



WASHINGTON STATE  
**OPPORTUNITY**  
SCHOLARSHIP

Supporting the next generation of STEM & health care leaders

July 9, 2013





Supporting the next generation of STEM & health care leaders

Tab 1	Agenda
Tab 2	Minutes
Tab 3	UW Event and Follow-up
Tab 4	Scholarship Update
Tab 5	Legislative Update
Tab 6	Fundraising
Tab 7	Investment Committee
Tab 8	Budget – Scope of Work
Tab 9	Resolution for Contract – 1 year extension
Tab 10	Updates and Background Information





Board Meeting  
July 9, 2013  
3:30 pm - 5:30 pm  
AGENDA

1. Executive Session (Board members only) Brad
2. Meeting called to order & approval of minutes (Tab 2) Brad
3. UW Event (Tab 3) Brad, Mack & Terry
4. Scholarship Update (Tab 4) Deborah
  - a. Cohort 2
    - i. Feedback from high schools on drop in Cohort 2 applicants
    - ii. Demographics of selected scholars
  - b. Cohort 1 renewals and completions
  - c. 2012-2013 Snapshot
5. Legislative Update (Tab 5) Chase Gunnell
  - a. HB 1251 status
  - b. Additional public funding for FY 13-14
6. Fundraising Update (Tab 6) Joan Caine & John Hoyt
  - a. Introduction of Fundraising Consultant and Pyramid and fundraising role.
  - b. Fundraising Action Plan
  - c. Plan for Fundraising Recommendations
7. Investment Committee Report (Tab 7) Mack
8. 2013-2014 Budget, Scope of Work (Tab 8) Deborah & John McDowell
9. Resolution for 1-year CSF Contract Extension (Tab 9) Brad
10. Brainstorm potential new WSOS Board members
11. Executive Session-if needed (Board members only)



Contract No. **2015-CS040**

**Contract for Professional Services  
between the  
State of Washington, Washington State Opportunity Scholarship Board  
and  
College Success Foundation  
and  
State of Washington, Washington Student Achievement Council**

This Contract is made and entered into by and between the state of Washington, Washington Student Achievement Council, hereinafter referred to as the "WSAC," and the Washington State Opportunity Scholarship Board, hereinafter referred to as the OS BOARD; and the College Success Foundation, hereinafter referred to as CSF.

***College Success Foundation***

***1605 NW Sammamish Rd, Ste 100***

***Issaquah, WA 98027***

***Phone: 425-416-2000***

***FAX: (425)416-2001***

***Email: sbyers@collegesuccessfoundation.org***

***Federal TIN: 20-5561911***

***WA State UBI Number: 602-027-399***

**PURPOSE**

The purpose of this contract is to perform the duties of RCW 28B.145 enacted by the 2011 Washington legislature that created the Washington State Opportunity Scholarship Act to assist low-income and middle-income students and invest in high employer demand programs. The OS BOARD was created with members appointed by the Governor to provide oversight and guidance for the Opportunity Scholarship and Opportunity Expansion programs. The CSF shall act as the OS Program Administrator, shall staff the OS BOARD, and shall manage the Opportunity Scholarship program. The WSAC shall manage the opportunity scholarship match transfer account. This contract establishes the responsibilities for each of the three parties in the administration of the Opportunity Scholarship and Opportunity Expansion programs.

The OS Program Administrator is defined in RCW 28B.145 as "a college scholarship organization that is a private nonprofit corporation registered under Title. 24 RCW and qualified as a tax-exempt entity under section 501(c)(3) of the federal internal revenue code, with expertise in managing scholarships and college advising." The CSF is a nonprofit scholarship organization devoted to improving higher education opportunities for underserved students in Washington through early college awareness, mentoring, advising, and scholarships.





The work related to the administration of the Opportunity Scholarship and Opportunity Expansion programs by the CSF will be overseen by the OS BOARD which will determine the administrative fee for the OS Program Administrator.

### **APPOINTMENT/TERMINATION**

The OS BOARD and WSAC hereby engage and retain CSF as OS Program Administrator (OS Administrator) to perform the services described herein. The appointment may be terminated by the OS BOARD for unsatisfactory performance, including failure to satisfactorily perform the duties set for in RCW 28B.145.030, upon 90 days notice. CSF may resign at any time upon 90 days notice to the OS BOARD and the WSAC.

