Mentor Collective

Beyond the Match: Architecting Your Survey for Future Impact

March 10, 2026

Audience Engagement

1. Upon entry, audio is on mute
2. Chat your **name** and **organization**
3. Submit your questions throughout the event and chat with attendees via the Chat feature in Zoom
4. Download Matching Survey Toolkit: **https://bit.ly/matchingtoolkit**

Like what you hear? Let us know with reactions!

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Today's Speakers

Annemieke Rice
Senior Vice President of Product Transformation

Lydia Anderson
Lead Implementation Manager

Agenda

Architect Mindset
How to customize your matching survey with the end in mind

Live Demo
Jump into the MC platform for a refresher on how to look at your results

Toolkit & Resources
Question templates and AI prompts to get you ahead

What's Next
Sneak peek into an upcoming product release to leverage institutional data

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Matching Survey Refresher

What is the Matching Survey?

Completed by mentors and mentees at sign-up to share who they are, what matters to them, and what they're looking for in a mentorship experience

The Matching Survey Captures:

1. **Shared Characteristics:** Aligns interests, identities, and experiences to support meaningful connections
2. **Mentorship Experience Preferences:** Captures expectations around communication and frequency to drive satisfaction
3. **Mentorship Guidance:** Identifies goals and conversation starters to help pairs build momentum from day one

Serves Two Key Purposes

- 🎯 Power strong matches aligned to goals, interests, and expectations
- 📊 Provide partner insights into participant backgrounds, preferences, and needs

Default Matching Surveys

Mentor Collective has developed matching surveys for Student Success, Career Readiness, Adult/Online, and Workforce programs. These include default questions based on research into essential criteria for making good matches.

Customizations

Your program and your participants' needs are special. Mentor Collective offers a comprehensive suite of matching survey customizations to best fit your program, including:

- Adding, removing, or rewording options for standard questions
- Creating custom questions
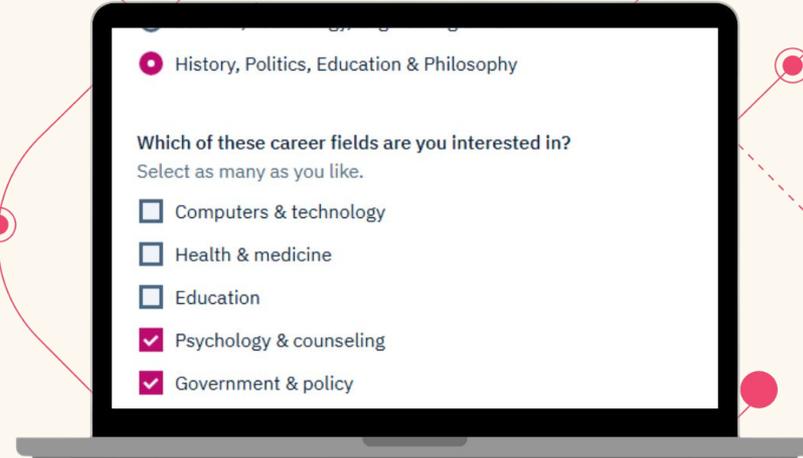
Coming Soon: Match by Institutional Data

Mentor

Jordan Rivera

About
Gender: Female
Age: 37
Language: Rivera
Race: Hispanic/Latino

Major
Healthcare Administration
Biology

Career Interests
Health & medicine

Life Experiences
Work a job during school
Currently have children
LGBTQ+
Non-native English speaker
Is single parent

Institutional Data
First Generation Status: TRUE
College: College of Public Heath; College of Arts and Sciences
Honors Scholar: TRUE
Student Athlete: TRUE

Mentee

Alex Chen

About
Gender: Male
Age: 24
Language: English
Race: Asian and Asian American, White

Major
Healthcare Administration

Career Interests
Science
Health & medicine
Computers & technology

Life Experiences
Unsure about career
Work a job during school
Currently have children
Had difficulty getting along with family
Traveled internationally

Institutional Data
First Generation Status: TRUE
College: College of Public Heath
Honors Scholar: TRUE
Student Athlete: FALSE

Verified Institutional Data

Seamlessly incorporate high-fidelity data that is often difficult for participants to recall or report accurately.

