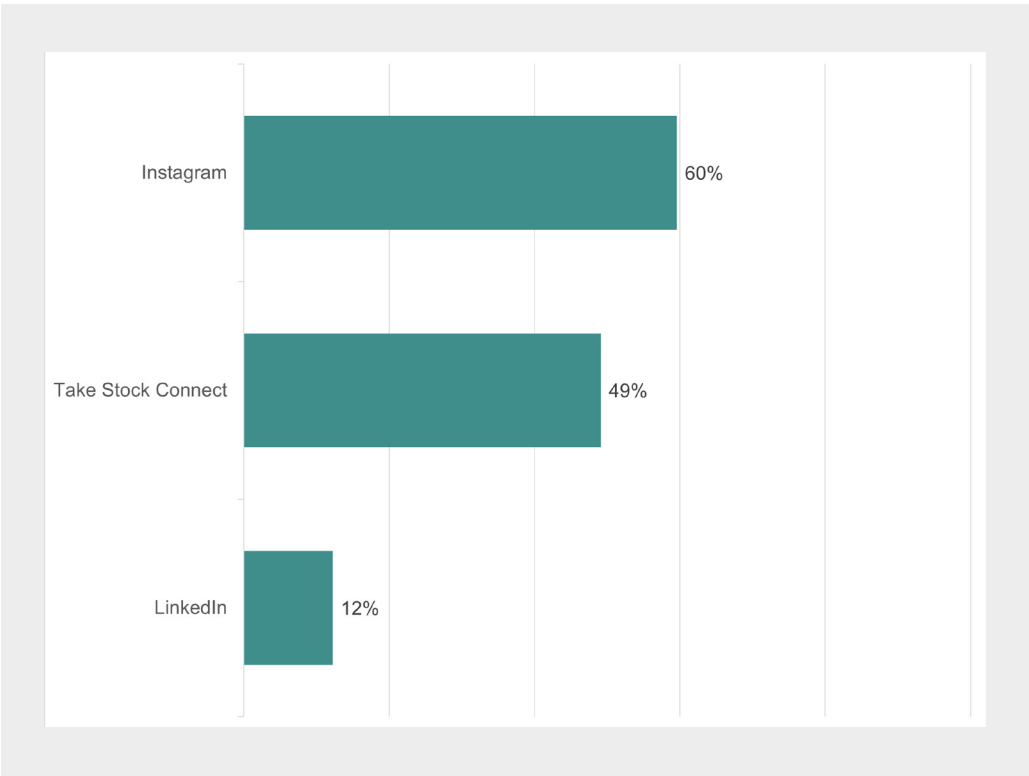
After reviewing student interactions with different platforms, the Take Stock in College program narrowed down its presence among three different social platforms for the 2023-2024 academic year. Of the scholars responding to the survey, Instagram was the most popular platform at 60%, followed by Take Stock Connect at 49%, and LinkedIn at 12%. Also, state law prohibits the use of TikTok, so the Take Stock in College program does not use TikTok to engage students even though many college-age students use the platform.

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

Figure 18.
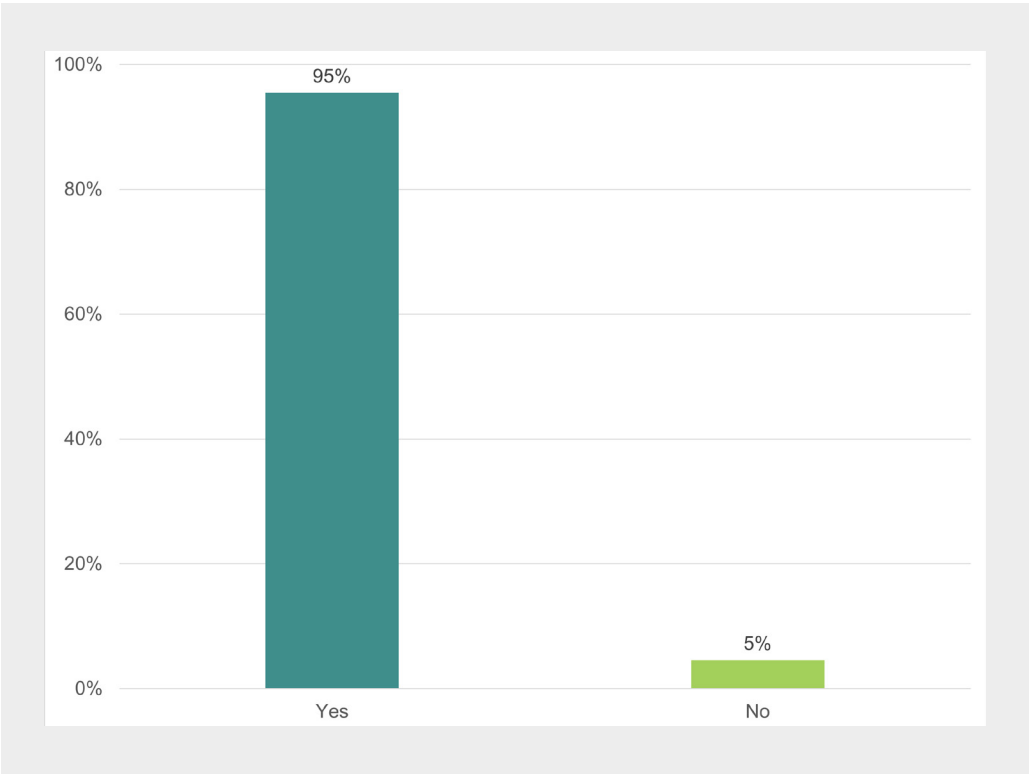
As indicated by the survey, 95% of respondents felt that the Take Stock in College program has made a difference in their collegiate journey. The Take Stock in College Program plans to continue its efforts to create innovative ways to connect and engage with Take Stock in College scholars with intentional programming. In addition, by continuing to grow its collaborative partnerships with postsecondary institutions and community organizations, the Take Stock in College program boosts persistence and achievement, positively impacting students' lives.

Survey Question: *Please select the on-campus postsecondary student support services, if any, that you have used.*
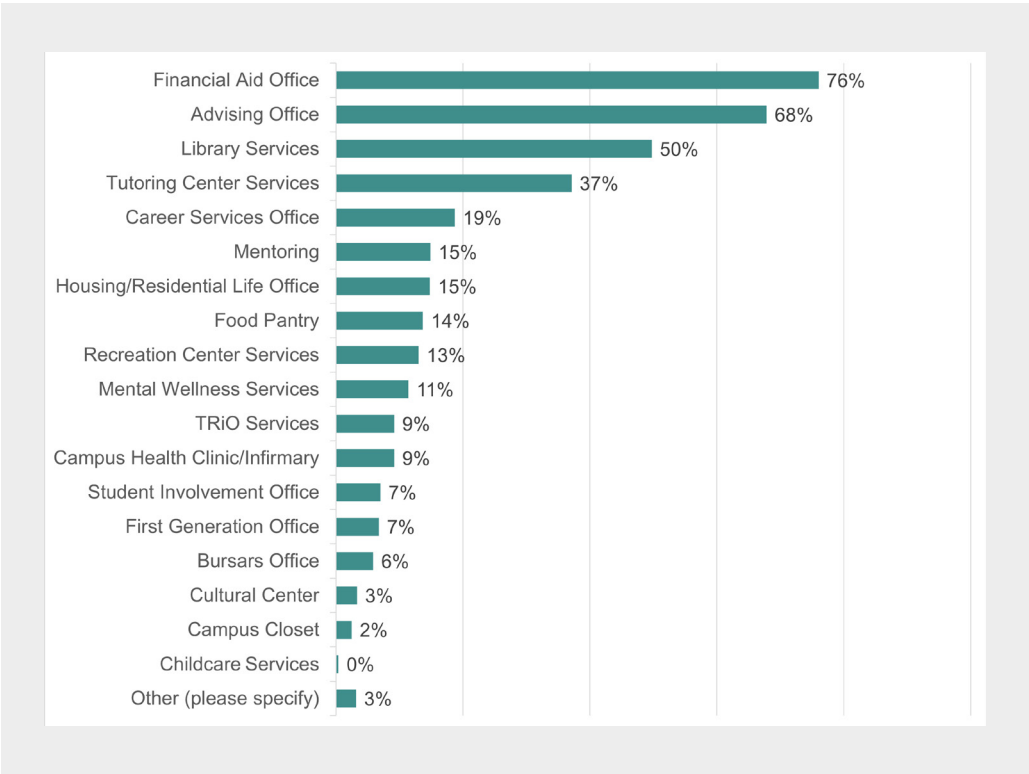
The Take Stock in College program addresses students' degree or certification completion challenges by connecting them to existing postsecondary support services and resources. Of the spring 2024 survey respondents, 76% used the Financial Aid Office, the most common support service. Students also indicated using the Advising Office (68%) and Library Services (50%). Despite direct Sunny messaging and nudges, the use of Career Services (19%), TRiO Services (9%), and the First-Generation Office (7%) were underutilized during the 2023-2024 academic year, which was surprising because communication about these resources was based on student feedback.

Survey Question: *What are you most concerned about right now?*
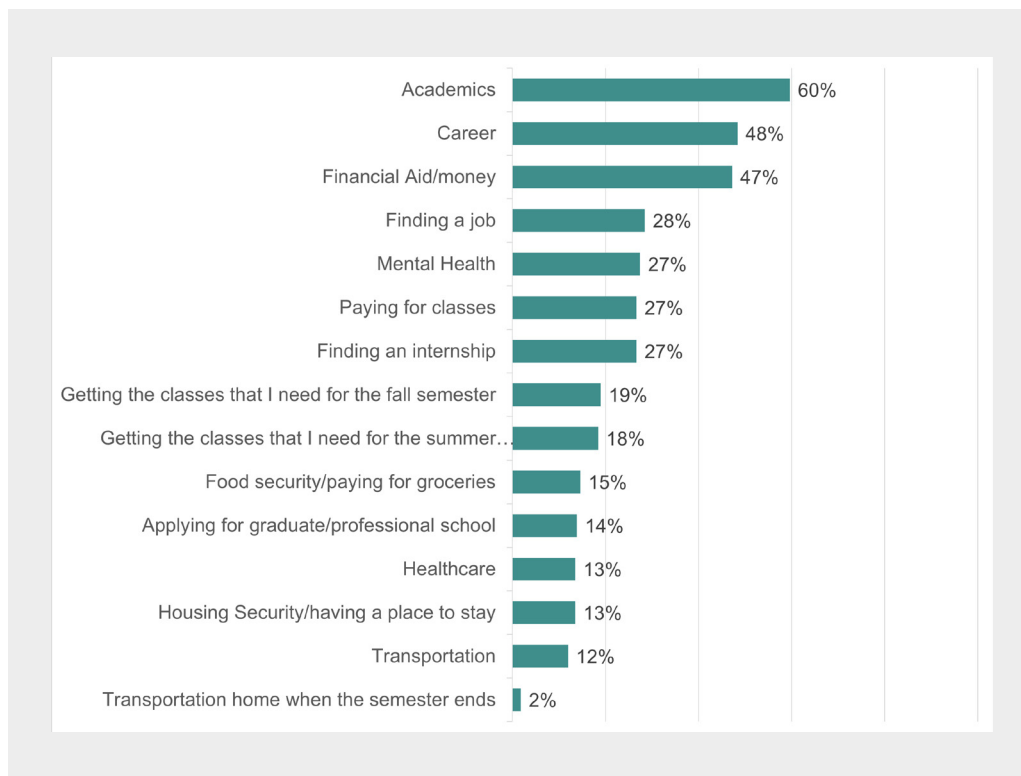
Knowing that student experiences differ, especially for those from economically disadvantaged backgrounds, the survey also elicited responses about what students are most concerned about. Take Stock scholars revealed that Academics (60%) were their greatest concern, followed by Career (48%) and Financial Aid/Money (47%). Although Career was one of the top three concerns, the number of scholars that visited Career Services was low (as shown in Figure 19), indicating an area where students may need additional assistance understanding available resources.

