



DECISION INFORMATION
RESOURCES, INC.

Description of Today's TRIO Programs and Proposing Options for Future Outcome Evaluations

UB/UBMS Data Collection Instrument

Dated June 26, 2026

National TRIO Grantee Survey Draft

PRELOAD/ADMIN DATA		
Variable	Label	Valid values (if applicable)
PROGRAM_NAME	TRIO program type	Upward Bound (UB), Upward Bound Math Science (UBMS)
TOT_PARTIC	Total number of participants in 2024-25	
2425_GRANT	2024-25 grant amount	

INTRODUCTION

Welcome to the National Survey of TRIO Grantees! The U.S. Department of Education (ED) Institute of Education Sciences (IES) has contracted with Decision Information Resources, Inc. (DIR), an independent research company, to conduct this survey. You can find a summary of the project on the IES website [here](#).

This survey will ask about the UB/UBMS program that you direct, including what services you offer, how much of your budget is spent on different services, how many participants receive different services, how you monitor participants' progress, and how participants are selected for your program. Your responses help ensure we get meaningful results that accurately reflect all TRIO grantees. The results of this descriptive study will also provide you and other TRIO programs with insights about services and programming that are not currently captured by any other required reporting.

You will need to reference your budget from the 2024-25 grant year to help you answer the questions. You may also need to consult with other program staff members. If the information needed to answer a question is not available, please provide your best estimate. If you'd like to see the questions before you begin, you may view a PDF version of the survey here: [LINK TO PDF VERSION OF SURVEY].

The survey should take about 70 minutes to complete. To thank you for your time you will receive a \$50 electronic gift card.

The researchers conducting this study follow the confidentiality and data protection requirements of IES (The Education Sciences Reform Act of 2022, Title I, Part E, Section 183). All your responses will be kept private and used only for research purposes. Your responses will be combined with the responses of other respondents so that results are presented in aggregate. (No individual grantee responses will be shared or reviewed for compliance purposes.) Participation in the survey is completely voluntary. If you are unsure of how to answer a question, please give the best answer you can rather than leaving it blank. Your participation will help us learn more about TRIO programs; other than the gift card, there are no direct benefits to participants. There are no known risks associated with your participation.

Thank you in advance for your assistance with this important study. If you have questions or issues with the survey, or if you think someone else in your program should receive it instead, please submit an inquiry form to the project team at this link [LINK TO ONLINE FORM].

Section A. Services Offered

The first question asks about your UB/UBMS services offered in the 2024-25 grant year.

A1. Which of the following services did your UB/UBMS program offer in the 2024-25 grant year?

[FILL IF PROGRAM_NAME = UB OR UBMS]

Please indicate separately for academic year and summer offerings

[PROGRAMMING NOTE: Fill response option for relevant programs]

TUTORING

Academic tutoring

ACADEMIC INSTRUCTION

High school courses for credit

Courses for college credit

Non-credit courses

ACADEMIC ADVISING

Academic advising (e.g. course selection advice and assistance)

Advising and support in achieving a high school diploma or equivalent

POSTSECONDARY EXPOSURE

College information sessions (not on a college campus)

College campus tours or visits

On-campus residential program

Workshops or other activities with college students and faculty

Offered during the academic year	Offered during the summer
r	r
r	r
r	r
r	r
r	r
r	r
r	r
r	r
r	r
r	r

[UBMS only] Math and science research opportunity with faculty or graduate students	r	r
---	---	---

Social or cultural activities at a college campus	r	r
---	---	---

POSTSECONDARY APPLICATION AND FINANCIAL AID SUPPORT

College entrance exam preparation classes or support	r	r
--	---	---

Assistance with completing college entrance exam registration	r	r
---	---	---

Assistance with college applications	r	r
--------------------------------------	---	---

College application fee waivers or fee payments	r	r
---	---	---

Information on financial aid and scholarship opportunities and assistance completing necessary applications (such as FAFSA)	r	r
---	---	---