Strategic Matching Survey

Move past the basics and design surveys that capture the personal data that can't be found in a database.
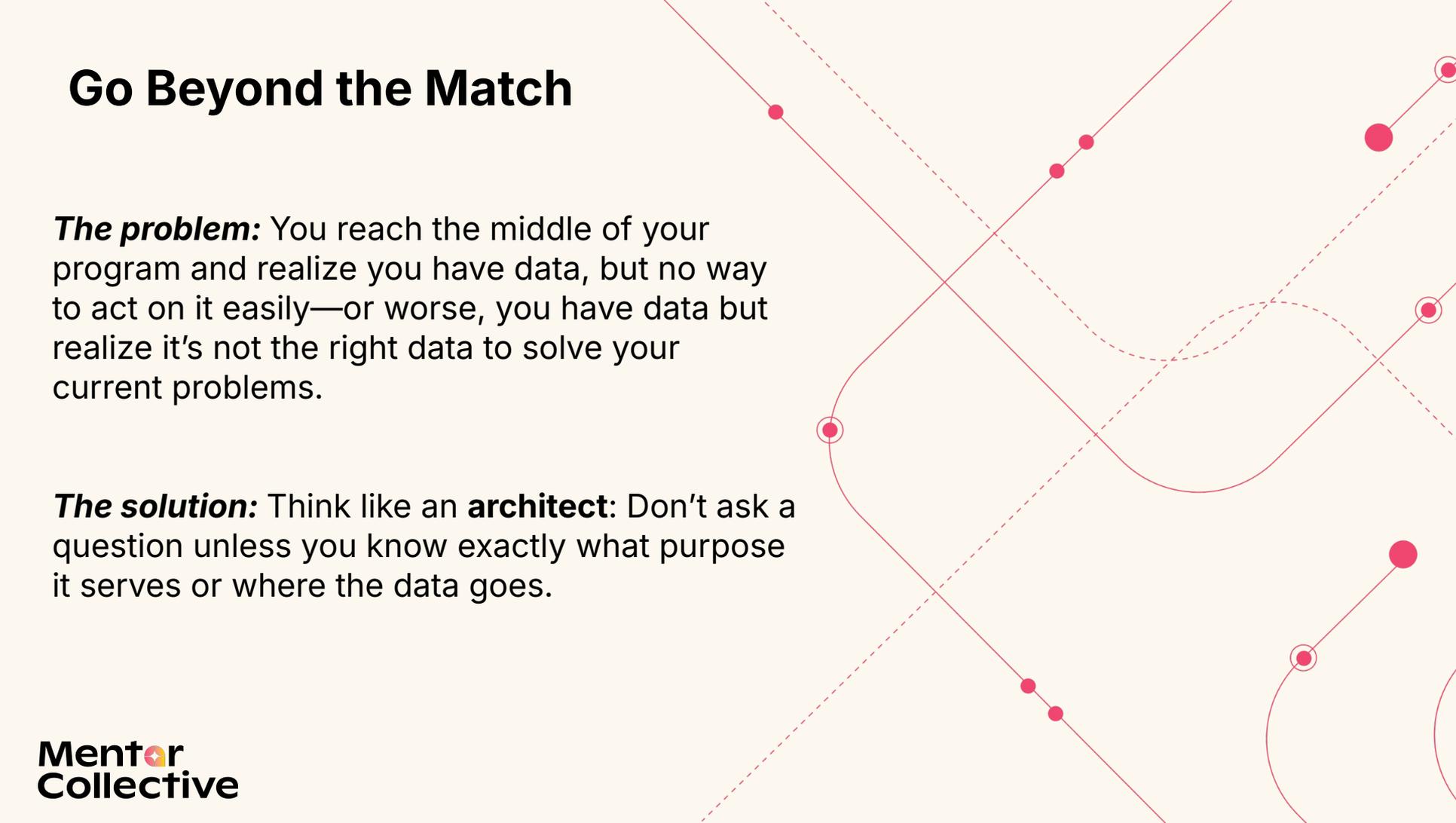
Holistic Matches

Synthesize official records with student voice, achieving matches that are both validated and personally resonant.

