

Published by

The Higher Education Quality Council of Ontario

1 Yonge Street, Suite 2402 Toronto, ON Canada, M5E 1E5

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Cite this publication in the following format:

Lenarcic Biss, D. & Pichette, J. (2018) *Minding the Gap? Ontario Postsecondary Students' Perceptions on the State of Their Skills.* Toronto: Higher Education Quality Council of Ontario.



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Executive Summary

The Government of Ontario purchased a blanket, three-year licence to Lynda.com to provide postsecondary students with free access to the skills-focused, online learning platform. The Higher Education Quality Council of Ontario (HEQCO) and eCampusOntario partnered to evaluate the utility of this investment, with a particular focus on whether and how Lynda.com can help address perceived skills gaps among Ontario college and university students. As a first step in this multi-year evaluation, we sought to understand student perceptions of the state of their skills and their appetite for online skills development. We surveyed 6,360 Ontario postsecondary students and conducted three in-person focus groups.

Students participating in both the survey and focus groups believe they are developing strength in transferable skills like critical thinking, work ethic, communications and organization/time management, along with industry-specific skills through their postsecondary experience, and they anticipate these skills will be needed in their chosen careers. Survey results suggest students are less certain that professional skills like data analysis, financial literacy and IT skills will be necessary in the workplace, though both focus group participants and survey respondents anticipate business etiquette (i.e., e-mailing and networking skills) will be in demand upon graduation.

Survey responses suggest that students perceive a gap between the skills they will need for their future careers and the skills they are developing while in university or college. The largest gaps identified are in business etiquette, leadership, teamwork and creative/innovative thinking skills. Focus group participants affirmed the perception that there is a gap between skill levels resulting from postsecondary education and skill levels required for successful employment. Survey respondents and focus group participants demonstrated an openness to strengthening their skills using online educational videos, including those on Lynda.com; however, they are most likely to use Lynda.com to develop those skills which they already perceive to be developing during postsecondary. There is less interest in using Lynda.com to address perceived skills deficits in areas like leadership, teamwork and business etiquette.

Introduction

As globalization and new technology change the nature of work, there is increased focus on how to prepare graduates for the jobs of the future. Suggestions of a "skills gap" dominate Ontario news headlines, leading educators and policy makers to ask what can be done to ensure that students graduate with the skills needed in tomorrow's workplaces. One of the ways the Ontario government has attempted to address this issue is by providing publicly funded colleges and universities with blanket access to the online, self-service, training and skills-development resources on Lynda.com.¹ Acquired by LinkedIn in 2015,² Lynda.com is an e-

¹ https://news.ontario.ca/mof/en/2017/04/ontario-boosting-on-the-job-learning-opportunities-for-students.html

² https://news.linkedin.com/2015/linkedin-to-acquire-lyndacom

learning platform offering a video library of business, software, technology and creative courses taught by industry experts. The investment grants unlimited access to the full suite of skills-focused content on Lynda.com to all students, instructors and staff at Ontario postsecondary institutions until September 2020.

This paper reports the findings of two research initiatives designed to understand Ontario students' perceptions of the skills acquired during their postsecondary years as well as their interest in online skills development: an online survey of Ontario postsecondary students conducted in spring 2018, and a series of in-person focus conducted in the fall of 2018. The research was conducted as part of a partnership between HEQCO and eCampusOntario, formed to understand the potential impact of the Lynda.com pilot and to evaluate how and whether Lynda.com content may address possible skills gaps among Ontario college and university students.

Skills Survey

A team of HEQCO researchers developed a 10-minute online survey in consultation with partners at eCampusOntario to examine students' perceptions of their skills development during postsecondary, their perceptions of the skills needed in the labour market and their interest in skills development using Lynda.com. The survey was administered to a sample of Ontario postsecondary students who are members of the Student Life Network (SLN), and received 6,360 survey responses. Students responded using a 4-point scale ("Not at all," "Not really," "Somewhat," "Very much") for the following 15 skills:

