EAB

BIT/CARE Team Assessment

Assessing Your Institution's BIT/CARE Team to Identify Gaps and Future Opportunities
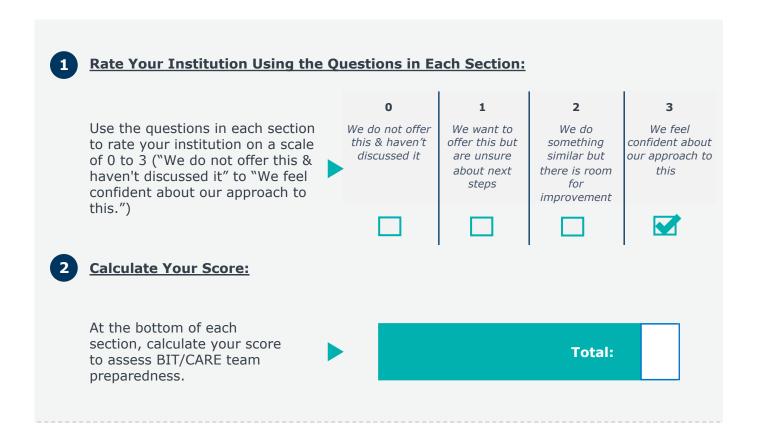
How to Use This Assessment

This assessment will help your BIT/CARE team identify strengths and diagnose weaknesses to improve your overall efficiency and effectiveness.

1 **Rate Your Institution Using the Questions in Each Section:**

Use the questions in each section to rate your institution on a scale of 0 to 3 ("We do not offer this & haven't discussed it" to "We feel confident about our approach to this.")

0	1	2	3
We do not offer this & haven't discussed it	*We want to offer this but are unsure about next steps*	*We do something similar but there is room for improvement*	*We feel confident about our approach to this*
☐	☐	☐	☑

2 **Calculate Your Score:**

At the bottom of each section, calculate your score to assess BIT/CARE team preparedness.

Total:

3 **After Completing This Assessment:**

● **Review Recommended Resources and Explore Potential Next Steps**
EAB's *Ideas for Next Steps* provides guides, best-practice highlights, and resources to help your BIT/CARE team better support the campus community.

● **Create an Implementation Plan**
EAB's *Implementation Work Plan* provides a template for your team to make an implementation plan to translate your assessment results into actionable next steps.

BIT/CARE Team Assessment

Formalizing Team Processes: This section will help your unit evaluate its current team processes.

Rate the questions below on a scale of 0-3

	0	1	2	3
	We do not offer this & haven't discussed it	*We want to offer this but are unsure about next steps*	*We do something similar but there is room for improvement*	*We feel confident about our approach to this*
Does a formal policy statement or procedure manual establish the authority of the BIT/CARE team, detail the team's membership, and outline its decision-making process?				
Does a formal document (e.g., policy statement, team members' job descriptions) describe each member's responsibilities on the BIT/CARE team?				
Does the assigned lead or case manager have clearly defined responsibilities for following up with the student, recordkeeping, and updating the BIT/CARE team?				
Does your team have a formal procedure for managing team members who do not follow up on assigned tasks?				
If your institution has a dedicated case manager in Student Affairs, does this individual provide regular reports to the BIT/CARE team chair about interactions with students of concern, campus outreach efforts, and consultations with the BIT/CARE team?				
Do you annually assess your BIT/CARE team?				
After conducting an annual assessment, do you use the results to revise BIT/CARE team protocols and improve team performance?				
Do you hold retreats at which your team may reflect on its strengths and weaknesses?				
Total:				

BIT/CARE Team Assessment

Recalibrating Training Outreach: This section will help your unit evaluate its current outreach and training efforts.