The Architect Mindset

Go Beyond the Match

The problem: You reach the middle of your program and realize you have data, but no way to act on it easily—or worse, you have data but realize it's not the right data to solve your current problems.

The solution: Think like an **architect**: Don't ask a question unless you know exactly what purpose it serves or where the data goes.

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Designing with the End in Mind

ACTION BY DESIGN FRAMEWORK
STEP 1: Identify Key Data Priorities

New Partners
(First launch with Mentor Collective)

Returning Partners
(Completed 1 or more launches)

Identify
Identify core "must-have" data points for the program cycle

Audit
Review last program's questions to cut the noise and amplify the signals that worked.

Student Action Examples

- *Issue:* We have incredible resources for specific populations (like First-Gen, Transfer, or International students), but we rely on students walking into an office to self-identify. Most never do.

- *Issue:* We treat all seniors the same, but some have jobs lined up while others are panicked. We can't support the 'panic' group because we don't have an accurate picture of who they are

- *Issue:* We know students are leaving because they haven't found their 'people,' but we don't know what they are actually interested in outside of the classroom.

- *Issue:* Our adult learners don't drop out because they aren't smart; they drop out because life gets in the way. We need to know who is balancing multiple responsibilities before the term starts.

Example

What are your primary commitments outside of school this term?
- Full-time work
- Part-time work
- Caregiving
- Military service
- Other

💡**Serves Dual Purpose:**
- **For Matching:** Pairs them with a mentor who also balances work/life (peer validation).
- **Leading Indicator:** Identifies students who could benefit from specific resources (e.g. Time Management for Student-Parents)

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Institutional Action Examples

- *Issue:* Academic leadership lacks early visibility into the specific career aspirations of their incoming cohorts.

- *Issue:* Faculty and staff may feel disconnected from the day-to-day realities and backgrounds of the current student body.

- *Issue:* The institution's strategic plan prioritizes "student belonging and engagement," but relies on guesswork to fund and promote campus organizations because they don't know what incoming students actually want.

- *Issue:* The institution needs a real-time needs assessment for incoming students, but standalone surveys often have low response rates.

Example: "Which of these career fields are you interested in?"
Action: Disaggregate this data by college and share it back with deans and academic advisors to inform programming.

Example: "What is one question you want your mentor to help you answer?"
Action: Conduct a qualitative data analysis on the responses to uncover immediate student needs and anxieties right as they enter the program.

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Toolkit

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: Key Data Priorities

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.

ACTION BY DESIGN FRAMEWORK
STEP 2: MAP FOR IMPACT

Matching Survey Question or Option	⇄	Resource or Institutional Action
"Interested in Study Abroad" *(Option within Tell Us About Yourself question)*	⇒	Pull list in September, send to Director of Study Abroad ahead of Study Abroad Fair
Add "Former foster youth" as option in *Tell Us About Yourself* question	⇐	**Resource: Grant available for former foster youth**
• Ensure *Career Interests options* align with all majors offered at Temple • Include "Currently work full or part-time" as option within *Tell Us About Yourself* question • Add custom question related skill development needs/interests	⇐	**"Revise work-study programs so that opportunities are aligned with career development"** (Temple University Strategic Plan) **Action:** • **Leverage self-reported employment data to recruit eligible students for open work-study positions based on skills they need to develop**

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Toolkit

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
	⇄	
	⇄	
	⇄	
	⇄	
	⇄	
	⇄	
	⇄	
	⇄	

View Your Matching Surveys

Uplift PROGRAM | MENTOR COLLECT

- Dashboard
- Activities
- Flags
- Conversations
- Mentorships
- Participants
- Resources
- Community
- Exports

🔔 **Lydia Anderson** ⌄
Partner

[View Matching Surveys] [Export Mentorships ⌄]

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Put it in Action

Live Demo: Understanding Your Data

Toolkit

Matching Survey Prompts

Goal:
Create a Custom Question

Level: 🟡 🟡

Role: Expert Survey Design Consultant

Task: Create a matching survey question that supports data alignment between two participant groups.