Table 1: Skills Included in the Survey

TRANSFERABLE SKILLS	PROFESSIONAL SKILLS
 Problem solving/critical thinking 	■ Financial literacy (budgeting & accounting)
Creative/innovative thinking	Project management
■ Teamwork	Data analysis
Communications (oral & written)	 Business etiquette (e.g., emails, networking)
Leadership	 Public speaking/oral presentation
Organization/time management	■ Software use (e.g., Microsoft Office, iWork)
Work ethic/personal responsibility	■ IT skills (e.g., web/tech programming & development)
	Skills specific to students' field of study

The list of skills was compiled with three goals: to use language that would be accessible to students and resonate with them; to align with opportunities for skills development on Lynda.com; and to align with skills included in similar student and employer surveys conducted by groups including Abacus Data (2016), the Business Council of Canada (2018), the Conference Board of Canada (Stuckey & Monroe, 2013) and The Economist (2015).

For more details on the survey administration, see the methodology section below.

Focus Groups

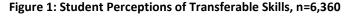
Drawing from the same sample of students who were invited to participate in the survey, SLN conducted 30-minute in-home user testing exercises and three in-person focus groups with 13 Ontario postsecondary students.

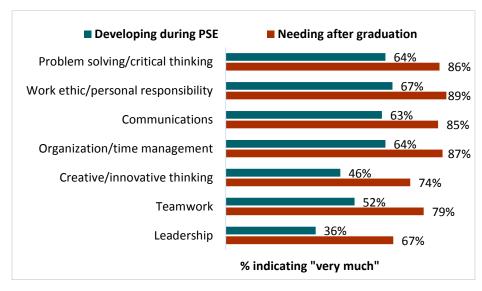
User testing ensured participants had familiarized themselves with Lynda.com and came prepared to the focus groups with questions and answers relevant to the research. Three in-person focus groups were conducted with student attending the University of Toronto, Humber College, Trent University and Fleming College.

More details on the focus group sample and research design are included in the methodology section below.

Findings

Both the survey and focus groups revealed a perceived misalignment between the skills that students think they will need after graduation and the skills being developed during their postsecondary experience. As Figures 1 and 2 indicate, many survey respondents said they will need all the skills on the list to a greater extent than they believed they were developing them through their studies at college or university.





The largest gaps in transferable skills were seen in leadership, teamwork and creative/innovative thinking skills: Only some students said that they were developing strength in these skills during their postsecondary experience. Gaps were smaller in problem solving/critical thinking and work ethic/personal responsibility. Education students ranked their development of transferable skills (e.g., communications, leadership, creative/innovative thinking) slightly higher than students in other fields of study; a greater proportion of these students also indicated that they will need these skills after graduation.

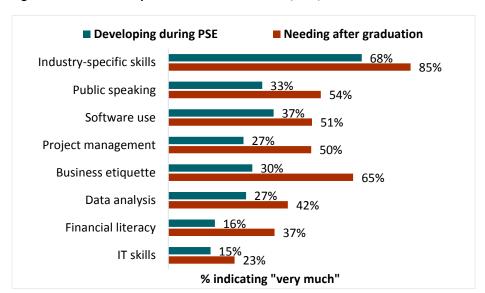


Figure 2: Student Perceptions of Professional Skills, n=6,360

Similarly, business students ranked their development of professional skills (e.g., management, financial literacy, public speaking, business etiquette) higher than their peers and a higher proportion signalled that these skills will be needed in the working world.

Overall, the largest gap in professional skills was seen in business etiquette. Most students indicated that they will need skills like writing emails and networking once they graduate, yet less than one-third of the

sample believed they were developing these skills during postsecondary. Other large gaps were seen in public speaking and project management. Smaller gaps were found in industryspecific skills and computer-related skills (software, data analysis and IT): Students are surer that they are developing adequate skill levels in these areas.

More than half of respondents indicated that they are "not really" or "not at all" developing financial literacy skills like budgeting and accounting, or IT skills like web/tech programming and development. Although respondents were less certain that these kinds of professional skills will be necessary in their careers, several students emphasized challenges with financial literacy skills in anecdotes at the end of the survey.

Focus group participants affirmed that transferable and professional skills are not being developed in the classroom to the extent that students anticipate they will need these skills when they graduate.

Survey Comments

"I wish that my teachers prepared us for how to talk to prospective employers."

