



# ***BOARD MEETING***

March 17, 2015

## BOARD MEETING AGENDA TUESDAY, MARCH 17, 2015 | 1:00-3:00 P.M. MICROSOFT CAMPUS

I. Meeting Called to Order		Brad Smith, Chair	1:00p
II. Approval of Minutes from December 18, 2014 Meeting	[Tab A]	Brad Smith	1:00-1:05p
III. Introduction of new Board Members	[Tab B]	Brad Smith	1:05-1:10p
IV. Scholar Spotlight	[Tab C]	WSOS Scholar	1:10-1:15p
V. Presentation from Independent Colleges of Washington	[Tab D]	Vi Boyer & Deans of Independent Colleges	1:15-1:45p
VI. Discussion/Action: Scholarship Services, Cohort 4, Eligible Majors	[Tab E]	Vickie Rekow Caroline Maillard	1:45-2:20p
VII. Activities Update (Program, Development, Advocacy, Media)	[Tab F]	Naria K. Santa Lucia & WSOS Staff	2:20-2:40p
VIII. Finance Update	[Tab G]	Mack Hogans Paul Kruglik	2:40-2:55p
IX. Upcoming Meeting & Closing	[Tab H]	Brad Smith	2:55-3:00p

**2015 Upcoming Board Meeting Dates:**  
 Tuesday, June 30, 2015  
 Wednesday, September 23, 2015  
 Tuesday, December 15, 2015

# **Tab A**

**Minutes from December 18, 2014 Meeting**



## WASHINGTON STATE OPPORTUNITY SCHOLARSHIP BOARD MEETING DECEMBER 18, 2014, 1:00-3:00 P.M., MICROSOFT CAMPUS MINUTES

The Board of Directors of the Washington State Opportunity Scholarship (WSOS) met on December 18th, 2014 at the Microsoft headquarters in Redmond, Washington.

Board members present: Brad Smith (Board Chair), Miller Adams, Stan Deal, Jerry Grinstein, Kimberly Harris, Mack Hogans, Jane Park, Jim Sinegal; Mike Wilson via telephone.

Additional attendees: Yolanda Watson Spiva, Naria Santa Lucia, Jane Broom, Caroline Maillard, John Bowden, Dave Stoler, Terrie Ashby-Scott, Erin Ashley, Kelly Bay-Meyer, Theresa Britschgi, Karyl Gregory, Juliette Schindler Kelly, Paul Kruglik, Megan Nelson, Vickie Rekow, Mahdi Ramadan, Huong Vo, Kyle Halmrast, Sarah Rathbone, Jeff Walker

### Meeting Called to Order

Having a quorum of the Board, Brad Smith, Board Chair of WSOS, welcomed everyone to the board meeting at 1:03 pm and introductions were made.

Jerry Grinstein moved that the minutes of the October 29, 2014 meeting be approved. Mack Hogans seconded the motion. The motion carried unanimously.

### Scholar Spotlight

Two scholars, Mahdi Ramadan and Huong Vo, shared their personal stories. They also expressed gratitude for their scholarship.

### Presentation of the 2014 Legislative Report

Kelly Bay-Meyer, Senior Research & Evaluation Officer, presented an overview of the 2014 Legislative Report.

Highlights include the following:

- ❖ More than 3,000 students started applications, over 1,500 submitted applications, and 900+ were eligible.
- ❖ 65% of WSOS graduates are employed and 90% of those are employed within WA.
- ❖ 21% of WSOS graduates are attending graduate school.

The Research & Evaluation department will follow up on the following items:

1. What is the breakdown of race/ethnicity of our scholars by gender?
2. What is the breakdown of employed WSOS grads by those who had research opportunities and those who did not?
3. Are we tracking wages over time?



4. Benchmarking attrition in STEM
5. Benchmarking employment trends

#### Private Fund Development

Kyle Halmrast, Jeff Walker, and Sarah Rathbone from the Ostara Group presented the Landscape for Higher Education. In 2013, the total nationwide charitable giving totaled \$335B. Giving to religion ranked #1 while giving to education ranked #2. Since 2010, people are giving more to education and especially to higher education. Trends have developed indicating fewer people are giving larger sums of money, corporations are pursuing a more strategic approach to their philanthropy, and people are investing in scholarships. There must be four elements of success to our fundraising strategy – investment potential, internal preparedness, a case for support, and volunteer leadership. Our strongest advantage is that we can tell potential investors that their contribution will be matched by the state of WA.

#### Scholarship Fundraising - WSOS Working Development Plan and Recent Updates

Naria Santa Lucia, WSOS Executive Director, and Jane Broom, Microsoft, presented the WSOS strategy to raise \$37M from these investors: \$30 million from cornerstone investors comprised of families and corporations who would donate gifts of \$5M+; \$10 million from major investors who are affiliated with STEM-related companies and would donate gifts of \$25K - \$5M; \$7M from corporations, individuals, and employees who would donate gifts of up to \$25K.

#### Activities Update

Santa Lucia offered details on the 2015 Scholarship Support Program including support service strategies, new tactics and intended outcomes. New tactics include instituting regular office hours at eight major WA universities this year, a new “Skills That Shine” series of lecturettes powered by Boston Consulting, and a human design-centered program on January 6<sup>th</sup>.

The application for Cohort 4 goes live January 5th and must be submitted by March 2nd.

Updates were provided regarding our advocacy efforts, government relations, and our media outreach including research into new forms of media.

The Board discussed additional development and outreach strategies including legislative meetings and supporting veterans.

#### Finance Update

Hogans provided an update on WSOS’ finances and investments.

First, Hogans reminded the Board that \$24M in private source funds were transferred to WSIB for management (\$17M scholarship and \$7M endowment) in September 2014. Hogans then reported that the Finance Committee affirmed the decision to transfer an additional \$19 million in the state match funds to WSIB for management in November 2014 (\$13M scholarship and \$6M endowment).



Hogans also reminded the Board that public and private source funds are currently kept separate. We are waiting for the Attorney General to decide whether public funds can be considered private so they can be invested in equities.

Dave Stolier, Assistant Attorney General, reported that the Attorney General's legal opinion team is considering allowing public funds to be invested in equities. A decision may be out in January.

Paul Kruglik provided an analysis of the WSOS balance sheet, income statement, and cash flow through 11/31/14. He also reviewed operating expenses through June 2015.

Next Meeting

The next board meeting is scheduled on Tuesday, March 17<sup>th</sup>, at 1:00 – 3:00 pm at Microsoft.

The meeting adjourned at 3:02 pm.

Respectfully submitted,  
Karyl Gregory

## **Tab B**

### **New Board Member Bio**



Supporting the next generation of STEM & health care leaders

## NEW BOARD MEMBER

### DIANE CECCHETINI, FORMER CEO OF MULTICARE

Ms. Diane E. Cecchettini, RN, served as Chief Executive Officer and President of MultiCare Health System from July 1999 until May 2014. Prior to her role as CEO, Diane served as Executive Vice President of MultiCare Health System from 1997 to 1999 and Vice President for Patient Services from 1989 to 1997. She served as an Assistant Administrator of Sutter General Hospital from 1985 to 1989, Administrative Director of Nursing and other management positions at Sutter Memorial Hospital, Sacramento, California from 1977 to 1985, and provided direct clinical experience at UCLA Medical Center in Los Angeles, California. Diane has been a Director of First Choice Health Network Inc. since 1999. In 1999, Diane retired as a Lieutenant Colonel from the Air Force Reserves, having served 21 years as a Flight Nurse in Aeromedical Evacuation - serving in the Vietnam era and as a Troop Commander in Desert Storm. Diane received a Bachelors Degree in Nursing in 1970 from the University of California, Los Angeles and a Masters of Science degree in Human Resources Management in 1976 from the University of Utah.



# **Tab C**

## **Scholar Spotlight**



Supporting the next generation of STEM & health care leaders



Yarely Gomez with Senator McAuliffe

## SCHOLAR PROFILE

### YARELLY GOMEZ

Yarely is a second year computer science major at the University of Washington Bothell. She grew up in Sunnyside, Washington and attended Sunnyside High School. She originally became interested in pursuing a STEM degree through the influence of her cousin who is also a Washington State Opportunity Scholarship recipient. Recently, Yarely was selected to represent the University of Washington at the SACNAS National Conference (Society for Advancement of Hispanics/Chicanos and Native Americans in Science). In December, she attended the annual Washington STEM Summit at Microsoft where she participated in a panel with Washington STEM CEO, Patrick D’Amelio. Yarely has spent the last year working for the IT Help Desk at UW Bothell and more recently, Yarely was offered a position in programming with GlamHive, a local start-up company which offers a shopping and photo-sharing social platform for fashion lovers everywhere.

Yarely is a first generation college student. She is grateful for her parents who came from Mexico and sacrificed everything so that she could succeed.

*Yarely’s take on WSOS support services staff: “You are amazing, you aren’t only a mentor to us, you are a friend. I promise to make you proud!”*

**1605 NW SAMMAMISH ROAD, SUITE 200, ISSAQUAH, WA 98027-5388**

**1.877.899.5002 | WWW.WAOPPORTUNITYSCHOLARSHIP.ORG**

*The College Success Foundation (CSF) is the program administrator for the Washington State Opportunity Scholarship.*

# **Tab D**

**Presentation from Independent Colleges  
of Washington**



# The Future We Want

**ICW colleges enroll 40,000 students from every Washington county, all 50 states, and 90 countries**

## Mission

Independent Colleges of Washington provide educational opportunity, choice, and success for students.

### Accomplished by:

- Making resources available to students
- Advocating for public policy that supports students
- Building strategic collaborations
- Telling the compelling story of independent higher education

### ICW colleges share a commitment to high quality academically rigorous learning with emphasis on:

- Critical thinking
- Lifelong learning
- Ethics
- Leadership
- Community service

### ICW is a nonprofit membership organization of 10 liberal arts based colleges and universities in Washington

## Vision

In 2022, Independent Colleges of Washington will be a leader in collaboration across sectors of higher education and business to sustain the strategic value of independent colleges in Washington as an integral part of the higher education solution for a vibrant,



### Responding to Local, Regional, and National Student Needs

ICW colleges extend access with over 250 online and hybrid courses, and 21 off-site locations in Washington

Belleuve	Moses Lake (2)
Bremerton	Olympia
Centralia	Tri-Cities
Des Moines	Renton
Everett	Seattle (3)
Issaquah	Spokane (3)
Joint Base Lewis-McChord	Stanwood
Kirkland	Yakima



## ICW Colleges

- Gonzaga University
- Heritage University
- Pacific Lutheran University
- Saint Martin's University
- Seattle Pacific University
- Seattle University
- University of Puget Sound
- Walla Walla University
- Whitman College
- Whitworth

# **Tab E**

**Bios of Scholarship Services Team**

**Scholarship Services, Cohort 4, Eligible Majors**

## **COLLEGE SUCCESS FOUNDATION SCHOLARSHIP SERVICES TEAM**

### **VICKIE REKOW DIRECTOR, SCHOLARSHIP SERVICES**

Vickie joined the College Success Foundation in October 2006. As the Director of Scholarship Services, she is responsible for overseeing all aspects of scholarship administrative management. This includes program setup and design, application process, selection and notification, renewals and tracking. Vickie, along with her team, awards funds to almost 3,000 recipients annually and disburses close to \$13 million in scholarship funds. Prior to joining College Success Foundation, Vickie was Director of Student Financial Services at Seattle Pacific University and brings more than 17 years of management, administration and financial aid expertise to the College Success Foundation. Vickie believes in the power of higher education. As a first generation college student, Vickie has firsthand knowledge of how a college education can provide unimaginable opportunities and success. In her free time, Vickie loves to run, bike, read, watch old movies, explore history, and travel. Vickie was born in Port Angeles and raised in Sequim. She received her BA from Northwest University.

### **LAUREN HARDIN PROGRAM OFFICER, SCHOLARSHIP SERVICES**

Lauren has served as a Program Officer in the Support Services department at College Success Foundation for two years. In her role, Lauren works primarily with the Leadership 1000, WA State Governors' Scholarship for Foster Youth, and the Uber Partner Driver Scholarship programs including the application, selection and awarding of those scholars. In addition, she supports the sun setting Achievers Scholarship program and their remaining scholars, and provides assistance to the WSOS program as needed. Prior to joining College Success Foundation, Lauren was Financial Aid Counselor at Seattle University where she was responsible for both the financial aid counseling of prospective and current students and their parents as well as the campus wide student employment program in which students were hired, trained and worked in both on and off campus positions. In her free time, Lauren is an avid Seahawks fan, likes to read, explore western WA, craft and party plan, spend time with friends and family, and try new restaurants. While Lauren was born in Houston, TX, she has called western Washington home for the last 20 years. Lauren received a BA in General Studies from Western Washington University and a MA in Public Administration from Seattle University.

## **KIMBERLY KING** **PROGRAM OFFICER, SCHOLARSHIP SERVICES**

Kimberly has served as a Program Officer in the Scholarship Services department at College Success Foundation for almost two years. In her role, Kim's primary responsibilities include application, selection and reporting efforts for the Washington State Opportunity Scholarship program. In addition, she supports the Director in developing and implementing policies and procedures and carrying out the objectives of the department. Prior to joining College Success Foundation, Kim was Director of Financial Aid at DigiPen Institute of Technology where she was responsible for the management and administration of student financial aid programs including federal, state and local funds. Kim finds nothing more rewarding than helping low-income students who exhibit hard work, fortitude and dedication gain access to higher education and giving them opportunities to give back to our community. Kim is a big kid at heart and enjoys spending time with her two kids, Nico (11 years old) and Hayden (2 years old). She also enjoys watching movies, snowboarding, home décor, shopping, spending time with friends, and family time. Kim was born in Seoul, Korea and raised in Seattle. She received a BA in Psychology from the University of Washington.

## **JILIAN RYAN** **PROGRAM OFFICER, SCHOLARSHIP SERVICES**

Jilian has worked for the Scholarship Services department at College Success Foundation for five years. Initially hired to handle selection and awarding for the Leadership 1000 and Governors' Scholarships, Jilian now works with college students and financial aid offices to award scholarship funding to students in all CSF scholarship programs and helps to manage the selection and renewal process for WSOS – including keeping high school mailing lists current, writing eblasts to promote the scholarship to high school and college contacts, updating the online application, renewal form, and WSOS website, and developing processes for managing application information and documents. Prior to working for the Scholarship Services team, Jilian started at CSF in 2008 as a Program Assistant for the Pre-College Services Team where she was responsible for program reporting and communication in addition to supporting a team of 16 school-based staff members. Jilian believes strongly that college changes lives and is proud to work for an organization that helps to make higher education more accessible to students from all backgrounds. She enjoys hiking, snowshoeing, running, cooking, baking, and photography in her free time. Jilian hails from Sammamish and received a BA in Psychology from Whitman College.

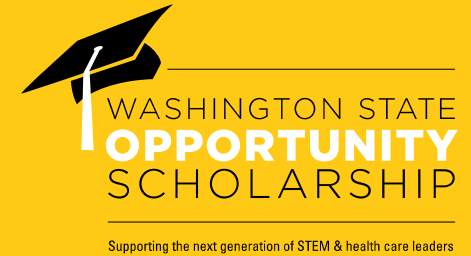


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# DISCUSSION: SCHOLARSHIP SERVICES COHORT 4 ELIGIBLE MAJORS



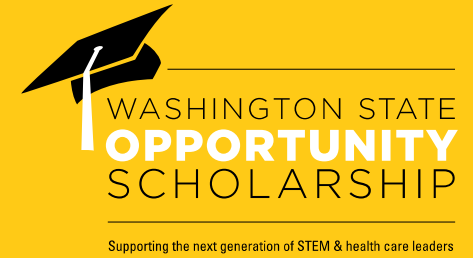
# Scholarship Services



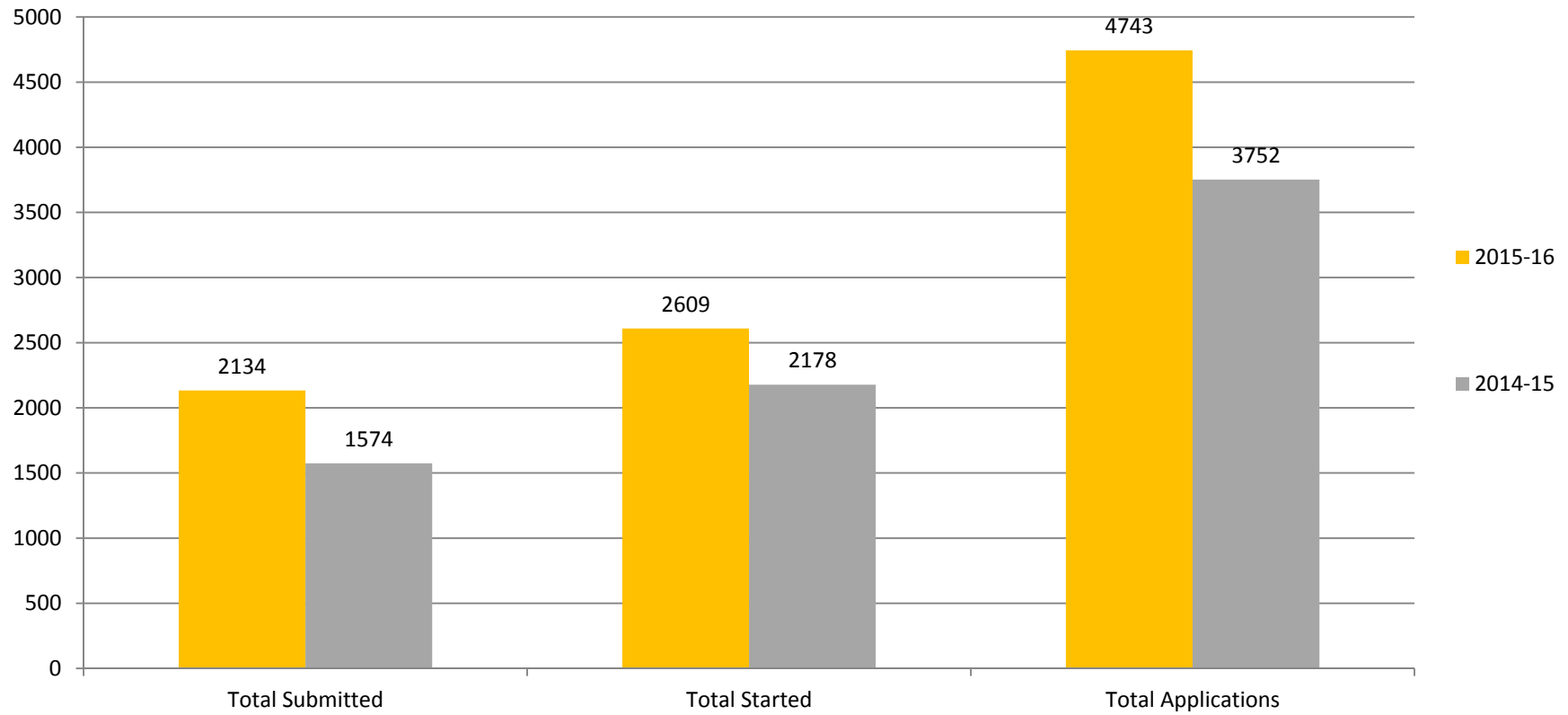
- 2.4 Staff work on WSOS
- Scope of Work for WSOS
  - Developing and maintaining on-line application
  - Web pages
  - Marketing
  - Managing the application process, which includes phone calls, emails and documents
  - Selection
  - Notification
  - Acceptance
  - Disbursement of scholarship funds to colleges/universities
- Activities for WSOS in 2013 - 2014
  - Answered over 7,500 emails and phone calls
  - Received, analyzed, and processed documents for the application and WSOS scholarship increases – over 4,000
  - Received close to 5,000 applications (includes Acceptance Form)
  - Provided scholarship and support to over 2,500 students
  - Annual renewal/update process for all WSOS recipients – over 2,500