Context:
Group A: [Insert description]
Group B: [Insert description]

Goal:
[Insert the outcome the matching should optimize for.]

Design Requirements:
- 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.

Return:
1. Question for Group A.
2. Question for Group B.
3. One unified bulleted list of response options.

OTHER PROMPTS:
- Make options more organization or institution-specific
- Align matching survey with strategic goals
- Audit website for all institutional resources
- Generate custom resources
  - Resources by Flag
  - Mentor Handbook

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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.

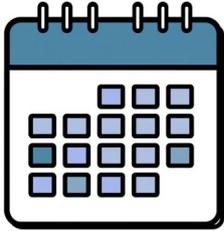- ❏ Turn matching survey data into filterable data (IPD) on your Partner Dashboard

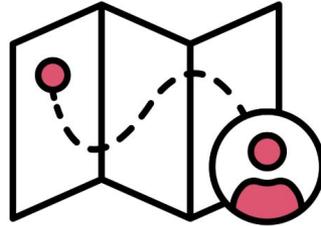**Mentor Collective**

Q&A
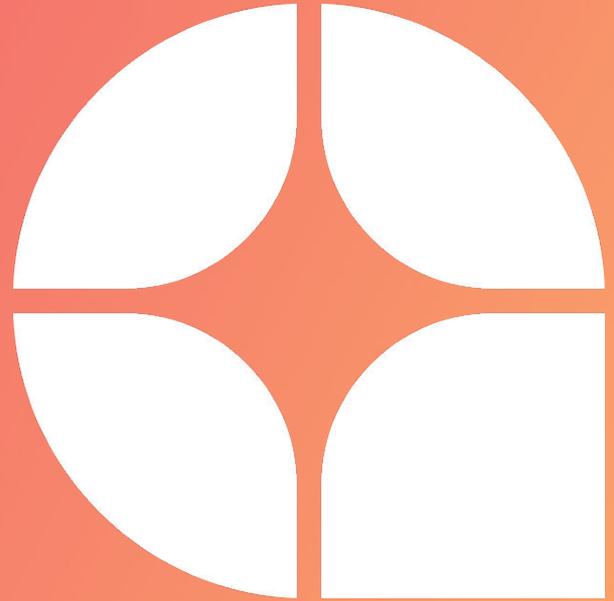
Resources & Events
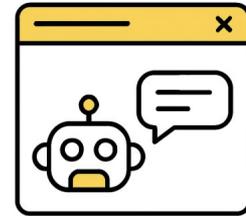
What's New & What's Next

Smart Scheduling

Eliminate the back-and-forth. **Integrate with Google & Outlook** calendars to book sessions directly in-app.

Convo Logs 2.0

Evolving participant conversation logs from rote compliance to an engaging, **reflective experience**.

Program Designer

Your 24/7 **digital consultant** for building high-impact programs, powered by 10+ years of mentorship data.

Need to catch up? Listen to the webinar <u>recording</u> or read our <u>release notes</u>.

Upcoming Events

March 15-18	**Innovations Conference** Monday session: *Mentorship for All: Building Comprehensive, Data-Informed Programs to Advancing Student Success*	Indianapolis, IN
March 18	***Student Success in Action: Building a Connection to Campus with Mentorship*** Hosted by Rural Community College Association, featuring College of Southern Idaho	Webinar
March 23 - 25	**Business Higher Education Forum** Spring Convening	Tempe, AZ
March *TBA*	**Partner Storie**s from Pellissippi State University, Augusta University, and Lincoln University	Webinar
April *TBA*	**Quarterly Product Updates**	Webinar

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