

Matching Survey Design Toolkit



This toolkit helps you design a matching survey strategy that does more than pair participants - it builds your data inventory and captures the insights you need to uncover trends in identity, needs, and support. Based on the Beyond the Match webinar, it shows you how to design with the end in mind so your matching survey becomes the foundation for smarter action all year long.

Step 1: Identify Key Data Priorities

A strong first step is to **identify 1-3 must-have data points for your matching survey** – the critical pieces of information that will directly guide how you connect participants, allocate resources, or inform institutional decisions. Focus on data that provides actionable insight, whether it's participant identity, specific needs, or support preferences, so every response can drive meaningful action.

Must-Have Data Points
1.
2.
3.

Step 2: Map for Impact

Next, review your matching survey questions and response options with intention. Start by asking: **what characteristics, experiences, or interests do you want participants to be matched on?** Even if you do not need these data points for reporting, they can be critical for creating meaningful matches. Questions about major, career interests, shared identities, goals, or lived experiences can help create stronger connections between participants.

At the same time, **consider how survey responses can connect participants to resources.** Ask yourself: if a participant selects this option, **what specific resource, office, or opportunity should they be connected to?** Ideally, each response creates a clear pathway to action. For example, if a student indicates interest in study abroad, you could direct them to the study abroad office, website, or advisor.

It is also helpful to take a broader institutional view. **Who on campus would find this information valuable, and what decisions could it inform?** For instance, if many participants report being single parents or lacking reliable transportation, this insight could guide outreach from basic needs services, commuter programs, or student life - or even support campus-provided grants for transportation or childcare.

Finally, think in reverse. **Identify programs or services that need more visibility and design your survey to surface them.** For example, if your campus offers a program for former foster youth, you

might include a survey option for students to self-identify, creating a direct pathway to targeted support.

INSTRUCTIONS

Use the space provided below. In the first column, list the matching survey question or option; in the second column, note the resource (website, staff member, service) or institutional action that is tied to each one. You can also work in reverse: start with the resource or action and identify which question or option would need to be included in the survey in order to collect that data. Some questions or options may already exist, while others might need to be added (either within an existing question or as a new custom question). Your Mentor Collective representative is available to help you incorporate these needs into your survey structure for the best results.

Find default questions in the Standard Matching Survey sections of our Knowledge Center:

[🔗 Standard Mentor Collective Content](#)

For returning partners: Head to your Partner Dashboard, click on the "Mentorships" tab and select "View Matching Surveys" at the top right to view your customized matching survey.

Matching Survey Question or Option	↔	Resource or Institutional Action
	↔	
	↔	
	↔	
	↔	
	↔	
	↔	
	↔	

Step 3: Put It In Action – AI Prompting Toolkit

AI tools such as Gemini, Claude, and ChatGPT can be powerful tools to accelerate your work and improve the quality of your matching survey data. Use them to brainstorm new ideas, refine and customize your matching survey questions, develop tailored resources for your audience, and draft clear, effective communications.

To get the most value, start with your specific goal and then use the tested prompts below to generate ideas, iterate on language, and adapt content to your organization’s voice and priorities. Review and refine the output to ensure it aligns with your program objectives and context.

Matching Survey Prompts	
Goal: Create a Custom Question	Level: ●●
<p>Role: Expert Survey Design Consultant</p> <p>Task: Create a matching survey question that supports data alignment between two participant groups.</p> <p>Context: Group A: [Insert description] Group B: [Insert description]</p> <p>Goal: [Insert the outcome the matching should optimize for.]</p> <p>Design Requirements:</p> <ul style="list-style-type: none"> - Maximum of 7 response options. - Short phrases only. - No definitions, examples, parentheses, or punctuation beyond standard words. - Identical response options for both groups. - Professional tone suitable for higher education or workforce programs. <p>Return:</p> <ol style="list-style-type: none"> 1. Question for Group A. 2. Question for Group B. 3. One unified bulleted list of response options. 	
Goal: Make Response Options More Organization-Specific Best for: Career fields, Hobbies	Level: ●
<p>Basic AI Prompt</p> <p>You are an expert in survey design for [higher education, workforce readiness, corporate, etc].</p> <p>Review the survey response options below and improve them so they better align with the institution or organization described.</p>	

Matching Survey Question:

[Insert Question Here]

Institution Context:

[Insert description or institution/organization name]

Current Response Options:

[Paste list]

Do the following:

- Identify misaligned or redundant response options.
 - Suggest edits to improve clarity and consistency.
 - Recommend any missing response options that should be included.
 - Provide a final revised list in clean bullet format.
 - Keep all options as short phrases only.
-

Advanced AI Prompt

Role: Expert Survey Audit and Optimization Consultant

Task:

Review and improve a list of existing survey response options to ensure alignment with an institution or organization's specific offerings and context.