### **SCOPE OF WORK**

#### **OS BOARD**

The OS BOARD provides oversight and guidance for the Opportunity Scholarship and Opportunity Expansion programs as outlined in RCW 28B.145. Primary responsibilities include:

1. Determine the administrative fee to the CSF as the OS Program Administrator.
2. Solicit funds and set annual fund-raising goals for both the scholarship account and the endowment account with support from CSF. Goals should include:
  - a. Maintaining a robust scholarship program.
  - b. Maximizing private sector contributions to both accounts.
  - c. Considering the needs for a long-term funding mechanism while balancing the needs of current students.
3. Determine eligible programs of study leading to bachelor's degrees that scholarship recipients must pursue to receive scholarship funding.
4. Provide general program guidance and ensure the fulfillment of duties and responsibilities assigned to CSF as the Program Administrator.
5. Determine, with the assistance of CSF, the division of funds between the scholarship and endowment accounts in the case of undesignated grants and contributions.
6. Report to the Governor, the WSAC, and Higher Education Legislative committees on December 1<sup>st</sup> regarding the Opportunity Scholarship program including:
  - a. The selected education programs for the scholarships.
  - b. The number of scholarship applicants and participants and their demographic information.
  - c. The number and amount of scholarships awarded and from which account they were paid.
  - d. The institutions and education programs in which participants enrolled.
  - e. The total amount of private contributions and state matching funds, how



funds were distributed between the scholarship and endowment accounts, including investment income and administrative fee paid to CSF.

7. Ensure that principal and income held in the Opportunity Scholarship Account and income from the Opportunity Endowment Account is used to cover the cost of scholarships disbursed and the administrative fee to the OS Program Administrator.
8. Select institutions of higher education to receive opportunity expansion awards as provided in RCW 28B.145.060.
9. Comply with all applicable state laws and rules including but not limited to the open public meetings act (Ch 42.30 RCW), ethics in public service (Ch 42.52 RCW), public records act (Ch 42.56.RCW), and state budgeting, accounting and reporting system (Ch 43.88 RCW).

### **CSF**

CSF, serving as the OS Program Administrator, shall staff the OS BOARD and perform the duties and responsibilities as outlined in the statute to manage the scholarship fund and expansion fund accounts and to administer the scholarship program. Primary responsibilities include:

1. Provide administrative support to the OS BOARD.
2. Manage the opportunity scholarship fund accounts.
  - a. Establish and manage two separate investment accounts: the Opportunity Scholarship Account and the Opportunity Endowment Account to receive grants and contributions from private sources and state matching funds and to disburse scholarship awards.
    - i. Manage the Opportunity Scholarship and Opportunity Endowment Accounts to achieve the maximum rate of return on the investment accounts in accordance with the prudent investor standard and the Uniform Prudent Management of Institutional Funds Act (UPMIFA), RCW 24.55.
    - ii. Ensure that for each dollar of state matching funds authorized by WSAC under RCW 28B.145.050, and paid to CSF, no less than an equivalent amount is expended, during the same biennium, on opportunity scholarship distributions to students and on services in direct support of the Opportunity Scholarship Program.
    - iii. All assets held in the Scholarship Account and in the Endowment Account are held in trust by CSF for the exclusive benefit of the OS BOARD to carry out the purposes set forth in RCW 28B.145.
    - iii. Should the appointment of CSF as OS Administrator be terminated, or should CSF resign as OS Administrator, or should CSF cease operations for any reason while it is still under contract as the OS Administrator, CSF will promptly transfer all assets held in the Scholarship Account and in the Endowment Account to a successor OS Administrator or to the OS BOARD, as directed by the OS BOARD.
  - b. Award funds from the scholarship account on an annual basis.
  - c. Consult with the WSAC and the Office of Financial Management prior to



disbursing funds from the endowment account.