# Cohort 4 Application Summary

based on preliminary findings

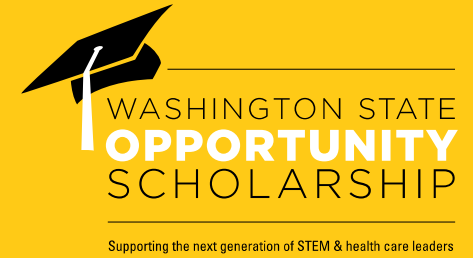


## Total Applications

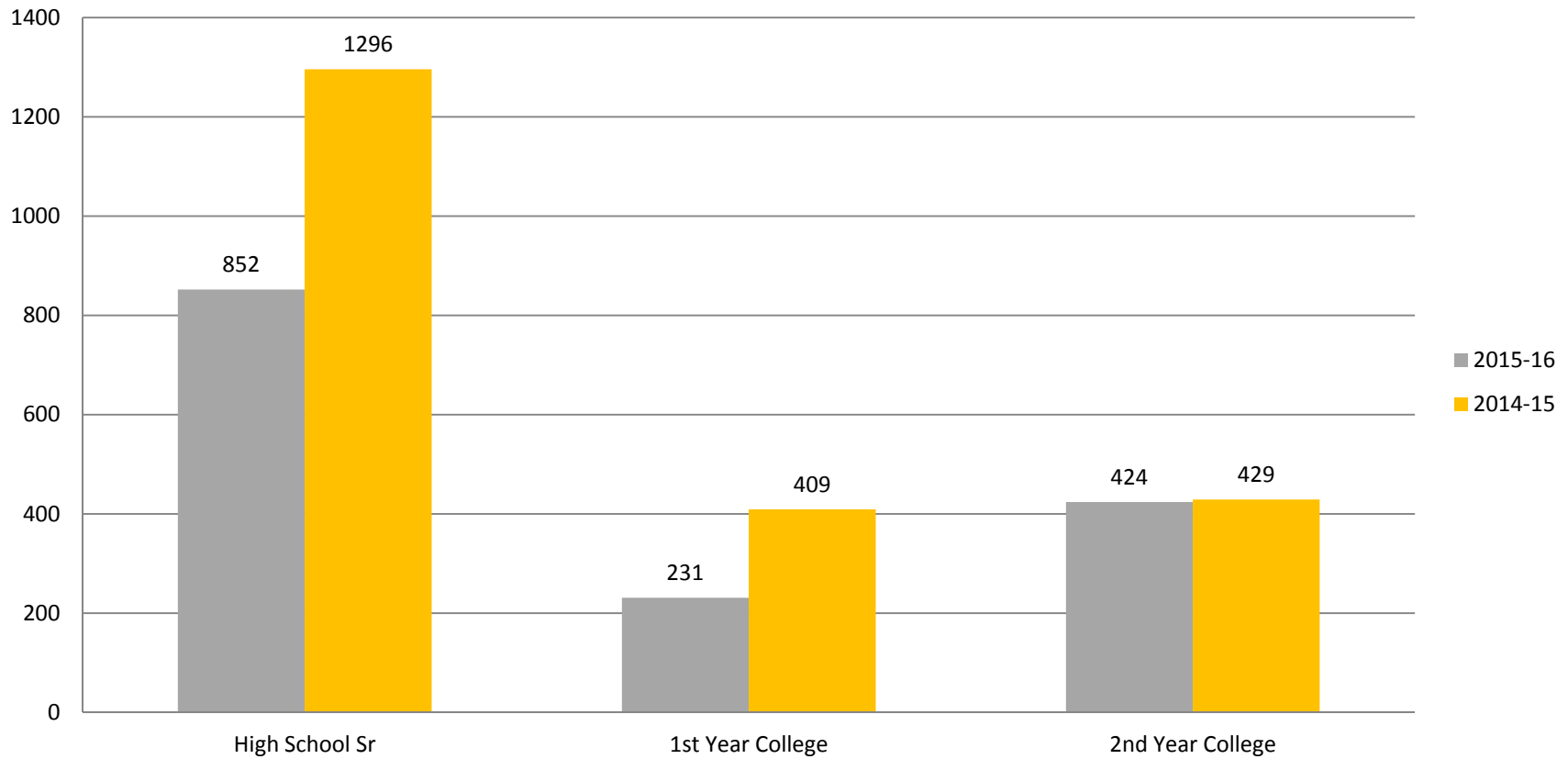


# Cohort 4 Application Summary

based on preliminary findings

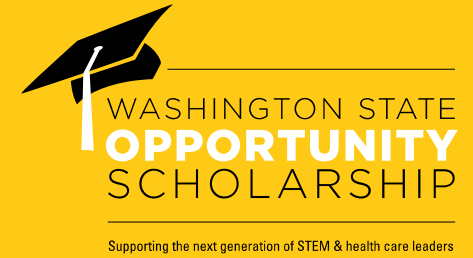


## Submitted by Current Class Standing

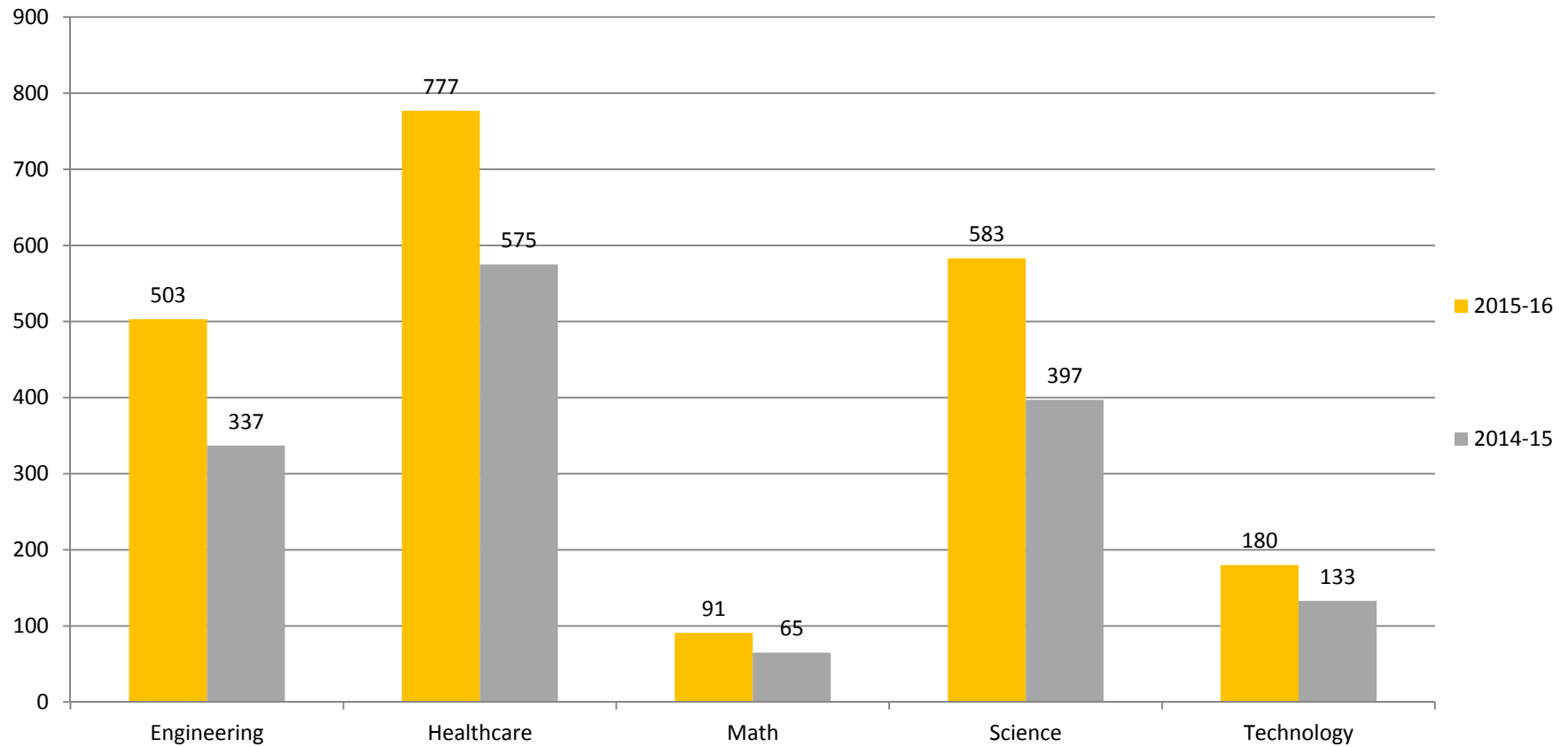


# Cohort 4 Application Summary

based on preliminary findings

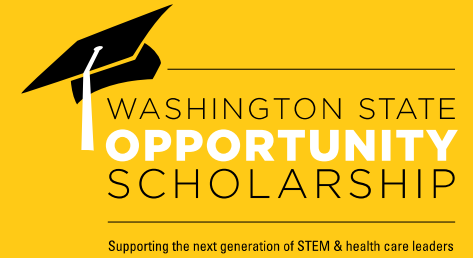


## Submitted by Area of Study

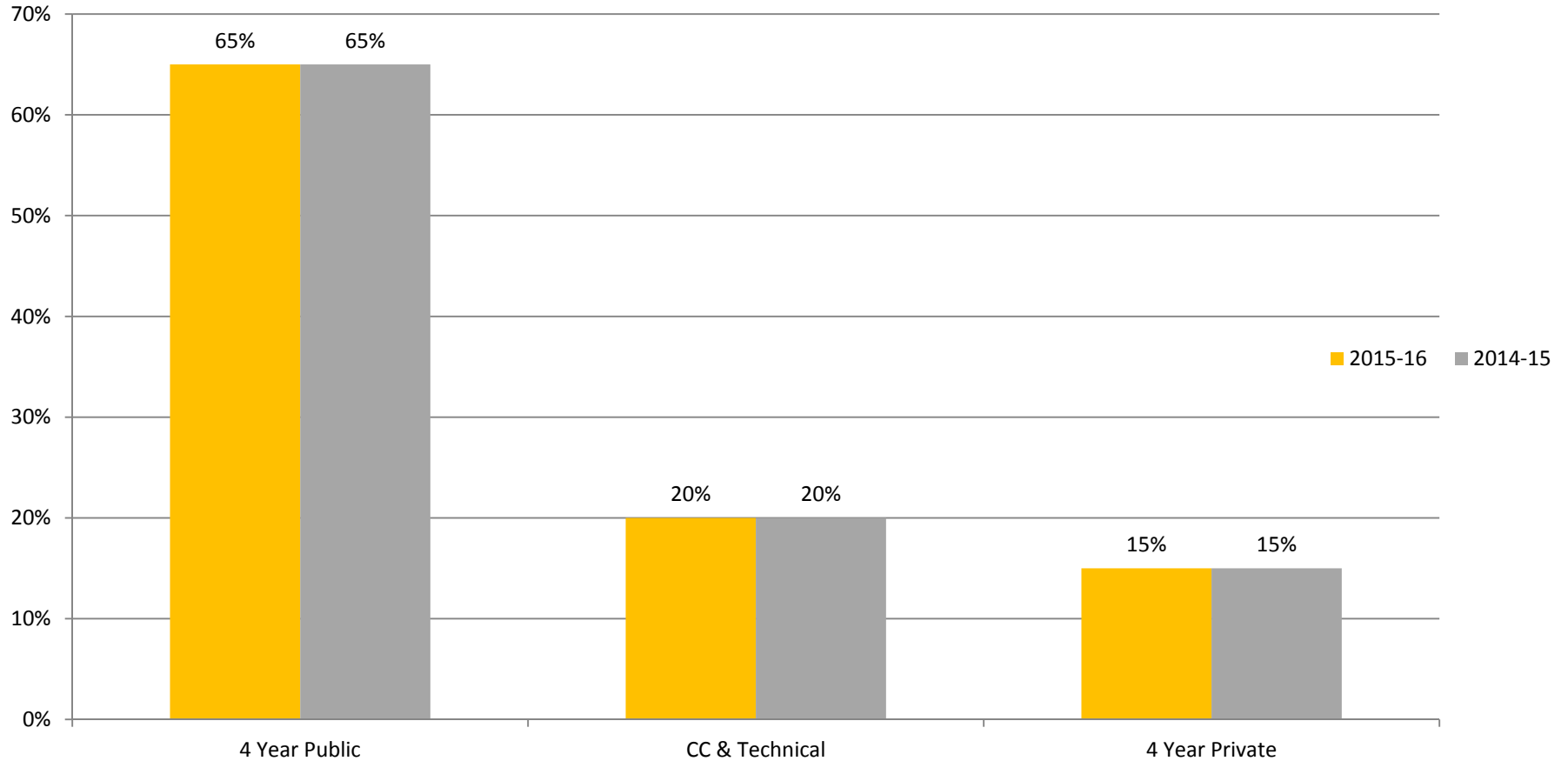


# Cohort 4 Application Summary

based on preliminary findings

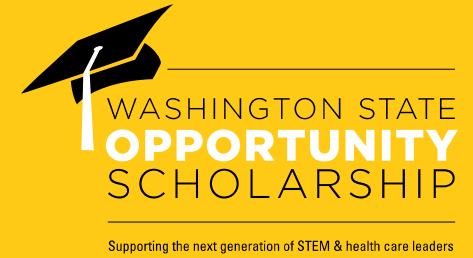


## Submitted by College Type

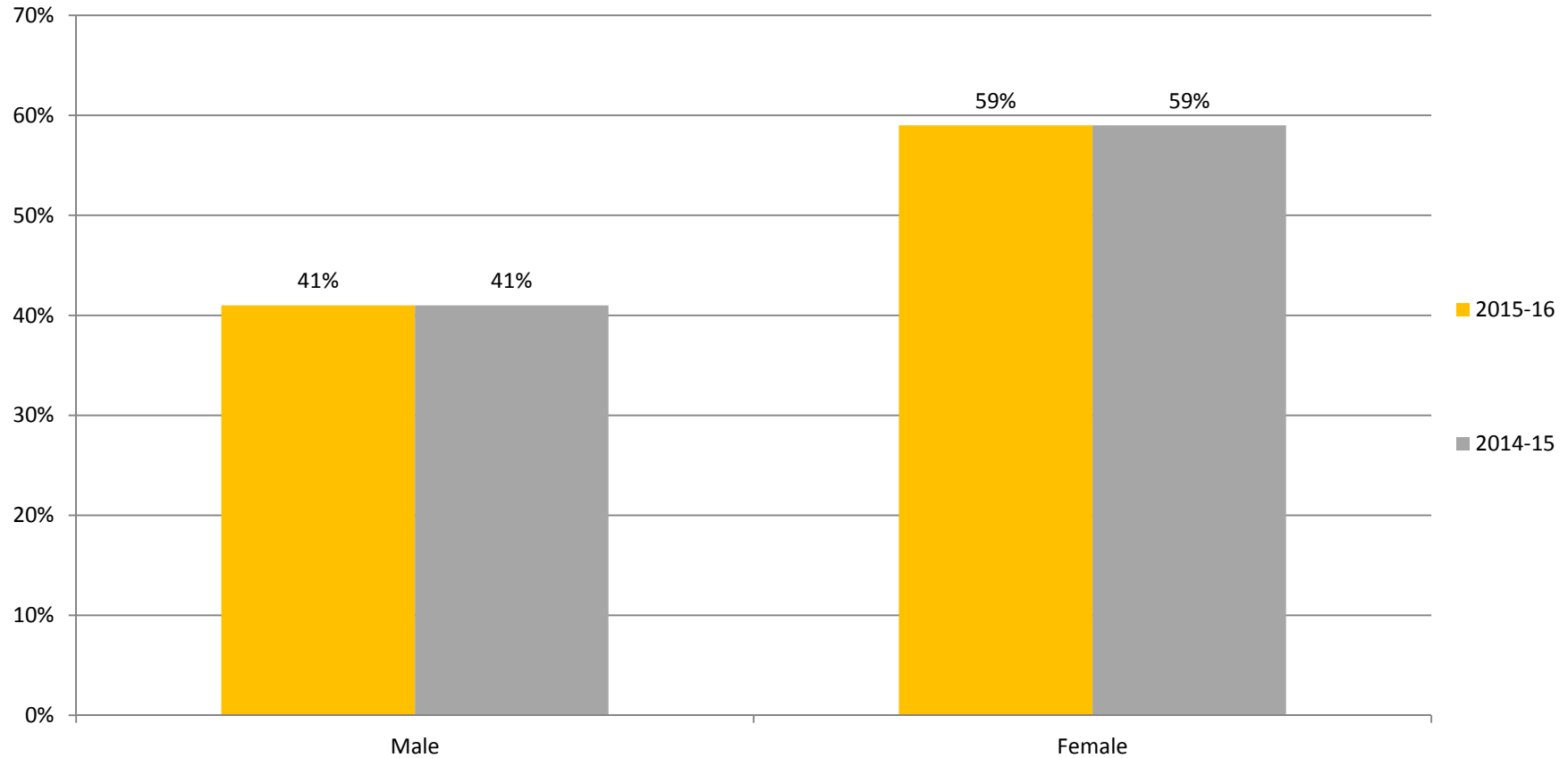


# Cohort 4 Application Summary

based on preliminary findings

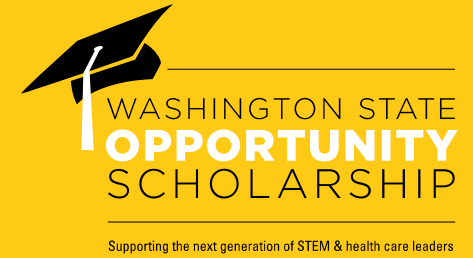


## Submitted by Gender

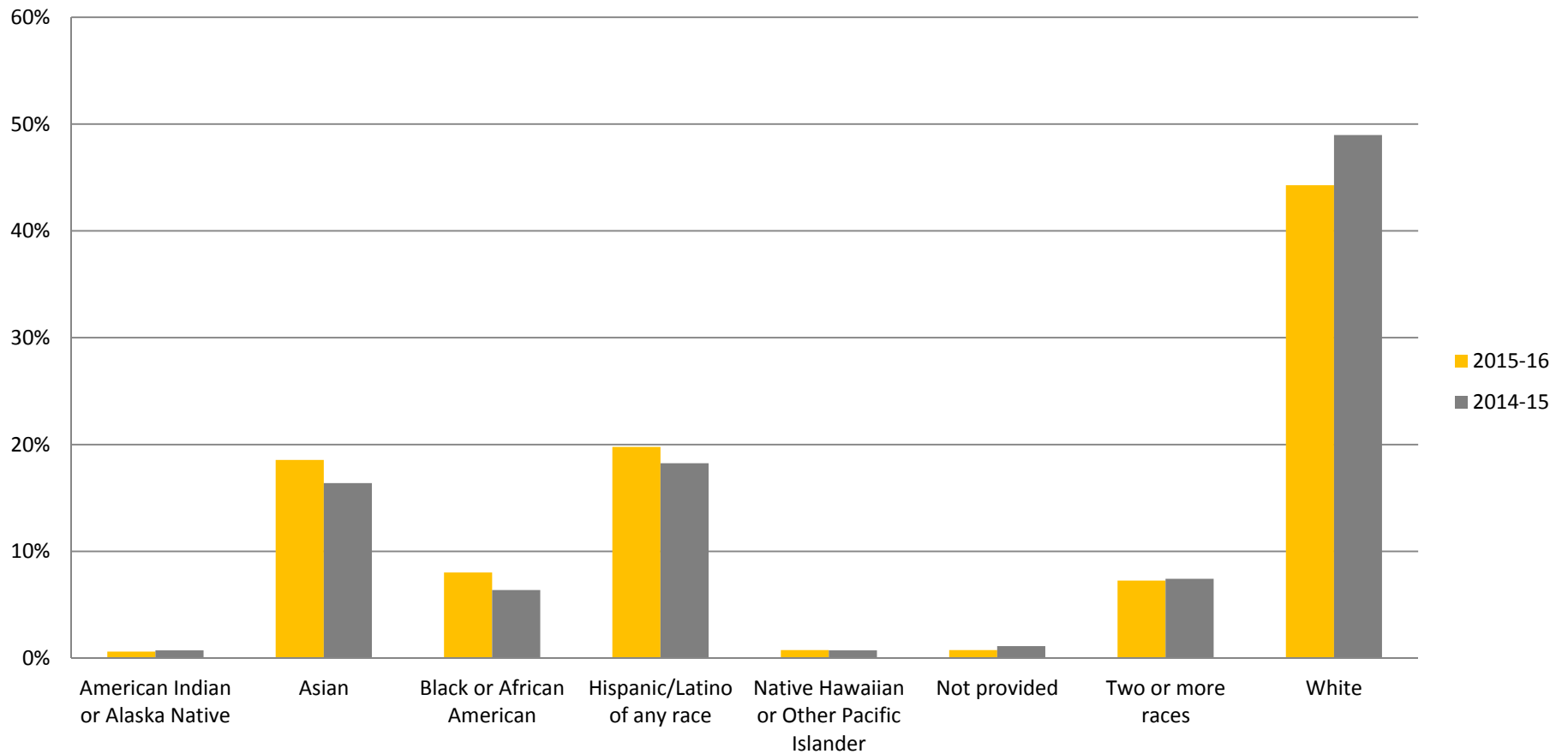


# Cohort 4 Application Summary

based on preliminary findings



## Submitted by Race



# Cohort 4 Application Summary

based on preliminary findings



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Top Ten Colleges	# Applications Submitted
University of Washington-Seattle	125
Washington State University	70
Eastern Washington University	44
Western Washington University	34
Central Washington University	33
Clark College	30
Bellevue College	28
Tacoma Community College	26
Seattle University	24
Pacific Lutheran University	22



# Cohort 4 Application Summary

based on preliminary findings



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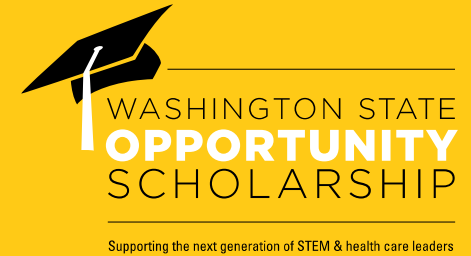
Top 10 High School	# Applications Submitted
Cleveland High School	26
Foster Senior High School	21
Kentridge High School	17
Davis High School	17
Toppenish High School	16
Kent-Meridian High School	16
Eisenhower High School	16
Todd Beamer High School	15
Garfield High School	15
Wilson High School	14

## Proposed Scholarship Awarding: Cohort 4



- **Tiered scholarship model**
  - \$2,500 for freshmen and second year students
  - \$5,000 for juniors who are admitted into an eligible high-demand STEM or health care major
  - \$7,500 for seniors
  - \$5,000 for 5<sup>th</sup> year seniors
- **Selection Criteria**
  - By class level?
  - By total score?
    - GPA – 80% weight
    - First Generation – 20% weight

## Proposed Scholarship Awarding: Cohort 4



- **Select 780; assume 750 will enroll**
  - 60% high school seniors\*
  - 20% first year college students\*
  - 20% sophomore\*

\*Depending on applicant pool

- **Scholarship Expenditure**
  - Projected to be \$10.1 million for C4

# **Tab F**

## **Activities Update**

**WSOS 2015-16 Application Promotion**

**WSOS BCG 2015 Resume Workshop**

**WSOS Volunteer Opportunities**

**Print Media**

## ACTIVITIES UPDATE TO BOARD OF DIRECTORS | JANUARY-MARCH 2015

Since our last report to the Washington State Opportunity Scholarship (WSOS) Board of Directors, the entire WSOS Team has been actively (and successfully) pursuing three goals: (1) increasing the number of WSOS applicants during the open application period, (2) expanding our student STEM support program offerings, and (3) laying the foundation for resource development activities. The following briefly details some highlights of our activities:

### WSOS OPEN ENROLLMENT AND SCHOLARSHIP OUTREACH

March 2, 2015 marked the close of the 2015-16 Washington State Opportunity Scholarship application period. We are thrilled to report that this year, we had 560 more submitted applications than last year - a 36% increase. Moreover, we saw an increase in applicants from students studying engineering (+49.2%), technology (+35.3%), and math (+40%). Further, total started applications increased by 991.

We are confident that our increased numbers were based on our efforts to increase outreach by exhibiting and presenting at college fairs, conferences and events across the state, connecting more effectively with partners (i.e., WA STEM networks, STEM/healthcare teachers and faculty, business leaders, etc.), increasing paid and earned social media outreach, and the planning and distribution of informative scholarship toolkits to high schools and universities.

To review the comprehensive list of our Cohort Four WSOS Scholarship marketing, communications and outreach efforts, please see the attached 2015-16 Scholarship Promotion Summary.

### SCHOLAR STEM SUPPORT SERVICES – PERSISTENCE, COMPLETION, FUTURE READINESS

In addition to our STEM Pipeline expansion efforts, the WSOS Team has been working to develop our program strategies and tactics to assist our students with persistence, completion, and ultimately, placement in a high-demand career in Washington State.



Presenting WSOS at NASA Space Grant



Hosting panel at Women in Science & Engineering Conference to encourage women applicants



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### **Office Hours**

Beginning in January, Theresa Britschgi and Terrie Ashby Scott, our WSOS STEM Support Services program staff, launched office hours at six campuses across Washington State including UW – Seattle, UW – Tacoma, Seattle University, Gonzaga, Eastern Washington University, Pacific Lutheran University, and Central Washington University and has served over 60 Scholars to date. At office hours, WSOS Scholars have the opportunity to connect with WSOS program staff to receive support, coaching, advice and to make connections with campus resources, professionals in a one-on-one setting. We are continuing to fine-tune this program offering and will expand our reach to schools throughout Washington.



CWU Student Accessing Office Hours

### **Skills That Shine**

Also in January, we had the good fortune of launching our first Skills That Shine in partnership with the Boston Consulting Group's (BCG) Seattle office. Our first session focused on resume writing and was extremely helpful for participants who made the following comments:

- “Really helpful. My resume is a lot different after today.”
- “We get some advice from our career services offices at school, but nothing like this. This is more practical and real.”
- “Really appreciated the one-to-one assistance.”
- “When is the next session? I’m definitely coming again.”

In addition to this feedback, our initial review of the pre- and post-survey indicates:

- **All** participants said they are likely to implement the tools and/or practices covered in this training.
- **All** participants said they are likely to follow-up with a peer or colleague from the training.

The highlight of the session occurred when former Governor Gregoire dropped in to make a few remarks to the students. In addition to providing great day-of programming, Skills That Shine will have a lasting impact on WSOS STEM support offerings. Through the pro bono filming and editing services of Snippiies (secured by BCG), a link to an interactive video presentation is now available online to be accessed by any one of our 2,400 WSOS Scholars per year. The second of three Skills That Shine workshops with BCG on April 24<sup>th</sup> will focus on interviewing. Each of the workshops in the series will be filmed and made available online to students.