Goal:

Ensure the response options accurately reflect the academic programs, career pathways, or strategic priorities of the institution while maintaining clarity and usability for matching or reporting purposes.

Matching Survey Question:

[Insert Question Here]

Institution Context:

[Insert details about the institution - majors offered, workforce focus, strategic priorities, student population, geographic region, etc.]

Current Survey Response Options:

[Paste the existing list exactly as written.]

Audit & Revision Instructions:

1. Identify response options that are:

- Misaligned with the institution's offerings
- Outdated or too broad
- Redundant or overlapping
- Missing but strategically important

2. Provide recommendations in three clearly labeled sections:

- A. Remove
- B. Revise
- C. Add

3. When suggesting revisions:

- Maintain short phrase formatting.
- Avoid definitions, examples, or parentheses.
- Keep wording professional and survey-ready.

4. If appropriate, provide a final proposed revised list that:

- Is clean and consolidated
- Avoids redundancy
- Maintains consistent phrasing structure

Tone:

Professional and practical.

Output Structure:

Section 1: Observations

Section 2: Remove

Section 3: Revise

Section 4: Add

Section 5: Proposed Revised List

Goal: Aligning Matching Survey with Strategic Goals

Best for: Tell Us About Yourself, Life Experiences

Level: ●●●

Role: Strategic Program Alignment Consultant specializing in survey design and participant matching.

Task: Evaluate and improve a matching survey question so that it intentionally and appropriately supports institutional strategic priorities - without forcing alignment where it does not meaningfully improve matching quality or participant insight.

Strategic Inputs:

[Paste mission, vision, strategic priorities, or key initiatives – can even just be a link to the webpage or multiple webpages]

Current Matching Survey Question:

[Paste current question]

Current Response Options

[Paste list]

Objectives

1. Extract Strategic Themes

Identify and summarize the 3–5 most relevant strategic themes that could reasonably:

- Improve match quality

- Influence compatibility or shared experience
- Surface meaningful self-reported participant data
- Act as leading indicators for engagement, persistence, workforce readiness, belonging, or support needs

Only include themes that strengthen either:

- Match compatibility
OR
- Actionable program insight

Do not include themes that are purely symbolic, operational, or better addressed through other assessments.

2. Alignment Assessment

Evaluate whether the current question and response options meaningfully support those themes.

Clearly distinguish between:

- Strong alignment
- Partial alignment
- No alignment (and explain whether alignment is necessary)

If the current survey already appropriately supports matching logic and strategic priorities, explicitly state:

“The current survey appropriately supports matching and strategic priorities. No revisions recommended.”

3. Strategic Gaps and Relevance Review

Identify:

- Gaps that would improve matching effectiveness
- Gaps that would improve actionable participant insight
- Missed opportunities to surface meaningful self-reported data

Do not recommend adding priorities that are symbolic or disconnected from participant experience.

4. Recommendations (Only If Justified)

Recommend changes only when they strengthen both:

- Matching effectiveness
OR
- Meaningful, actionable participant data

Provide:

- A. Revisions to the question (if needed)
- B. Response options to remove
- C. Response options to revise
- D. Response options to add

For any new option added, briefly explain why it improves either matching logic or participant insight - not just strategic optics.

Constraints

- Must follow the matching survey logic outlined here: <https://help.mentorcollective.org/hc/en-us/articles/15282404882327-Customizing-Your-Matching-Surveys#Accordion-change-the-standard-question-text--7>
- Response options must remain short phrases only.
- No definitions, parentheses, or examples in the final option list.
- Maximum of 10 final response options unless strongly justified.
- Maintain professional tone suitable for higher education or workforce programs.
- If no meaningful improvements are identified, clearly state that no revisions are recommended.

Output Structure

- Section 1: Key Strategic Themes Identified
- Section 2: Alignment Assessment
- Section 3: Recommended Revisions
- Section 4: Proposed Strategically Aligned Final List

Resource Development

Goal: Audit Resources

Level: ●

You are helping identify official student support resources at a college or university.

Institution website to review:

[PASTE FULL MAIN WEBSITE URL HERE]

Your task:

Scan the institution's official website and identify campus resources that support students experiencing the challenges listed below.