FINANCIAL LITERACY AND PLANNING

Financial and economic literacy counseling, workshops, or courses	r	r
---	---	---

CAREER DEVELOPMENT

Workshops, seminars, panels, and fairs related to career options and job skills	r	r
---	---	---

Career counseling and planning services	r	r
---	---	---

OTHER PROGRAMING OR SERVICES

Cultural activities not on a college campus (e.g., visits to museums, etc.)	r	r
---	---	---

Community service opportunities	r	r
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Personal counseling	r	r
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Leadership skills training	r	r
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MENTORING

Mentoring from high school or college students to program participants (peer mentoring)	r	r
---	---	---

FINANCIAL SUPPORT

Program participation stipends	r	r
--------------------------------	---	---

Work-study	r	r
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OTHER

Any services not described above. (SPECIFY.)

r

r

Section B. Funding and Participation Across Services

These next questions ask about funding and resource allocation for the 2024-25 grant year as well as intensity of program participation.

For the following questions, please only consider funding provided by the TRIO program. Please reference your budget from the 2024-25 grant year to help you answer the questions. If your actuals for the year are available and they differ from your budget, please use your actuals.

B1. Your total TRIO funding for your UB/UBMS program was [2425_GRANT] in 2024-25. Is that correct (within \$1,000)?

- Yes
- No

[IF NO TO B1]

B1a. What was your total TRIO funding for your UB/UBMS program in the 2024-25 grant year? Your best estimate is fine.

Response format: dollar amount

B2. Please provide the following information about staff roles or positions for your UB/UBMS program for the 2024-25 grant year:

1. In the first column, list each TRIO-funded staff role or position (e.g., Project Director, Advisor, Administrative Assistant) for your UB/UBMS program. Include full-time and part-time staff.
2. In the second column, enter the total TRIO-funded annual salary for each role during the 2024-25 grant year.
3. In the third column, enter the TRIO-funded fringe benefits associated with each role during the 2024-25 grant year.

If multiple individuals serve in the same role with the same salary and fringe benefits, you may combine them into a single line item by reporting the *total* salary and fringe benefits for all staff in this type of role.

<u>STAFF TITLE</u> <i>(Include full-time and part-time staff)</i>	<u>TRIO GRANT-FUNDED SALARY</u> <i>(annual salary during 2024-2025 grant)</i>	<u>TRIO GRANT-FUNDED FRINGE</u>	<u>TOTAL</u>

	<i>year)</i>		
Project Director	\$	\$	\$ [AUTOSUM]
[Staff 1]	\$	\$	\$ [AUTOSUM]
[Staff 2]	\$	\$	\$ [AUTOSUM]
[Staff 3]	\$	\$	\$ [AUTOSUM]
[Staff N]	\$	\$	\$ [AUTOSUM]
TOTAL	\$	\$	\$ [AUTOSUM]

B3. Please provide the other direct costs (ODCs) for the 2024-25 grant year. This should include travel, supplies, contractual, and other costs.

Do not include staff salary and fringe benefits. Please only include ODCs covered by funding provided by the TRIO program.

\$ _____

B4. Please provide the total indirect costs for the 2024-25 grant year. Please only consider indirect costs covered by funding provided by the TRIO program.

\$ _____

B5. For each staff position, approximately what percentage of the staff member's time was spent on the following services or components in the 2024-25 grant year? Please only consider staff time covered by funding provided by the TRIO program. If a person's work supports the delivery of a specific service or set of services (but not all services), please count their time toward that service or set of services.

Please provide your best estimate. You may need to consult other staff in order to complete this section.

Percentages must sum to 100%, so please aim to categorize all staff time into one of the listed categories. You may need to consult other staff in order to complete these questions.