Survey Question: *What learning environment did you take classes in over the last two semesters?*
Figure 21.
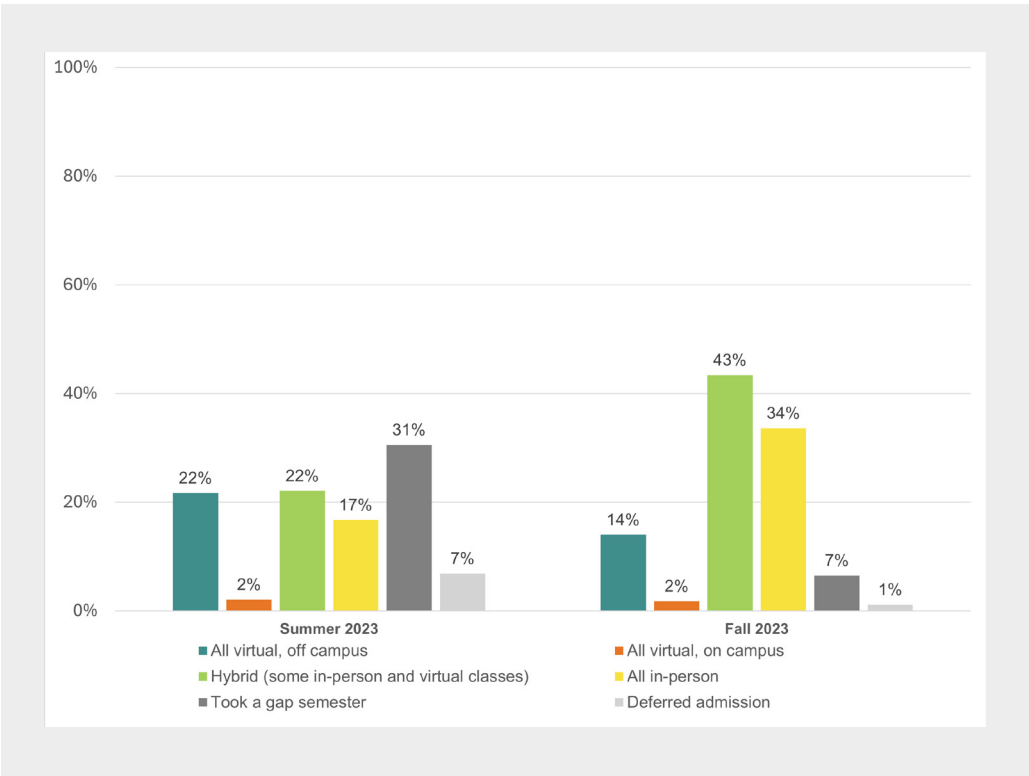
Numbers may not sum to 100% due to rounding

In the last two semesters, Summer 2023 and Fall 2023, the majority of student survey respondents indicated that they took classes each semester, whether the virtual, hybrid model, or in person, with 63% of respondents taking classes in the Summer 2023 Semester and 93% in the Fall 2023 Semester. For the Fall 2023 Semester, 43% of respondents noted that they took classes in a hybrid modality, followed by in-person (34%) and all virtual, whether on or off campus (16%). These survey results highlight that access to technology is vital for postsecondary studies.

Survey Question: *Do you personally have adequate technology for college?*
Figure 22.
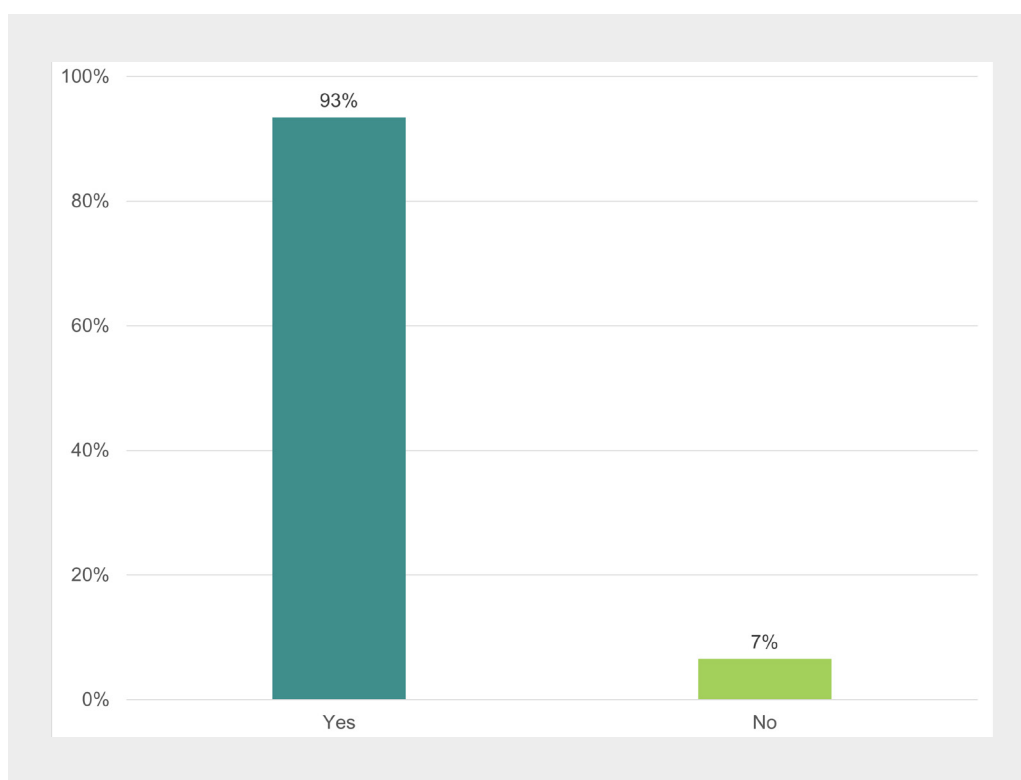
Fortunately, the majority of survey respondents (93%) indicated they had sufficient technology for college.

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

Figure 23.
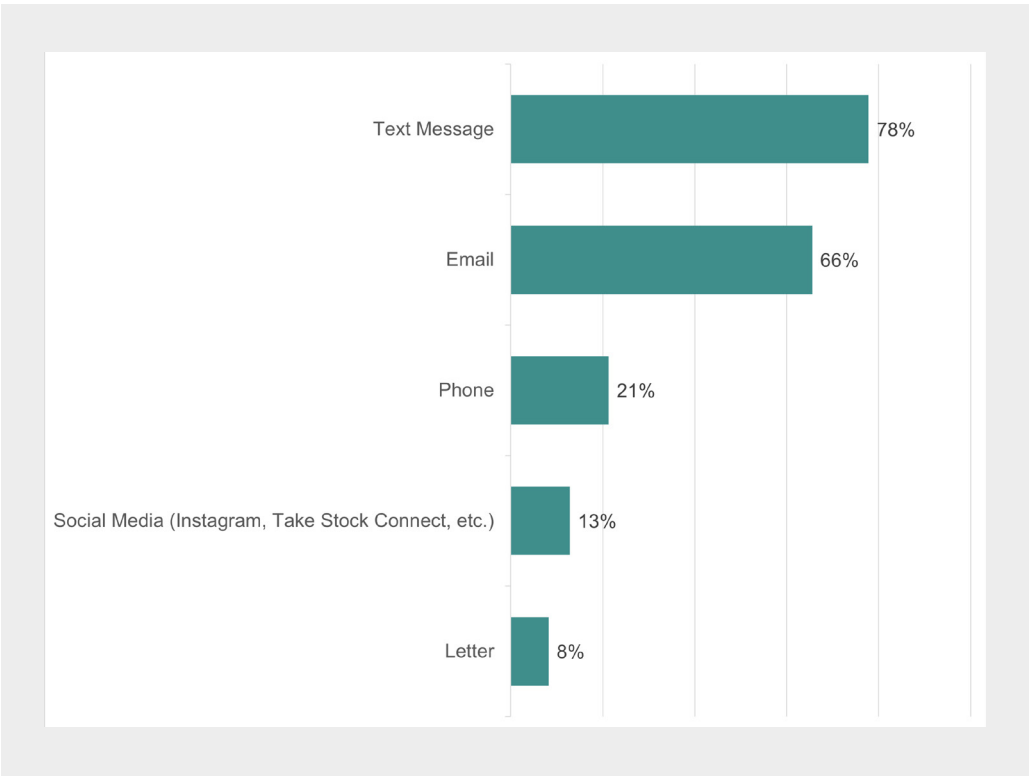
The Take Stock in College program uses a multi-faceted communication strategy to engage with its scholars. This strategy is tailored to deliver information in shorter, more easily consumed portions, meeting students, especially Generation Z, on their preferred platforms. When Take Stock scholars were asked how they prefer to receive communication, 78% responded that they prefer to receive text messages, 66% prefer email, 21% prefer phone, and 13% prefer social media, as described above (e.g., Instagram, Take Stock Connect).

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

Figure 24.
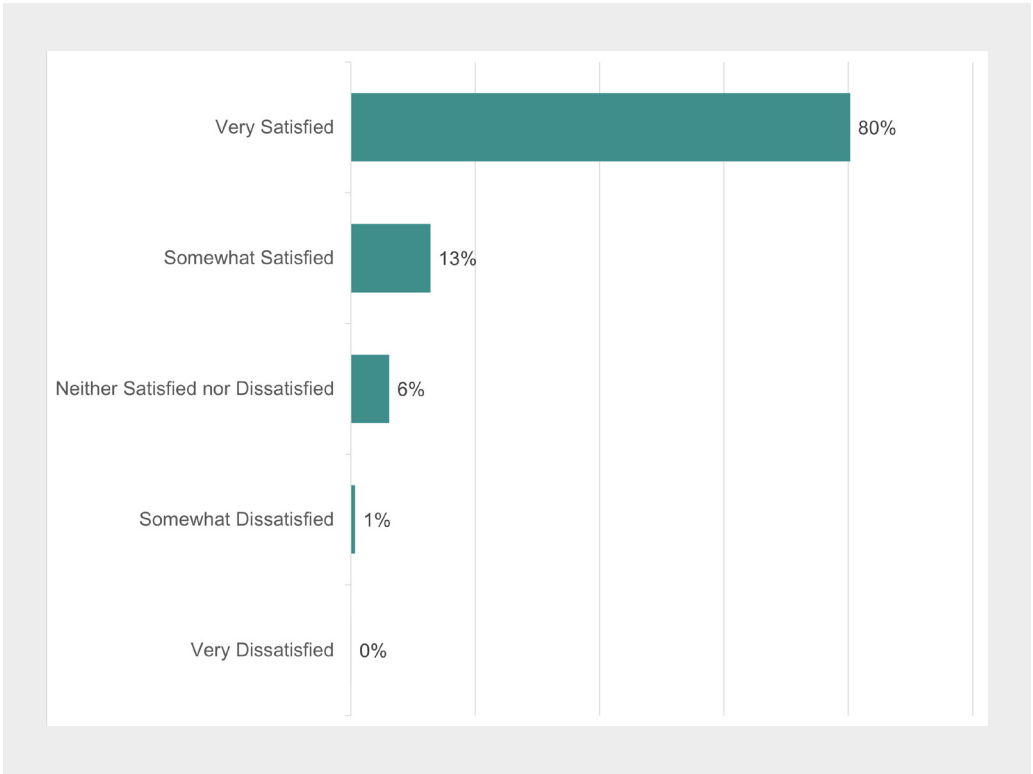
*Numbers may not sum to 100% due to rounding

Among the Take Stock scholars surveyed, 93% indicated they were overall satisfied with their experience with the Take Stock in College Program. This was a slight increase of 1% in comparison to last year. These results align with the Take Stock in College program's goal of connecting students to resources and supporting their success in achieving degrees or career certifications.