Former Governor Gregoire addressing students at Skills that Shine Workshop

### **STEM Professionals Network**

At the start of the year, the WSOS team worked with Anne Keeney, a program design consultant, to devise a rich, engaging STEM Professionals volunteer engagement program. Following our discussions, we developed clear volunteer opportunities for STEM professionals to be involved with our programs. Please see the attached “WSOS Volunteer Opportunities” document.

### **Career Fairs**

Throughout the winter, WSOS has been a fixture in college career fairs across the state as presenters and exhibitors including but not limited to the UW Computer Science and Engineering Industry Fair, the Civil Engineering Career Fair, the UW Society for Women Engineers Career Fair. The focus of these efforts included 1) raising awareness with potential applicants, 2) raising awareness with employers and campus partners and 3) to mentor attending Scholars on networking skills.

In February, in collaboration with the Spokane College Career Fair which is Spokane’s largest career fair of its kind, WSOS hosted a lunch and workshop for Scholars on resume building, interviewing, networking and negotiating an employment offer. Students from Washington State University, Gonzaga, Eastern and others attended the workshop which was seamlessly designed to prepare students prior to meeting with prospective employers at the ensuing career fair. In addition to mini-sessions led by WSOS staff members, Craig Dias, Vice President & General Manager, Haskins Steel Co. Inc., provided keynote remarks and shared with Scholars his 12 key factors for success. Students reported that the workshop helped them feel confident and well-prepared to meet with employers at the career fair in the afternoon.



Workshops during Spokane College & Career Fair

### **Additional Opportunities for Access to STEM Professionals**

Finally, from January to March 2015, we provided our WSOS Scholars with numerous opportunities for access to STEM professionals at various events in our region. These opportunities included GeekWire Start-Up Day, Crosscut’s IdeaLab, WTIA sponsored events, and the Women in Transportation Luncheon. We’ve also made connections and started conversations with additional businesses and industry players such as Microsoft, Boeing, F5, Bungie, Rightside, and others to begin planning site visits and mentorship opportunities.



## DEVELOPMENT UPDATE

From January to March, WSOS team members' development efforts focused on preparation, planning and cultivation of donors to ultimately seek funding support for WSOS.

### **Cornerstone Family Strategy**

Working closely with Thrive Washington and Washington STEM, the WSOS team has finalized a presentation which will be made to Steve and Connie Ballmer (Ballmer Family Giving) on March 19<sup>th</sup>. At this meeting, Brad Smith and the executive directors from the three organizations will lead the Ballmers through the STEM education continuum – from early childhood education through higher education. Also, John Wenstrup from BCG will present the research featured in the recent Investing in the STEM Pipeline report. All are very excited about this meeting and we look forward to reporting back a favorable response from the Ballmers.



### **Major Donor Strategy**

This quarter, we have also been working to plan a major donor event focused on leaders from the tech sector. In the first of our OpportunityTalks dinner series, Board Members Brad Smith and Jane Park have graciously agreed to co-host a dinner at the Four Seasons on Tuesday, April 7 at 7:00pm. We are expecting 30-40 tech executives will participate in an evening of networking and dialogue about innovation in our region. We will also have 5-6 Scholars presenting their stories/research at the reception before dinner. There will not be an “ask” at the event, but each of the guests will eventually be cultivated for a personal investment or an investment by their company. We hope to replicate this event for other industry sectors including engineering, healthcare and bio-med in the coming months.

### **Partner Investor Strategy**

Our development team has also been working to plan and recruit champions for WSOS' first large-scale event, the OpportunityTalks Breakfast, on November 17<sup>th</sup> at the Four Seasons in Seattle. To date, we have recruited Kimberly Harris, CEO of Puget Sound Energy as well as Mary Knell, CEO of Wells Fargo Washington and Western Canada as two of our Event Chairs. We are looking to add one or two additional Co-Chairs and have asks planned for significant leaders in the community. In addition to our Chairs, we are looking to recruit approximately 10 industry members to join our Executive Event Committee. To date, we have secured two individuals and are looking to add to that list through the early spring. We are also finalizing an engaging speaker from the STEM community.

In order to ensure our inaugural year is a success, we are looking to partner with each Board Member to host a table and provide a sponsorship.



## ADVOCACY UPDATE

With the legislative session in full swing, WSOS hit the ground running in Olympia. As a reminder, while the Economic Revenue Forecast Council had forecasted \$20M for WSOS in the 2015-17 Biennium, Governor Inslee's budget provided for \$100M during the same period. Working with CSF's Government Relations Director, Juliette Schindler Kelly, and our Olympia advocacy team, WSOS met with numerous Senators and Representatives, especially those on the Higher Education and the Ways and Means Committees. These legislators included Senators Bailey, Baumgartner, Dammeier, Frockt, Kohl-Welles, Liias, and Ranker, and Representatives Hunter, Magendanz, Peterson, Pollett, and Sullivan.



WSOS Scholars with Rep. Sullivan

All of our meetings were hugely successful, in large part because we were able to include at least one WSOS Scholar. Therefore, in addition to having a chance to inform legislators about the great progress of the program as well as our early results and trends, we were able provide real-life examples why the legislature should continue to prioritize funding of WSOS and keep it at the forefront of the State's higher education strategy.

## UPCOMING

With spring around the corner, the WSOS team will begin or continue to work on a number of initiatives including: (1) focusing on development, cultivation and solicitation efforts (including cornerstone, major and partner investments); (2) continuing to increase awareness of WSOS with our legislators during the session, our schools and universities, and our community partners; (3) working through the terms of our annual administrative contract with the College Success Foundation; and (4) developing our calendar of STEM Support activities for the 2015-16 school year.