	Project Director	[Staff 1]	[Staff 2]	[Staff 3]	[Staff N]
Tutoring	%	%	%	%	%
<i>Academic tutoring</i>					
Academic instruction	%	%	%	%	%
<i>High school courses for credit</i>					
<i>Courses for college credit</i>					

<i>Non-credit courses</i>					
<u>Academic advising</u> <i>Academic advising (e.g. course selection advice and assistance)</i> <i>Advising and support in achieving a high school diploma or equivalent</i>	%	%	%	%	%
<u>Postsecondary exposure</u> <i>College information sessions (not on a college campus)</i> <i>College campus tours or visits</i> <i>On-campus residential program</i> <i>Workshops or other activities with college students and faculty</i> <i>[UBMS only] Math and science research opportunity with faculty or graduate students</i> <i>Social or cultural activities at a college campus</i>	%	%	%	%	%
<u>Postsecondary application and financial aid support</u> <i>College entrance exam preparation classes or support</i> <i>Assistance with completing college entrance exam registration</i> <i>Assistance with college applications</i> <i>College application fee waivers or fee payments</i> <i>Information on financial aid and scholarship opportunities and assistance completing necessary applications (such as FAFSA)</i>	%	%	%	%	%

<u>Financial literacy and planning</u> <i>Financial and economic literacy counseling, workshops, or courses</i>	%	%	%	%	%
<u>Career development</u> <i>Workshops, seminars, panels, and fairs related to career options and job skills</i> <i>Career counseling and planning services</i>	%	%	%	%	%
<u>Other programing or services</u> <i>Cultural activities not on a college campus (e.g., visits to museums, etc.)</i> <i>Community service opportunities</i> <i>Personal counseling</i> <i>Leadership skills training</i>	%	%	%	%	%
<u>Mentoring</u> <i>Mentoring from high school or college students to program participants (peer mentoring)</i>	%	%	%	%	%
<u>Financial support</u> <i>Program participation stipends</i> <i>Work study</i>	%	%	%	%	%
<u>Staff professional development and travel</u>	%	%	%	%	%
<u>General operations and management not specific to a service</u> <i>Recruitment</i> <i>Facilities and utilities</i> <i>General management</i>	%	%	%	%	%
<u>Other</u>	%	%	%	%	%
<u>TOTAL</u>	<u>SUM TO</u> <u>100%</u>	<u>SUM TO</u> <u>100%</u>	<u>SUM TO</u> <u>100%</u>	<u>SUM TO</u> <u>100%</u>	<u>SUM TO</u> <u>100%</u>

B6. Please estimate how much of your program’s ODCs are associated with the following activities for the 2024-25 grant year. Please reference your budget, as needed, for this exercise.

Do not include staff salary and fringe benefits. Please only consider ODCs covered by funding provided by the TRIO program. If an ODC is used to support general operations, please categorize it under “General operations and management not specific to a service.” If an ODC is used across more than one service but not all services, divide up a portion of the cost to each service.

Your best estimate is fine.

	<u>Other Direct Costs (ODCs)</u>
<u>Tutoring</u> <i>Academic tutoring</i>	\$
<u>Academic instruction</u> <i>High school courses for credit</i> <i>Courses for college credit</i> <i>Non-credit courses</i>	\$
<u>Academic advising</u> <i>Academic advising (e.g. course selection advice and assistance)</i> <i>Advising and support in achieving a high school diploma or equivalent</i>	\$
<u>Postsecondary exposure</u> <i>College information sessions (not on a college campus)</i> <i>College campus tours or visits</i> <i>On-campus residential program</i> <i>Workshops or other activities with college students and faculty</i> <i>[UBMS only] Math and science research opportunity with faculty or graduate students</i> <i>Social or cultural activities at a college campus</i>	\$
<u>Postsecondary application and financial aid support</u> <i>College entrance exam preparation classes or support</i> <i>Assistance with completing college entrance exam registration</i> <i>Assistance with college applications</i>	\$