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

Thank you for everything; I would not be able to have made it this far without the help and support from Take Stock in College.

Katelyn S.

I think some kids are not meant to go to traditional college, and I'm one of those students! I am going to a technical college because I'm a "hands on" person and I think it's great that Take Stock will help further education in any kind of capacity to further all students to succeed in life.

Jacob N.

The Take Stock representatives have been so helpful in my college experience and they even do a great job on checking up on you with a quick call, text message, or email.

Mayra A.

The staff has been helpful in the last few months when I had to leave school for personal/ financial or housing hardship.

Christopher B.

I am internally grateful for Take Stock in College, and their commitment to my education.

Rachel N.

I really love the useful tips; I find this program very useful and helpful for students such as myself that aren't financially capable of paying for full tuition.

Macy I.

I love Sunny messages.

Leticia M.

I really appreciate all of the Take Stock in College resources that they have available, especially the text messages that I received from Sunny.

Jennifer O.

I enjoy being in this program because of how helpful it is.

Lakeva J.

Overall, this program is so helpful, and has helped me tremendously with my collegiate journey.

Medjine E.

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

The UF Lastinger Center completed an updated examination of research literature, identifying strategies that support college enrollment, enhance retention, encourage persistence in postsecondary education, and facilitate degree attainment. A brief summary is included below. For the full review, please refer to Appendix B of this report. The findings in this evaluation indicate that the Take Stock in College program model effectively integrates research-based best practices.

Key Indicators To Improve Postsecondary Success, Persistence, And Completion

Several core factors have been confirmed by current research to be key elements in improving postsecondary success, persistence, and completion.

Instructional and Student Support Expenditures

Research indicates that institutional factors, including levels of institutional spending and expenditure on student support services, are linked with higher graduation rates. For instance, an analysis of three college mentorship programs demonstrated that programs with robust financial support tended to be the most effective. The findings highlight the essential role that adequate funding plays in program efficacy.

Involvement and Engagement (Feeling Connected)

Social support and active involvement are critical factors in retaining college students. This is particularly true for first-generation students, those from low-income backgrounds, and underrepresented groups, including Black and Hispanic students. More specifically, the decision to persist in or withdraw from college is primarily dependent on their successful academic and social integration within the institution.

Connections through Technology

Over the past three years, the Take Stock in College program has focused on developing and integrating virtual and hybrid coaching models. These initiatives have produced promising outcomes, affirming their effectiveness in boosting student persistence and supporting degree completion. In addition, these technology-driven methods serve as alternatives for students with demanding schedules, allowing them more opportunities to engage in activities that foster connections with peers.

Research has validated the effectiveness of text message-based communications delivered through platforms like Sunny, the AI chatbot, in providing critical information and guidance to college students from low-income households and underrepresented groups. These strategies have significantly improved the academic outcomes for these student populations. Additionally, the research highlights the benefits of targeted text messages covering key topics such as financial aid, FAFSA renewal, and maintaining satisfactory academic progress, which have proven pivotal in boosting student persistence rates and facilitating successful financial aid renewals. Ensuring that FAFSA renewals are submitted on time is a critical factor in securing continuous financial aid and access to diverse funding mechanisms for students. Uninterrupted financial support plays a significant role in families' decisions to enroll in college and in allowing students continuous enrollment (Dickler, 2024; Federal Student Aid [FSA], 2024; National College Attainment Network [NCAN], 2024). According to the FSA (2024) and NCAN (2024), there is a notable decline in error-free FAFSA completions by high school seniors, with current data showing a 40% drop from the previous year. Similarly, FAFSA submissions that require corrections to be processed are down by 27% compared to this time last year. The Take Stock in College program invests considerable resources and programmatic efforts to proactively engage with students to ensure that FAFSA applications are submitted promptly and correctly each year.

Programs and Courses for Specific Student Populations

- **Coursework**: Targeted coursework to support underprepared students, as well as university-operated STEM programs, have been identified as key factors in improving retention rates among female, Black, and Hispanic student populations.

- **Mentoring and Coaching Programs**: Research supports the role of peer mentors in aiding students' adjustment to college, which includes help with course enrollment and campus orientation, leading to better academic results. Faculty mentors also play a pivotal role by offering expertise in academic fields and providing essential research and career guidance, which are key to achieving college persistence and success. The research further highlights that coaching, particularly for non-traditional students, significantly improves attendance and persistence rates. Evidence also shows that both peer and personal coaching contribute to enhanced academic performance.

Family and Student Attributes

Research findings suggest that factors such as familial support, student motivation, and coping strategies play a significant role in academic success and persistence. The provision of additional support to students, especially those who are first-generation college attendees and from low-income families, has proven effective in enhancing their persistence and increasing degree completion rates.

Comprehensive Supports

Findings from recent research demonstrate that providing students with both financial and non-financial support can lead to significant academic gains. This integrated approach has been associated with substantial improvements in credit accumulation, academic progress, completion of degree programs, and increased GPA levels.

Financial Support

Studies on financial aid for higher education underscore the importance of providing students with financial support structures like scholarships and grants. These financial resources consistently enhance student persistence by facilitating higher enrollment rates and improving degree completion outcomes.

1. **Scholarships**: Scholarships, such as the Florida Student Assistance Grant (FSAG), have a positive impact on academic attendance and success. Specifically, the FSAG has been effective in increasing both credit accumulation and the completion rates of bachelor's degrees within six-years.

2. **Grants**: Providing students with additional aid has been linked to higher GPAs and improved probabilities of attaining a bachelor's degree. This support not only bolsters academic performance but also enhances the likelihood of undergraduate degree completion.

3. **Incentives**: Offering incentives to non-traditional students and those from low-income families has yielded positive outcomes, enhancing enrollment rates, increasing the number of full-time enrollments, and boosting credits earned. These measures have proven to be effective strategies for supporting diverse student populations in their academic pursuits.

Opportunities For Growth

The Take Stock in College program offers a comprehensive suite of support aimed at fostering student persistence, well-being, and successful degree completion. This includes evidence-based strategies such as coaching, financial assistance, and initiatives to enhance student engagement. Enhancing the program by increasing opportunities for peer interaction, mentoring, and coaching programs could further boost academic success and retention rates, strengthening overall program effectiveness.

The Take Stock in College program employs predictive analytics to optimize student support strategies. This method utilizes historical data, statistical modeling, data mining, and machine learning to forecast educational outcomes. Sunny, the AI chatbot, is undergoing continuous improvements to its knowledge base to better personalize support for students. There is ample scope for further advancements in Sunny's capabilities to provide more precise, individualized support directly aligning with the specific needs of students. This could lead to higher rates of college success and increased degree completion. Additionally, continuous data analysis will provide deeper insights into the supports that most effectively lead to degree attainment.

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, 2023		
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 125 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, 2023		
Quarter 1 BOG Deliverables	**Submitted to BOG**	**Approved by BOG**
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 — Evaluation Plan Submitted.	✓	✓
7 — Convene a Take Stock in College Expo at the TSIC Back-to-School Student Success Summit and invite 100% (40 of 40) of Florida public colleges and universities to attend to interact with all 45 Take Stock affiliates and network and engage with the Take Stock in College.	✓	✓
8 — Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	✓
9 — Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	✓

Table 11. Quarter 2 Deliverables: Fidelity of Implementation

Quarter 2: October 1 - December 31, 2023		
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 125 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.	✓	✓

Quarter 2: October 1 - December 31, 2023		
Quarter 2 BOG Deliverables	**Submitted to BOG**	**Approved by BOG**
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.	✓	✓
7 Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	✓
8 Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	✓
9 Take Stock in College will complete at least 10 in-person campus visits to strengthen postsecondary partnerships and/or conduct one-on-one student meetings/appointments per semester.	✓	✓

Table 12. Quarter 3 Deliverables: Fidelity of Implementation

	Quarter 3: January 1 - March 31, 2024		
	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 125 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 3: January 1 - March 31, 2024		
Quarter 3 BOG Deliverables	**Submitted to BOG**	**Approved by BOG**
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.	✓	✓
7 — Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✓	✓
8 — Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✓	✓
9 — Big changes in FAFSA outreach campaign to update students and assist with annual FAFSA completion.	✓	✓

Table 13. Quarter 4 Deliverables: Fidelity of Implementation

	Quarter 4: April 1 – June 30, 2024		
	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 125 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

Quarter 4: April 1 – June 30, 2024			
	Quarter 4 BOG Deliverables	Submitted to BOG	Approved by BOG
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
7	Maintain and expand Points of Contact at 100% (40 of 40) of Florida public colleges and universities to connect TSIC students with existing supports and replace points of contact as needed due to position turnover.	✔	TBD
8	Collect at least 15 student impact statements documenting formal connections of programmatic impact between students and the Take Stock in College program.	✔	TBD
9	Take Stock in College will complete at least 10 in-person campus visits to strengthen postsecondary partnerships and/or conduct one-on-one student meetings/appointments per semester.	✔	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.

Observations

In the previous grant year, the Take Stock in College program streamlined and refined the program's operational framework, organizing the program components into five core areas: Engage, Track, Connect, Coach, and Complete. These key program components are outlined below and detailed in the Program Strategies section (p. 33). The components are uniquely designed to support students as they navigate their pathway to degree attainment or career certification. Each of the program activities that follow is structured to encourage, promote, operationalize, or support one or more of the five key program components to:

1. **Engage** – to spark student engagement through technology and innovation channels by capturing student attention and influencing behaviors conducive to positive student outcomes.

2. **Track** – to track student status utilizing data integration and technology tools, including student surveys, National Student Clearinghouse data, and the Florida Prepaid Scholarship annual survey to ensure students receive appropriate levels of support.

3. **Connect** – to utilize strategic partnerships established with Florida's public colleges and universities ensuring scholars have access to on-campus and off-campus resources and services supporting their postsecondary success.

4. **Coach** – to give virtual or in-person aid to students to navigate a successful college-going process.

5. **Complete** – to ensure students reach postsecondary degree attainment or career certification, and support students' transition into life after college, be it into the workforce or advanced education.

The key takeaway is that the Take Stock in College program has developed and delivered an array of technology-enhanced support mechanisms that are diverse enough to meet a wide range of student needs and interests.

Rapid innovations in technology have ushered in a new era in student engagement. The advances have redefined how students connect and interact on and off college campuses with their peers, instructors, support staff, and other academic community members. Accordingly, the Take Stock in College program has made efforts to keep pace with the ever-evolving socio-technological environment. As detailed in the Take Stock in College program description, the Take Stock in College program has developed and continues to develop and utilize a suite of multimedia resources, social media, and virtual communication platforms to both enhance student engagement and involvement. These platforms also allow the Take Stock in College program to gather useful student-level data to inform decision-making centered on proactive student support and improving student outcomes.

