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## Appendices

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### Template for Heads-up Email

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Dear «First\_Name» «Last\_Name», «Position\_Title»:

On Monday, December 9th, you will receive an email invitation to participate in a survey gathering feedback on proposed topics and delivery formats for the Leadership and Management Seminar sponsored by the U.S. Department of Education's Minority Serving and Under Resourced School Division (MSURSD). The Department is interested in determining your level of interest in attending the seminar, the proposed content areas and across different delivery approaches. If you have participated in a past seminar, the Department would like to get a better understanding of the impact it had on your institutional role. Your responses will be very valuable to MSURSD in improving its services to you.

When you receive the survey, please take 5-10 minutes to provide your thoughts. Use this opportunity to let your voice be heard and know that your input will be instrumental in shaping future seminars and other MSURSD support services.

If you have any questions, please contact Brooke Shelley at [brooke.shelley@windwalker.com](mailto:brooke.shelley@windwalker.com). Thank you for your time.

Sincerely,

«Cluster\_Lead\_Name»  
Cluster Lead

### **Leadership and Management Seminar Audience Expansion and Content/Delivery Approach Update Survey**

#### **Introduction**

The U.S. Department of Education's Minority Serving and Under Resourced Schools Division (MSURSD) is interested in expanding the audience, content and delivery approaches of their Leadership and Management Seminars, which provide training on default management policies and procedures to institutional staff. The goal of this survey is to identify ways to meet the needs of the training's expanded audience.

You were selected to participate in this survey because you have been identified as a member of the audience that MSURSD believes would benefit from participating in the seminar. During this survey, you will be asked questions assessing what you would like to learn from this seminar hosted by MSURSD, your interest in specific content areas, and how likely you would be to participate in the seminar if it were presented in different formats.

The survey is expected to take approximately 10 minutes to complete and must be submitted by December 20, 2013. Thank you for taking the time to provide your feedback. If you have any questions, please contact Brooke Shelley at [brooke.shelley@windwalker.com](mailto:brooke.shelley@windwalker.com).

**Background**

1. Please indicate the number of years you have served in your current role at your institution. *Select one.*

- Less than 5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- 26-30 years
- More than 30 years

2. What is your role at your institution? *Select one.*

- President / CEO
- CFO
- Director of Financial Aid
- Other (please specify): \_\_\_\_\_

{Ask Q3 only to institutional financial aid directors as identified in Q2}

3. One of the goals of the seminar is to enable institutional leaders, such as Presidents and CEOs, to take more ownership of default management policies and procedures.

Of the following training topics, how important do you think each would be in making your institutional leader a more active participant in default management policies and practices? *Select one for each.*

	Not At All Important	Somewhat Important	Important	Very Important	Extremely Important

Title IV rules and regulations					
Program Participation Agreement (PPA)					
Default Prevention and Management (DPM)					
Title IV audits					
Cohort default rates					
Title IV leadership and staff requirements					

**Past Seminar Participation**

4. Did you attend the 2012 Leadership and Management Seminar? *Select one.*

- Yes
- No

{If yes to Q4, ask Q5-7}

5. Please indicate your level of agreement with the following statements regarding your experience as a participant in the 2012 Leadership and Management Seminar. *Select one for each.*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I have been able to apply what I learned in the seminar.					
The knowledge I gained through the seminar will help my institution minimize and/or avoid financial risks.					
The knowledge I gained					

through the seminar will help ensure my institution is compliant with Title IV rules and regulations.					
As a result of attending the seminar, I better understand how I can help ensure that my institution meets Title IV requirements.					
As a result of attending the seminar, I better understand how to bring together people, groups, and/or departments at my institution to achieve institutional goals.					

6. Please rate the level of knowledge you feel you've retained from the seminar on the following topics. *Select one for each.*

	No Knowledge	Minimal Knowledge	Basic Knowledge	Adequate Knowledge	Superior Knowledge
Title IV rules and regulations					
Program Participation Agreement (PPA)					
Default Prevention and Management (DPM)					
Title IV audits					
Cohort default rates					
Title IV leadership and staff requirements					

7. Which of the following seminar topics have you found most helpful and/or relevant to your work? *Select all that apply.*

- Title IV rules and regulations
- Program Participation Agreement (PPA)
- Default Prevention and Management (DPM)
- Title IV audits
- Cohort default rates

- Title IV leadership and staff requirements
- o All of the above
- o None of the above

**Seminar Content Updates**

8. Of the following seminar topics, how important do you think each would be in increasing your knowledge of default management policies and practices? *Select one for each.*

	Not At All Important	Somewhat Important	Important	Very Important	Extremely Important
Title IV rules and regulations					
Program Participation Agreement (PPA)					
Default Prevention and Management (DPM)					
Title IV audits					
Cohort default rates					
Title IV leadership and staff requirements					

9. Which of the following seminar topics would be most helpful to increasing your knowledge of default management policies and practices? *Select up to three.*

- Title IV rules and regulations
- Program Participation Agreement (PPA)
- Default Prevention and Management (DPM)
- Title IV audits
- Cohort default rates
- Title IV leadership and staff requirements

10. Are there any other seminar topics that may be helpful to increase your knowledge of default management policies and practices?

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11. Do you think there are other people within your institution who would benefit from attending this seminar? *Select one.*

- Yes
- No

{If yes to Q11}

12. What are the roles of the people who would benefit from attending this seminar?

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**Seminar Delivery Approaches**

13. Currently, the seminars are conducted as in-person workshops over several days, however, there are different formats in which the seminars can be held. We would like to understand if you would be interested in attending the seminars if they were conducted in the following formats:

- In-person workshops held over multiple days that require you to travel to the training site on a specific date
- Live webinars that are conducted by MSURSD staff at a scheduled time where you are able to ask them real-time questions
- Recorded webinars that you are able to access online at any time where you are not able to ask real-time questions

	Not At All Interested	Somewhat Interested	Interested	Very Interested	Extremely Interested
In-person workshops that require you to travel to the training site					
Live webinars that allow you to ask questions in real-time					
Previously recorded webinars that allow you to listen to a live webinar that had already been conducted					

{If responded “Not at all Interested” or “Somewhat Interested” to an element above, ask}

14. Why are you not interested in attending the seminar in these formats?

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15. Are there any other formats in which you would like to see seminars delivered?

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**Final Thoughts**

16. Thinking about the content areas and delivery approaches that were mentioned in this survey, how likely is it that you would attend the next Leadership and Management Seminar? *Select one.*

- Not At All Likely
- Somewhat Likely
- Likely
- Very Likely
- Extremely Likely

17. Do you have any additional thoughts regarding what would make you more likely to attend a seminar?

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Your survey has been submitted. Thank you for taking the time to provide your feedback on the Leadership and Management Seminar. Your feedback is very valuable to MSURSD and will be used to help improve its services.