## WSOS 2015-16 Application

### Marketing and Promotion Summary

#### Direct Mail

12/15/14 High School packet mailing (488 final recipients)

1/5/15 2- and 4-year colleges packet mailing (409 final recipients)

#### Eblasts

ID	Details	Sent Date	Sent	Opened	Bounced	Page Visits
106023	WA - (#119) - WSOS L1000 & GS Announcement	12/10/2014	1972	693	65	6488
106047	WSOS - (#121) - STEM Contacts Eblast Scholarship is Coming	12/16/2014	615	196	18	4738
106489	WSOS - (#136) - 2015-2016 WSOS Announcement- Application Open	1/6/2015	3784	1006	88	8356
107740	WSOS - (#149) - WSOS Reminder	1/20/2015	1424	429	31	2766
108665	WSOS - (#160) - News From WSOS	1/27/2015	2328	1333	5	375
109839	WSOS - (#168) - Save the Date - E. WA Career Event & Application	2/4/2015	548	330	0	59
109807	WSOS - (#165) Application Now Open! - Up to \$22,500 Scholarship for STEM & Health Care Majors	2/10/2015	1422	550	28	473
110610	2015-16 WSOS, L1000 & Gov. Apps Open - Reminder (#162)	2/10/2015	1398	467	9	4797
111107	WSOS - (#172) - Launch Lunch Spokane Invite	2/12/2015	543	296	1	13
112141	WSOS - (#178) - Last Call: Launch Lunch	2/18/2015	543	278	1	23
108781	Watch: Scholars on the Impact of WSOS (#152)	2/18/2015	3612	868	12	1078
108783	One Week Left to Apply (#151)	2/24/2015	1376	316	2	869

114507	WSOS - (#191) - oNews Feb	2/26/2015	2312	1365	5	209
114832	WA - (#196) - Final L1000/Gov Application Reminder	3/4/2015	1856	363	12	345

## **Social Media**

**Facebook:** Jan 1 – Mar. 10, 2015

957 followers Jan. 1, 2015

1,279 followers Mar. 10, 2015 **(+34%)**

Total reach (paid and organic) **166,012**

### **Top Posts:**

<b>Date</b>	<b>Reach</b>	<b>Clicked</b>	<b>Likes/Comments</b>
1/5	41.1k	387	225
1/6	4.3k	37	38
1/14	10.9k	90	53
1/20	560	50	23
1/23	13k	54	31
1/27	4.8k	64	26
2/4	1.3k	115	19
2/9	12.8k	174	307
2/16	4k	32	6
2/22	19.2k	520	38
2/25	7.8k	68	69
3/2	3.6k	60	26

**Twitter:** Jan. 1 – Mar. 10, 2015

820 followers Jan. 1, 2015

877 followers Mar. 10, 2015 **(+7%)**

Tweets earned **28.9K impressions**

### **Top Engaging Posts (Organic)**

<b>Date</b>	<b>Impressions</b>	<b>Engagement</b>
1/5	3.4k	60
1/14	1,807	114
1/16	1,149	1
1/21	521	10
1/30	241	12
1/30	3,012	92
2/5	573	11
2/25	663	19
2/27	986	90
3/4	213	12

## **Paid Media**

WSU The Daily Evergreen – digital, 1 month

UW Daily – print, Feb. 10

UW SWE Evening With Industry program – print, Jan. 22

WWU The Western Front – Career Fair program – print, Feb. 10

## **Earned Media**

12/11 Everett Herald: Keeping our jobs and students

12/16 Columbia Herald: In Our View: STEM Key to State's Future: Report underscores need to train today's students for tomorrow's high-tech jobs

1/9 Spokesman Review: Editorial: STEM scholarship plan right for Spokane

2/1 UWT The Ledger: Need-Based Scholarship for STEM Undergraduates

2/13 The Spokesman-Review: Editorial: SFCC takes right step in closing STEM gap

2/13 Puget Sound Business Journal: How people in business can upgrade education

2/24 The Seattle Times: Use Washington State Opportunity Scholarship as a pathway to STEM and health care

**Events** – participated via staffed booth **and/or** presentation to event attendees to promote scholarship application

5/16 UW Undergraduate Research Symposium

5/30-6/2 Imagine Tomorrow HS Problem Solving Competition

8/11-13 WA STEM Network Meeting

8/21 WBBA Summer Social

8/27 Heritage U Fall Welcome

9/19 Office of Minority Affairs and Diversity

9/22 UW LSAMP event

9/23 WSU Fall Welcome

9/25 PLU Fall Welcome

9/26 SURP Award Certificate presentation & Space Grant Reception

10/2 GU Fall Welcome

10/10 Seattle Central College Fall Welcome

10/11 GeekGirl Conference

10/13 UW Fall Welcome

10/16 EWU Fall Welcome

10/17 Connecting Community Colleges to WSU

10/17-19 Washington Science Teachers Association Conference

10/20 WWU Fall Welcome

10/21 UWT Fall Welcome

10/23 CWU Fall Welcome

11/3 SPU Fall Welcome

11/4 SPU Career Fair

11/6 CWU Engineering Career Fair

11/26 Native American Tribal Leadership Meeting

12/2 WA STEM Summit

12/3 UWT Hour of Code presentation

12/5 WA MESA Board Meeting presentation

12/17 Kent SD Science Director presentation

1/3 Clear Sky Native Youth Leadership Conference

1/6 Two Rivers Alternative School in the N. Sammamish Valley presentation

1/7 UW STARS presentation

1/8 presentation to Spokane SD superintendents and business community members

1/9 Rainier Beach HS (Career, College and CPA, faculty) presentation

1/10 UW Young Executives of Color (YEOC) Resource Fair

1/13 Issaquah HS Seniors presentation

1/15 NW Science Writers meeting presentation

1/21 Friends of the Children presentation

1/21 UW Civil Engineering Career Fair

1/21 UW Computer Science and Engineering Industry Fair

1/21 UWB STEM Career Networking Night – UWB

1/22 Washington Technology Industry Alliance Event (Author) presentation

1/23 SU Fall Welcome

1/23 UW Society for Women Engineers Career Fair and Dinner

1/26 Rural Alliance (E. WA Superintendents) presentation

1/27 UW NSBE Diversity Fair

1/28 UW Undergraduate Science Job and Internship Fair

1/29 Highline High School targeted presentation

1/30 Geekwire Startup Day

2/3 Pomeroy School District HS presentation

2/3 South Central STEM Foundation Meeting presentation

2/3 Central Valley HS (Spokane) Career and Scholarship Fair

2/4 Shadle Park HS (Spokane) presentation

2/4 SCC Meeting – Multicultural Director

2/4 Seattle BioMed Teacher Workshop presentation

2/4 EWU/WSU Nursing Information Night

2/11 Bellevue College Scholarship Event

2/18 Edmonds College presentation to MESA students

2/19 Pride Foundation Meeting

2/20 TAF Academy Presentation

2/20 Toppenish HS, White Swan HS and CWU Cat Tracks presentation

2/23 UW NASA Space Grant Reception

2/23 WiSE: Women in STEM Panel

2/25 WSOS Launch Lunch Spokane & Partnership in Career Fair

2/25 GSI Engineering Week STEM Tours

2/27 Highline College presentation to MESA students

2/27 SPU Nursing Career Fair

2/28 UW WiSE Conference

3/16 Dream Big screening and panel at Microsoft Redmond campus

**Other**

WA STEM Network distribution



# WSOS Resume Workshop

Creating your resume in 30 minutes or less

January 16, 2015

THE BOSTON CONSULTING GROUP



# What is a resume? What is a resume not?

## A resume is: a summary of your experiences

- Education
- Employment or research work
- Clubs, student groups, volunteering
- Sports teams

## A resume is: a showcase of your character

- Leadership
- Initiative
- Creativity
- Dedication

## A resume is not: just a list

- Every role you've ever had
- All your duties and responsibilities

**JOHN DOE**  
Full Address • City, State, ZIP • Phone Number • E-mail

---

**OBJECTIVE:** Design apparel print for an innovative retail company

**EDUCATION:**

UNIVERSITY OF MINNESOTA City, State  
College of Design May 2011

- Bachelor of Science in Graphic Design
- Cumulative GPA 3.93, Dean's List
- Twin cities Iron Range Scholarship

**WORK EXPERIENCE:**

AMERICAN EAGLE City, State  
Sales Associate July 2009 - present

- Collaborated with the store merchandiser creating displays to attract clientele
- Use my trend awareness to assist customers in their shopping experience
- Thoroughly scan every piece of merchandise for inventory control
- Process shipment to increase my product knowledge

PLANET BEACH City, State  
Spa Consultant Aug. 2008 - present

- Sell retail and memberships to meet company sales goals
- Build organizational skills by single handedly running all operating procedures
- Communicate with clients to fulfill their wants and needs
- Attend promotional events to market our services
- Handle cash and deposits during opening and closing
- Received employee of the month award twice

HEARTBREAKER City, State  
Sales Associate May 2008 - Aug. 2008

- Stocked sales floor with fast fashion inventory
- Marked down items allowing me to see unsuccessful merchandise in a retail market
- Offered advice and assistance to each guest

VICTORIA'S SECRET City, State  
Fashion Representative Jan. 2006 - Feb. 2009

- Applied my leadership skills by assisting in the training of coworkers
- Set up mannequins and displays in order to entice future customers
- Provided superior customer service by helping with consumer decisions
- Took seasonal inventory

**VOLUNTEER EXPERIENCE:**

TARGET CORPORATION City, State  
Brand Ambassador August 2009

- Represented Periscope Marketing and Target Inc. at a college event
- Engaged University of Minnesota freshman in the Target brand experience

# Activity: What does a potential employer see in a resume?

## Put yourself in the shoes of your next boss

- It's 5pm Thursday afternoon
- You have to leave work in 15 minutes to pick up your daughter from soccer practice
- Your colleague rushes in
  - We need to screen 100 resumes
  - Pick 5 people to invite for interviews

What do you do?

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**Time Remaining**  
**10s**

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**Time Remaining**  
**5s**

# Do you invite John in for the interview?

---

**Yes / No**

# How should a resume be organized?

<b>Objective</b>	<ul style="list-style-type: none"> <li>Summarize your work goals</li> <li>Provide a unifying theme</li> </ul>
<b>Education</b>	<ul style="list-style-type: none"> <li>Institution</li> <li>Degree</li> <li>Major</li> <li>GPA</li> </ul>
<b>Work Experience</b>	<ul style="list-style-type: none"> <li>Previous or current jobs</li> <li>Research work</li> <li>Volunteer work</li> <li>Leadership positions</li> </ul>
<b>Extra-curricular</b>	<ul style="list-style-type: none"> <li>Sports teams</li> <li>Clubs</li> <li>Provides personal touch</li> </ul>

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Reverse  
Chronological



# What are the jobs and duties you want to leverage

---

**Describe the range of "job" and experiences that could be used in the employment section**

**Follow up with a group brainstorming session**

# Activity: Brain storm relevant positions

Job / Club / Event	Duties / Activities	Actions



# What are the characteristics you want to communicate

---

**Discuss positive characteristics that can be communicated in a resume**

**Brainstorm the duties and activities that would demonstrate:**

- Leadership
- Creativity
- Technical ability



# Employers don't care about your title or roles

They care about what you did

---

**Drive home the importance of writing in actions**

# Start with action verbs

What qualities are you trying to communicate?

<b>Creativity</b>	<b>Analytical</b>	<b>Leadership</b>	<b>Education</b>	<b>Technical</b>
Adapted	Allocated	Approved	Advised	Assembled
Composed	Analyzed	Assigned	Clarified	Built
Customized	Appraised	Chaired	Coached	Calculated
Designed	Assessed	Consolidated	Communicated	Constructed
Developed	Balanced	Coordinated	Conducted	Debugged
Established	Budgeted	Established	Coordinated	Designed
Formulated	Calculated	Hosted	Critiqued	Developed
Founded	Computed	Initiated	Developed	Engineered
Illustrated	Corrected	Instituted	Enabled	Fabricated
Initiated	Determined	Managed	Encouraged	Fortified
Instituted	Estimated	Motivated	Explained	Installed
Integrated	Forecasted	Navigated	Facilitated	Maintained
Introduced	Marketed	Organized	Focused	Overhauled
Invented	Measured	Oversaw	Guided	Programmed
Originated	Programmed	Prioritized	Informed	Rectified
Performed	Projected	Persuaded	Instilled	Remodeled
Planned	Qualified	Reorganized	Instructed	Repaired
Revised	Reconciled	Scheduled	Motivated	Restored
Revitalized	Reduced	Streamlined	Taught	Solved
Shaped	Researched	Strengthened	Trained	Specialized
Solved	Retrieved	Supervised	Tutored	Upgraded



# Appendix





## VOLUNTEER OPPORTUNITIES

Opportunity	Group Setting	One-on-One	Academic	Career	STEM Background needed	Time
<b>Coach</b> Provide coaching support at a local WSOS “Skills that Shine” professional development workshop series. Topics including but not limited to career exploration, resume building, interviewing, professionalism and networking.	√	√		√		1-3 hrs
<b>Host</b> Host a field trip for up to 10 Scholars on a tour or site visit of your company, lab or work place.	√			√		3 hrs (planning); 2 hrs (event)
<b>Speak</b> Share your education and career path with WSOS Scholars at a career fair, campus event or as a panel guest	√		√	√	√	1 hr
<b>Advise</b> Provide advice to WSOS Scholars at “office hours” on campus at a local college or university, at your workplace or via phone/Skype.		√	√	√	√	20 min – 2 hrs



# The Seattle Times

## **Editorial: Use Washington State Opportunity Scholarship as a pathway to STEM and health care**

**Thousands of dollars are available to help needy students earn STEM degrees, but the deadline to apply is March 2.**

*Published: Feb. 24, 2015*

WASHINGTON state employers have plenty of jobs in the high-paying science, technology, engineering, math (STEM) and health-care fields. The problem is finding qualified candidates locally to fill thousands of positions in a competitive market.

Only 9 of 100 students born in the state will work in these STEM and health-care fields, according to a 2013 joint report by the Boston Consulting Group and the Washington Roundtable.

More Washington natives can become programmers at Microsoft or engineers at Boeing. But too many students, especially those from poor families, are not sure how to pursue an education for these high-demand fields.

The Washington State Opportunity Scholarship can help.

Started in 2011 as a public-private partnership funded by businesses and the Legislature, the scholarship program is a strategy to help develop homegrown talent and fill a leaky pipeline to jobs specifically in the STEM and health-care fields.

So far, about 4,400 students from low- to middle-income households have received scholarships to attend public and private two- and four-year colleges statewide. More than two-thirds of the 900 Opportunity Scholarship graduates so far are working in their field or seeking an advanced degree.

Students receive \$2,500 for the first two years of college. As long as they earn college credits, they are eligible for up to \$5,000 in the third year, \$7,500 in their senior year and, if necessary, up to \$5,000 in a fifth year. They also receive counseling and help with internships.

Scholars say the money allows them to focus more on school and less on barriers to graduation, such as working part-time jobs and commuting long distances.

Teachers and counselors should spread the word.

Applications are due by 5 p.m. on Monday. For more information, visit: [waopportunitiescholarship.org](http://waopportunitiescholarship.org)

# THE SPOKESMAN-REVIEW

## Editorial: SFCC takes right step in closing STEM gap

*Published: Friday, February 13, 2015*

The announcement that Spokane Falls Community College will begin offering a four-year applied science degree is welcome news in a state battling a “skills gap” in the fields of science, technology, engineering and math (STEM). Another computer-related degree is under consideration.

The applied science program is designed to produce graduates who are ready to take jobs in the information technology field. In its proposal to the State Board of Community and Technical Colleges, SFCC estimated this sector is expected to add 758,800 jobs nationwide from 2010 to 2020. The Spokane and North Idaho area is expected to see 11 percent growth in such jobs. There will also be management positions to fill.

It's a step in the right direction.

Two years ago, the Washington Roundtable reported that 25,000 high-skill jobs went unfilled for at least three months because employers couldn't find qualified applicants. About 1,200 potential majors in technology fields were being turned away from two-year and four-year colleges because they didn't have the funding to create more slots. In 2005, this narrow educational pipeline produced only 21 computer science graduates for every 1,000 jobs in that field. Utah produced such graduates at five times that rate.

It's a confounding situation for a state that leads the nation in per capita STEM jobs, but leaders have begun to respond.

In 2013, the Legislature passed a bill that allows high school advanced placement computer science courses to count as science or math credits. Before that, the courses were considered electives. Since the change, 10 more high schools have begun offering AP computer science.

The state is embracing the Common Core curriculum, which should help improve math instruction and reduce the number of students who need remedial help in college.

The Washington State Opportunity Scholarship, a public-private partnership, is increasing its outreach to low- and middle-income students who may be interested in STEM-related fields. Boeing and Microsoft put up money that's matched by the state, and the awards were increased last summer. Students can collect as much as \$22,000 toward a degree. About 4,400 students have taken advantage, thus far.

But the biggest challenge remains direct funding to higher education so colleges and universities can create more STEM slots. A significant incentive for lawmakers is the increased revenue that would come from meeting workforce needs: an estimated \$720 million annually in sales tax and \$80 million in local taxes, according to the Washington Roundtable business organization.

With the demands on lawmakers imposed by the Washington Supreme Court's McCleary school-funding decision, money for the universities won't come all at once. But they can do a better job ensuring that current majors end up with diplomas.

In the meantime, initiatives like SFCC's show that the state is making progress.

## Special Section – Education

# How people in business can upgrade education

Published: Feb 13, 2015

It's hard to find a local business leader who doesn't proclaim the urgent need to invigorate Washington's education system to improve the workforce.

The Association of Washington Business, Seattle Metropolitan Chamber of Commerce and Washington Roundtable all put schools atop their priorities for the legislative session, which is already on track to pour billions into K-12 schools.

But what can businesses themselves actually do to erase the skills gap? The Business Journal's panel of nine educators offered plenty of suggestions, which generally fell into four categories:

### **Crash the campus gates**

"The first thing is invest — invest time," said Dave Cillay, a Washington State University vice president. "It's time with curriculum. It's time with understanding of students. It's understanding the university, and investing that time to not just hire our graduates, but to help us create better graduates."

Universities can be daunting places to connect with and navigate, Cillay said.

"I think we are doing a better job," he said, "but we can still do a better job of helping industry come in the door."

Offering internships is a direct way to get involved. The student gains money and work experience, and the company gets first crack at emerging talent.

Violet Boyer, CEO of the Independent Colleges of Washington, calls internships "a three-fer."

"That internship makes a difference to the college, makes a difference to the student, and makes a difference to the company," Boyer said.

### **Be a role model**

Beyond imparting skills, contact with employers exposes young people to the behavioral cues they will need to succeed.

"I think there is a way for businesses to have a vital role in helping to teach the soft skills to our students," said Naria Santa Lucia, executive director of the Washington State Opportunity Scholarship. "What does it mean to be professional — especially if you're from a vulnerable population where you don't have professionals in your world? How do you write an email addressed to people in authority in a business setting?"

Her organization's Skills that Shine program coaches students on essentials such as writing a resume and nailing a job interview.

### **Expand your horizons**

Employers can benefit from what Yolanda Watson Spiva, president and CEO of the College Success Foundation, calls "an expanded notion of best-quality candidates."

A high-tech employer might find a gem in someone who majored in the arts. Ditto for a job applicant whose transcript might not be perfect but who was the first in the family to attend college, an immigrant or foster youth.

### **Raise your voice**

Business leaders don't all agree on how Olympia needs to improve education.

Some business groups push teacher accountability, graduation testing, charter school expansion and other reforms, while others put more weight on expanded public funding for classroom programs and financial aid.

But whatever the remedy, educators say, business leaders need to be vocal about need for an upgrade.

"We are 49th in the nation in terms of state support for postsecondary education," said Gene Sharratt, executive director of the Washington Student Achievement Council. "We want to increase access, increase attainment, and address the affordability issue. A very specific thing for business people would be to use their political clout to really talk to legislators and the governor to really focus on reinvestment in education."



Mel Curtis

"I think there is a way for businesses to have a vital role in helping to teach the soft skills to our students." Naria Santa Lucia, Washington State Opportunity Scholarship



# Need-Based Scholarship for STEM Undergraduates

*Published: Feb. 1, 2015*

Did you graduate from a Washington State High School? Is your major within a STEM field? Freshman or Junior? GPA of at least 2.75? If so, then it is possible that you may be eligible to apply for the Washington State Opportunity Scholarship (WSOS). This Scholarship will provide 700 new students with an initial amount of \$2500 per academic year, after which if the recipient chooses to renew they can even apply for an additional \$2500 each consecutive year, maxing at a possible \$7500 upon reaching Junior status after which the maximum received amount decreases to \$5000.