Program Components: Supporting Students In Their Journey Towards Degree Attainment

The Take Stock in College program has established various ways to facilitate student engagement in activities designed to promote college success. During interviews conducted with Take Stock in College students, it became apparent that students' unique needs lead to varying patterns of interaction with program activities. For instance, some students assumed the role of Student Ambassadors, representing the program and supporting their peers. Other students actively participated in the Take Stock in College program's virtual events, such as informative webinars. Additionally, some students sought guidance and interaction with Sunny, the AI chatbot. In contrast, others relied on updates and content their fellow Student Ambassadors shared to stay informed about program initiatives.

Student Engagement Tools

To enhance their postsecondary journey, the Take Stock in College program provides its scholars with an array of resources. These resources are specifically tailored to improve the academic performance of Take Stock scholars, a majority who are first-generation students. The resources also foster self-efficacy and facilitate access to important campus resources. Within this suite of offerings, students can access informative on-demand videos and webinars, engage with enlightening College Corner podcasts, and peruse social media content thoughtfully curated by dedicated Take Stock in College Student Ambassadors. Additionally, students can explore a library of information and insights available through the Take Stock in College blog, stay informed via the weekly newsletter, and participate in text messaging with Sunny, the AI chatbot. Collectively, these student engagement tools are crafted to promote active student involvement and provide students with a wealth of valuable information and essential resources.

Themed Weekly Programming

The Take Stock in College program provides comprehensive postsecondary retention programming, which involves consistent weekly outreach and engagement activities, as detailed in the curriculum description for Quarter 1 through Quarter 4 (Appendix A). These weekly themed programs are strategically designed to address the most significant challenges and obstacles hindering students' progress toward degree completion or career certification. The objective is to offer timely resources and interventions that align with critical milestones in a student's college journey. To structure its themed weekly

curriculum, the Take Stock in College program draws upon the ECMC Foundation's PERSIST curriculum as a guiding framework, ensuring a comprehensive approach to postsecondary retention, persistence, and success. This curriculum encompasses seven key domains, including: 1) Academic Progression, 2) Financial Support, 3) Institutional Commitment, 4) Social Involvement, 5) Academic Optimism and Self-Efficacy, 6) Academic-Related Skills, and 7) Social Support/Interpersonal Skills. Furthermore, a substantial portion of Take Stock in College's programming leverages the expertise of external professionals in areas such as financial aid, mental wellness, and academic success. Topics addressed in Quarter 1 and Quarter 2 included time management, using on-campus resources, financial planning and budgeting, stress management, academic planning, financial aid awareness, and career planning. In Quarter 3 and Quarter 4, topics such as how to network, resume writing, interview skills, experiential learning, career exploration and decision making, and study skills were addressed (See Appendix A).

Take Stock Connect, an Online Community

Take Stock Connect is a dedicated online community platform accessible to every Take Stock in College scholar. This channel aims to enhance engagement, foster connections, and facilitate communication among students within their institution and across the Take Stock in College program's statewide network. Take Stock Connect has evolved into a thriving and comprehensive community where students can actively participate by sharing valuable information and providing mutual support.

Enhancements made to the Take Stock Connect platform over the 2023-2024 grant year show increased student engagement. The Take Stock in College program had an increase of 8% in new users to the platform compared to last year. Resource interaction within the platform also increased this academic year by 390% compared to the same period last year . These interactions demonstrate the importance of and interest in Take Stock Connect among Take Stock in College program scholars.
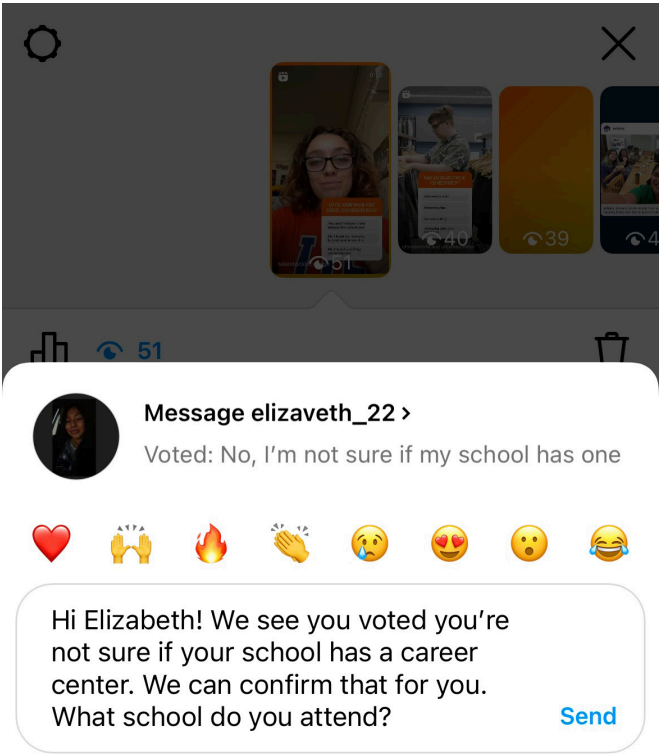
To consistently employ best practices and the most relevant tools available, the Take Stock in College program continually assesses emerging technologies and digital resources. Take Stock scholars appreciate the capabilities of Take Stock Connect, which is full of resources and empowers them to engage with their peers at their college or university. This activity fosters discussions regarding success strategies, on-campus events, and external resources, particularly about scholarships and internship opportunities.

Webinars

Take Stock in College scholars have access to a collection of recorded webinars on a diverse range of topics aligned with the program's curriculum. These webinars are made available through Take Stock Connect. Each webinar is thoughtfully designed to accommodate students' busy schedules, typically lasting between five to fifteen minutes.

During the 2023-2024 grant year, the Take Stock in College program shared on-demand webinars for students to learn how to navigate their college portal, how to create an effective resume, and opportunities to learn outside of the classroom using internships and study abroad. To encourage FAFSA completion, the Take Stock in College program solicited support from community partners to share a step-by-step recording of how to complete the new FAFSA form. The program also teamed up with a postsecondary partner to host live virtual webinars to give Take Stock scholars a chance to complete their FAFSA form in real time with financial aid experts. All webinars created and provided to Take Stock scholars are designed to enhance their understanding of specific topics within the monthly programming.

Take Stock in College Blog

The Take Stock in College Blog offers a wide range of articles on various subjects designed to support students in their college journey. These blog write-ups are comprehensive resource guides addressing critical issues for postsecondary success. The blog's coverage is all-encompassing, addressing every facet of college life and dispelling prevalent myths that may hinder students from achieving their degree aspirations. The dissemination of blog content is facilitated through channels such as Take Stock Connect and the weekly Take Stock in College newsletter.

The Take Stock in College program has created blog content on ten college completion and career readiness topics during the 2023-2024 grant year, including financial strategies for college success, strategies for social involvement, life and career skills, and a wealth of other pertinent topics. During 2023-2024, subscribers to the Take Stock in College Blog increased 20%. While subscribers increased, overall engagement remained low. For this reason, the Take Stock in College program plans to retire the blog and focus on other engagement channels in future grant years.

Take Stock in College Newsletter

The Take Stock in College program shares the College Corner Newsletter each Friday with Take Stock collegiate scholars. The newsletter includes each week's programming topics, resources related to programming, information on upcoming campus visits, available scholarships, and student job and internship opportunities. Throughout the 2023-2024 grant year, the College Corner Newsletter had an open rate of over 55% for each newsletter.

Take Stock in College "College Corner" Podcast

The "*College Corner*" Podcast was explicitly designed to provide advice to Take Stock in College scholars and incoming Take Stock in Children students as they transition to college life. The podcast series serves as a repository of insights to guide students toward success in their academic pursuits, professional endeavors, and overall life experiences. Fresh podcast episodes are introduced every two weeks, ensuring a steady stream of relevant information, and are easily accessible through popular podcast platforms like Apple Podcasts, Spotify, and Google Podcasts, catering to a diverse range of listeners.

The Take Stock in College program has created 19 podcasts during the 2023-2024 grant year, providing essential "how to" college completion and career readiness support strategies through topics including Maintaining a Positive Mindset, Expanding your Network and How to Network, Epic Fails to Avoid During Your First Interview, War Against Procrastination, and Taking Test Prep to the Next Step. During this grant year, the "College Corner" Podcast was shared with over 80,000 Take Stock audience members. Listeners have expressed interest in the podcast; there is a strong indication that students are informed by and interested in podcast content, applying the knowledge they gain to their success.

Success in Seconds

Success in Seconds, the Take Stock in College program's new video content series created for Instagram, launched this fiscal year. It was designed to engage and support students on platforms where they live and how they take in information, generally in quick and concise bits of information. Through "bite-size" video content, scholars learn the necessary tools to succeed in college, career, and life. These videos are produced and distributed every week. The Take Stock in College program released 33 bites of programming on everything from a Recipe for the best resume, Emailing like a pro, and the Importance of social involvement, to Studying like a champ, and more. With this new engagement initiative launched this grant year, the Take Stock in College Instagram account increased reach by 24% and increased its followers by 37% .
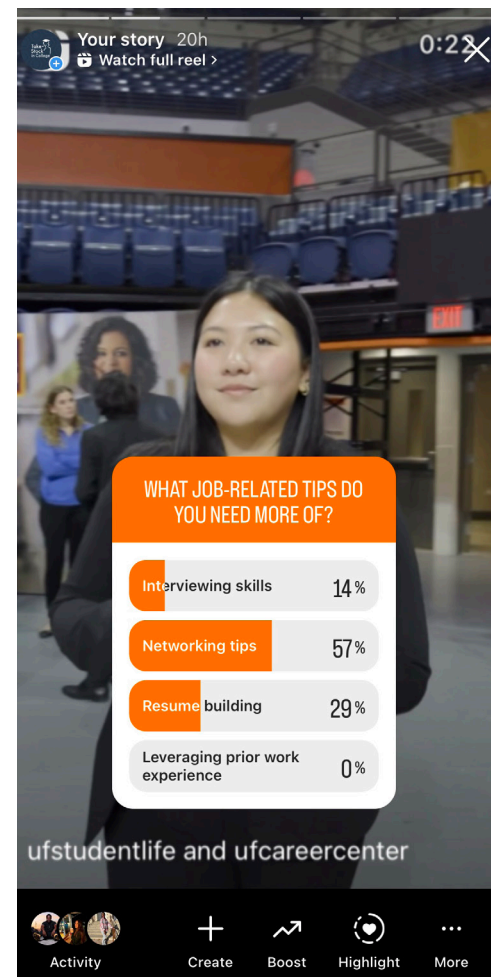
Social Media: Student Ambassadors - Postsecondary Degree Attainment Influencers

Take Stock in College Student Ambassadors serve a significant role as "Postsecondary Degree Attainment Influencers." Student Ambassadors utilize the power of social media to connect with their peers and support students as they navigate the collegiate experience and progress toward degree attainment or career certification. Student Ambassadors cover diverse topics, including student leadership, academic excellence, resume building, self-advocacy, first-generation experiences, networking, and other relevant subjects. The innovation Student Ambassadors contribute to our organization on social media channels has resulted in substantial growth for Take Stock in College's Instagram account. Our ambassadors provide a lot of useful information for college students to learn new strategies and information. The goal is to promote peer-to-peer mentoring and representation so that students with similar challenges can overcome collegiate obstacles. Their experiences and skills aid in ensuring postsecondary degree attainment is a continuous focus for students.