Rate the questions below on a scale of 0-3

	0	1	2	3
	We do not offer this & haven't discussed it	*We want to offer this but are unsure about next steps*	*We do something similar but there is room for improvement*	*We feel confident about our approach to this*
Does your institution offer BIT/CARE team training at times other than new faculty and staff orientation?				
Do BIT/CARE team members receive periodic trainings on team procedures, legal and policy updates, and case-evaluation protocols?				
Does the team use external resources, such as professional associations, webinars, publications, and regional partnerships, to supplement periodic trainings on top and/or new areas of concern?				
Do BIT/CARE team training presentations cover the following key components: how to identify students of concern, resources to guide next steps, the BIT/CARE team's mission, directions for emergency situations, and an overview?				
Do you use referral data to offer targeted programming and training to the departments and units?				
Does your BIT/CARE team have a quick reference guide to approach and direct distressed students to available resources and next steps?				
Does your BIT/CARE team send reminders about the referral process and available support resources to faculty and staff during high-stress periods such as mid-terms and final exams?				
Does your BIT/CARE team create an annual outreach plan to target campus populations that have not received training recently?				
Total:				

BIT/CARE Team Assessment

Branding One-Stop Referrals: This section will help your unit evaluate its current referral processes.

Rate the questions below on a scale of 0-3

	0 — We do not offer this & haven't discussed it	1 — We want to offer this but are unsure about next steps	2 — We do something similar but there is room for improvement	3 — We feel confident about our approach to this
Does your BIT/CARE team have a dedicated website with clear instructions on the referral process and channels, team membership, and how to contact the team?				
Can referrers communicate with the team through multiple channels (e.g., web form, email, phone, virtual meeting, drop-in hours)?				
Does the BIT/CARE team webpage provide examples of reasons to make a referral or when to make a referral?				
Does your BIT/CARE team webpage include a section that covers common FAQs?				
Does your BIT/CARE team webpage provide information about resources for students who have been referred?				
After submitting a referral, do referrers receive an automated confirmation that includes an overview of the next steps in the referral process, timeline, and where they can direct additional concerns or questions?				
Do websites for your institution's counseling center, student conduct office, dean of student's office, and faculty portal include links to the BIT/CARE team website?				
Do you review aggregated case data on an annual basis to identify departments or units from which you receive the fewest referrals?				

Total:

BIT/CARE Team Assessment

Consolidating Case Information: This section will help your unit evaluate its current recordkeeping initiatives.

Rate the questions below on a scale of 0-3	0 *We do not offer this & haven't discussed it*	1 *We want to offer this but are unsure about next steps*	2 *We do something similar but there is room for improvement*	3 *We feel confident about our approach to this*
Are BIT/CARE team members automatically alerted when a new referral is submitted?				
Does your BIT/CARE team maintain a structured agenda for regular meetings and distribute it to all members prior to the session?				
Do team members review their office's records after receiving meeting agendas and share pertinent information about students of concern with the BIT/CARE team chair?				
Are low-level concerns referred to appropriate campus resource and closed before being discussed by the BIT/CARE team?				
Does your BIT/CARE team use either a password-protected Microsoft Excel spreadsheet or a secure database to house BIT/CARE team records?				
Does the BIT/CARE team recordkeeping system interface with the campus's student information system?				
Are team members asked to update the recordkeeping system before meetings and after conducting case follow-up?				
Has the BIT/CARE team assigned one or more individuals to serve as recordkeeping system super users?				

Total:

BIT/CARE Team Assessment

Monitoring Complex Cases: This section will help your unit evaluate its current approach to managing complex cases.

Rate the questions below on a scale of 0-3

	0	1	2	3
	We do not offer this & haven't discussed it	*We want to offer this but are unsure about next steps*	*We do something similar but there is room for improvement*	*We feel confident about our approach to this*
Does your BIT/CARE team assign cases to team members based on their previous interactions with a student and/or on their expertise in dealing with the student's specific concern(s)?				
Does your team offer guidance and/or support for faculty or staff who may be uncomfortable continuing to teach or work with a student of concern during your team's investigation and response?				
Does your team offer guidance and/or support for students who continue to live or attend class with a student of concern during your team's investigation and response?				
Does your team maintain a list of high-priority, ongoing cases that are reviewed regularly in BIT/CARE team meetings?				
Is the BIT/CARE team notified about students who have withdrawn from the institution if the reason for withdrawal falls under the team's mission and responsibilities?				
Before a student of concern returns to campus, does the BIT/CARE team make a recommendation about the student's reintegration needs for future academic and personal success?				
Throughout the months following the referral, do you periodically touch base with referrers to ask about new developments and to communicate that your BIT/CARE team is continuing to monitor the case?				
Is the BIT/CARE team's role in supporting students returning from leave written into its policy statement or procedures manual?				