WSOS began in 2011 as the brainchild of Washington State Legislature and Business to meet the need imposed by rising tuitions across the state. Aside from meeting the financial needs of Washington students with an accruing scholarship, it also hopes to provide future employees with jobs through partnerships with big names such as Boeing and Microsoft.

Students who are interested in the scholarship must complete their application by going to its website [www.waopportunitiescholarship.org](http://www.waopportunitiescholarship.org). The scholarship must be submitted no later than March 2 at 5 p.m. Aside from financial information and transcripts, included is one essay prompt.

With roughly a month to complete an application any students that qualifies for this scholarship has a generous amount of time to enter for a chance to receive \$2500, close to a fifth of a year's tuition.



**UW Tacoma graduate Dalarie**

# THE SPOKESMAN-REVIEW

## Editorial: STEM scholarship plan right for Spokane

*Published: Friday, January 9, 2015*

A unique public/private scholarship program is putting down roots in Spokane, which should enable more area students to take advantage of a program that can work for them, and the state's economy.

Spokane County has been underrepresented in the pool of applicants for Washington State Opportunity Scholarships, and therefore underrepresented among the winners. But the hiring of a senior program officer for the region should raise the program's profile.

It fits Spokane well.

The scholarships were created in 2011 to help low- and middle-income students earn degrees in science, technology, engineering and math, also known as STEM. The median household income for applicants has been \$47,105.

Despite the large number of Spokane County households that qualify, only 7 percent of applicants are from the county. Applications from Pierce County, with a similar demographic profile, are almost double that for Spokane.

That said, scholarship administrators have done an excellent job spreading out the money; only Garfield County is unrepresented among recipients.

Women, defying a stereotype that they are averse to STEM disciplines, captured 62 percent of scholarships awarded in the most recent round. More than half the recipients identified themselves as "students of color."

The scholarships are substantial: up to \$22,000 through five years, the duration for many students whose progress is delayed by the lack of classroom and laboratory capacity at Washington colleges and universities. As long as they maintain a 2.75 grade-point average and stick with one of 376 majors, they will get their scholarship.

The funds are provided by Microsoft Corp. and Boeing Co., which put up \$25 million each, with a 100 percent state match. So far, about \$18 million has been disbursed to 4,400 students. Gov. Jay Inslee has put \$100 million in his biennial budget for the program, and program officials are working to expand the number of contributors from the private sector.

A study completed last month by the Boston Consulting Group estimates the state gets back \$7 in tax revenue for every \$1 invested.

After a first-round distribution to 3,000 students, officials have tightened criteria and settled on an annual goal of 780 new recipients. Survey responses from early graduates indicate 65 percent are going on to graduate schools or finding jobs in a STEM-related field; 90 percent with Washington companies. Every graduate with an agriculture-related major is employed.

The BCG study says companies could add as many as 25,000 jobs – if they only had the graduates to fill them. Washington State Opportunity Scholarships help sustain students who can close the gap. More Spokane and Eastern Washington students should be applying.

The online address is [www.waopportunityscholarship.org](http://www.waopportunityscholarship.org).

# **Tab G**

## **Financial Update**



Supporting the next generation of STEM & health care leaders

# **Investment & Finance Committee**

**Tuesday, March 10, 2015**

**1:00 – 2:00 pm**

**Call in: 877.384.6131 – PIN: 7100**

**or Paul Kruglik's Office**





## Agenda

### **WSOS Investment & Finance Committee Meeting**

*March 10, 2015, 1-2 pm*

Call-in: 877.384.6131 – PIN: 7100

- |    |                              |         |
|----|------------------------------|---------|
| 1. | Call to Order                | Mack H. |
| 2. | Approval of 12/16/14 Minutes | Mack H. |
| 3. | Financial Update             | Paul K. |
| 4. | Legislative Update           | Joe G.  |
| 5. | Executive Session            | Mack H. |
| 6. | Adjourn                      | Mack H. |

**NEXT MEETING: TBD, prior to the June 30, 2015  
Board Meeting**



Supporting the next generation of STEM & health care leaders

## **DRAFT**

# **INVESTMENT & FINANCE COMMITTEE MEETING MINUTES | TUESDAY, DECEMBER 16, 2014 VIA TELECONFERENCE**

**Members Present:** Mack Hogans, Peter Harvey, Caroline Kelly  
**Others Present:** Beau Damon, Paul Kruglik, Karyl Gregory

Mack Hogans called the meeting to order at 2:03 PM.

Peter Harvey moved and Caroline Kelly seconded the approval of the minutes of the September 23, 2014 Washington State Opportunity Scholarship (WSOS) Investment and Finance Committee meeting, and the motion was approved.

### **Financial/WSIB Investment Update**

Paul Kruglik provided an update on WSOS' finances and the results of the Washington State Investment Board (WSIB) role and activities as the WSOS funds investment manager.

Since its inception, WSOS has sent \$43M over to WSIB – first, \$24M in September 2014 and then, \$19M in November 2014. The Committee was informed that WSIB plans to provide quarterly reports. The Committee suggested that Paul routinely touch base with WSIB prior to our Investment and Finance Committee meetings to review the reports.

Paul referred the Committee to the new cash flow projection presented and, upon review, the Committee reaffirmed its recommendation to send \$3.5M in public funds to WSIB for management. The Committee agreed to keep a reasonable contingency in the operations budget to meet anticipated short term budget needs.

The Profit and Loss Statement was reviewed by the Committee and it was noted that the revenue received included \$129,000 from the public sector, \$25M from the state of WA, and a lesser amount of investment dollars.

The variance in salaries and benefits in the P&L is based on unfilled positions and positions that were filled later than expected. That amount will decrease over time as positions are filled.

### **Legislative Update**

It was reported that the Governor has budgeted 50M per year for the upcoming biennium (100M total). The Committee was encouraged by this proposal.

The Committee discussed the optimum allocation between the scholarship and endowment fund in the event that the Governor's WSOS budget was fully funded.



Supporting the next generation of STEM & health care leaders

**Attorney General’s Opinion Update**

The Committee next discussed the outstanding formal opinion request to the Washington State Attorney General regarding the public vs. private nature of WSOS public funds that are transferred to the WSOS. The Committee was reminded that if the WSOS public funds are deemed “private” in nature following transfer to WSOS, these funds could potentially be invested in instruments such as equities.

The Attorney General has convened a panel and a decision should be made in a month or two. At that time, we will find out if public funds can be invested in equities.

**Timing of Investments**

Finally, the Committee discussed the timing of investments through WSIB and it was reported that this issue had been raised with WSIB leadership. Based upon that conversation, the Committee endorsed the WSIB policy.

The meeting adjourned and the Committee went into Executive Session at 2:48 pm. No significant issues were raised in executive session.

Respectfully submitted,

Mack Hogans



# Investment & Finance Committee Report

March 17, 2015

Investment Balances and Income As of January 31, 2015:

The following is a Summary of Investments showing **Investment Asset Balances** as of January 31, 2015, as well as **Investment Income** for the Seven Months Ended January 31, 2015.

Seven Months Ended January 31, 2015, total Investment Income of \$155,766 is unfavorable to Budget by (\$307,368). Prior to October 1, 2014, investment returns continued to be low and unfavorable to budget, due to keeping both Scholarship and Endowment investments in short term money market funds and bank CDs that are FDIC insured pending hiring of WSIB as the new investment manager. After October 1, 2014 investment returns began to increase due to the WSIB taking over managing WSOS investments.

	WSOS Scholarship Investments	WSOS Endowment Investments	Total Combined
--	------------------------------------	----------------------------------	-------------------

Investment "Asset Balances" As Of January 31, 2015

US Bank	\$ 2,480,670	\$ -	\$ 2,480,670
Oppenheimer	1,941,351	984,189	6,425,540
Washington State Investment Board	31,098,890	15,542,449	46,641,339
Total Market Value	\$35,520,911	\$16,526,638	\$52,047,549

Investment "Income (Loss)" Seven Months Ended January 31, 2015

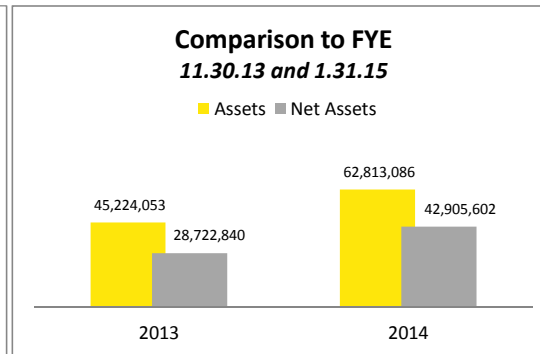
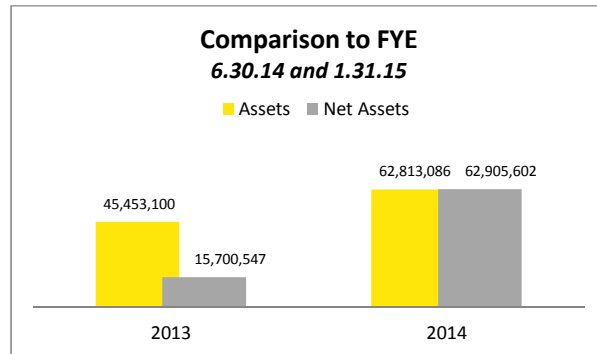
Net Investment Income (Loss)	\$105,397	\$50,369	\$155,766
Budgeted Net Investment Income (Loss) <sup>(1)</sup>	166,978	296,156	463,134
YTD Variance Fav (Unfav)	(\$61,581)	(\$245,787)	(\$307,368)

<sup>(1)</sup> Budgeted Net Investment Income is based on the original 2014/2015 Budget which assumed that WSOS would have engaged a new Investment Manager to manage investments and earn a higher rate of return. However, the hiring of Washington State Investment Board (WSIB) as Investment Manager did not begin until October 1, 2014 due to the late approval of the State legislation authorizing WSIB as the Investment Manager and WSIB conversion, set-up process, and timing constraints. The WSIB Board approved the WSOS investment policy and strategic asset allocation recommendations on September 18, 2014. Investment returns have begun to increase since transferring money on September 30, 2014 to WSIB.



**Washington State Opportunity Scholarship**  
**Comparative Balance Sheets**  
*Period Ending January 31, 2015*

	Comparison to FYE			Comparison to same period LFY		
	6/30/14	% Chang	1/31/15	1/31/14	% Chang	1/31/15
<b>Assets</b>						
Cash	1,357,640	83%	2,480,670	1,984,630	25%	2,480,670
Investments	28,163,081	76%	49,566,879	22,801,022	117%	49,566,879
Pledges Receivable	15,932,379	-32%	10,759,874	20,438,401	-47%	10,759,874
Prepaid Fees		0%	5,663		0%	5,663
<b>Total Assets</b>	<b>45,453,100</b>	<b>38%</b>	<b>62,813,086</b>	<b>45,224,053</b>	<b>39%</b>	<b>62,813,086</b>
<b>Liabilities and Net Assets</b>						
Accounts Payable	354,277	-17%	293,256	322,832	-67%	107,913
Payroll Related Liabilities		0%	30,440		0%	30,440
Scholarship Commitments	29,398,277	-12%	25,954,816	16,178,381	22%	19,769,131
<b>Total Liabilities</b>	<b>29,752,554</b>	<b>-12%</b>	<b>26,278,512</b>	<b>16,501,213</b>	<b>21%</b>	<b>19,907,484</b>
<b>Total Net Assets</b>	<b>15,700,546</b>	<b>133%</b>	<b>36,534,574</b>	<b>28,722,840</b>	<b>49%</b>	<b>42,905,602</b>
<b>Total Liabilities and Net Assets</b>	<b>45,453,100</b>	<b>38%</b>	<b>62,813,086</b>	<b>45,224,053</b>	<b>39%</b>	<b>62,813,086</b>





**Washington State Opportunity Scholarship**  
**Income Statement for the Seven (7) Months Ending January 31, 2015**  
*Actual vs Budget | Prepared on Accrual Basis*

	Seven months ending January 31, 2015			FYE June 30, 2015
	Actual	Budget	Variance Fav (Unfav)	Annual Budget
<b><u>Revenue</u></b>				
Private	\$ 134,582	\$ 5,833,333	\$ (5,698,751)	\$ 10,000,000
Public	25,000,000	25,000,000	-	25,000,000
Investment Income	155,766	463,134	(307,368)	793,944
<b>Total Revenue</b>	<b>25,290,348</b>	<b>31,296,467</b>	<b>(6,006,119)</b>	<b>35,793,944</b>
<b><u>Expense</u></b>				
Scholarship	6,835,315	6,788,556	(46,759)	11,637,525
Salaries and Benefits	207,864	422,341	214,477	724,013
Program Other Direct	200,838	163,041	(37,797)	279,499
Allocated Indirect Overhead	81,718	83,598	1,880	143,311
Professional Fees	388,703	472,044	83,341	809,219
<b>Total Expense</b>	<b>7,714,438</b>	<b>7,929,580</b>	<b>215,142</b>	<b>13,593,567</b>
<b>Net Income (Loss)</b>	<b>\$ 17,575,910</b>	<b>\$23,366,887</b>	<b>\$ (5,790,977)</b>	<b>\$ 22,200,377</b>



**Cash Flow and Reconciliation to Net Assets**

**Inception-To-Date**

*Through January 31, 2015*

**Inception -- January 31, 2015**

**CASH FLOW**

**Cash Inflows:**

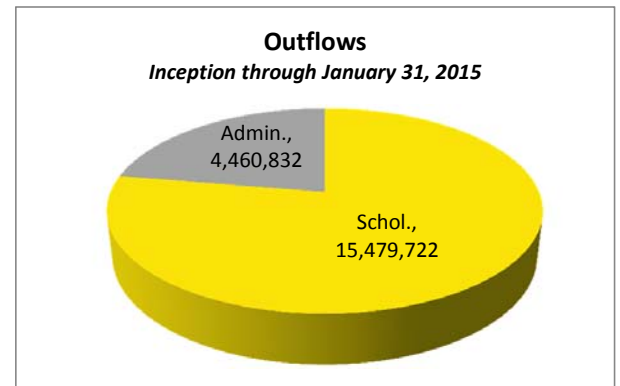
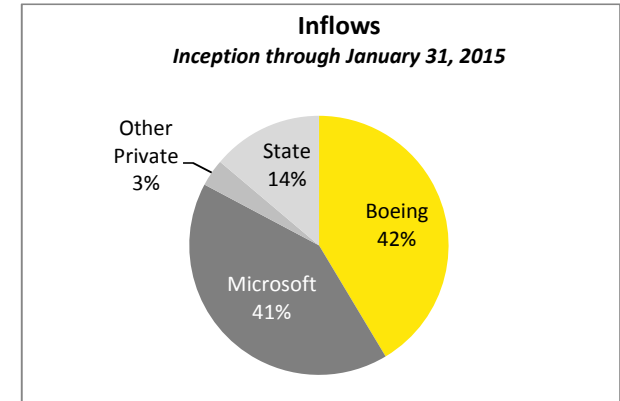
	Scholarship	Endowment	Total
Boeing	10,000,000	10,000,000	20,000,000
Microsoft	20,000,000		20,000,000
Other Private	1,341,719	469,719	1,811,438
State	24,000,000	6,000,000	30,000,000
Investment Income	119,747	58,197	177,944
<b>Total Cash Inflows</b>	<b>55,461,466</b>	<b>16,527,916</b>	<b>71,989,382</b>

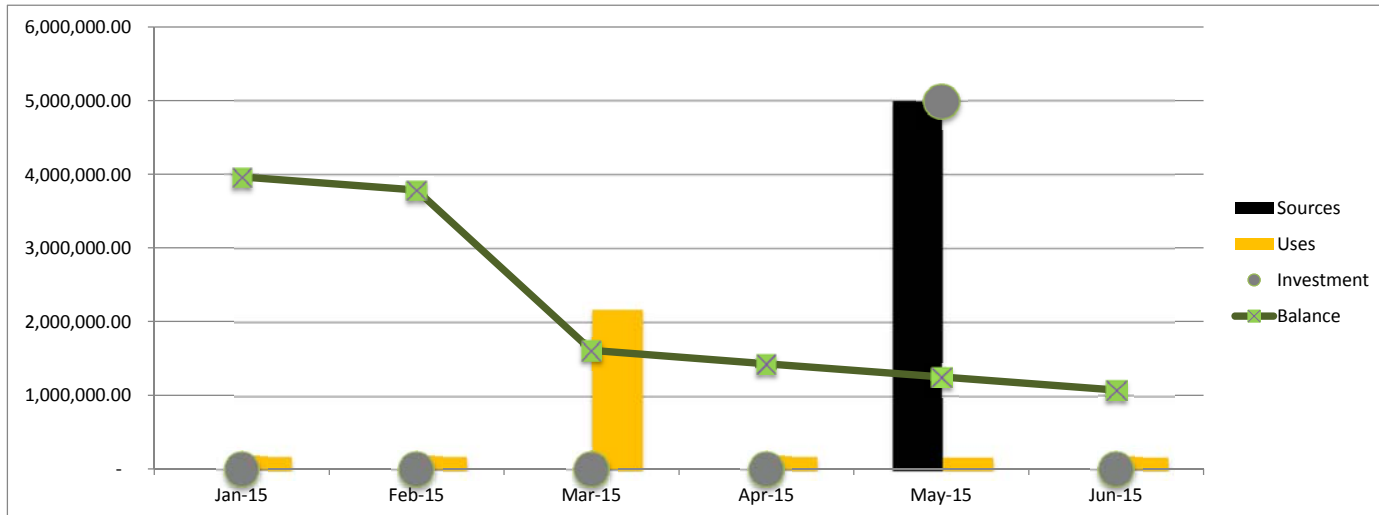
**Cash Outflows:**

Scholarships	(15,479,722)	-	(15,479,722)
Program Administrator and Marketing	(4,460,832)	(1,279)	(4,462,111)
<b>Total Cash Outflows</b>	<b>(19,940,554)</b>	<b>(1,279)</b>	<b>(19,941,833)</b>