In interviews, student ambassadors conveyed a strong sense of fulfillment and pride in their roles and emphasized their commitment to supporting their peers. They view their work as a significant service, helping other students gain access to valuable resources and information through their contributions. One student expressed, "*I've been able to share what I've learned on a platform to help others who are from a similar background. I've learned to create and share materials [and hope] that others can learn from and use the information as well.*" Another scholar shared, "*I just hope my perspective helps others. Even if it's just one thing that helps them learn or look at things differently.*"

As Take Stock in College Student Ambassadors their work allowed frequent communication and interaction with Take Stock in College program staff in virtual meetings, workshops, and via email and texts. They mentioned having gained valuable transferable skills and how their role as ambassador has been crucial in helping them develop and hone their leadership skills. During interviews, several ambassadors shared insights on how their roles enhanced their presentation skills and fostered collaboration. They described learning from peers, exchanging information and tips to refine their content. Some ambassadors also reported opportunities to speak at events designed to educate and prepare younger students, with one noting a recent invitation to address a leadership day event. One student indicated that he was recently invited to speak at their leadership day. "*They invited me to tell my Take Stock story. I got to see my Take Stock people from back home.*

I also was invited to speak with my local [former] Take Stock in Children team (at the Spring workshop before graduation) from back home and got to share my tips for freshman year with the kids who were graduating."

Some scholars spoke of the additional opportunities for finding mentors and expanding their social networks being student ambassadors provided. One scholar described her experience with Take Stock in College program staff *"I was in frequent contact with the previous program director. She was very helpful and encouraging, in some ways like a mentor to me. She introduced and connected me with other professionals in the Take Stock organization. I really don't think I would have been as strong without Take Stock and all the people I've met through them."* Another scholar mentioned, "*I was invited to their annual summit, where I got to meet more people in TSIC and high-level administrators. One staff member is now one of my mentors who provides great advice. I would not have been able to meet him, had I not been a part of the Take Stock in College program.*"

When asked how the Take Stock in College program could further support ambassadors, the majority of participants found it challenging to identify additional areas where the program could enhance its support. That suggested a general satisfaction with the current level of assistance provided to the ambassadors, as one ambassador asserted, "*I'm just really happy to be working with them.*" Another scholar commented, "*All of the TSIC staff are great! They're always open and allow you to reach out. I have a community that supports me and that's been most beneficial for me moving closer to receiving my degree.*"

Building upon the work performed in Quarter 1 and Quarter 2, Quarter 3, twenty-four Take Stock in College scholars were background checked, trained, and onboarded to serve in their role as a Take Stock in College Student Ambassador. In addition to their core responsibilities, Student Ambassadors participated in individual and group training. During training

sessions, ambassadors received tailored instruction on creating videos, honing their public speaking abilities, and social media training. These training activities were strategically designed to improve their content creation proficiency and facilitate the development of professional and career-related competencies.

Over Quarter 3 and Quarter 4 of the grant year, Student Ambassadors created over 75 Postsecondary Student Success Content video communication posts to support Take Stock in College scholars, many of whom are first-generation and first-time-in-college students. Overall, for this grant year, the Take Stock in College Student Ambassadors created more than 150 social media video posts. In addition, Student Ambassadors wrote over 160 posts on Take Stock Connect to share campus resources to assist their peers in obtaining a college degree or certification. As a result of this activity, the Take Stock in College Instagram account saw a total reach of 21,200 within this grant year. Reach measures the number of accounts that saw any of the program page's posts or stories at least once.

During the 2023-2024 academic year, Take Stock in College Student Ambassadors played key roles in guiding students through college persistence. Student Ambassadors concentrated their efforts on addressing key areas such as 1) Financial budgeting; 2) Completion of the Free Application for Federal Student Aid (FAFSA); 3) Strategies for adequate exam preparation; 4) Enhancing the success of first-generation college students; 5) Exploring academic majors; 6) Promoting experiential learning; 7) Social involvement; 8) Life and career goals; 9) Future planning including graduate school and graduation preparation, and 10) Combatting summer melt.

Social media reach and engagement data are critical. The goal is to support all Take Stock in College scholars to ensure they receive the helpful information the student ambassadors share. Reach and engagement on a public platform such as Instagram also assists in building the Take Stock in College program brand on social media.

Sunny, the AI Chatbot

The Take Stock in College program continues its commitment to further student success among Take Stock scholars by leveraging Sunny, the AI chatbot. Sunny has undergone more technological advancements this academic year. The ongoing evolution and enhancement of Sunny's knowledge base, which is a bank of information allowing the AI Chatbot to respond to students when they ask questions, remains a central focus. The Take Stock in College program increased its data collection and built-in customizations for each of the 40 public colleges and universities in Sunny's knowledge base. This build-out has allowed the Take Stock in College program to easily connect scholars to on-campus resources, increase engagement with the AI Chatbot, and streamline interventions for students in need.

Throughout the 2023-2024 grant year, more intentional and customized interactive messages and nudges from Sunny improved student engagement. Sunny's friendly persona was also core to increasing engagement with students. The Take Stock in College program continuously explores ways to optimize Sunny's utilization and its generated data. During the year, Sunny asked students questions that helped the Take Stock in College program better identify issues and needs and provide interventions to meet those needs. These interventions, prompted

through student engagement with Sunny, have allowed the Take Stock in College program team to engage in targeted calling and one-on-one coaching campaigns with students. The insights students shared with Sunny also led to timely interventions - particularly for students whose Sunny responses signaled an increased need for additional support. The Take Stock in College team also encouraged students to leverage campus resources and provided students with the necessary support to help them achieve degree attainment.

Throughout the year, the Take Stock in College program team sent over 220 strategically targeted messages to nearly 7,500 scholars through the AI chatbot, to help improve student engagement and provide students with resources and information. These directed text message topics included Motivation Mondays, first-generation connections, Career Services information, study tips, financial aid, developing good time management skills, and other postsecondary persistence message topics utilizing the PERSIST Curriculum. To illustrate, recognizing that the FAFSA completion rate is a key metric for postsecondary persistence, the Take Stock in College program strategically deployed Sunny's text nudges. These nudges communicated important information, including FAFSA preparation tips, sharing of resources and a step-by-step video on how to complete the FAFSA, and promotion of a live virtual webinar with a college partner to assist with completing the FAFSA.

To further increase Sunny's student engagement rates, the Take Stock in College program strategically sent customized messaging to cohorts of students based on their college level, housing status, and other criteria gleaned from responses to Sunny interactions. The program uses various texting methodologies to maximize outcomes. The expanded data collected from Florida's 40 public colleges provides students with a more robust knowledge base and provides automated access to college and university-specific information and resources. Sunny's responses are now more customized, based on where students attend school, which is increasing engagement. The goal is to facilitate more meaningful student interactions with Sunny. Through Sunny, the Take Stock in College program analyzed and responded to students to ensure they received the information and coaching needed for success.

Engagement with Sunny during the 2023-2024 grant year peaked at 90%. Active engagement, which measures students who respond to Sunny texts and students who ask Sunny questions directly, giving Sunny an opportunity to respond, reached 46%. The results indicated that strategic and thoughtful messaging noticeably impacts students' motivation to actively engage with and utilize Sunny's range of available resources and services. Another positive indicator of Sunny's success was a 3% reduction in the opt-out rate this grant year compared to last year. Sunny's interactive messages and nudges remain pivotal in enhancing student engagement and cultivating a strong sense of belonging among the Take Stock in College program student body.

As the Take Stock in College program continues to use Sunny, the AI chatbot, as a critical tool to reach its 7,000+ student population each year, the data for "Active Engagement," "Passive Engagement," and opt-outs continue to be monitored, so refinements to messaging and strategies can be made. Increased response rates have shown that using SMS messaging, especially with an Artificial Intelligence Chatbot, is vital to improving students' communication and access to resources and services. Increased Sunny engagement combined with a decrease of opt-outs indicate that being intentional in how messaging is deployed is key to influencing students'

access to resources and services. The Take Stock in College program is optimizing the use of a range of tools and methods, including student success platforms, artificial intelligence, evidence-based success frameworks, predictive analytics, and student engagement models, to meet students where they are to increase the likelihood of their degree attainment.

The Take Stock in College program is poised to streamline its operations through the integration of systems to further its goals. A structured three-tiered tracking system is being used to categorize students based on their distinct needs. The initial tier, identified as green, encompasses general programmatic support accessible to all students. Subsequent tiers, denoted by yellow and red, will deliver targeted programmatic assistance tailored to specific topics or needs and personalized one-on-one guidance. This comprehensive approach will empower the program to gain real-time insights into the challenges hindering students' educational progress, enabling the seamless provision of essential resources. Whether accessed online, at their respective college or university, or through the engagement of a dedicated Take Stock in College program staff member, this framework will bridge the gap between students and the support required to succeed.

Cultivating Postsecondary Partnerships

A continuous and strategic initiative within the Take Stock in College program framework involves establishing and nurturing partnerships with all 40 of Florida's public colleges and universities. The overarching goal of the Take Stock in College program is not to replicate existing services but rather to serve as a conduit, connecting students to the wealth of resources and services already available at their respective postsecondary institutions. Given its role as a bridge for underrepresented and economically disadvantaged student populations, the program places significant emphasis on maintaining a comprehensive understanding of the resources and programs offered by colleges and universities. To achieve this, the program remains actively engaged in the process of establishing and strengthening relationships with various departments within these educational institutions, fostering collaboration to ensure the success of scholars in their postsecondary studies.

In year six of the Take Stock in College program, the program continues to build on its existing partnerships with Florida's postsecondary institutions. This year, the program aims to connect even more students with campus programs specializing in services focused on Take Stock in College's student demographics. TRIO-Student Support Services (TRIO-SSS) is an example of a service aimed at first-generation students. TRIO-SSS provides students numerous on-campus supports such as tutoring, advising, and a peer campus community. Many Take Stock in College scholars are first-generation college students. The Take Stock in College program actively facilitates connections between its scholars and on-campus initiatives such as TRIO-Student Support Services and various other first-generation resources. These on-campus programs are pivotal in providing students with the supplementary support they may require, including personalized advising, dedicated tutoring services, potential financial aid, and the opportunity to engage with peers similar to them. By offering these resources, these programs not only provide students with valuable academic assistance and support but also contribute significantly to fostering a sense of belonging among students as they navigate their postsecondary journey. All in all, it plays a crucial role in bolstering student engagement, enhancing the overall college experience, and increasing persistence.

In addition to TRIO-SSS, The Take Stock in College program has produced a collaborative partnership with the TRIO-Educational Opportunity Centers (EOC) program, an initiative dedicated to offering guidance and pertinent information on college admissions to eligible adults aiming to commence or continue their postsecondary education. Notably, the TRIO-EOC program also extends its services to enhance financial literacy among its beneficiaries. In a concerted effort, the Take Stock in College program is aligning its efforts with TRIO-EOC programs across the state, specifically focusing on re-engaging students who are currently not enrolled in college. This initiative addresses the needs of Take Stock students who did not pursue a postsecondary degree or career certification immediately after high school graduation or began their postsecondary journey but discontinued before attaining their desired degree or certification. This collaborative alliance catalyzes both programs, allowing them to join forces with a shared mission: the successful re-enrollment of Take Stock scholars in postsecondary institutions to facilitate the completion of their degrees or career certifications.