College application fee waivers or fee payments Information on financial aid and scholarship opportunities and assistance completing necessary applications (such as FAFSA)	
Financial literacy and planning Financial and economic literacy counseling, workshops, or courses	\$
Career development Workshops, seminars, panels, and fairs related to career options and job skills Career counseling and planning services	\$
Other programing or services Cultural activities not on a college campus (e.g., visits to museums, etc.) Community service opportunities Personal counseling Leadership skills training	\$
Mentoring Mentoring from high school or college students to program participants (peer mentoring)	\$
Financial support Program participation stipends Work study	\$
Staff professional development and travel	\$
General operations and management not specific to a service Recruitment Facilities and utilities General management	\$
Other	\$
TOTAL	[AUTOSUM]

B7. What proportion of your UB/UBMS participants received stipends during the 2024-25 academic year? Please only consider stipends covered by funding provided by the TRIO program. If you are unsure, please provide your best estimate.

_____ %

B8. Please provide the average stipend amount for participants who received them for your UB/UBMS program during the 2024-25 academic year? Please only consider stipends covered by funding provided by the TRIO program. If you are unsure, please provide your best estimate.

\$ _____

B9. Your Annual Performance Report indicates that your UB/UBMS program served [TOT_PARTIC] in 2024-25. Is that correct?

- Yes
- No

[IF NO TO B9]

B9a. How many participants did your UB/UBMS program serve in the 2024-25 grant year? If you are unsure, please provide your best estimate.

Response format: number.

B10. Approximately what percentage of your participants receive the following services for the hour ranges below during the 2024-25 academic year? Do not include summer programming. If you are unsure, please provide your best estimate.

For example, if your program has 100 participants and half of them participate in “Service A” for one hour per year, 20 of them participate in “Service A” approximately 10 hours per year, and the remaining 30 participants do not participate in “Service A” at all, you would enter the following:

	0 hours	1 hour	2-4 hours	5-9 hours	10-19 hours	20-39 hours	40+ hours
Service A <i>Example service</i>	30%	50%	0%	0%	20%	0%	0%

Note that percentages across the row must total 100%.

PROGRAMMER NOTE: Response format is percentage. Display each row (including header) on its own screen and use hard check to ensure total is 100%.

[USE DETAILED LIST OF SELECTED ITEMS FROM THOSE INCLUDED IN A1, EXCLUDING FINANCIAL SUPPORT AND INSTRUCTION]

	0 hours	1 hour	2-4 hours	5-9 hours	10-19 hours	20-39 hours	40+ hours
Tutoring							

<i>Academic tutoring</i>							
Academic advising <i>Academic advising (e.g. course selection advice and assistance)</i> <i>Advising and support in achieving a high school diploma or equivalent</i>							
Postsecondary exposure <i>College information sessions (not on a college campus)</i> <i>College campus tours or visits</i> <i>On-campus residential program</i> <i>Workshops or other activities with college students and faculty</i> <i>[UBMS only] Math and science research opportunity with faculty or graduate students</i> <i>Social or cultural activities at a college campus</i>							
Postsecondary application and financial aid support <i>College entrance exam preparation classes or support</i> <i>Assistance with completing college entrance exam registration</i> <i>Assistance with college applications</i> <i>College application fee waivers or fee payments</i> <i>Information on financial aid and scholarship opportunities and assistance completing necessary applications (such as FAFSA)</i>							
Financial literacy and planning <i>Financial and economic literacy counseling, workshops, or courses</i>							
Career development <i>Workshops, seminars, panels, and fairs related to career options and</i>							

<i>job skills</i> <i>Career counseling and planning services</i>							
Other programing or services <i>Cultural activities not on a college campus (e.g., visits to museums, etc.)</i> <i>Community service opportunities</i> <i>Personal counseling</i> <i>Leadership skills training</i>							
Mentoring <i>Mentoring from high school or college students to program participants (peer mentoring)</i>							
Other							

B11. Approximately what percentage of your UB/UBMS program participants complete the following number of each course type in the 2024-25 academic year as part of their participation in your program? Please focus only on coursework offered by your UB/UBMS program, not courses offered in general for students enrolled at their high school.

Do not include summer programming. If you are unsure, please provide your best estimate.