"Being in a music program we don't learn much about the business world. It would be nice to be more educated in these areas since performance graduates act as their own advocates to get auditions and jobs. Having stronger communication (emailing/oral/leadership) and financial (budgeting/taxes) skills would extremely benefit us."

Survey Comments

"After finishing high school, I realized that I'm closer to the 'real world' and have next to zero financial literacy. We are not taught how to budget ourselves, do taxes, pay bills, etc."

"I've had to learn almost all professional skills and relevant knowledge by myself outside of school."

"Financial literacy, budgeting, accounting, taxes are all missing from the core curriculum unless you are enrolled in that field of study. It would be great to have access to quality resources in these areas."

Overall, students were most sure that they are developing strength in skills specific to their field. The majority (85.3%) also indicated that they will "very much" need these skills in their chosen career.

Students enrolled in college programs perceived greater development in all of their skills compared to students enrolled in university programs, with the exception of data analysis. Generally, a greater proportion of students completing a university postgraduate degree, college graduate certificate or joint college-university credential indicated that they were developing stronger skill sets than students completing other types of credentials. Given that older students tend to pursue the former types of credentials, the findings line up with those apparent between self-reported age and skills development: that is, a greater proportion of older students indicated that their education is helping them to develop skills, particularly the skills they think they will need in the labour market such as communications, teamwork and leadership. Fewer older students indicated that their postsecondary study is supporting development of financial literacy and IT skills.

Student Interest in Lynda.com

The majority of students in the survey sample (80%) were somewhat or very interested in watching online educational videos for skills development, including content on Lynda.com. Most students (73.8%) had not used Lynda.com previously; those that had, had done so to support course work, skills development and creative interest.

As Figures 3 and 4 indicate, students in the sample indicated that they are most likely to use Lynda.com for sharpening their industry-specific skills. Interestingly, these are the same skills they already perceived to be developing during postsecondary. Students also indicated a greater likelihood of using Lynda.com to develop their financial literacy skills.

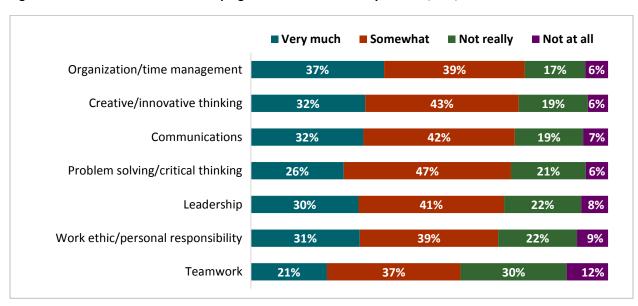


Figure 3: Student Likelihood of Developing Transferable Skills on Lynda.com, n=6,134

Respondents indicated less interest in using Lynda.com for upskilling in areas where the largest perceived skills gaps exist, namely business etiquette, leadership, teamwork and creative/innovative thinking.

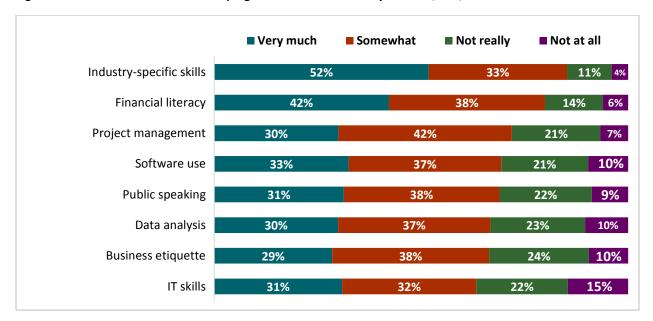


Figure 4: Student Likelihood of Developing Professional Skills on Lynda.com, n=6,134

Business students indicated the most interest in using Lynda.com for skills development. Older students indicated they would be more likely to use the resource to develop project management skills but less likely for developing organization/time management skills, work ethic/personal responsibility and business etiquette. Overall, university students indicated slightly more interest in using Lynda.com to develop professional skills while college students indicated slightly more interest in developing transferable skills.

Focus group participants shared many of the perceptions reflected in the survey results. Participants demonstrated an interest in developing transferable and professional skills, which they feel are not being adequately developed in the classroom. They were generally not inclined, however, to learn some of these skills online. While participants were open to learning professional skills

Survey Comments

"Communication, public speaking and team management are learned through face-to-face interactions. So I don't think Lynda.com could assist students there."