The Take Stock in College program has successfully nurtured a network of more than 450 essential contacts spanning various departments within Florida's large college and university systems. These contacts represent key partnerships within diverse departments, including Financial Aid, Student Success, TRIO, First Generation Offices, and Career Services. The Take Stock in College program remains committed to expanding its network of contacts, thereby creating interdepartmental connections that collectively form a robust support network for scholars, which is critical in ensuring postsecondary persistence and degree/certification completion.

To strengthen relationships with the postsecondary partners during the Fall Semester of 2023-2024, the Take Stock in College program invited partners to attend their 2023 Back-to-School Student Success Summit and College Expo/Forum. The event was attended by 17 of Florida's public colleges and universities. Each school had a booth, interacted with the entire Take Stock network, and participated in an open forum to share the latest news from their campuses.

Following the Student Success Summit, the Take Stock in College program staff returned to in-person on-campus visits, meeting with postsecondary partners and engaging with Take Stock scholars. For the 2023-2024 grant year, the Take Stock in College program staff visited 26 college and university campuses. 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. The Take Stock in College program continues to use relationships with postsecondary partners, inviting them to participate in webinars and podcast interviews. During the Spring Semester, the Take Stock in College program collaborated with one of their college partners to co-host live virtual webinar sessions to promote FAFSA completion. These live sessions provided students with the opportunity to work one-on-one with the college partner to ensure students understood and submitted the new FAFSA.

By exposing Take Stock scholars to college contacts and the opportunities and resources available through our postsecondary partnerships, the Take Stock in College program gives students the information they need to take advantage of these much-needed services. There is power in partnerships. The Take Stock in College program has strong partnerships which they continue to deepen to enhance the college experience for Take Stock scholars, promoting persistence and completion. For many students, these connections and additional support services are the difference between success and failure. Growing relationships with postsecondary partners are essential to creating a supportive context that helps ensure Take Stock in College scholars reach degree or career certification attainment.

One-On-One Coaching Sessions

The Take Stock in College program offers individual one-on-one coaching opportunities tailored to the unique needs of its students. These one-on-one interactions are strategically designed to enhance critical college success factors while facilitating connections with essential campus resources. The program model significantly emphasizes comprehensive college coaching appointments, a cornerstone for guiding college scholars toward successful outcomes. The program initiates proactive student outreach efforts to encourage and ensure students take advantage of these appointments. This proactive initiative results from student responses to Sunny, the AI chatbot. The coaching sessions include campus resources from collaborative engagement with postsecondary partners at Florida's 40 public colleges and universities. The Take Stock in College program deploys a diverse range of

resources to address the barriers that hinder students from completing their degrees or career certifications, and it actively supports students in making full use of resources readily available to them, both on and off campus. On average, during the 2023-2024 grant year, the Take Stock in College program conducted at least 125 virtual student appointments every quarter, utilizing various communication methods such as Teams, Zoom, and telephone to engage with students.

In Quarter 3, the Take Stock in College program staff conducted 212 virtual appointments with students. During these meetings, the Take Stock in College program team connected students to various resources. These valuable connections helped students overcome barriers to financial aid, and connected students to FAFSA completion assistance. Connections also helped students suffering from homesickness, encouraged connections to mental wellness support, and promoted self-advocacy.

In Quarter 4, the Take Stock in College program staff conducted 219 virtual appointments with students. Virtual student meetings had a continued focus on FAFSA completion, next semester planning, getting involved on-campus, internship opportunities, and the process to enroll, re-enroll, or transfer. While addressing many student questions and concerns during the initial coaching sessions, some students often received follow-up communication from a college program staff member via email or text to ensure they have continued support. This type of follow-up also boosts Take Stock scholars' trust in the Take Stock in College program.

Throughout this academic year, the Take Stock in College program has conducted over 730 virtual coaching sessions, well over the required 125 per quarter, to assist students with reaching college degree or certification attainment. As stated in the student survey data, 95% of survey respondents felt that the Take Stock in College program has made a difference in their collegiate journey, and that is in part of the Take Stock in College model, including the One-On-One Coaching Sessions.

Opportunities For Growth

The survey data reveals that a majority of Take Stock in College students (93%) indicated they are satisfied with their Take Stock in College experience, and an even larger percentage (95%) believe the program has positively impacted their college journey. The survey also highlights that while students are navigating their academic programs, they are simultaneously managing stressors associated with academic, career, and financial concerns. The most commonly sought forms of support to alleviate these pressures are financial and academic advisement. These findings underscore the students' strong desire to succeed in the postsecondary environment and their proactive engagement with the program's resources, which are critical to their success.

- In discussions about future directions for the Take Stock in College program, scholars emphasized the critical need for continuous guidance and support during their higher education pursuits. They suggested that the program should expand its mentoring and/or coaching initiatives to include college-level support. Those discussions also revealed feelings of disappointment among several scholars, who expected that some support structures that were familiar to them in high school would persist, only to find these supports unavailable once they advanced to higher education—revelations that highlighted a gap in assistance as they transitioned out of high school. The Take Stock in College program should consider and implement creative solutions to fill this gap in support, particularly for scholars who prefer more structured guidance as they advance toward degree attainment.

- Additionally, students expressed a desire to receive more career-oriented support, such as specialized webinars, internship opportunities, tips and career planning, which are generally available but perhaps underutilized on college campuses. Most of the scholars interviewed were in their junior or senior year of study and looking ahead to life after graduation. Multiple scholars noted that there had been few that focused on career readiness, which was now an important topic for them. One student described a valuable learning experience from a session with a representative from Capital One, yet she noted the need for more comprehensive information on the job-seeking process. To optimize these opportunities, the Take Stock in College program should enhance its collaborations and deepen engagement with available campus and community resources to widen the scope of services accessible to students.

- A key finding from interviews with both scholars and program staff highlights the potential benefits of increasing in-person engagement on campuses for the Take Stock in College program. Although students are generally comfortable with online interactions, they believe in-person activities could foster stronger connections among Take Stock scholars. During interviews, a scholar explained the importance of in-person activities on campus and noted the advantages of direct interactions. One student suggested, "*in-person communication is beneficial in creating community*" because it eliminates the impersonal nature of communicating through computer screens. The scholar's response underscores the importance of physical presence in facilitating engagement and cultivating interpersonal relationships. A fellow scholar shared, "*If it were on campus, I would make it one of my… priorities. So like, take it seriously and want to actually participate more.*" Another suggested that they "*should have formal campus events where everyone attends.*" Some simply preferred in-person peer interaction, as this student noted, "*I really don't like doing anything online.*"

The Take Stock in College model currently provides an online community through Take Stock Connect where students can engage with one another. Furthermore, students participate in campus visits and events with Take Stock staff, providing additional opportunities for students to engage with their Take Stock peers on their college campus. Nonetheless, Take Stock in College participants voiced the desire for additional peer engagement opportunities. To facilitate this, both scholars and staff proposed establishing a Take Stock in College student club, organization, or a dedicated program office on campus that would serve as a gathering point for students. A program staff member mentioned the importance of establishing a dedicated space for Take Stock students to convene and interact with one another. As the staff member explained, "*Just having someplace where TSIC students can gather and commune amongst each other*" is important. The staff member's response emphasized the value of having a designated area where students can meet, share experiences and vital information, and provide communal support—that such a space is vital for fostering a sense of community, collaboration, and mutual support among Take Stock in College peers. Additionally, ideas were suggested for more creative approaches to increase awareness of and enhance the visibility of the Take Stock College program's presence on campuses.

Literature on student engagement, persistence, and retention in higher education is robust and emphasizes that the choice to persist in college is heavily dependent on successful integration into the academic and social fabric of the institution (Astin, 1993; Schlossberg, Lynch, & Chickering, 1989; Tinto, 1993). This integration is greatly influenced by daily interactions within the academic community (Umbach & Wawrzynski, 2004). Pascarella and Terenzini (1991) indicated that the impact of attending college is determined by the amount and quality of interactions with major socializing agents on campus, such as faculty and peers. Astin (1993) further highlighted the critical role of peer influences, which he identified as "*the single most potent source of influence*" affecting a wide range of developmental areas, including cognitive, affective, psychological, and behavioral growth (Kuh et al., 2006). A key concern arises from this literature: students who are less active in the academic community often gain less from their educational experiences due to limited participation.
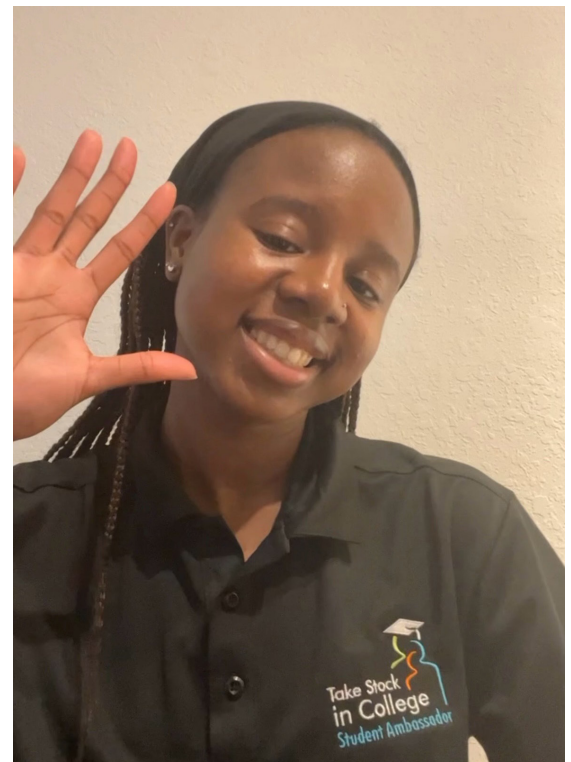
Several Take Stock in College scholars indicated that they lived and/or worked off-campus. In fact, a majority of Take Stock in College scholars are commuter students (60%, according to Take Stock in College program staff). These students may encounter more challenges than their residential counterparts in establishing meaningful connections and a sense of community or connectedness within their campus environments (Jacoby & Garland, 2004). The Take Stock in College program should consider how these issues affect student outcomes and how new program initiatives can be designed to mitigate the impact.

Jacoby & Garland (2004) emphasized the role of administrative and programming staff in enhancing campus engagement among commuter students. They advocate for the creation of opportunities that align with the needs of these students. The researchers further assert that educational institutions should take the initiative to develop co-curricular activities that are specifically targeted at involving commuter students, rather than expecting these students to adapt their lifestyles to fit traditional campus models.

In the future, the Take Stock in College program may want to consider ways to partner with institutions to develop campus employment and housing initiatives for Take Stock in College scholars that would allow greater interaction with peers within the academic environment.

- Partners from postsecondary institutions expressed a strong desire to expand their collaboration with the Take Stock in College program, each highlighting different aspects of potential engagement. For instance, one partner is interested in linking their Student Ambassadors with their institution's First-Generation office to bolster student support. Another partner is interested in adopting communication strategies utilized by the Take Stock in College program to improve connections with their student body. Additionally, there is interest in co-presenting during recruitment visits to high schools and other venues, which could amplify outreach efforts and effectiveness.

- Based on the responses from institutional partners, the Take Stock in College program should continue to enhance and expand its collaborative efforts with postsecondary institutions. Strengthening these alliances will enhance the Take Stock in College program's ability to channel existing institutional services to the students who most need them.

- The program should also continue to identify and establish community partnerships to provide additional support not readily available on campuses, avoid duplication, and maximize resource allocation.