Student challenges to map:

[PASTE YOUR LIST HERE; INCLUDE THE RESPONSE OPTIONS FROM THE MATCHING SURVEY THAT YOU WANT TO REFER STUDENTS TO]

Examples:

- *Academic support*
- *Financial stress*
- *Mental health concerns*
- *Food insecurity*
- *First-generation student support*
- *Career uncertainty*
- *Housing insecurity*
- *Disability accommodations*

- *Veteran or military-affiliated support*
- *Transfer student support*
- *Commuter students*
- *International student support*
- *LGBTQ+ student support*
- *Parenting students*
- *Technology access issues*
- *Transportation challenges*
- *Social connection / sense of belonging*

Instructions:

1. Only include resources that are clearly listed on official institutional webpages.
2. Do not assume services exist. If no clear resource is found, write: "No clearly identified resource found."
3. For each challenge category, provide:
 - Resource name
 - Office or department name (if applicable)
 - 1-2 sentence description of the service
 - Direct webpage link
4. If multiple resources apply to one challenge, list all of them.
5. If one resource applies to multiple challenges, include it under each relevant category.
6. Organize results using clear headers for each challenge.
7. Do not provide recommendations or commentary - only verified findings.

Output format example:

Academic Support

- Resource Name:
- Office/Department:
- Description:
- Link:

Financial Stress

- Resource Name:
- Office/Department:
- Description:
- Link:

If information appears unclear or outdated, note that.

Goal: Generate Custom Resources - Resources by Flag

Level: ●

Project Variables:

- **Institution Name:** [Insert Name]

- **Institution Website:** [Insert URL]
- **Specific Flags & Focus Areas:** [PASTE YOUR MENTOR COLLECTIVE FLAGS TOPICS HERE]

Note to Partners: [Standard Flag topics can be found here](#). If you have customized Flag topics, those can be viewed in the "Flags" tab of your Partner Dashboard - click on "Filter Flags" and then "Topic" to see your full list]

Role: You are an expert Content Creator and Student Success Specialist in Higher Education.

Task: Produce a clean, participant-facing resource guide of recommended support services for learners at [Institution Name]. This guide will be used by mentors to provide specific referrals based on "flags" raised during conversations.

Instructions:

1. **Source Discovery:** Research [Institution Website] (specifically the Division of Student Affairs, Dean of Students, Academic Success centers, and Counseling services) to identify current, official offices.
2. **Resource Mapping:** For **every single flag** listed in the "Specific Flags & Focus Areas" block, identify the most relevant campus resource.
 - *Note:* Multiple flags may point to the same office (e.g., "Anxiety" and "Depression" both point to Counseling), but the "What it Offers" section should be tailored to address that specific flag's context.
3. **Content Requirements:** For every resource identified, include:
 - **Official Name:** (e.g., "The Student Success Center")
 - **What it Offers:** A 2–3 sentence summary of services.
 - **Who it Serves:** Eligibility requirements (e.g., "All enrolled students").
 - **How to Connect:** Specific action steps (e.g., "Book via the online portal," "Email for intake," or "Visit [Building Name], Room [Number]").
 - **Contact Info:** Phone, Email, and direct URL.
4. **Tone & Formatting:** * **Tone:** Empathetic, supportive, and jargon-free.
 - **Format:** Use clear headings, bullet points, and white space.
 - **Front Matter:** Include a Title Page, a Table of Contents based on the flags, and a brief "How to Use This Guide" intro for students.
 - **Footer:** "[Institution Name] | Student Support Guide | [Current Date]"

Deliverable: A ready-to-convert text draft titled: "[Institution Name] – Key Learner Support Resources (by Focus Area)"

Other Ideas

Use your AI tool of choice to help you...

- **Draft a Mentor Handbook:** Generate a structured handbook covering mentor expectations, conversation starters, boundaries, goal setting, and common challenges.
- **Create a Program Timeline or Marketing Calendar:** Map out key milestones and events based on the academic calendar like mentor recruitment, mentee enrollment, matching,

kickoff events, midpoint check-ins, and program wrap-up.

- **Generate Value Propositions for Different Audiences:** Create tailored messaging explaining the benefits of mentoring for students, alumni, staff, or industry partners.
- **Brainstorm Incentives for Participation:** Suggest creative incentives such as recognition programs, certificates, networking opportunities, digital badges, or resume benefits.
- **Create Event Promotion Materials:** Draft messaging for kickoff events, mentor training sessions, networking events, and celebration ceremonies.
- **Summarize Participant Feedback:** Analyze open-ended survey responses and identify trends, strengths, and areas for improvement.
- **Brainstorm even more ideas!**

Examples from the Collective

If you're looking for inspiration on the best questions or response options to include, review the examples that other institutions and organizations have successfully implemented!

