

# **SURVEYING & STUDENT/ALUMNI ENGAGEMENT IN CYCLICAL PROGRAM REVIEWS**

Presented by: Quality Assurance Office, Institutional Analysis  
and Planning and Alumni Relations



# PURPOSE OF THIS WORKSHOP

To provide you with information to get positive engagement and feedback from students and alumni in program reviews and the resources available to you.

At the end of this session, you will be able to:

- Understand the importance of engaging students and alumni in the academic program review
- Recognize where and how students and alumni can be involved
- Understand the proper process for getting information from students and alumni
- Know where to access survey templates and survey software
- Know how to disseminate surveys and collect responses
- Know who can assist you with surveys and focus groups

# WHY ENGAGE STUDENTS AND ALUMNI IN ACADEMIC PROGRAM REVIEWS?

**It is best practice AND a requirement to include students and alumni in the authorship of the self-study:**

“The self-study results from a participatory self-critical process and documents involvement in its preparation of all faculty in the program, and of students.”

“The self-study shows active involvement of students in the agenda-setting, self-analysis and preparation of the Report.”

“Students contribute to the preparation of the self-study, as well as meet with the external reviewer(s).”

(Source [Guide to the QAF](#))

# SURVEYING

## Who to survey?

- Undergraduate students
- Graduate students
- Alumni
- Employers
- Professional associations

# OVERVIEW OF THE PROCESS

- Get existing student survey data (e.g., NSSE, CUSC, OUGS etc.) from IAP
  - Look at the timeline for doing a survey and work backwards from deadline
- Consider:
- Review survey administration process & Academic Program Review survey toolkit on IAP website
  - When is the best time to send out a survey? Consult data steward (e.g., RO, Alumni Relations, Graduate Studies & Postdoctoral Affairs, Cooperative and Experiential Education).
  - Explore how RO and Alumni Relations support departments/programs with surveys (e.g., survey dissemination)

# EXISTING UNDERGRADUATE SURVEYS

- IAP will review the survey database/repository for existing survey results by program
- Data availability is dependent on sample size of the program

- NSSE
- CUSC
- OUGS (Alumni)

Survey data provided by IAP:

- Employment rate, related skills/subject, and salary – six months/two years (OUGS)
- Satisfaction with quality of teaching, would recommend Waterloo, program contribution to growth and development (CUSC Graduating)
- Program contribution to skills, quality of overall experience, would students take same program again (NSSE)

# EXISTING GRADUATE SURVEYS

- IAP will review the survey database/ repository for existing survey results by program
- Data availability is dependent on the sample size of the program
  - CGPSS

Survey data provided by IAP:

- Availability of courses needed to complete program (CGPSS)
- Would recommend Waterloo to someone considering their program (CGPSS)
- Would select same field of study if restarting graduate/professional program (CGPSS)

# CONDUCTING YOUR OWN SURVEY

- Preparation is KEY in a well-thought-out survey!
- Survey Toolkit (general survey guidelines and process) and Academic Program Reviews Survey Toolkit (specific to program reviews) are available on the IAP website
- Academic Program Reviews Survey Toolkit includes:
  - Set of pre-approved questions and instructions for conducting surveys
  - Student questions (e.g., Academic Profile, Program Satisfaction and Quality, General Satisfaction etc.)
  - Alumni questions (e.g., Academic Profile, Program Satisfaction and Quality, Skills and Competencies, General Satisfaction, Post Graduation Experiences etc.)
- Waterloo's Statistical Consulting & Survey Research Unit (SCSRU) can assist with the development and operationalization of a survey for a fee



# IAP | SURVEY REVIEW GUIDELINES

Institutional process: all surveys to be reviewed by IAP on behalf of the Survey Advisory Committee (Policy 55)

To begin the review:

- Check IAP survey calendar for appropriate timeline
  - Discuss proposed timeline with IAP and Data stewards (Alumni, GSPA, Registrar)
- Submit the following for review via IAP Survey review form
  - Brief description of survey
  - Target population and proposed timeline
  - Description of incentives
  - Documents: Survey instrument, invitation/reminder letters, Incentives rules\*, Privacy policy\*
- IAP to review documents and send feedback usually within 1 – 2 weeks

# IAP | INCENTIVES GUIDELINES

- Incentives can be offered to all survey participants or in the form of a draw
- If offering a draw, consider the following:
  - Draws should be open to the entire target population regardless of if they participate in the survey (Criminal Code of Canada/ Competition Act)
  - Skill-testing question requirement (Criminal Code of Canada)
  - Privacy: store contact information used for draws separately from Survey responses (PIPEDA)
  - Disclose the following to participants (Competition Act – Fair disclosure):
    - Number/ value of prizes, skill-testing requirement, odds of winning, eligibility criteria, contest rules, privacy policy
    - Prepare & disseminate Incentives Rules and Privacy Policy to survey participants
    - **NOTE:** Please contact Legal and Immigration Services <[LIS@uwaterloo.ca](mailto:LIS@uwaterloo.ca)> for help with drafting/approval of the draw contest rules before the survey opens.