Overall, it is evident that Take Stock in College students, the program's staff, and partnering postsecondary institutions all recognize and appreciate the program's capacity to aid students in achieving their academic goals. They are fully engaged in activities that significantly contribute to Take Stock in College's mission of guiding students toward successful degree completion.

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 2022 Take Stock in College Scholars high school graduates:

- 88% of Take Stock in College Scholars (1,517) started a postsecondary program after graduating in the Spring of 2022.

- By Spring 2024, 81 % of those students either continued in their program or had obtained a postsecondary degree (see Table 14).

Table 14. Persistence Rates for Take Stock 2022 High School Graduates

	# of Students	Percent
Continued in a postsecondary program by Spring 2024	1,220	80%
Graduated with a degree by Spring 2024	15	1%
Total Persistence Rate	**1,235**	**81 %**

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 (2023) research indicates that only 72% of students from low-income schools persist, and only 70% 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.

Regardless of facing numerous challenges, survey data shows that Take Stock in College students remain committed to their academic goals. According to the survey, 84% of respondents are confident in completing their current academic year, 94% plan to return to college next semester, and another 98% believe they will finish their degree programs. The high level of engagement with financial guidance services is particularly encouraging, as financial constraints are a well-documented barrier to degree completion, especially for first-generation students and those from low-income families. This report has previously highlighted the importance of FAFSA completion as a key indicator of persistence in postsecondary education, largely because it enables students to access essential financial resources. The survey further reveals that 76% of students have sought financial advisement, while 68% have pursued academic advisement. Interviews with students also underscore their proactive use of support resources to manage the financial demands of college education.

The array of support available through academic advising and other mechanisms provides students with critical help along their educational journey. This support not only aids in their academic achievement but it also ensures their well-being and fosters a supportive environment that enhances their potential for success.

Opportunities For Growth

The Take Stock in College program has successfully supported the needs of its students throughout the 2023-2024 academic year. It has formed strong collaborative partnerships with 40 public colleges and universities. To build on this success, the Take Stock in College program could increase its efficacy by continually monitoring and analyzing student persistence to pinpoint strategies that effectively boost postsecondary degree attainment for subsequent scaling.

Observations

The services provided by the Take Stock in College program are instrumental in increasing post-secondary degree completion among low-income students, which not only breaks cycles of poverty but also offers considerable economic benefits for the state of Florida. Research continues to validate the long-held view that a college degree substantially boosts lifetime earnings, whether it is a two-year or a four-year degree, reinforcing the value of the program's efforts (Ma & & Pender, 2023; Schaeffer, 2022). In addition, studies on the impact of earning an associate degree reveal that recipients are 9.3 percentage points more likely to be employed than those without any college education, further demonstrating the tangible benefits of higher education (Turk, 2019).

In terms of the income generated from earning an associate degree, individuals with an associate degree experience a 13.4% increase in hourly wages compared to those without any college education (Turk, 2019). The impact of attaining a four-year degree is even more significant with substantial improvements in lifetime earnings. These statistics highlight the profound impact of the Take Stock in College program, which requires a modest investment and offers significant socioeconomic benefits that could potentially rescue thousands from poverty and set them on a course for long-term success.

The general consensus regarding the Take Stock in College program's effectiveness is overwhelmingly positive. Feedback from Take Stock in College's postsecondary partners is uniformly favorable. Noting the value of the partnership with Take Stock in College, one partner commented, *"It's just such a great opportunity for the college students to have extra support…"* The sentiment underscores the profound impact of Take Stock in College's collaborative efforts. A common theme across responses is the perceived value of the Take Stock in College program as a strategic partner and ally in helping institutions achieve their objectives and effectively deliver services and information to the students most in need. These views are substantiated by multiple supportive quotes from these partners.

Partners shared feedback on their positive experiences and perceptions, as follows:

- *"My experience has been positive, particularly with the representative. I feel like she's very caring and that reflects when she's like working with students."*

- *"We do enjoy having the Take Stock in College representative come to the campus to meet students who are here. It kind of shows our students what they're capable of in the future."*

- *" It really helps us to be able to support as many students as we possibly can."*

Students also shared overwhelmingly positive sentiments, with remarks such as, *"Take Stock is a light at the end of the tunnel, no matter what you're experiencing;" "they're just a good team all around;"* and *"Take Stock makes a big impact in people's lives."* While these comments originate from a select group of students, they closely align with survey findings where 80% of students conveyed a strong sense of support from the Take Stock in College program.

The Take Stock in College program is actively refining its strategies to further enhance its effectiveness and significantly increase the college graduation rates of its participants. Currently, the program boasts a graduation rate of 70%, which substantially surpasses the national average of 29% for students from low-income schools, as reported by the National Student Clearinghouse Annual High School Benchmarks Report, 2023. With an ambitious target of achieving a 95% graduation rate, the program recognizes the need to elevate its standards and enhance efficiency. Key to this improvement is gaining a deeper insight into the evolving needs of students and ensuring that the program can offer targeted support.

Developing strong collaborative partnerships with postsecondary institutions is crucial for achieving the Take Stock in College program's broad goals. These partnerships are essential for ensuring that services are delivered on time and without duplication. In addition, the program's ongoing enhancement of student interactions with Sunny, the AI chatbot, combined with advanced data analytics, provides the ability to accurately identify students' changing needs as they occur. This enables the program to efficiently direct students to the appropriate programs, information, or additional support services available at their educational institutions.

Delivering targeted support for students requires a deep understanding of their needs at various points in their educational journey. Enhancing collaborative partnerships with postsecondary institutions is crucial to this effort to ensure that services are delivered efficiently and without redundancy. The Take Stock in College program's ongoing enhancements in student engagement with Sunny, the AI chatbot, coupled with the utilization of advanced data analytics, play a pivotal role in timely identification of student needs. For instance, 93% of students reported receiving communications from Sunny, with many benefiting from timely reminders about important deadlines and events. To further improve the effectiveness of these messages, there is a continuous effort to tailor communications and interventions more closely to individual student needs. Identifying student needs promptly allows for the quick connection to necessary resources and support available at their schools or in the broader community.

Opportunities For Growth

The Take Stock in College program provides a notable return on investment by engaging collaboratively with higher education institutions to assist students who face barriers to postsecondary achievement. To build on this success, the Take Stock in College program should further strengthen its partnerships with these institutions and continue its investment in technological advancements such as Sunny, the AI chatbot, and robust data analytics. Such strategic enhancements will enable the delivery of targeted, timely, and effective student support.

Summary Of Opportunities For Growth

The Take Stock in College program offers a comprehensive suite of supports that significantly contributes to students' persistence, well-being, and degree attainment. Feedback from program participants indicates high levels of satisfaction, with 80% of students reporting that they are very satisfied with the support provided. Furthermore, a substantial 95% of students acknowledge that the program's support has positively impacted their collegiate journey, underscoring the effectiveness of these services.

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.

- To increase student engagement and interaction on campus, it is recommended that the program staff create more opportunities for in-person engagement. This should be complemented by ongoing enhancements to marketing strategies, which will help improve the visibility of Take Stock in College across campus environments. Additionally, Take Stock in College should explore new and innovative approaches to build supportive communities for Take Stock in College scholars within the campus setting, as it will foster a more inclusive and supportive educational environment.

- Building on the foundation of support established through Student Ambassadors, the Take Stock in College program could enhance the overall student experience and potentially raise both academic performance and retention rates by offering peer-leader pairings within the Take Stock program. Specifically, new students would be matched with advanced students who have similar backgrounds, creating a more tailored and supportive network that resonates with their personal experiences and challenges.

- To increase program impact, continue monitoring student persistence to identify the strategies that have the most impact on student postsecondary degree attainment for future replication, and expand efforts to identify and assist students who have either delayed enrollment or withdrawn from college to provide them with necessary guidance and support for re-enrollment.

- Continue refining Sunny, the AI chatbot, and further develop its predictive analytics capabilities. These technological advancements hold the potential to more accurately anticipate student needs, uncover deeper insights into the factors contributing to degree completion, and offer customized support based on data-driven analysis. Such enhancements are vital for the continuous improvement of the program's effectiveness in supporting student success.

- Cultivating and enhancing partnerships with postsecondary institutions is essential for the Take Stock in College program. This allows the program to connect students more effectively with on-campus and virtual resources. Simultaneously, the program should expand its search for and integration of community resources, developing partnerships that provide the additional supports students require outside of their college environment. Such community partnerships are integral to the program's commitment to efficiently link students with available resources without duplicating existing services.

By adopting and implementing the recommended strategies, the Take Stock in College program could substantially improve its operational effectiveness and efficiency. These recommendations aim to refine the program's ability to deliver focused and timely support directly aligned with student needs, thereby enhancing overall student success. This approach ensures that the program remains responsive and adaptable to the evolving requirements of its participants.

Conclusion

At the heart of the Take Stock in College program is a commitment to breaking the cycle of poverty through education, particularly for students who face economic challenges and are underrepresented in higher education. The primary goal of the program is to guide these students towards not only completing their postsecondary education but also thrive academically, professionally, and personally. To achieve this, the program utilizes a structured approach comprising of five key strategies: **Engage**, **Track**, **Connect**, **Coach**, and **Complete** to create a seamless environment of support for students. The findings from the recent evaluation highlight the program's effectiveness in steadily advancing its mission and positively affecting Take Stock in College scholars. Results affirm the Take Stock in College program has achieved its mission for Take Stock in College scholars across Florida during 2023-2024.

To further strengthen the Take Stock in College program, several growth opportunities have been identified. First, there is a need to continue advancing the program's data analytics through the implementation of Sunny, the AI chatbot, to provide "just in time" support tailored to individual student needs. Second, the program should explore additional partnerships with educational and community organizations to enhance post-graduation career support for students. Third, maintaining and expanding access to essential resources that support certification or degree attainment—specifically financial aid, academic advisement, and tutoring—should remain a priority, as these have been frequently accessed and valued by many scholars within the program.

The Take Stock in College program has effectively achieved, and in multiple instances exceeded, the deliverables identified by the Board of Governors as crucial indicators of its success. The evaluation suggests that the program is adept at providing key resources that aid in degree attainment. This includes facilitating access to financial aid, offering academic advisement, and supporting the mental wellness and personal resilience of students. Continuation of these services is essential for sustaining and enhancing the program's impact.

The Take Stock in College program employs a range of evidence-based strategies that are proven to enhance college persistence and degree completion. By consistently utilizing data to guide its program implementation and development, it effectively alters the educational trajectories of numerous students throughout Florida, signaling a transformative impact on their future prospects.