- i. Scholarship disbursements from earnings on the endowment account shall occur only if the state match has been made into both accounts; the appropriations for State Need Grant meets or exceeds biennial appropriations for 2011-2013 for students at 70 percent of median family income or below; and the state has made progress in per-student funding levels.
    - d. Ensure transparency in the investment decisions and process.
- 3. Support the OS BOARD in developing annual fund raising goals and soliciting funds.
  - a. Solicit and accept grants and contributions from private sources, via direct payment, pledge agreement, or otherwise for deposit into one or both of the two accounts.
  - b. Provide proof of receipt of grants and contributions from private sources to the WSAC, identifying the amounts received by name of private source and date, and whether the amounts received were deposited into the scholarship or the endowment account as determined by the legislation.
  - c. Deposit at least fifty percent of all grants and contributions into the scholarship account until twenty million dollars have been deposited.
    - i. After twenty million dollars in total from all sources have been deposited into the scholarship account, private donors may designate whether their contributions must be deposited to the scholarship or the endowment account.
  - d. Verify that state matching fund expenditures do not exceed the total amount of private contributions.
- 4. Design and manage the scholarship program.
  - a. Develop and implement a promotion, application, selection, and notification process for awarding opportunity scholarships.
  - b. Initiate the scholarship disbursement process by making annual scholarship award notifications no later than May 1 each year.
  - c. Provide verification that scholarship awards disbursed from the endowment account from earnings occur only in years that meet the criteria described in RCW 28B.145.
  - d. Determine the scholarship award amounts.
    - i. The award shall be at least one thousand dollars or the difference in tuition and fees from 2008-09 to the academic year of disbursements.
    - ii. Awards may be increased on an income-based sliding scale to cover eligible expenses or encourage participation in targeted programs.
    - iii. Scholarships should be renewable to the extent funds are available.
  - e. Disburse scholarships to eligible Washington resident students at or below 125 percent median family income enrolled in eligible programs up to 125 percent of the length of the program, and other criteria as specified in RCW 28B.145.



- i. Students must file a Free Application for Federal Student Aid and apply for educational tax credits if applicable.
  - f. Notify institutions of scholarship recipients and terms of the student's eligibility.
  - g. Consult with the WSAC and State Board for Community and Technical Colleges to determine eligible educational expenses.
5. Manage the Opportunity Expansion Program (OEP)
- a. Assist the OS BOARD with development and implementation of an application, selection, and notification process for making OEP awards to institutions of higher education.
  - b. Accept grants and contributions from private sources for OEP awards.
6. CSF shall maintain the following insurance at the following limits to satisfy its obligations under this Agreement:

Directors & Officers Liability Full Prior Acts Coverage	\$5,000,000
Employment Practices Liability Full Prior Acts Coverage	\$5,000,000
Fiduciary Liability	\$1,000,000
Employee Dishonestly with ERISA Fidelity	\$500,000 \$500,000
Forgery Alteration	\$50,000

**WSAC**

The WSAC will manage the opportunity scholarship match transfer account. Primary responsibilities include:

1. Subject to the availability of funds, authorizing the transfer of the first five million dollars in state match to be deposited into the scholarship account of CSF.
2. Ensuring that any future transfers of state contributions into the scholarship account and the endowment account do not exceed the total amount of private contributions deposited in each account.
3. Authorizing transfers in a timely manner following receipt of proof of private contributions.
4. Ensuring that expenditures from the transfer account do not exceed the private contributions amount.
5. Contracting with the Program Administrator on behalf of the OS BOARD.





**PERIOD OF PERFORMANCE**

The period of performance under this contract will be from July 1, 2013, or date of execution, whichever is later, through June 30, 2014.

**DES FILING REQUIREMENT –SOLE SOURCE CONTRACTS (Non Direct Buy)**

The provisions of Chapter 39.26 RCW require the WSAC to file this sole source professional service contract with the Department of Enterprise Services (DES) for approval. No contract so filed is effective nor shall work commence under it until the tenth (10<sup>th</sup>) working day following the date of filing or until DES approval, whichever is later. The WSAC is also required to provide notice of this sole source professional services contract opportunity by posting notice on the state’s enterprise vendor registration and bid notification system (WEBS). No contract so posted is effective, nor shall work commence under it, until the fifth (5<sup>th</sup>) working day following the date of posting. Further, the WSAC is required to make this sole source professional services contract available for public inspection by posting this contract on the WSAC’s website. No contract so posted is effective, nor shall work commence under it, until the tenth (10<sup>th</sup>) working day following the date of posting.