"I think it would be great if Lynda could serve as something to fill the gaps. Mainly focused on the professional skills that we feel we are missing from our education - financial literacy, networking, etc."

online such as email etiquette, presentation skills and written communication, they were skeptical of going online to learn transferable or 'soft' skills, such as teamwork or leadership. Most focus group participants considered online learning to be better suited to more technical or 'hard' skills, such as software use. A few participants noted their interest in online learning platforms also depends on the learning styles the platform caters to, suggesting that online learning is a skill in and of itself.

Similar to the survey sample, the majority of focus group participants had not used Lynda.com previously.

Focus Group Comments

"I would chose to participate in online learning to develop new skills, and even enhance old skills"

"I think soft skills, like leadership, are very hard to develop online because leadership skills actually need you to lead a project or something like that."

"[Lynda.com is] a great program. It's just not something I knew about."

"I want interactive tutorials. I want to be supported during them with a coach or something like that. I want [the tutorials] to be interactive and simple." Those who had used Lynda.com were encouraged to do so by their instructor(s). As homework prior to the focus group, the participants were asked to login to Lynda.com, select a video, and watch that video for a few minutes. Most participants had not accessed Lynda.com before this exercise, and had been unaware they had free access to the platform.

After browsing the content, focus group participants were generally impressed by Lynda.com. They considered the content to be of a high quality, appreciated the lack of ads (comparing it with platforms like YouTube), and were happy with the diversity of topics covered. Most participants expressed interest in using the platform in the near future to develop their skills or support their coursework. Some participants, who were balancing school and work commitments, said they would prefer to have access to the platform after graduation when they have fewer demands on their time.

Focus group participants suggested online learning would be more appealing if the platform featured: opportunities to solidify and assess learning through quizzes or discussion forums; learning support in the form of a coach or tutor; and a record of learning such as a credential or certificate.

Conclusion

The majority of students who participated in our survey and focus groups indicated that transferable skills and industry-specific skills will be needed in their chosen careers, although not all believe they are developing strong skills in these areas during their postsecondary experience. Students also indicated professional skills such as IT and project management were not being well developed during their postsecondary studies. The largest perceived deficiencies were in business etiquette, leadership, teamwork and creative/innovative thinking.

Although students express an openness to watching online educational videos to upgrade their skills, they are most likely to use Lynda.com to complement industry-specific skills that they already perceive to be developing during postsecondary. There was only some interest among students in using Lynda.com to develop transferable skills that are perceived to be less honed but important for the labour market. Students in the focus groups expressed that they would be more interested in online learning if the format were interactive and included an assessment/credentialing component.

Access to Lynda.com content is available to Ontario postsecondary students, faculty and staff until September 2020. Communicating with students will play an important role in ensuring awareness and understanding of the

Focus Group & Survey Comments

"I think a platform like Lynda.com is more suited to teaching 'hard' skills. A lot of soft skills are best learned by doing in real life because they often involve other people."

"An emphasis on post-graduation skills would be great! Networking, interview skills, etc. would be awesome for non-commerce students."

"I think it would be great if Lynda could serve as something to fill the gaps [in] professional skills — financial literacy, networking, etc."

"There are actually bookmarks on my browser of things that I would love to learn and study more in depth, but I do not have time to do that as a grad student who also works full-time."

"I don't just want to read text, I don't just want to watch a video, I want something I have to participate in.

resources available to them for skills development. Future research conducted as part of the HEQCO and eCampusOntario partnership will allow for comparison of survey findings with aggregate data of postsecondary students' actual use of Lynda.com. Of particular interest is the question of whether students are actually using Lynda.com to upgrade their skills in the areas highlighted in this report, i.e., to develop skills students believe they will need in the labour market and/or the skills they believe they are lacking.

Methodology

Survey results reported in this study are based on 6,360 survey responses from a sample of Ontario postsecondary students who are members of the Student Life Network (SLN), the largest research panel of students in Canada with more than one million student members and over 400,000 active postsecondary student members in Ontario (M_{age} = 21.8 years, SD = 4.1). SLN distributed the survey to a simple random sample of 205,000 students between March 13 and 27, 2018. Students were recruited via an email invitation with instructions and a unique, secure URL for completing the online survey in English or French. To incentivize students, the survey included an online contest with five, \$2,000 cash prizes. At the conclusion of the survey period, SLN randomly selected five participants and awarded the prizes.