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Appendices

Appendix A: General Take Stock In College Programming

Fall Semester

July 2023		
Theme	**Summer Melt II**	**Dates**
Week 1:	**No Programming**	July 3rd-9th
Week 2:	**Family Pressures**	July 10th-16th
Week 3:	**What is a Syllabus & How can it Help me? Communicating w/your Professors**	July 17th-23rd
Week 4:	**Mindset Matters & Overcoming Obstacles for Student Success (Connecting to Campus Resources)**	July 24th-30th

August 2023		
Theme	**Back-To-School**	**Dates**
Week 1: Week 2:	**Summer Melt Crash Course**	August 7th-20th
Week 3:	**Back to School /Welcome Back (Freshman)**	August 21st – 27th
Week 4:	**Navigating the Campus & Campus Resources (Freshman)** - Find Your FIG, LC, or Learning Block or Cluster (Locating Help on Campus)	August 28th – September 3rd

September 2023		
Theme	**Navigating The Campus & Adjusting To College Life**	**Dates**
Week 1:	**Adjusting to Campus Life & Campus Resources-Part2** (Locating Help Online)	September 4th – 10th
Week 2:	**First-Gen Student Success:** Time Mgt/Stress Mgt.	September 11th – 17th
Week 3:	**First-Gen Student Success:** Budgeting & Accountability & Self-Advocacy	September 18th – 24th
Week 4:	The Benefits of College Advising (Freshman?) Why All Student need their College Advisor?	September 25th – October 1

October 2023

Theme	Goal Setting: From College Attending To College Completing	Dates
Week 1:	**Goal Setting: Academic & Life Goals**	October 2nd – 8th
Week 2:	**Academic Goals & Success:** Academic Skills for Success Mid-Terms: Planning for Success (Study, Stress, Sleep, Eat, Health)	October 9th – 15th
Week 3:	**Academic Goals & Success:** Academic Planning/ Degree Mapping & Meta Majors	October 16th – 22nd
Week 4:	**Academic Goals & Success:** Academic Support	October 23rd – 29th
Week 5:	**Life Goals:** Personal Branding & Social Involvement	October 30th – November 5th

November 2023

Theme	Financial Planning	Dates
Week 1:	Next Semester/Academic Planning Senior Plan: Grad School First-Gen Week/Financial Planning & Budgeting	November 6th – 12th
Week 2:	FAFSA (Free Application for Federal Student Aid)	November 13th – 19th
Week 3:	Financial Aid Awareness and Resources -Your Money Happy Thanksgiving/Give Thanks	November 20th – 26th
Week 4:	FAFSA RELEASE/REMINDER Giving Tuesday (tbd)	November 27th – December 3rd

December 2023

Theme	Career Planning	Dates
Week 1:	FAFSA Reminder & Finals Encouragement	December 4th – 10th
Week 2:	Earnings By Degree & Exploring the Possibilities	December 11th – 17th
Week 3:	Building Experience While in School/Career Planning Happy Holidays – Success in College, Career & Life	December 18th – 24th
Week 4:	Happy New Year – See you again in 2024. Success in College, Career & Life	December 25th – 31st

Spring Semester

January 2024		
Theme	**Social Involvement**	**Dates**
Week 1:	Creating a Feeling of Community on Campus	January 1st – 7th
Week 2:	Expanding your Network and How to Network	January 8th – 14th
Week 3:	Why Campus Clubs & Organizations Matter	January 15th – 21st
Week 4:	Developing Connections with Academic Staff and Faculty (Professors and Departments)	January 22nd – 28th
Week 5:	Recognizing the Need to Assess College Resources (TSICollege)	January 29th – February 4th

February 2024		
Theme	**Life And Career Skills**	**Dates**
Week 1:	Resume Writing	February 5th – 11th
Week 2:	Interview Skills	February 12th – 18th
Week 3:	Email Etiquette	February 19th – 25th
Week 4:	Life & Career Skills: Soft Skills Employers want and Career Fairs	February 26th – March 3rd

March 2024		
Theme	**Future Plans: Get Started Now**	**Dates**
Week 1:	Experiential Learning, including Internships, Apprenticeships and Volunteering	March 4th – 10th
Week 2:	Experiential Learning, including Study and Work Abroad	March 11th – 17th
Week 3:	Visualizing your Future: Upperclassmen - Grad School /Post Grad Underclassmen - Choosing a major	March 18th – 24th
Week 4:	Career Exploration/Career Decision Making	March 25th – 31st

April 2024		
Theme	**Finals (All Students) And Planning For Graduation (Seniors)**	**Dates**
Week 1:	Time Management	April 1st – 7th
Week 2:	Ask for Help! (Office hours, study group, tutoring services, StudyEdge)	April 8th – 14th
Week 3:	Study Skills and Note-Taking Skills	April 15th – 21st
Week 4:	Test Preparation (Final Exams)	April 22nd – 28th

May 2024		
Theme	**Life Goals/Big Decisions- Planning For Summer, Next Semester & Your Future Career**	**Dates**
Week 1:	What's Next? Next Semester Planning, Transferring, and Life after Graduation	April 29th – May 5th
Week 2:	Celebrating Achievements/ Graduation	May 6th – 12th
Week 3:	Degree Audit and Academic Advising	May 13th – 19th
Week 4:	Reflect, Recharge, and Refocus (Mental fitness and focus)	May 20th – 26th
Week 5:	Staying Connected (social media, success stories, alumni nation invite)	May 27th – June 2nd

Summer Melt 2024 Calendar

June 2024		
Theme	**Summer Melt I**	**Dates**
Week 1:	Welcome to Take Stock in College/Orientation & Course Registration (Freshmen 2024)	June 3rd-9th
Non-HS grad 2024	Maximizing your Summer	
Week 2:	The 3 Essentials in College: Food, Housing, and Transportation	June 10th-16th
Week 3:	Financial Aid	June 17th-23rd
Week 4:	Campus Resources	June 24th-30th

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. 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, 2021).

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 (Tram 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 Hispanic 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 Hispanic 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 advisory, 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; Slanger 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 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).

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 Take Stock in College.

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 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 between 2020 and 2022 is slowing. Take Stock in College has introduced, developed, extended use of, and incorporated into their programming a variety of strategies and interventions designed to increase enrollment and retention. One example is personalized coaching and mentoring focused on students' social and mental 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.

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 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 Postsecondary 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 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

Spring 2024 Student Feedback Survey Questions

Are you a first-generation college student, as defined as a student whose parents or parent did not receive a bachelor's degree?

   Choices:

      O Yes

      O No

      O I'm not sure

What type of degree are you currently pursuing?

   Choices:

      O Associate of Arts

      O Associate of Science

      O Bachelor of Arts

      O Bachelor of Science

      O Career and Technical Education Certification Program

      O Master's

      O Other

      O Not sure

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

   Choices:

      O Associate of Arts

      O Associate of Science

      O Bachelor of Arts

      O Bachelor of Science

      O Career and Technical Education Certification Program

      O Graduate level (i.e. Masters, JD, PhD, MD)

      O Other

      O Not sure

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

   Choices:

      O Full-time

      O Part-time

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

   Choices:

      O Very Likely

      O Somewhat Likely

      O Not Likely

Are you planning to return to college next semester (Summer or Fall 2024)?

    Choices:

        O *Yes*

        O *No*

        O *No, because I am graduating*

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

    Choices:

        O *Very Likely*

        O *Somewhat Likely*

        O *Not Likely*

Are you aware of the Take Stock in College program?

    Choices:

        O *Yes*

        O *No*

Did you participate in any Take Stock in College programming in the 2023-24 academic year (ex: Take Stock Connect, podcasts, webinars, virtual coaching appointments, blogs, text messages from Sunny, etc.)?

    Choices:

        O *Yes*

        O *No*

        O *I did not participate, but I like knowing the program is available*

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:

        O *Yes*

        O *No*

        O *I'm not sure*

What Take Stock in College platforms do you use? (Please select as many options that pertain to you)

    Choices:

        O *Virtual Coaching Appointment link*

        O *Motivational Texts*

        O *FAFSA Reminders*

        O *Florida Prepaid Survey Reminders*

        O *Links to Webinars*

        O *Connections to Campus Resources*

        O *Campus Visit Reminders*

        O *Links to The College Corner Podcasts*

        O *Links to Success in Seconds*

        O *Links to Resources on Take Stock Connect*

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

    Choices:

        O *Instagram*

        O *LinkedIn*

        O *Take Stock Connect*

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

    Choices:

        O *Yes*

        O *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:

O *Advising Office*	O *Housing/Residence Life Office*
O *Bursars Office*	O *Library Services*
O *Campus Health Clinic/Infirmary*	O *Mental Wellness Services*
O *Campus Closet*	O *Mentoring Services*
O *Career Services Office*	O *Recreation Center Services*
O *Childcare Services*	O *Student Involvement Office*
O *Cultural Center*	O *TRiO Services*
O *Financial Aid Office*	O *Tutoring Center Services*
O *First-Generation Office*	O *Other (please specify)*
O *Food Pantry*	

What are you most concerned about right now?

    Choices:

        O *Academics*

        O *Career*

        O *Healthcare*

        O *Mental Health*

        O *Transportation*

        O *Housing Security/having a place to stay*

        O *Food Security/paying for groceries*

        O *Paying for classes*

        O *Financial Aid/money*

        O *Finding a job*

        O *Finding an internship*

        O *Getting the classes that I need for the summer semester*

        O *Getting the classes that I need for the fall semester*

        O *Transportation home when the semester ends*

        O *Applying for graduate/professional school*

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

    Choices:

        O *All virtual, off campus*

        O *All virtual, on campus*

        O *Hybrid*

        O *All in-person*

        O *Took a gap semester*

        O *Deferred admission*

Do you personally have adequate technology for college?

    Choices:

        O *Yes*

        O *No*

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

    Choices:

        O *Email*

        O *Phone*

        O *Letter*

        O *Text Message*

        O *Social Media (Instagram, Take Stock Connect, etc.)*

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

    Choices:

        O *Very Satisfied*

        O *Somewhat Satisfied*

        O *Neither Satisfied nor Dissatisfied*

        O *Somewhat Dissatisfied*

        O *Very Dissatisfied*

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

    Choices:

        O *Open-ended response*

Appendix E : About The Evaluator

University of Florida Lastinger Center for Learning

UF Lastinger Center 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. Led by Dr. Mary Bratsch-Hines, Lastinger Center employs a robust research and evaluation team, which 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. Julianna Banks, Research Coordinator for Research and Evaluation at Lastinger Center supports the Center's external research and evaluations initiatives. Before joining the Lastinger team in 2023, Dr. Banks previously conducted mixed-methods research aimed at broadening participation in STEM disciplines in higher education. She also served as a Project Director for the Center for Urban and Multicultural Education in Indianapolis, where much of her work focused on examining educational environments; the professional development of K-12, university, and medical faculty; and the impact of institutional policies on diverse populations. In earlier work with the National Survey of Student Engagement (NSSE), Dr. Banks worked with over 150 colleges and universities across the US and Canada to conduct survey research on deep learning and student engagement.


Dr. Mary Bratsch-Hines, Senior Manager for Research and Evaluation at the UF Lastinger Center, has an extensive research background. At the Center 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 the 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.

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.

Jamie Greenspan is the graphic design coordinator at the Lastinger Center for Learning. Jamie manages graphics, photos and design initiatives related to marketing, sales, recruitment and the Lastinger Center's visual identity. Jamie is a graduate from the Digital Media Technology program at Santa Fe College and holds a Bachelor of Arts degree in Business Administration, with a specialty in Mass Communications from UF Warrington College of Business.
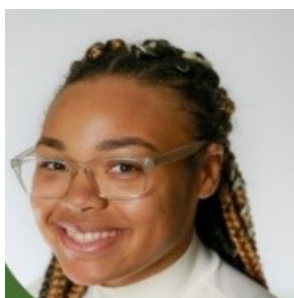
Amaris Jones is a Graphic Designer and Marketing Manager with expertise in marketing and design. She has a strong background in marketing, including experience as a Marketing Specialist in the federal sector and Digital Marketing Manager at Island Products LLC.As Co-Owner of Airy Salon & Spa, Amaris oversees the development of brand identity, coordinates community outreach initiatives, and drives marketing efforts to drive revenue growth. She holds a Bachelor of Arts degree in Communication Studies from Florida International University.