**Net Cash Flow Inception-To-Date &  
Balance of Cash & Investments  
January 31, 2015**

	35,520,912	16,526,637	52,047,549
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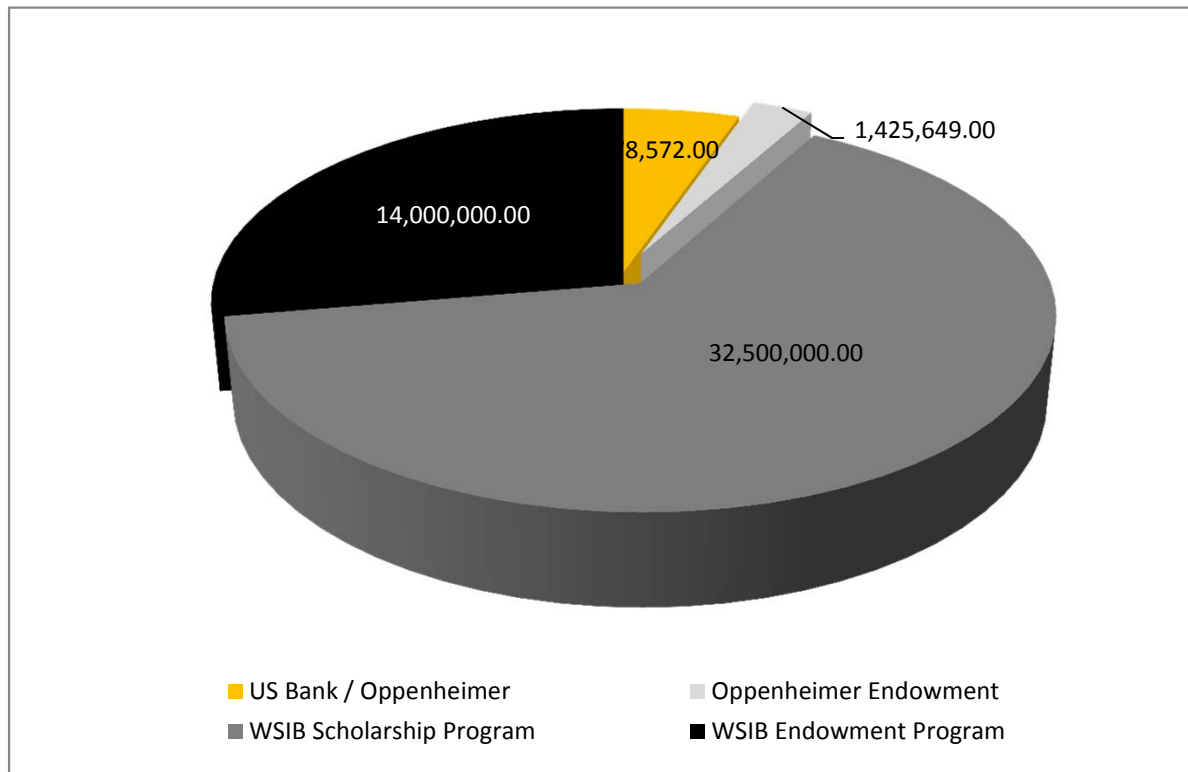


WSOS / CSF OPERATING	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15
<b>Beginning Balance</b>	4,144,390.00	3,964,890.00	3,785,390.00	1,608,900.00	1,424,400.00	1,247,400.00
Sources during period	-	-	-	-	5,000,000.00	-
Scholarships paid	(2,500.00)	(7,500.00)	(2,004,490.00)	(12,500.00)	(5,000.00)	(3,750.00)
Other Uses of funds	(172,000.00)	(172,000.00)	(172,000.00)	(172,000.00)	(172,000.00)	(172,000.00)
Investment (WSIB)	-	-	-	-	(5,000,000.00)	-
<b>Ending Balance</b>	3,969,890.00	3,785,390.00	1,608,900.00	1,424,400.00	1,247,400.00	1,071,650.00





Through 1.31.15





## Washington State Opportunities Scholarship

Quarterly Report – December 31, 2014

Portfolio Size, Allocation, and Assets Under Management.....	1
Performance .....	2

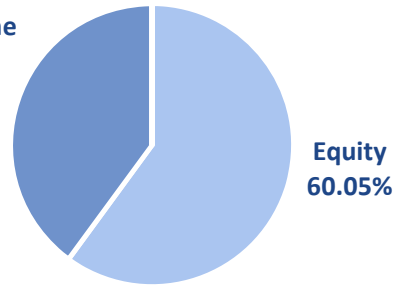
**Private and State Match Scholarship**

Private	
<b>Total</b>	<b>\$17,098,639</b>
Equity	\$10,266,894
Fixed Income	\$6,831,721
Cash	\$24

State Match	
<b>Total</b>	<b>\$13,000,250</b>
Cash	\$13,000,250

Fixed Income  
39.95%



Private Allocation

■ Private ■ Private Benchmark ■ State Match ■ State Match Benchmark



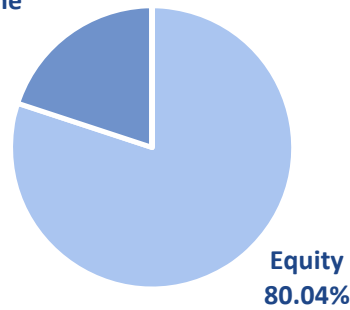
**Private and State Match Endowment**

Private	
<b>Total</b>	<b>\$7,042,335</b>
Equity	\$5,636,726
Fixed Income	\$1,405,586
Cash	\$23

State Match	
<b>Total</b>	<b>\$6,000,115</b>
Cash	\$6,000,115

Fixed Income  
19.96%



Private Allocation

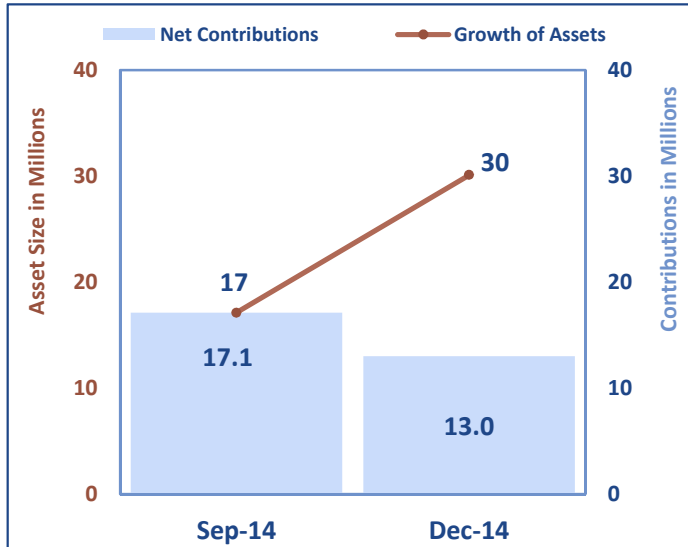
■ Private ■ Private Benchmark ■ State Match ■ State Match Benchmark



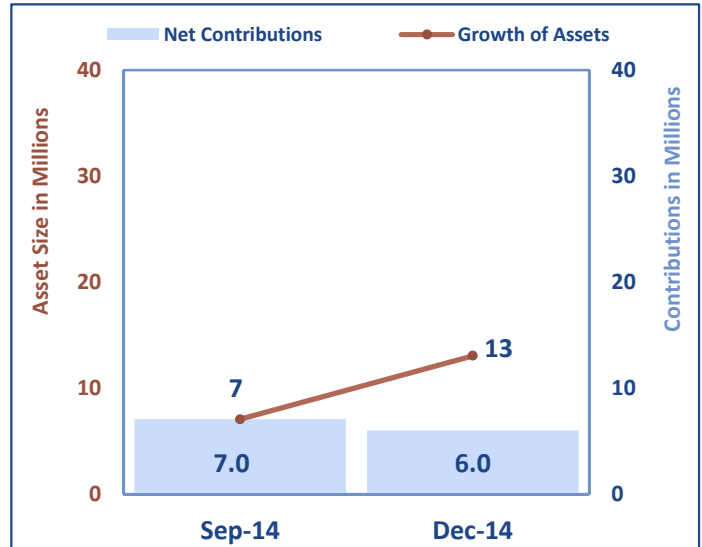
Scholarship Benchmarks: Private 60% MSCI ACWI IMI w/U.S. Gross & 40% Barclays Intermediate Credit, State Match 90 Day Tbill  
 Endowment Benchmarks: Private 80% MSCI ACWI IMI w/U.S. Gross & 20% Barclays Intermediate Credit, State Match 90 Day Tbill  
 \* Since Inception: Private 10/1/14, State Match 11/25/14

Assets Under Management

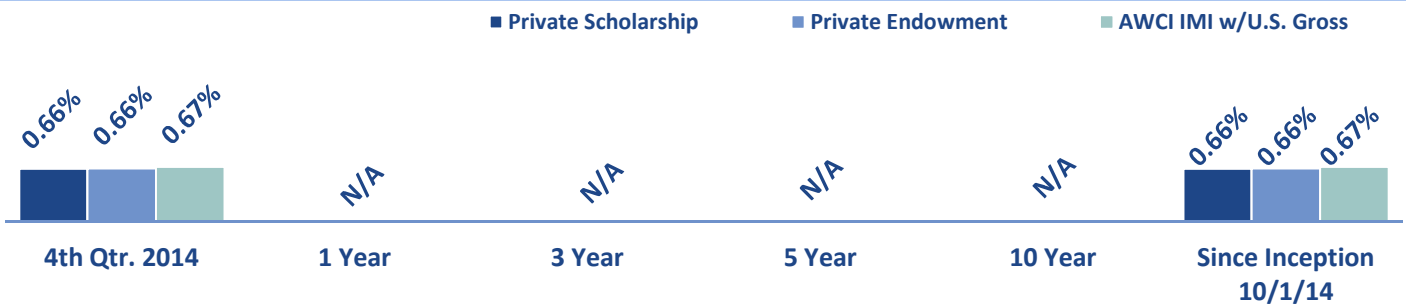
**Private and State Match Scholarship**



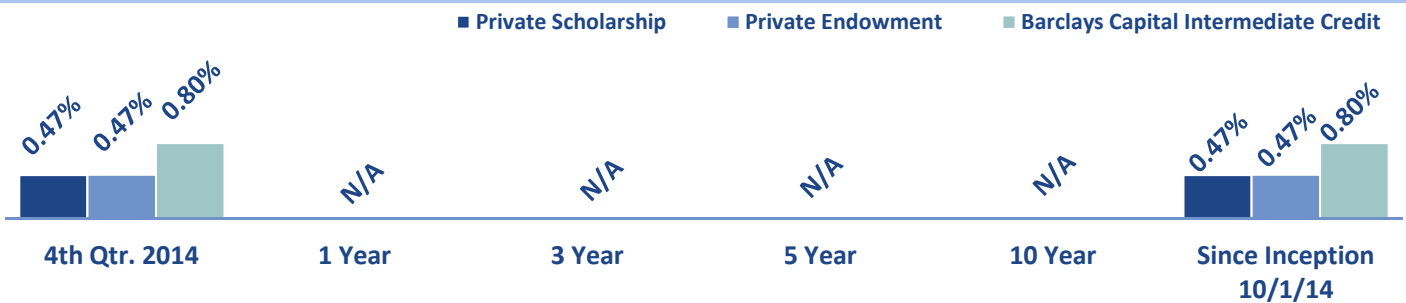
**Private and State Match Endowment**



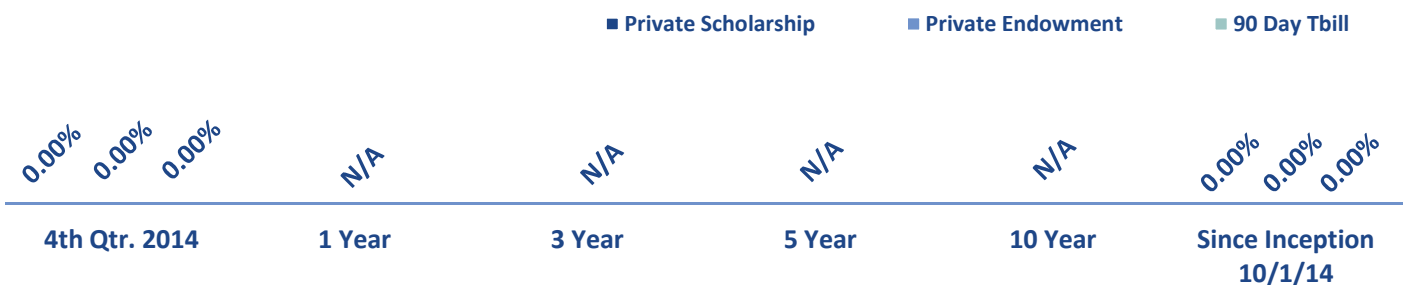
**Equity Returns**



**Fixed Income Returns**



**Cash Returns**



# **Tab H**

**“Congratulations, Graduate” Email Cover Letter**

**WSOS Post-Grad Survey Draft**

**2014-15 CSF Contract**

**From:** Naria K. Santa Lucia [<mailto:info@waopportunityscholarship.org>]  
**Sent:** Monday, March 09, 2015 1:37 PM  
**To:** Megan Nelson  
**Subject:** You Earned It

Trouble reading this email? [View online](#)



## Congratulations, Graduate!

On behalf of the Washington State Opportunity Scholarship (WSOS) Board of Directors, I want to congratulate you on your college achievement. It has been an honor to support you as a WSOS Scholar.

WSOS is supported by funding by public and private funds. Continued investment in great students like you is predicated upon our partners learning how the scholarship has helped YOU, and how your job search and/or new job is going since graduating.

Below you will find a link to the 2015 WSOS Post-Graduation Survey. The survey will take approximately **5 minutes** to complete. Every Scholar response is valued and critical to our ability to improve the program and better-support thousands of WSOS Scholars for years to come.

**As a thank you for completing this survey, you will be entered into a drawing for one of fifteen \$25 Amazon.com gift cards. Winners will be notified via email one week after the survey deadline (April 5).**

TAKE THE SURVEY

I want to personally thank you in advance for completing the survey. Your information and feedback is extremely valuable to the future of the Washington State Opportunity Scholarship and is truly appreciated.

Sincerely,

A handwritten signature in black ink, appearing to read "Naria K. Santa Lucia".

Naria K. Santa Lucia  
Washington State Opportunity Scholarship



# WSOS Post-Graduation Survey 2015

## Graduation Data

**1. Based on our records you have graduated with your bachelor's degree. Congratulations! Please provide your approximate graduation date.**

MM DD YYYY  
Grad Date  /  /

**2. In what field of study was your 1st college major?**

1st major

Field

**3. In what field of study was your 2nd college major, if you had one?**

2nd major

Field

## Post-Graduation Plans

**4. Have you started or completed your search for post-graduation employment?**

- Yes
- No
- No, I am or will be attending graduate school or professional school.

## Employment Status

**5. What best describes your current employment status?**

- Employed within my field of study
- Employed outside of my field of study
- Not employed, but currently searching for work

## Employed Outside of Field of Study

**6. Even though you are currently employed, are you still searching for employment within your field of study?**

- Yes
- No

## Job Search

# WSOS Post-Graduation Survey 2015

**7. Approximately how long did you search or have you have been searching for post-graduation employment?**

- Less than 3 months*
- Between 4 and 6 months*
- Between 7 months and 1 year*
- Longer than 1 year*

**8. Approximately how many positions did you apply for within and outside of your field of study?**

	<i>Less than 5</i>	<i>5 to 10</i>	<i>11 to 15</i>	<i>16 to 20</i>	<i>More than 20</i>
<i>Within field of study</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Outside of field of study</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**9. Approximately how many job offers have you received within and outside of your field of study?**

	<i>Less than 5</i>	<i>5 to 10</i>	<i>11 to 15</i>	<i>16 to 20</i>	<i>More than 20</i>
<i>Within field of study</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Outside of field of study</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**10. If you received a job offer that you did not accept, what were the major factors in your decision? (Please check all that apply.)**

- Salary*
- Benefits*
- Not full-time*
- Not in field of study*
- Other (please specify)*
- Geography*
- Work setting*
- Work culture*
- Advancement opportunities*



# WSOS Post-Graduation Survey 2015

**11. Please indicate whether you have completed the following career readiness activities and the level of impact it has had upon your competitiveness on the job market.**

	<i>I have not done this.</i>	<i>Did this but no impact</i>	<i>Did this, small impact</i>	<i>Did this, moderate impact</i>	<i>Did this, great impact</i>
Visited a campus career center or career fair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Took a career assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Had cover letter and/or resume reviewed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Updated LinkedIn profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participated in mock interview or job shadow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participated in mentorship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Participated in internship or related activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**12. Please indicate whether you have participated in the following activities or have received the following supports and the level of impact it has had upon your competitiveness on the job market.**

	<i>I have not done this.</i>	<i>Did this but no impact</i>	<i>Did this, small impact</i>	<i>Did this, moderate impact</i>	<i>Did this, great impact</i>
Attended WSOS-hosted skills training session	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attended WSOS office hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attended College Success Foundation (CSF) Career Institute	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Received WSOS and CSF staff introductions and networking assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utilized WSOS and CSF web-based tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Post-Graduation Employment Plans

# WSOS Post-Graduation Survey 2015

## 13. When do you plan to start searching for post-graduation employment?

- In the next three months
- In the next six months
- In the next year
- In over a year

## Post-Graduate Degree Plans

## 14. What post-graduate degree(s) will you be pursuing?

- Master's Degree (e.g., MA, MS, etc.)
- Doctoral Degree (e.g., PhD, MD, etc.)
- Other (please specify)
- Other Degree Type (please specify)

## 15. In what field of study will your post-graduate degree(s) be in?

1st field of study

Field

## 16. In what 2nd field of study will your post-graduate degree(s) be in (if applicable)?

2nd field of study

Field

## 17. When do you anticipate graduating and joining the workforce full-time?

- In the next three months
- In the next six months
- In the next year
- In 1 to 2 years
- In 2 to 3 years
- In 3 to 4 years
- In 4 to 5 years
- In more than 5 years

## 18. Will your future job search focus on employment opportunities located in Washington State?

- Yes
- No
- Unsure

Job #1

# WSOS Post-Graduation Survey 2015

**19. What is the name of the company or organization where you are currently employed?**

**20. In what city is your job located?**

**21. In what U.S. state is your current job located (if applicable)?**

State

Job Location State

If not in a U.S. state, please specify other location:

**22. Your position/title**

**23. Employment start date (approximate)**

MM DD YYYY

Start Date

 /  / 

**24. Did you previously intern or work at this company or organization in another role?**

- Yes  
 No

**25. How many hours per week do you work at this job?**

- 40+ hours/week  
 20-39 hours/week  
 Less than 20 hours/week

**26. What is your individual annual gross salary (salary before taxes and deductions)?**

- Under \$20,000 per year  
 \$20,000 - \$39,999 per year  
 \$40,000 - \$59,999 per year  
 \$60,000 - \$79,999 per year  
 \$80,000 - \$99,999 per year  
 \$100,000 or more per year

# WSOS Post-Graduation Survey 2015

**27. Do you have a second job?**

- Yes
- No

## Job #2

**28. Is this position within your field of study?**

- Yes
- No

**29. How many hours per week do you work at this job?**

- 40+ hours/week
- 20-39 hours/week
- Less than 20 hours/week

**30. Do you have a third job?**

- Yes
- No

## Job #3

**31. Is this position within your field of study?**

- Yes
- No

**32. How many hours per week do you work at this job?**

- 40+ hours/week
- 20-39 hours/week
- Less than 20 hours/week

## Comments, Raffle and Follow-up

**33. Do you have any feedback related to your participation in WSOS or any additional feedback related to your job search?**

## WSOS Post-Graduation Survey 2015

**34. Are you interested in talking to scholars at a WSOS event or meeting with professionals, legislators or staff to share your appreciation for WSOS and to discuss how it has helped you? (We want to hear from you!)**

- Yes
- No

**35. If "Yes," please provide your phone number below.**

*As a thank you for completing the survey, you are automatically entered into a raffle drawing for one of fifteen \$25 Amazon gift cards (odds of winning: approximately 1 out of 30). Winners will be notified via email one week after the survey deadline.*

*Thank you so much for taking the time to provide your feedback! Your responses support the efforts of the WSOS team in supporting current and future scholars.*

## EXECUTIVE SUMMARY

Since its inception, the partnership between the state of Washington, the College Success Foundation (CSF) and the Washington State Opportunity Scholarship (WSOS) Board has produced meaningful results. To date, more than 4,400 scholarships have been awarded to students pursuing STEM and health care degrees at 68 colleges. By the fall of 2014, more than 1,000 scholars will have graduated, and nearly 90 percent of graduating scholars will have found work in Washington State. This is the first program of its kind in the nation to mitigate the skills gap through the combined strategy of college scholarships and wrap-around support services for scholarship recipients.