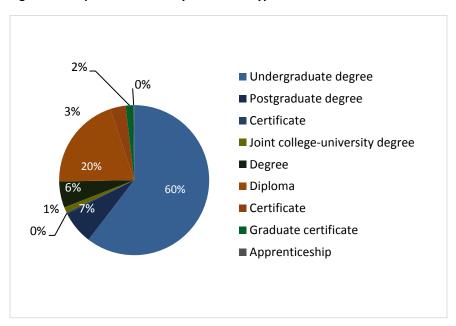


Figure 5: Sample Distribution by Credential Type

SLN set soft target quotas for institution type and sex, proportionately representative of Ontario postsecondary students based on the most recent available enrolment data from Statistics Canada.³ One week after the initial launch email, a reminder email was sent to students in the sample who had not clicked the survey link or completed the survey. Additional emails were sent to a male-only sample to target an even distribution.

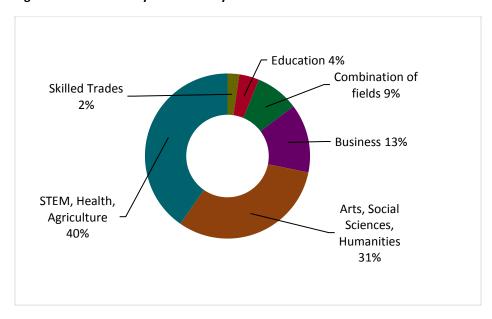
³ https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3710001801

Table 2: Target and Actual Sample Distributions by Institution Type and Gender

		Target distribution	Actual distribution
Universi	ity		
	Males	29%	27%
	Females	36%	42%
College			
	Males	16%	12%
	Females	19%	19%
Total		100%	100%

Participants selected their field(s) of study from a menu of options based on their institution type. Fields of study were later merged into five groups along with an "other" category and a category for participants who indicated studying in more than one of the five fields; students in the "other" and "combination" categories were excluded from analyses of differences across fields of study.

Figure 6: Distribution by Field of Study



Focus group results reported in this study are based on three in-person focus groups, each two hours long, with a total of 13 Ontario postsecondary student participants. In advance of the focus groups, students participated in a 30-minute in-home user testing exercise.

Participants were recruited for the research through the same SLN panel as the survey. Participants were offered \$15 to incentivize the completion of the in-home user testing exercises and a \$50 incentive and free dinner for attendance and completion of a focus group.

SLN recruited students enrolled full time at Ontario Universities and Colleges, located within and north of the Greater Toronto and Hamilton Area (GTHA), namely the University of Toronto, Humber College, Trent University and Fleming College. Two focus groups were conducted within the GTHA, and due to small population sizes at schools outside of the GTHA, SLN conducted one focus group with that population, combining participants from both Trent University and Fleming College.

SLN screened a total of 279 qualified recruits through the five-minute online recruitment screener distributed to target SLN members by email from September 25 to October 2, 2018; 141 from University of Toronto, 84 from Humber College, 45 from Trent University, and nine from Fleming College. A total of 18 participants were confirmed on two occasions to attend the focus groups, distributed as six participants per focus group as shown in the table below.

All participants were confirmed to be aged 18–27, full-time students at an Ontario University or College, 50-50 split GTHA (urban/suburban) and north of GTHA (rural/exurban), 50-50 split University and College split, 50-50 split female and male. Students representing a mix of ethnic backgrounds, area of study and year of study were recruited.

Ontario Region	Primary Area Type	Institution type	Institution Names	Sex	Target Sample Size	Focus Group			
			University of	Males	3				
Within GTHA	Urban/	University	Toronto	Females	3	#1			
Widini	Suburban	Callana	Humber	Males	3	#2			
		College	College Co	College	College	College	College	College	Females
	Rural/ Exurban	University	Trent	Males	2				
North of GTHA			University	Females	2	#3			
		Callana	Fleming	Males	1				
		College	College	Females	1				
-	-	-	-	Total	18	-			

Likely due to the timing of the focus groups (during mid-terms), the actual turnout of students was lower than anticipated, with a total of 13 participants (rather than the 18 recruited to participate).