	0 Courses	1 Course	2 Courses	3+ Courses
High school courses for credit				
Courses for college credit				
Non-credit courses				

B12. Does your UB/UBMS program offer summer programming?

- Yes
- No

[IF YES TO B12]

B13. Is your UB/UBMS summer program residential, day program, virtual/online, hybrid, or something else?

- Residential
- Day program
- Virtual/online program
- Hybrid (virtual/online and in-person) program
- Something else [SPECIFY]

B14. How many weeks is your UB/UBMS's summer programming?

- Response format: number

B15a. Approximately how many of your participants participate in your summer program?

- Response format: number

B15b. Approximately what percentage of summer participants receive the following services for the hour ranges listed below in total during the 2024-25 summer program?

Do not include academic year programming. If you are unsure, please provide your best estimate.

Response format: percentage.

[USE DETAILED LIST OF SELECTED ITEMS FROM THOSE INCLUDED IN A1 EXCLUDING FINANCIAL SUPPORT AND INSTRUCTION]

	0 hours	1 hour	2-4 hours	5-9 hours	10-19 hours	20-39 hours	40+ hours
Tutoring <i>Academic tutoring</i>							
Academic advising <i>Academic advising (e.g. course selection advice and assistance)</i> <i>Advising and support in achieving a high school</i>							

<i>diploma or equivalent</i>							
Postsecondary exposure <i>College information sessions (not on a college campus)</i> <i>College campus tours or visits</i> <i>On-campus residential program</i> <i>Workshops or other activities with college students and faculty</i> <i>[UBMS only] Math and science research opportunity with faculty or graduate students</i> <i>Social or cultural activities at a college campus</i>							
Postsecondary application and financial aid support <i>College entrance exam preparation classes or support</i> <i>Assistance with completing college entrance exam registration</i> <i>Assistance with college applications</i> <i>College application fee waivers or fee payments</i> <i>Information on financial aid and scholarship opportunities and assistance completing</i>							

<i>necessary applications (such as FAFSA)</i>							
Financial literacy and planning <i>Financial and economic literacy counseling, workshops, or courses</i>							
Career development <i>Workshops, seminars, panels, and fairs related to career options and job skills</i> <i>Career counseling and planning services</i>							
Other programing or services <i>Cultural activities not on a college campus (e.g., visits to museums, etc.)</i> <i>Community service opportunities</i> <i>Personal counseling</i> <i>Leadership skills training</i>							
Mentoring <i>Mentoring from high school or college students to program participants (peer mentoring)</i>							
Other							

B16. Approximately what percentage of your UB/UBMS program participants complete the following number of each course type during 2024-25 summer programming? Please focus only on coursework offered by your UB/UBMS program, not courses available to students outside of your program.

Do not include academic year programming. If you are unsure, please provide your best estimate.

	0 Courses	1 Course	2 Courses	3+ Courses
High school courses for credit				
Courses for college credit				
Non-credit courses				

Section C. Application and enrollment of participants

This section has a few questions about the grant application and enrollment process for your UB/UBMS program.

C1. How many applicants applied to your UB/UBMS program in 2024-2025? Please estimate if you did not know the exact number.

If your application process has multiple stages, please include all applicants who completed the first stage of your process. For example, if the first stage in your process is completing an interest form, please include the number that did so.

Response format: Number of applicants per year (numeric entry)

C2. Does your UB/UBMS program have applicants in 2024-2025 who were not admitted because they did not meet eligibility criteria?

Select one.

- Yes
- No

[IF YES to C2]

C3a. Approximately how many applicants for your UB/UBMS program did not meet the necessary eligibility criteria in 2024-2025? Please estimate if you did not know the exact number. (If a participant meets the requirements to participate that are relevant for one-third of your participants, please count them as eligible, even if they do not have the additional characteristics necessary to meet the requirements for two-thirds of participants.)

Response format:

- Number of applicants (numeric entry)

C3c. How do you typically determine whether an applicant is classified as low-income?

Select all that apply.