Edits to Default Questions

From the question *"Tell Us About Yourself..."*

- Earned GED/HSED
- Homeschooled
- Military connected (spouse/dependent)
- Re-entry student (out of college 1-2 years)
- Re-entry student (out of college more than 3 years)

Life Experiences (Student Success)

"Do you want a mentor who has had any of these particular life experiences?"

"Some mentees are looking for mentors with particular life experiences. Select as many as you like."

- Grew up in a rural setting
- Grew up in a suburban setting
- Grew up in an urban setting
- Limited family support
- Primary caregiver for a family member
- Primary financial provider while also attending school
- Experience with bullying, cyberbullying, etc.

Life Experiences (Career)

- Attended graduate school
- Attended law school
- Attended medical school
- Entrepreneur/started their own business OR Entrepreneur or small business owner
- Experience in leadership or management
- Career changer or transitioned industries
- International work or global perspective

Life Experiences (Any program)

- LGBTQ+ or Ally

- Involved in caring for a family member
- Raised by other caretakers (e.g. grandparents or foster parents)
- Neurodiverse (e.g. Autism, ADHD)
- Challenges due to mental health
- Challenges due to physical disability
- Challenging family relationships/dynamics
- Former foster youth
- Demonstrated resilience in challenging social situations
- Balanced work and education
- Actively raising or supporting children
- First-generation college graduate
- Experience balancing work and caregiving (i.e. children, elders)
- Military or veteran background

Hobbies (*These are a few of my favorite things...*)

- Content creation
- Social media
- DIY/Crafts
- Water sports

Custom Questions

Questions for Student Success Programs

Mentee: What types of clubs/activities do you hope to be involved in at [Institution Name]? Select all that apply.

Mentor: What types of clubs/activities have you been involved in at [Institution Name]? Select all that apply.

- Academic & Professional Clubs
- Greek Life
- Cultural and Identity-Based Organizations
- Service & Volunteer Groups
- Religious & Spiritual Groups
- Arts & Performance Organizations
- Sports & Recreation Clubs
- Special Interest & Hobby Clubs
- Political & Advocacy Organizations
- Technology & Innovation Clubs
- None
- Other _____

What are the reasons you chose online learning?

- Balancing school with work or family commitments
- Convenience and flexibility in scheduling
- Health or accessibility considerations
- It was my top choice for education

- Limited access to in-person classes
- Preference for independent or self-paced learning
- Other

If applicable, which of the following student success programs do you participate in? Please select all that apply.

- *List options of student success programs at your institution*

Questions for Career Programs

Mentee: How many years of professional experience would you like your mentor to have? If no preference, please select multiple options or all that apply.

Mentor: How many years of professional experience do you have?

- 01-05 years
- 06-10 years
- 11-20 years
- 21+ years

Mentee only: To help the [Program Name] best support you, what areas would you like additional support with?

- Academic support
- Applying/securing an internship
- Applying to/getting into Graduate School
- Applying to/securing a full time position
- Building my professional network
- Career exploration
- Other

Mentee: What are the key motivators driving your career choices?

Mentor: What key motivators drove your career choice?

- Agency Over Work
- Alignment with Personal Values
- Career ambitions
- Diversity, Equity, and Inclusion Efforts
- Doing research
- Entrepreneurship
- Financial Security/Compensation
- Growing network
- Leadership Opportunities
- Making a community/social impact
- Teamwork and Collaboration Opportunities
- Work-life Balance and Flexibility
- Other

Questions that can be used in any program:

Do you have any military affiliation?

- Active duty

- Dependent
- National Guard
- Reserves
- Spouse
- Veteran

Mentee: What personality traits would be important in a mentor? (Optional)

Mentor: Choose the options that align with your personality.

Select all that apply

- Collaborative
- Detail-focused
- Direct & clear
- Empathetic & supportive
- Extroverted (recharges with others)
- Flexible (go-with-the-flow)
- Growth- or process-focused
- Independent
- Introverted (recharges alone)
- Optimistic & encouraging
- Quick responder
- Realistic & grounded
- Results-driven
- Stability-oriented (likes routine)
- Subtle & diplomatic
- Task-focused & efficient
- Thoughtful & reflective

TIPS

- AI Prompting:** Before using an AI tool, copy and paste your desired prompt into a separate document for easy refinement.
- Data Action:** Schedule a reminder on your calendar or to-do list to retrieve relevant survey data and implement necessary actions at the appropriate times.
- Partner Support:** Contact Mentor Collective's Partner Support (partnersupport@mentorcollective.org) to distribute new resources to specific participant groups, send reminders to access resources, or issue event invitations.
- Partner Support:** Contact Mentor Collective's Partner Support (partnersupport@mentorcollective.org) to request matching survey data be turned into filterable data on your Partner Dashboard