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Appendix A: Overall Student Responses

Figure A1: Student Perceptions of Skills Development during Postsecondary, n=6,360

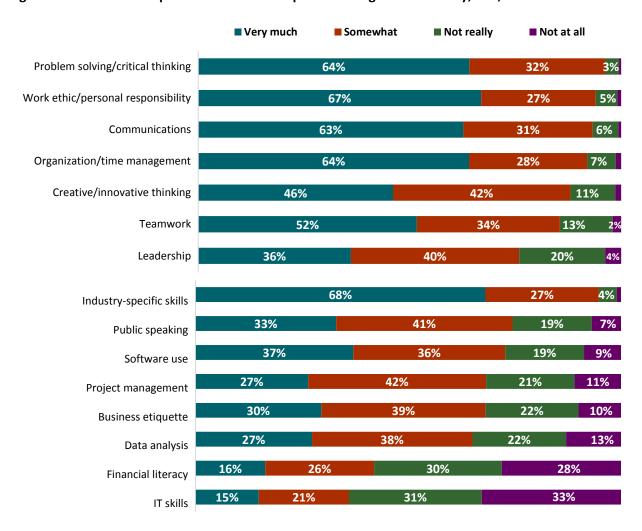
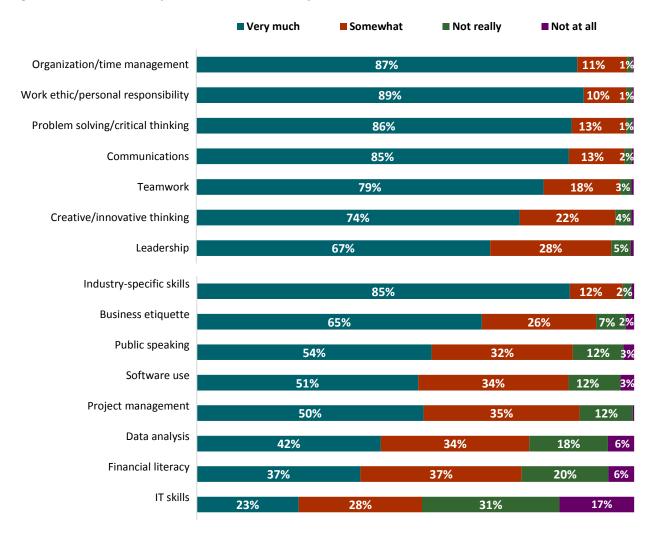


Figure A2: Student Perceptions of Skills Necessary after Graduation, n=6,360



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Appendix B: Survey

Complete this survey for your chance to win one of five \$2,000 cash prizes! [contest rules]

The Ontario government has purchased a blanket licence to Lynda.com, which will allow all Ontario college and university students to have unlimited access to Lynda.com's online self-service training and skill-development resources for the next three years.

To understand the potential impact of this investment, researchers at eCampusOntario and the Higher Education Quality Council of Ontario (HEQCO) want to know whether Lynda.com content can meet students' needs. They want to understand what skills students want to develop and whether the platform can help.

This survey will take approximately 10 minutes to complete. You can complete it all at once or stop part way and come back later.

The survey is being conducted by Student Life Network on behalf of eCampusOntario and HEQCO. Your participation is voluntary and your responses will remain anonymous.

If you have any questions, please contact Jackie Pichette from HEQCO, at 416-314-8780 or jpichette@heqco.ca.

- 1. Are you currently a postsecondary student in Ontario?
 - Yes
 - o No
 - → If no, end survey
- 2. What is your age?

3A. In what type of postsecondary program are you enrolled? Select one.