- Applicant self-report or attestation
- Tax return
- Financial aid application
- Verification from another government source (e.g. eligibility for another benefits program)
- Other methods [SPECIFY]

C3d. For what percentage of applicants do you use a tax return to determine if the applicant is low income?

Response format:

- Percentage (1 to 100)

C3e. For what percentage of applicants do you use a financial aid application to determine if the applicant is low income?

Response format:

- Percentage (1 to 100)

C4. In 2024-2025, were there applicants who met eligibility criteria and completed all necessary steps of the application process who you were unable to serve due to capacity constraints or due to a requirement that two-thirds of participants meet certain criteria (for example, a requirement that two-thirds of participants must be first generation and low-income)?

Select one.

- Yes
- No

[IF YES to C4]

C5a. Approximately how many eligible applicants who completed all the necessary steps in the application process were you unable to serve in 2024-2025 due to capacity constraints (a limit to the maximum number of participants) or due to a requirement that two-thirds of participants meet certain criteria (for example, a requirement that two-thirds of participants must be first generation and low-income)? Please estimate if you did not know the exact number.

Response format:

- Number of applicants (numeric entry)

C5b. Approximately how many of these applicants (who met minimum eligibility requirements and completed all the necessary steps in the application process) for your UB/UBMS program that you were unable to serve in 2024-25 (due either to capacity constraints or a two-thirds requirement) do you expect to serve in a later year? Please estimate if you did not know the exact number.

Response format:

- Number of applicants (numeric entry)

C5c. Approximately what percentage of eligible applicants who were admitted chose to participate in the program?

Response format:

- Percent (numeric entry)

C6b. How long are program participants expected to participate in the program? Please select the category that best describes the milestone at which most participants leave the program.

- Less than one full academic year
- One full academic year
- Two full academic years
- Through the end of high school
- Other [SPECIFY]

Section D. Monitoring Program Success and Outcomes

We understand that you track and report data on the objectives required for your grant as outlined in legislation and submitted through your Annual Performance Reports (APRs). Questions in this last section ask about **additional data collection and monitoring** activities your UB/UBMS program might conduct beyond these federally required measures.

D1. Does your program track any of the following additional measures?

Implementation Fidelity Measures

Service Delivery & Participation

- ☐ Participation rates in key services
- ☐ Hours of services received per participant

Quality & Satisfaction

- ☐ Participant satisfaction with specific services
- ☒ Suggestions for program improvement

Interim Progress Measures

Progress Indicators

- ☐ Term-to-term persistence (before annual persistence)
- ☐ Course completion/failure rates each term
- ☐ GPA each term
- ☐ Credit accumulation (on-track indicators)
- ☐ Missing assignments or attendance patterns (early warning signs)

College Readiness Progress

- ☐ Number of college applications submitted
- ☐ Knowledge of college application and financial aid process
- ☐ Improvement in academic self-efficacy and college-going identity

Financial Progress Indicators

- ☐ FAFSA completion
- ☐ Financial literacy gains

Connection

- ☐ Measures of belonging with program cohort
- ☐ Career goal clarity
- ☐ Strength of peer mentoring or advisor relationships

Other outcomes not listed above (SPECIFY)

D2: How often does your team review performance data (i.e., measures related to participants' progress through the program toward objectives)?

- Weekly
- Monthly
- Quarterly
- Once per term
- Annually
- We do not regularly review data

D3. When you review performance data (i.e., measures related to participants' progress through the program toward objectives), which of the following actions do you typically take in response to the data? Check all that apply.

- ☐ Identify participants needing additional support
- ☐ Adjust service delivery methods
- ☐ Reallocate resources or staff time
- ☐ Modify program activities or curriculum
- ☐ Create action plans for improvement
- ☐ Share findings with staff for training purposes
- ☐ We review data but don't typically make changes based on it

D4. Of the services your program provides, which do you think are most critical to participant success in your program?

Select up to three.

[INCLUDE ALL ITEMS INDICATED AS YES IN A1]