CSF submits the following proposed management structure and associated costs of administering the program over the next two years. The proposal further presents the costs and outcomes associated with the four key elements of the program, including:

Project Component	Description
<i>STEM Pipeline</i>	WSOS will increase STEM career aspirations statewide, attracting qualified applicants to the WSOS scholarship and, ultimately, to STEM and healthcare majors at colleges statewide, by partnering with other community-based organizations.
<i>Scholar Retention</i>	Based upon the premise that real world relevance positively influences persistence in college fields, WSOS Scholars currently enrolled in college will be connected with opportunities to access authentic practice/practitioners through WSOS signature events such as an Innovation Summit, experiential learning, STEM professional mentors and STEM networking events in their local area.
<i>Scholar Transition</i>	Scholarship and wrap-around supports will enable scholars to successfully transition from college to high demand fields with the contributions of WSOS STEM support services staff, key CSF administrative team members, technology platforms, campus partners, industry leaders and mentors.
<i>Administration</i>	WSOS will be sustained through the foundation's fundraising efforts and effectively managed to help close the skills gap in Washington State.

## ANTICIPATED OUTCOMES

1. WSOS achieves a defined and influential role in the comprehensive preK-20 pipeline to increase demand for STEM education.
2. 750 new scholarships are awarded annually.
3. At least 65 percent of WSOS Scholars persist in post-secondary STEM and Healthcare-related courses and majors at Washington State 2- and 4-year colleges and universities annually.
4. At least 75 percent of WSOS graduates report obtaining employment in Washington State within one year of graduation.
5. At least 50 percent of WSOS graduates report obtaining employment in high demand fields within 18 months of graduation.

The proposed operating and scholarship cost of WSOS for 2014-2015 is \$13,617,264 (details below). Under the leadership of the proposed new WSOS executive director, the board and community can anticipate bold and innovative programming, increased accountability and robust outcomes for WSOS scholars.

<b>WSOS Projected Expenses</b>		
<b>Core Services</b>	<b>2014-2015</b>	<b>2015-2016</b>
Scholarships	\$11,637,525	\$11,358,375
Pipeline Expansion	\$ 137,219	\$ 139,963
Scholar Retention	\$ 431,366	\$ 439,993
Scholar Placement	\$ 270,756	\$ 276,171
Sub-TOTAL	<b>\$12,476,866</b>	<b>\$12,214,503</b>
<b>Support Services</b>		
General Administration	\$ 658,410	\$ 671,578
Fundraising	\$ 481,988	\$ 445,728
Sub-TOTAL	<b>\$1,140,398</b>	<b>\$1,117,306</b>
<b>TOTAL EXPENSE</b>	<b>\$13,617,264</b>	<b>\$13,331,809</b>

## EXPENSE AND SERVICE DESCRIPTIONS

The four categories of work described in the executive summary of this document represent an evolution in understanding of how best to serve WSOS scholars. In order to close the skills gap, the difference between available jobs and people with the skills to fill those jobs, three things need to occur: more students need to enroll in degree programs that prepare them for high-demand fields, more students need to graduate with degrees in those fields, and finally, more graduates need to apply for jobs in those fields. In the first three years of the WSOS, efforts centered on the beginning and middle of that spectrum: raising awareness and granting scholarships. While those two elements are critical for success, WSOS cannot effectively continue to work in each of these domains at the scale currently envisioned. As a result, the current proposal focuses attention on graduation from college and job attainment. The “pipeline” work of encouraging middle- and high-school students to enter STEM-related degree programs continues, but does so in partnership with other organizations. The result of this collaboration is a more unified and efficient field of community-based organizations working on stimulating the STEM pipeline, thereby resulting in more STEM majors in colleges.

The following sections outline anticipated outcomes, strategies and tactics for each of the functional areas. Administrative and fundraising elements necessary to support the project annually are also described.

### EXPANDING THE STEM PIPELINE - \$137,219

WSOS will take advantage of strong partnerships with existing STEM networks to increase awareness of, and demand for, STEM-related degrees among Washington’s preK-12 student population. Chief partners in this collaborative effort include Thrive by Five Washington and Washington STEM, as well as service providers such as First Robotics, TEALS, Washington Science Teacher Association, and Career and Technical Education in the Office of the Superintendent of Public Instruction, which collectively engage with thousands of qualified and diverse middle- and high-school students and educators across the state annually (see Appendix A for expense detail).

## ANTICIPATED OUTCOMES

1. At least 50 percent of the state's middle and high schools receive information about the WSOS opportunity in 2014-15 with an annual increase of 10 percent in each subsequent year.
2. At least 900 well-qualified students apply for the WSOS scholarship annually.
3. Contribution to a comprehensive preK-12 roadmap that articulates a clear path for partnership among community based organization to increase awareness of STEM fields and careers among students and their families in Washington State.

## STRATEGIES

- Strategy #1 Sponsor or participate in signature STEM events statewide offered by WA CAN, CSF College Bound staff and other leading STEM networks and service providers to deliver educational materials and/or present on the WSOS opportunity.
- Strategy #2 Participate in campaigns designed to raise STEM awareness and agency statewide.
- Strategy #3 Sponsor or participate in student and teacher signature STEM events that heighten student capacity to conduct research activities prior to attending college (e.g., Imagine Tomorrow, the Washington State Science and Engineering Fair and ComGen).
- Strategy #4 Develop a coherent partnership strategy with other community-based organizations working in the STEM space.

## TACTICS

- Heighten collaboration with schools, statewide organizations and networks to raise awareness of the WSOS opportunity and positively contribute to comprehensive preK-12 roadmap for action in STEM education across Washington.
- Engage at least five (5) partner organizations as a distribution network to share information about, and generate interest in, WSOS.
- Provide training to statewide staff with three (3) CSF training events for field staff (Regional Officers, Navigators and AmeriCorps) on STEM and use the organization's network of 30 middle and high-schools to distribute information directly to students.
- Craft and disseminate audience-specific WSOS print and e-resources regarding STEM career and college opportunities through media and stakeholder channels at least four (4) times a year.
- Communicate WSOS recruitment and outreach activities in at least six (6) highly-visible middle-school and high-school events statewide (e.g., Imagine Tomorrow, the Washington State Science and Engineering Fair, and TEALS App Day).
- Collaborate with CSF Scholarship services to strategically communicate/disseminate application goals.
- Communicate programmatic events and outcomes to WSOS stakeholders (e.g., K-12 leaders, STEM community, legislators and industry partners) at least four (4) times a year.

## SCHOLAR RETENTION - \$431,366

The scholar retention component of the WSOS work plan draws on research which suggests that real world relevance positively influences persistence in undergraduate STEM fields. Retention efforts will center on college and career supports that connect WSOS scholars with a range of real-world experiences and opportunities focused on their specific fields of study. This will be accomplished through collaboration with higher education faculty, research staff and leadership, as well as industry partners. (See appendix A for expense detail.)

## ANTICIPATED OUTCOMES

1. 100 percent of WSOS Scholars are aware of the goals of the WSOS program and the availability of WSOS retention supports from WSOS staff, CSF field staff and campus partners.
2. 20 percent of WSOS Scholars annually participate in research or experiential learning opportunities offered by their campuses or through the WSOS Innovation Summit.
3. At least 65 percent of WSOS Scholars persist in post-secondary STEM and Healthcare-related courses and majors at Washington state 2- and 4- year colleges and universities annually.



## STRATEGIES

- Strategy #1 Conduct surveys that facilitate understanding of Scholar persistence in their majors and in college.
- Strategy #2 Connect Scholars with campus-based academic supports via direct wrap-around service and customized tools on the WSOS website.
- Strategy #3 Connect Scholars with WSOS Program Officers through award communiques and campus events (fall welcomes, career fairs and research symposia).
- Strategy #4 Provide academic and career support to WSOS Scholars through college level STEM and Healthcare-related programs.
- Strategy #5 Promote WSOS Scholars to potential STEM and health care internship providers utilizing technology-centered partners such as *InternMatch* and *Rocket 21*.
- Strategy #6 Develop a strategy to utilize the Opportunity Expansion Fund to increase the number of spots in high-demand degrees available in Washington universities by partnering with colleges, universities, funders and nonprofit organizations to leverage this investment through a competitive grant-making process.

## TACTICS

- Assess student progress through annual surveys (conducted during renewal) and during WSOS service events (e.g., CSF Career Institute)
- Conduct an annual environmental scan of scholar support assets and programs at WSOS campuses and disseminate among scholars.
- Disseminate WSOS programmatic information at least twice by attending CSF navigator and campus partner trainings annually to educate campus-based CSF staff on WSOS programming and goals.
- Designate select WSOS Scholars to serve as lead contacts or Ambassadors on campuses statewide. Rather than advisors, these Scholars will be trained to serve as campus-based advocates who communicate opportunities to engage with WSOS and CSF staff during periodic campus visits in return for modest stipends.
- Through direct service (Career Institute, campus events, etc.), and via web-based tools, advise Scholars statewide on internship opportunities.
- Co-sponsor 12 WSOS scholars in campus-based research internships at universities serving our largest numbers of scholars (e.g., UW, WSU, CWU and WWU). Resulting evaluation data and student research progress will be shared with WSOS stakeholders, and models will inform programmatic support.
- Host an annual WSOS Innovation Summit to showcase WSOS scholar research projects and expose their work to professionals in STEM fields.
- Identify and promote WSOS scholars to at least four (4) STEM professional organizations annually.
- WSOS will develop a discretionary grant program which will utilize the existing Opportunity Expansion Fund resources and propose alternatives based on future funding scenarios.

## SCHOLAR TRANSITION - \$270,756

The scholar transition component of the Washington State Opportunity Scholarship helps students move from studying for a degree in a STEM field to getting a job in a high-demand field. These efforts will leverage the College Success Foundation's Center for Career Success which has a successful record of helping prepare students for securing gainful employment.

## ANTICIPATED OUTCOMES

1. 100 percent of WSOS Scholars are aware of the goals of the WSOS program and the availability of placement assistant services.
2. 40 percent of WSOS Scholars utilize at least one placement service offered by WSOS.
3. At least 75 percent of WSOS graduates report obtaining employment in Washington State after graduation.

4. At least 50 percent of WSOS graduates report obtaining employment in high-demand fields after graduation.

#### STRATEGIES

- Strategy #1 Train Scholars in career development activities through annual CSF Career Institutes, campus-based career fair events, research symposium event and via web-based career exploration tools.
- Strategy #2 Provide online coaching on Linked In and networking strategies.
- Strategy #3 Participate in industry professional summits (e.g., WA Biotechnology and Biomedical Association) to raise employer awareness of WSOS brand and scholars and include Scholars as permitted.
- Strategy #4 Sponsor and promote WSOS scholars to potential STEM and health care internship and job providers through direct service and through partners such as *InternMatch* and *Rocket 21*.

#### TACTICS

- Assess student progress through annual surveys (conducted during renewal) and during WSOS service events (e.g., CSF Career Institute).
- Conduct an annual environmental scan of scholar support assets and programs at WSOS campuses and disseminate among scholars.
- Attend at least two (2) CSF navigator and campus partner trainings annually to educate CSF staff on WSOS programming and goals.
- Provide at least two (2) opportunities annually for Scholars to attend campus-based career (e.g., Fall Welcomes, Campus Career fairs and Campus undergraduate research symposia).
- Provide semi-annual STEM career forecasts to all WSOS Scholars through CSF's Center for Career Success, campus events, and via web-based tools.
- Build employer and strategic partnerships, focused on identifying on developing WSOS internship and career opportunities using tools such as *InternMatch*, a service that helps students identify paid internships.
- Provide access to mentors in STEM-related industries through services such as *Rocket21*, a web-based mentoring forum.
- Develop online library of professional development webinars and learning tools for WSOS scholars.
- Create and make available a database of relevant internship and career opportunities.
- Deliver a minimum of three (3) Career Salons connecting WSOS scholars with prospective employers.

#### ADMINISTRATION - \$658,410

CSF will continue to serve as the WSOS program's administrator under contract with the Washington Student Achievement Council (WSAC), at the discretion of the WSOS board of directors. WSOS employees will be housed at CSF with the executive director reporting to the WSOS board chair. Day-to-day oversight will be provided by CSF's CEO. Subcontractors will initially be selected by CSF until WSOS is fully staffed and can take on full responsibility for deliverables. A timeline for staffing WSOS can be found in Appendix B.

WSOS staff will leverage the College Success Foundation's complementary programs and staff associated with middle- and high-schools as well as its robust relationships with colleges, universities, and community partners. CSF will support the advocacy efforts of WSOS in Olympia, conduct the selection and awarding of scholarships, provide all finance and accounting functions, support all IT functions, provide physical space and fundraising support. Appendix C provides a CSF scope of work for these activities. A draft service level agreement describing overhead services can be found in Appendix E. Appendix B, page 2, provides an approximate summary of expenses by month.

#### ANTICIPATED OUTCOMES

1. 750 new Scholars selected each year.
2. 500+ graduates each year.
3. Initial research to gauge effectiveness of WSOS scholarship strategy is conducted.

4. Continued awareness of, and support for, WSOS among legislators.
5. WSOS is fully staffed in October of 2014.
6. Facilities and support services (HR, IT, Finance/Accounting) are effectively provided.
7. Scholarship Model forecast based on fundraising progress produced.
8. WSOS Board indicates satisfaction with administrative services.

## **SCHOLARSHIP SELECTION & AWARDING**

CSF will continue to manage the application process, the disbursement of the scholarship funds to the college/university the recipients attend, and manage the scholarship refund process when students drop out or transfer institutions. CSF will also continue to manage the renewal and annual increase process (including: modifying and updating the renewal process, managing the scholarship paperwork required for the scholarship increase, and answering inquiries from colleges/universities and applicants throughout the calendar year).

## **EVALUATION**

The Washington State Opportunity Scholarship was created to help close the expanding skills gap in the state. A recent study by the Boston Consulting Group found that without meaningful change, by 2017 more than 50,000 jobs in Washington will go unfilled for lack of qualified candidates. The vast majority of those jobs, 80 percent, are in STEM and health care. CSF's Research and Evaluation team will work with the WSOS Board and staff to develop a research agenda that produces insight into the extent to which WSOS is able to reduce the skills gap in Washington.

## **GOVERNMENT RELATIONS**

As a truly unique public-private partnership, maintaining the positive relationship that exists between WSOS and the state legislature is critical for long-term success. WSOS will work with CSF's director of advocacy and subcontract with lobbyists to generate and execute a legislative agenda that promotes continuing support for the scholarship among legislators. Between sessions, the government relations team will continue to promote WSOS by providing legislators with opportunities to attend events, meet students from their districts and better understand the goals and outcomes of the program. Each year, legislators will receive a summary of the number of scholarships awarded by WSOS generally with detail for their district.

## **SUPPORT SERVICES (HUMAN RESOURCES. FINANCE & ACCOUNTING. INFORMATION TECHNOLOGY)**

In addition to taking advantage of the College Success Foundation's (CSF) network of programs and contacts, one of the chief reasons WSOS is partnering with CSF is to utilize support services such as Human Resources, Information Technology and Finance to reduce operating costs. Each year the WSOS executive director will negotiate a service level agreement with CSF that specifies the costs and deliverables associated with these services. Please see Appendix E for a draft Service Level Agreement.

## **OVERHEAD**

College Success Foundation will provide physical space for WSOS staff as well as general administrative tools such as computers, telephones, and access to copy machines (see Appendix E, section B, for detail).

## **FUNDRAISING - \$481,988**

The Washington State Opportunity Scholarship staff will be responsible for achieving fundraising goals set by the board and executive director. At full strength, WSOS will have a fundraising staff comprised of an executive director, development director and a development officer. The College Success Foundation's advancement staff will collaborate with WSOS on planning and coordinating events as well as identifying prospects and providing administrative support to record, track, and acknowledge gifts. Direct solicitation of gifts for WSOS is

not within CSF's scope of work. Appendix E provides the draft scope of work for a fundraising contractor to provide transition support until the WSOS fundraising staff is in place as well as a draft scope of work for government relations contractor(s). At the April 2014 board meeting, a private-sector fundraising goal of \$10M per year for five years beginning 2014-2015 was approved.