- University Undergraduate degree
- University Postgraduate degree
- University Certificate
- Joint College-University degree
- College Degree
- o College Diploma
- College Certificate

0	College – Graduate Certificate	е			
0	College – Apprenticeship prog	gram			
	→ If university or joint university-	college degree, ski	ip to question 3B	11:	
3B1. W	hat is your field of study? Check of	all that apply.			
0	Social sciences (e.g., psycholo	gy, sociology, g	geography, ed	onomics, poli	tical science, law)
0	Humanities (e.g., literature, h	istory, languag	es)		
0	Arts (e.g., fine arts, music, pe	rforming arts)			
0	Math, physical & applied scie	nces, technolog	gy, engineerin	ıg	
0	Agriculture, health & biologic	al sciences			
0	Education				
0	Commerce				
0	Other				
	Please specify:				
	→ If college, skip to question 3B2:			_	
3B2. W	hat is your field of study? Check of	all that apply.			
0	Education				
0	Business				
0	Health				
0	Technology				
0	Applied arts				
0	Skilled trades				
0	Other				
	Please specify:				
1 Λrον	you developing the following per s	sonal/transferak	ole skills throug	th vour nostsed	condary evnerience?
4. AIC	you developing the following pers	Not at all		Somewhat	Very much
proble	m solving/critical thinking				
creativ	e/innovative thinking				
teamw					
	unications (oral & written)				
leaders	•				
_	ration/time management				
work e	thic/personal responsibility				

5. Are you developing the following professional skills through your postsecondary experience?					
	Not at all	Not really	Somewhat	Very much	
financial literacy (budgeting & accounting)					
project management					
data analysis					
business etiquette (e.g., emails, networking	g) 🗆				
public speaking/oral presentation					
software use (e.g., Microsoft Office, iWork)) 🗆				
IT skills (e.g., web/tech programming &					
development)					
skills specific to your field of study					
6. After you graduate, do you think you wil career?	l need the fol	llowing persona	l/transferable	skills in your chosen	
	Not at all	Not really	Somewhat	Very much	
problem solving/critical thinking					
creative/innovative thinking					
teamwork					
communications (oral & written)					
leadership					
organization/time management					
work ethic/personal responsibility					
7. After you graduate, do you think you will need the following professional skills in your chosen career?					
	Not at all	Not really	Somewhat	Very much	
financial literacy (budgeting & accounting)					
project management					
data analysis					
business etiquette (e.g., emails, networking	g) 🗆				
public speaking/oral presentation					
software use (e.g., Microsoft Office, iWork)) 🗆				
IT skills (e.g., web/tech programming &					
development)					
skills specific to your field of study					
8. How interested are you in watching onling	ne education:	al videos to dev	elop vour skills	? Select one.	
· · · · · · · · · · · · · · · · · · ·	nt really	Somewhat	Very much		

9A. H	Ha۱	ve you watched Lynda.com videos ir	n the past?				
(0	Yes					
(0	No					
(0	I'm not sure					
		→ If no or I'm not sure, skip to	question 10.				
		→ If yes, skip to question 9B:					
9B. I	ln g	general, what motivated you to v	watch Lynda.c	om videos in	the past? Che	ck all that apply	<i>/</i> .
(0	Creative interest					
(0	Professional skill development					
(0	Personal/transferable skill deve	lopment				
(0	To support my course work	•				
(0	Other					
		Please specify:					
		, <u> </u>					
train	ing	Ontario college and university stude g and skill-development resources for to develop your skills?			-		
(0	Yes					
(0	Maybe					
(0	No					
		→ If no, skip to question 13.					
11. F	lov	w likely are you to watch videos on I	•	•			ills?
			Not at all	•	Somewhat	Very much	
		n solving/critical thinking e/innovative thinking					
tean		· ·					
		inications (oral & written)					
lead							
orga	niz	ation/time management					
work	k et	thic/personal responsibility					

Not at all Not really Somewhat Very much financial literacy (budgeting & accounting)	12. How likely are you to watch videos on Lynda.com to develop the following professional skills ?					
, , , , , , , , , , , , , , , , , , , ,						
project management						
project management — — — — — — —						
data analysis						
business etiquette (e.g., emails, networking)						
public speaking/oral presentation $\ \square$ $\ \square$ $\ \square$						
software use (e.g., Microsoft Office, iWork)						
IT skills (e.g., web/tech programming &						
development)						
skills specific to your field of study						
13. Is there anything else you wish to tell the researchers?						

Thank you for taking the time to participate in our survey.

You've been entered for your chance to win one of five \$2,000 cash prizes. [contest rules]

Have a great day!