Total:

BIT/CARE Team Assessment

Linking BIT/Care Teams to Student Success: This section will help your unit evaluate its current BIT/CARE team assessment initiatives.

Rate the questions below on a scale of 0-3	0 We do not offer this & haven't discussed it	1 We want to offer this but are unsure about next steps	2 We do something similar but there is room for improvement	3 We feel confident about our approach to this
Does your BIT/CARE team track data on basic metrics, such as the number of case, types of concerns, and referral sources?				
Do you track data on advanced metrics, such as number of reports for key student subpopulations (e.g., athletes), the number of students of concern by academic major, and the number of mandated assessments?				
Is caseload data aggregated into a summary document for inclusion in annual unit-level or divisional assessment reports?				
Would your team consider uploading your aggregated BIT/CARE team data to your website for public viewing?				
Does your BIT/CARE team systematically share key data points with senior administrators across the year?				
Do you track the retention and graduation rates for students who have been referred to the BIT/CARE team?				
Would your team be comfortable in soliciting student feedback about their experiences and outcomes from the intervention process?				
Does the team regularly use assessment data to identify current resource gaps, pinpoint emerging populations of high-need students, and model future service adjustment?				
Total:				

Ideas for Next Steps

Next Steps:	Inspiration & Resources:
Embed Annual Team Assessment into Procedure • Establish a regular time to assess your BIT/CARE team (at least annually) • Place a calendar hold and attach the most recent assessment results and a blank assessment	• Use this assessment each year to identify gaps in your BIT/CARE team's preparedness • Read this expert insight about how to optimize your BIT/CARE team size and composition
Formalize BIT/CARE Team Procedures • Implement a procedure manual to formalize operations and increase team visibility on campus • Establish role definitions to provide recognition and awareness regarding members' duties	• Find examples of procedures and policy manuals here • Find examples of role definitions here

Build Outreach Strategy
• Create an in-the-moment resource for faculty and staff to help connect students to the best-fit next steps
• Create a One-Stop Shop' BIT/CARE Team Website to streamline information
	• Discover examples of how other institutions are creating a resource folder to help faculty connect students to support below:
	    • Stanford's Red Folder
	    • UBC's Green Folder
	• Find examples of BIT/CARE team websites here

Strengthen Post-referral Communication • Invest in short-term strategies for post-referral communication to build referrer trust in the team's response • Implement a central point of contact to consolidate information about students of concern and better coordinate the BIT/CARE team's response	• Use EAB's Post-referral Communication Template to assess for opportunities to improve current follow-up plans
Advance Case Management • Adopt a case recordkeeping system to manage student case information • Consider hiring a dedicated case manager or implementing a student care coordination team	• Use EAB's Questions for Vendors to brainstorm around issues such as access levels, security features, and reporting capabilities • Check out EAB's case study about Vanderbilt University's centralized student care coordination team
Assess BIT/CARE Team Initiatives • Track KPIs, such as the number of referrals per year and referrer demographics, to identify high-impact improvements • Explore student success outcomes to demonstrate the team's contribution to institutional priorities	• Read this case study about how Central Michigan University used EAB's guidance to enhance KPI tracking • Read this expert insight to Link BIT/CARE team outcomes to student success

Implementation Work Plan

Use the reflection prompts and work plan template below to prioritize and outline next steps after completing your BIT/CARE Team Assessment.

✅ Highest Scoring Category:	⚠️ Lowest Scoring Category:

Areas of greatest priority/additional context or comments:

Next Steps Work Plan:

Task	Due Date	Owner

Project Director

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Kate Brown

Managing Director

Liz Rothenberg, PhD

EAB

Education's Trusted Partner to Help Schools and Students Thrive

Your Imperatives Determine Ours

INSTITUTIONAL STRATEGY
Prepare Your Institution for the Future
Executive guidance rooted in research to support your strategic priorities

MARKETING AND ENROLLMENT
Achieve Your Enrollment and Growth Goals
Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

STUDENT SUCCESS
Build a Student-Centric Campus
Technology trusted by 850 schools to retain, graduate, and empower more students

DIVERSITY, EQUITY, AND INCLUSION
Advance DEI on Campus and in Your Community
Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

DATA AND ANALYTICS
Embrace Digital Transformation
Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with 2,500+ institutions to accelerate progress and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.