# IAP | SURVEY RESOURCES

## IAP Resources:

- [IAP Survey Calendar](#)
- Survey Request form:  
<https://uwaterloo.ca/iap/surveys/survey-data-request-form>
- Survey Review form:  
<https://uwaterloo.ca/iap/surveys/survey-review-form>
- Survey Toolkit (sample documents: student letters, incentives rules, privacy policy) & APR Survey Toolkit (pre-approved sample questions):  
<https://uwaterloo.ca/iap/surveys/survey-toolkits>

## Other Resources (Contact list):

*Each data steward has specific guidelines about how to contact their constituents. Please follow the instructions on the following pages:*

- Undergraduate students (Registrar):  
<https://uwaterloo.ca/registrar-resources/communications/requests-send-mass-email>
- Graduate students (GSPA):  
<https://uwaterloo.ca/graduate-studies-postdoctoral-affairs/current-students/graduate-student-e-news>
- Faculty and Staff (University Relations):  
<https://uwaterloo.ca/university-relations/resources/mass-email-guidelines>

# ALUMNI RELATIONS

## Step 1: Connect with your Alumni Staff Member

### Faculties

**Katelyn Gordner**

Faculty of Health

**Maryam Latifpoor-Kepearoutis**

Faculty of Environment

**Phoebe Wong**

Faculty of Arts

**Melissa Nantais**

Faculty of Mathematics

**Gosia Brestovacki**

Faculty of Engineering

**Patricia Rintjema**

Faculty of Science

Contacts and email addresses:

<https://uwaterloo.ca/alumni/about/people>

### AFIW

**Fred Martin**

Conrad Grebel University College

**Cort Egan**

Renison University College

**Hayley Winters**

St. Jerome's University

**Rebecca Wagner**

United College

# ALUMNI RELATIONS

## Step 2: Alumni staff will help coordinate for an email to be sent on your behalf

- Message will be scheduled so it does not conflict with other emails alumni are receiving.
- Staff will request recipient data list, making sure message goes to your alumni and honours privacy and Canada Anti-Spam Law (CASL) guidelines.
- Will be sent using a branded template to be consistent with messaging alumni are accustomed to.
  - Responsive: email adjusts to device screen size
  - Can be personalized: Dear [first name],

**Tip:** A lot of email goes out to alumni – reach out to Alumni Staff sooner rather than later to book your email

# Alumni Relations

## Step 3: Consider email best practices

- Alumni audience likely 5-7 years out from graduation
  - Millennials/Gen Z: TL;DR
  - Keep your message brief and to the point – 200-250 words
  - Put the “fine print” on the first page of the survey
- Alumni live in 140+ countries – consider for any incentives
- Consider who the email signatory will be
  - Name recognition can lead to more responses
- Average email open rate: 43%

# ALUMNI RELATIONS

## Step 4: Develop content for your email

- Alumni staff will coordinate content with you and can provide examples of other programs' emails
- Be sure to communicate to alumni the reasons why they should take the survey?
  - Your feedback can make a difference
  - You're going to help future students
- Be courteous: let them know how long the survey will take and include your thanks
- Optional – survey close date



*Faculty of*  
**ARTS**

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The Department of Economics is embarking on an important review of our degree programs. We would love your perspective on your degree experience while studying with us. We have designed a short survey (5-10 minutes) which you can access via the button below. Your participation is confidential but we'd be happy to share the results with you if you are interested.

Thanks in advance for considering this request in the midst of your busy day! Your feedback is important as we consider how to shape our program for future students.

We sincerely appreciate your support.

Lutz-Alexander Busch,  
Chair, Economics Dept.

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**TAKE THE SURVEY**



# ALUMNI RELATIONS | SUMMARY OF STEPS

1. Connect with your Alumni staff member
2. Alumni staff will coordinate with Alumni Relations for an email to be sent on your behalf
3. Consider email best practices
4. Develop the content for your email

# SURVEY CREATION & DISSEMINATION



- Create your survey in a software platform
- Qualtrics is recommended - UW has a license, IST support available
  - Can also use other survey platforms, such as Survey Monkey

## Student Surveys

- Timing of student surveys should be verified with IAP.
- Programs are responsible for programming & disseminating the survey. IAP is available for consultation.
- Contact list/population files available through the Data stewards (see slide 11).

## Alumni Surveys

***\*All contact with alumni must be run through Alumni Relations\****

Your Faculty Alumni Officer can help facilitate surveying (e.g., provide list of alumni to contact, email content and timing).

# SURVEY RESPONSES

- The software platform in which you create your survey will collect the responses
- Send reminders to respondents, if needed
- Review the results
- Seek assistance for interpretation of data, if needed
- Statistical Consulting & Survey Research Unit (SCSRU) will provide data analysis services (Note: a cost maybe involved for their services)

# FOCUS GROUPS

The QA Office can assist you to:

- help prepare a set of questions
- host and facilitate the focus group
- report back on results

Alumni Relations will:

- help connect you with alumni for focus groups



# INTEGRATING RESULTS INTO THE SELF-STUDY

## Self-Study (Section 1.6)

- Discuss how students and alumni were consulted and what role they played in creating the self-study.
  - Include a copy of survey(s) or focus group questions as an appendix
  - Include aggregate data as an appendix

## Self-Study (Section 9)

- Survey/focus groups results will help inform the strengths, challenges, weaknesses and opportunities for improvement

# QUESTIONS?

## **Quality Assurance Office**

[quality.assurance@uwaterloo.ca](mailto:quality.assurance@uwaterloo.ca)

## **Institutional Analysis and Planning**

Rohem: [rohem.adagbon@uwaterloo.ca](mailto:rohem.adagbon@uwaterloo.ca)

## **Alumni Relations**

Katherine: [katherine.prospero@uwaterloo.ca](mailto:katherine.prospero@uwaterloo.ca)