## APPENDIX A – WSOS 2014-2015 EXPENSE DETAIL BY FUNCTION

Pipeline Expansion					
Position	FTE	Org.	Salary	Benefits	Total
Program Director	0.25	CSF	\$21,250	\$6,163	\$27,413
College Programs Officer 1	0.25	WSOS	\$15,625	\$4,531	\$20,156
Leveraged Support Mgr.	0.5	CSF	\$36,875	\$10,694	\$47,569
Sub-TOTAL	1		\$73,750	\$21,388	\$95,138
Program Expenses					\$10,000
<b>TOTAL</b>	<b>1</b>				<b>\$105,138</b>

Scholar Retention					
Position	FTE	Org.	Salary	Benefits	Total
Executive Director	0.25	WSOS	\$28,750	\$8,338	\$37,088
Administrative Asst.	0.5	WSOS	\$22,500	\$6,525	\$29,025
Program Director	0.5	CSF	\$42,500	\$12,325	\$54,825
College Programs Officer 1	0.75	CSF	\$46,875	\$13,594	\$60,469
College Programs Officer 2	1	CSF	\$62,500	\$18,125	\$80,625
Leveraged Support Mgr.	0.25	CSF	\$14,625	\$4,241	\$18,866
IT Officer	0.75	CSF	\$46,875	\$13,594	\$60,469
Sub-TOTAL	4		\$264,625	\$76,741	\$341,366
Program Expenses					\$90,000
<b>TOTAL</b>	<b>4</b>				<b>\$431,366</b>

Scholar Transition					
Position	FTE	Org.	Salary	Benefits	Total
Executive Director	0.25	WSOS	\$28,750	\$8,338	\$37,088
Administrative Asst.	0.25	WSOS	\$11,250	\$3,263	\$14,513
Program Director	0.25	CSF	\$42,500	\$12,325	\$54,825
Leveraged Support Mgr.	0.25	CSF	\$14,625	\$4,241	\$18,866
Career Success Officer	1	CSF	\$62,500	\$18,125	\$75,465
Sub-TOTAL	2		\$159,625	\$46,291	\$200,756
Program Expenses					\$70,000
<b>TOTAL</b>	<b>2</b>				<b>\$270,756</b>

## APPENDIX A – WSOS 2014-2015 EXPENSE DETAIL BY FUNCTION CONTINUED

<b>Administration</b>					
Role	FTE	Org.	Salary	Benefits	Total
Evaluation Officer	1	CSF	\$62,000	\$17,980	\$79,980
Government Relations	0.25	CSF	\$26,250	\$7,613	\$33,863
Scholarship Select/Award	2	CSF	\$124,375	\$36,069	\$160,444
Finance/Accounting	1	CSF	\$79,375	\$23,019	\$102,394
Marketing Officer	0.5	CSF	\$31,250	\$9,063	\$40,313
Human Resources	0.25	CSF	\$18,750	\$5,438	\$24,188
Sub-TOTAL	5		\$342,000	\$99,182	\$441,182
Overhead on CSF staff					\$73,917
Overhead on WSOS staff					\$143,311
Sub-TOTAL					\$217,228
<b>TOTAL</b>	<b>5</b>				<b>\$658,410</b>
<b>Fundraising &amp; Lobbying</b>					
Executive Director	0.5	WSOS	\$57,500	\$16,675	\$74,175
Administrative Asst.	0.25	WSOS	\$11,250	\$3,263	\$14,513
Development Director	1	WSOS	\$100,000	\$29,000	\$129,000
Corporate Relations Officer	1	WSOS	\$70,000	\$20,300	\$90,300
Development	0.5	CSF	\$50,000	\$14,500	\$64,500
Sub-TOTAL	3.25		\$288,750	\$83,738	\$372,488
Fundraising		Contract			\$45,000
Lobbying		Contract			\$64,500
Sub-TOTAL					\$109,500
<b>TOTAL</b>	<b>3.25</b>				<b>\$481,988</b>
<b>Project TOTAL</b>	<b>15.25</b>				<b>\$1,947,657</b>

Appendix B – WSOS Hiring Timeline

Position	Status	Target Hire Date	Comments
Executive Director	Open	1-Aug 2014	Waldron HR was hired in May of 2014 to begin the search for an Executive Director (ED). Should the position go unfilled beyond 7/31/14, the contract fundraiser will be responsible for the fundraising activities of WSOS until the ED position is filled. If the position is not filled by 10/1/14 (the date funding for the fundraising contractor expires), a portion of the executive director salary may be used to extend the date of the fundraising consultant's contract.
Administrative Asst.	Open	31-Aug 2014	The WSOS ED will hire the organization's administrative assistant with the support of CSF's human resources department. CSF has already hired a temporary administrative assistant to support some elements of WSOS, and that person may be hired to fill the role. If the WSOS ED chooses to look outside CSF to fill this position, the target date of 7/15/14 may not be met. Under those circumstances, the temporary CSF administrative assistant will continue to provide some support for WSOS.
Program Director	Filled	NA	Theresa Britschgi was hired in March of 2014 and is in place as the WSOS Program Director.
College Program Officer 1	Open	30-July 2014	This position was filled by Evie Livingston until June of 2014 when she left to become the principal of First Place, a charter school in Seattle. The position is currently open and the search is being managed by the WSOS program director with support from CSF's human resources department.
College Program Officer 2	Open	30-July 2014	Filled by Megan Urbaitis until March of 2014 when she left to raise her newborn daughter. The position is currently open, and the search is being managed by the WSOS program director with support from CSF's human resources department.
Development Director	Open	1-Oct 2014	This position will work closely with the WSOS Executive Director and will likely require a longer lead time than other positions to fill. Until the position is filled, fundraising responsibilities will be split between the WSOS ED and the fundraising contractor. Should the contractor need to be extended beyond October 1, 2014, the FTE allocation for this position would be used to pay for that extension.
Corporate Relations Officer	Open	30-Oct 2014	This position will be hired by the WSOS Development Director. In consultation with the WSOS Executive Director, CSF will post a job description for the Corporate Relations Officer that will run concurrently with the Development Director position in order to reduce the lead time necessary to fill this role.

## APPENDIX B – WSOS HIRING TIMELINE CONTINUED

Monthly expenses for 2014-2015 should approximate the schedule below based on the hiring schedule outlined on the previous page:

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	TOTAL
<b>Core Services</b>													
Scholarships	-	\$2,585,061	\$3,900,000	-	-	\$2,816,552	-	-	\$1,135,912	\$1,200,000	-	-	\$11,637,525
Pipeline Expansion	\$9,465	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$11,614	\$137,219
Scholar Retention	\$34,068	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$36,118	\$431,366
Scholar Placement	\$20,594	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$22,742	\$270,756
Sub-TOTAL	\$64,127	\$2,655,535	\$3,970,474	\$70,474	\$70,474	\$2,887,026	\$70,474	\$70,474	\$1,206,386	\$1,270,474	\$70,474	\$70,474	\$12,476,866
<b>Support Services</b>													
General													
Administration	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$54,868	\$658,410
Fundraising	\$31,666	\$31,666	\$31,666	\$42,999	\$42,999	\$42,999	\$42,999	\$42,999	\$42,999	\$42,999	\$42,999	\$42,999	\$481,988
Sub-TOTAL	\$86,533	\$86,533	\$86,533	\$97,867	\$97,867	\$97,867	\$97,867	\$97,867	\$97,867	\$97,867	\$97,867	\$97,867	\$1,140,398
<b>TOTAL</b>	<b>\$150,660</b>	<b>\$2,742,068</b>	<b>\$4,057,007</b>	<b>\$168,341</b>	<b>\$168,341</b>	<b>\$2,984,893</b>	<b>\$168,341</b>	<b>\$168,341</b>	<b>\$1,304,253</b>	<b>\$1,368,341</b>	<b>\$168,341</b>	<b>\$168,341</b>	<b>\$13,617,264</b>



## APPENDIX C – CSF SCOPE OF WORK (Services Provided to WSOS)

Type of Work	Project Role	Description	FTE:
Core Service	Leveraged support and program evaluation	Supports CSF programs staff, allowing the project to leverage the foundation's presence in middle- and high-schools as well as its relationships with colleges and universities, and community partners (1 FTE). It also provides support for CSF's research and evaluation department to design, implement and report on summative outcomes (1 FTE). Additionally, it allows WSOS to take advantage of CSF's information technology capabilities to deliver product and service to students as well as ongoing updating and maintenance of WSOS website and communication tools. Includes reporting of data analytics as well as management of data warehouse (.75 FTE).	2.75
Administration	Scholarship Selection, Awarding and Reporting	Includes management of the application process and communication with applicants and Scholars; selection of recipients; management of awarding and renewal processes with status verification; data compilation and analysis for board reports; preparation of annual legislative reports. Select and award at least 750 scholars annually.	2.0
Administration	Government Relations	Provides ongoing support for WSOS legislative activities with contract lobbyists via the CSF Director of Government Relations and Advocacy (.25 FTE). Includes work on strategy development, relationship development and support for legislative advocacy and asks.	0.25
Administration	Finance & Accounting, Investment Management Coordination	Includes support of the Investment Committee involving both Scholarship and Endowment Funds; Investment Policy Statements and related Investment Guidelines; cash management, investment management, and management of investment managers.	1.0
Administration	Marketing	This position will work with CSF's marketing department to produce all WSOS materials and manage the brand. The position will participate in student-centered events and activities.	0.50
Administration	Human Resources	Provides HR support, including hiring support and payroll, for all WSOS employees.	0.25
Fundraising	Development Coordination	CSF advancement staff will collaborate with WSOS on planning and coordinating events as well as identifying prospects and providing administrative support to record, track, and acknowledge gifts. WSOS will use CSF's donor-tracking software. <i>Direct solicitation of gifts for WSOS is not within CSF's scope of work.</i>	0.50
<b>TOTAL</b>			<b>7.25</b>

## APPENDIX D – WSOS SCOPE OF WORK (Services Provided by WSOS)

Type of Work	WSOS Staff	Description	FTE:
Wrap-around support	WSOS Executive Director	Participates in WSOS student-related events and activities.	0.25
Wrap-around support	Administrative Asst.	Supports the creation and execution of events/activities as well as directly engages with students that call in to WSOS.	0.25
Wrap-around support	Program Director	Provides day-to-day oversight of services to students in middle/high-schools and in college.	1.0
Wrap-around support	College Program Officer 1	Manages WSOS work in colleges and universities. Responsible for metrics outlined in the work plan on pages 3 and 4 of this document.	1.0
Wrap-around support	College Program Officer 2	Manages WSOS work in colleges and universities. Responsible for metrics outlined in the work plan on pages 3 and 4 of this document.	1.0
Wrap-around support	Marketing Officer	Produces all WSOS materials and manages the brand. Participates in student-centered events and activities.	1.0
<b>TOTAL</b>			<b>4.50</b>

Type	WSOS Staff	Description	FTE:
Administration	WSOS Executive Director	Provides day-to-day oversight of the organization.	0.25
Administration	Administrative Asst.	Supports day-to-day back office services.	0.50
<b>TOTAL</b>			<b>0.75</b>

## APPENDIX D CONTINUED – WSOS SCOPE OF WORK (Services Provided by WSOS)

Type	WSOS Staff	Description	FTE:
Fundraising	WSOS Executive Director	Participates in fundraising activities of WSOS including soliciting gifts and stewarding donors.	0.50
Fundraising	Administrative Asst.	Supports all aspects of WSOS fundraising activities.	0.25
Fundraising	Development Director	Responsible for developing and maintaining relationships with corporate donors and soliciting gifts.	1.00
Fundraising	Corporate Relations Officer	Provides coordination between the fundraising efforts of WSOS and CSF in addition to day-to-day assistance in the use of donor tracking software.	1.00
<b>TOTAL</b>			<b>2.75</b>

## CONTRACT FUNDRAISING (FOR 2014 ONLY)

Role (Under the Direction of WSOS)	Description	Cost
Transition	Onboard the WSOS Executive Director in regards to fundraising underway and provide day-to-day support until the WSOS development department is fully staffed, or within 90 days, whichever comes first.	\$45,000

## CONTRACT GOVERNMENT RELATIONS

Role (In collaboration with CSF)	Description	Cost
Government Relations	Includes legislative strategy, development of legislative agenda, coalition building and third-party stakeholder activation development of talking points and messaging around legislative strategy and goals; support of legislative effort including assistance with key legislative leaders, staff and governor's office. Also includes meeting preparation and event coordination as needed.	\$47,600
Strategic Counsel	Includes strategic advice during communications planning and coordination with CSF and WSOS; developing materials and messaging related to public affairs work, legislative relations and outreach, team meetings, project management, and project updates.	\$16,900

## APPENDIX E – DRAFT SERVICE LEVEL AGREEMENT

### College Success Foundation - WSOS

#### DRAFT Service Level Agreement (final SLA to be negotiated annually)

<u>Item</u>	<u>Summary Description of Service</u>
<b>A.</b>	<b><u>Human Resources</u></b>
<b>1.</b>	<b>Employee Hiring Process</b>
a.	Position classification and compensation analysis. Review new and existing positions for correct classification. Advise hiring managers on correct salary placement.
b.	Recruitment support. Drafting and posting of position openings on advertising sites.
c.	Drug testing. Maintain contract with lab company. Review results of tests, facilitate follow-up if necessary.
d.	Background checks. Maintain contract with testing company. Review results, follow-up as necessary.
e.	New employee orientation support. Meet with new employees, facilitate completion of new hire paperwork.
f.	State/Federal law/regulation compliance
<b>2.</b>	<b>H/R consulting</b>
a.	Employee policy and procedure development and management
b.	Position classification and compensation analysis
c.	Employee Relations/Administration. Conflict resolution, Employee performance issue management, performance review process.
d.	State/Federal law/regulation compliance
e.	Staff professional development. Develop and facilitate professional development opportunities for all staff.
f.	Sexual harassment prevention training.
<b>3.</b>	<b>H/R Policy and Procedures</b>
a.	Employee policy development and administration
<b>4.</b>	<b>Benefits planning, implementation and administration</b>
a.	Medical/dental/vision plan administration
b.	Benefit plan administration. Annual assessment and enrollment processing.
c.	Flex plan administration. Monitor plan, ensuring that employees contributions and reimbursements are processed correctly
d.	403b Admin (Retirement Plan). Ensure contributions and deductions for eligible employees are correct. Submit contributions to 403B plan every pay period
e.	LTD. Reporting and Administration
f.	Life insurance. Reporting and Administration
<b>5.</b>	<b>Payroll Processing</b>
a.	Benefit/deduction maintenance
b.	Employee profile and pay rate maintenance
c.	Bi-weekly payroll processing
d.	Detailed payroll expense allocation for grant management

- e. Vacation/Flex/Sick leave accrual tracking
- f. Child Support withholdings (working with agency)
- g. Court ordered wage garnishment withholdings
- h. W-2 and W-3 processing

**6. New Employee Evaluation Process**

**7. Staff Development**

**8. Training Support**

**B. Facilities**

- 1. Office rent including common area charges and maintenance
- 2. Furniture, cubicles and ergonomics
- 3. Meeting facilities including multi-media equipment
- 4. Telephone sets, direct phone numbers, long distance service
- 5. Property Insurance
- 6. Multi-party conference call service
- 7. Kitchen with coffee/beverage for staff and guests
- 8. Quarterly carpet cleaning
- 9. Security system and monitoring
- 10. Database Coding for Copy Machine and Postage Meter
- 11. Storage
- 12. Coordination of repairs, maintenance and cleaning
- 13. Facilities Policies and Procedures

**C. Information Technology**

- 1. Network and Internet connectivity
- 2. E-mail hosting/Outlook web access/PDA phone support. Messaging and collaboration
- 3. Website hosting with core content update support
- 4. Helpdesk support. Multi-media, event/meeting support, desktop training. Account maintenance, hardware support, software support
- 5. Desktop/laptop computers w/ core software licenses
- 6. Software license management
- 7. Workgroup printer support and maintenance
- 8. Multi-function copier support and maintenance
- 9. Fax machine support and maintenance
- 10. Video teleconference equipment and support
- 11. Asset tracking
- 12. User Training
- 13. Maintenance on various machines
- 14. Management of various databases/software packages. Donor/prospect/pledge tracking, accounting databases, event mailing/rsvp databases
- 15. File backup and recovery systems
- 16. Public domain name service configuration maintenance
- 17. IT Policies & Procedures.

**D. Finance & Accounting**

1. Monthly internal financial statements. Income Statement, Balance Sheet, etc.
2. Preparation of 990 tax return information for CSF Form 990
3. Payroll
  - a. Direct deposit processing
  - b. Child support/wage garnishment payments
4. Executive view
5. Annual external audit
6. General ledger maintenance
7. Financial analysis. Special projects, research and answer questions re outstanding balances and discrepancy resolutions.
8. Data Entry A/P checks, scholarship checks, etc.
9. Purchasing with corporate credit card and monthly reconciliation
11. Payment of L&I, 1099, SUTA, 940/941, tax return
12. Questions re O/S balances and discrepancy resolution
13. Bank deposits (correct coding). Correct coding, physical deposit of money
14. Processing & Posting of cash receipts
15. Cash management
16. Filing of documents/maintenance of grant files
17. Pledge account reconciliation
18. Reconciliation of scholarship payments in accounting system with subsidiary data systems.
19. Grant billings (State, OSPI, WSOS, DSHS, etc.)
20. Provide line of Credit Supporting Organizations
21. State/Federal Audits
22. Bank relations
23. Credit card processing and reconciliation
24. Accounts payable maintenance
25. Fixed Asset tracking & reporting
26. Cash flow analysis
27. Regulatory Requirements
  - a. Charitable Organizations registration
  - b. Annual reports
  - c. Returns
  - d. Etc., etc.
28. Planning / Strategic Planning
29. Budgeting
30. Finance & Accounting Policy & Procedures
31. Financial analysis and support for operations
32. Grant budgeting support
33. Investment Finance Committee, Executive Committee and Board preparation of materials and presentations as needed.

**E. General Administration**

1. General supplies. Pens, paper, etc.
2. General front desk support
  - a. Supplies ordering

- b. Courier/shipping coordination
- c. Mail sorting and distribution
- d. Phone coverage and guest reception/hospitality
- 3. Domain name management (paying fees, etc.)
- 4. Event support as needed (credit card expertise, multimedia, etc.)
- 5. Raisers Edge
- 6. Risk management and purchasing of insurance