**COMPENSATION**

Total compensation payable to CSF for satisfactory performance of the work under this contract shall be determined by the OS Board on the basis of good faith negotiations between the OS Board and CSF under a separate contract for the performance of all things necessary for or incidental to the performance of work as set forth in the Scope of Work.

**CONTRACT MANAGEMENT**

The Contract Manager for each of the parties shall be the contact person for all communications and billings regarding the performance of this contract.

CSF Contract Manager	WSAC Contract Manager
Deborah Wilds College Success Foundation 1605 NW Sammamish Rd, Ste 100 Issaquah, WA 98027  <i>Phone</i> : 425-416-2000  <i>Fax</i> : 425-416-2000  <i>Email address</i> : dwilds@collegesuccessfoundation.org	Vicki Merkel Washington Student Achievement Council 917 Lakeridge Way SW P.O. Box 43430 Olympia, WA 98504-3430  <i>Phone</i> : 360-759-7853  <i>Fax</i> : 360-704-6277  <i>Email address</i> : vickim@wsac.wa.gov

**ASSURANCES**

The parties to this contract agree that all activity pursuant to this contract will be in accordance with all the applicable current federal, state, and local laws, rules, and regulations.



## **ACCESS TO DATA**

In compliance with RCW 39.29.080, CSF shall provide access to data generated under this contract to the WSAC, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the CSF'S reports, including computer models and methodology for those models.

## **AMENDMENTS**

This contract may be amended by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.

## **AMERICANS WITH DISABILITIES ACT (ADA) OF 1990, PUBLIC LAW 101-336, also referred to as the "ADA" 28 CFR Part 35**

The CSF must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.

## **CONFORMANCE**

If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

## **ASSIGNMENT**

Neither this contract, nor any claim arising under this contract, shall be transferred or assigned by the CSF without prior written consent of the WSAC and the OS BOARD.

## **ATTORNEYS' FEES**

In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney fees and costs.

## **ENTIRE CONTRACT**

This contract, including referenced exhibits, represents all the terms and conditions agreed upon by the parties. No other statements or representations, written or oral, shall be deemed a part hereof.

## **GOVERNING LAW**

This contract shall be construed and interpreted in accordance with the laws of the State of Washington and the venue of any action brought hereunder shall be in the Superior Court for Thurston County. If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

## **INDEMNIFICATION**

Each party shall be responsible for the negligence of its own employees or agents in the performance of this Contract.



To the fullest extent permitted by law, The OS BOARD and CSF expressly agree to indemnify, defend, and hold harmless the WSAC for any claim arising out of or incident to the CSF's performance or failure to perform the contract. This indemnification includes any claim by or against the CSF or the OS BOARD, or their agents, employees, representatives, or any subcontractor or their employees.

#### **INDEPENDENT CAPACITY OF CSF**

The parties intend that an independent relationship will be created by this contract. The CSF and its employees or agents performing under this contract are not employees or agents of the WSAC or the OS BOARD. CSF will not hold himself/herself out as or claim to be an officer or employee of the WSAC, OS BOARD, or of the State of Washington by reason hereof, nor will CSF make any claim of right, privilege, or benefit that would accrue to such employee under law. Conduct and control of the work will be solely with the CSF.

#### **INDUSTRIAL INSURANCE COVERAGE**

CSF shall comply with the provisions of Title 51 RCW, Industrial Insurance. If CSF fails to provide industrial insurance coverage or fails to pay premiums or penalties on behalf of its employees, as may be required by law, WSAC may collect from the CSF the full amount payable to the Industrial Insurance accident fund. The WSAC may deduct the amount owed by the CSF to the accident fund from the amount payable to the CSF by the WSAC under this contract, and transmit the deducted amount to the Department of Labor and Industries (L&I) Division of Insurance Services. This provision does not waive any of L&I's rights to collect from CSF.

#### **NONDISCRIMINATION**

During the performance of this contract, CSF shall comply with all federal and state nondiscrimination laws, regulations, and policies.

#### **ORDER OF PRECEDENCE**

1. Applicable federal and state of Washington statutes and regulations
2. Terms and conditions contained in this contract
3. Any other provision, term or material incorporated herein by reference or otherwise incorporated

#### **PUBLICITY**

CSF agrees to submit all advertising and publicity matters relating to the Opportunity programs for approval in concept to the OS Board as may be prescribed by the OS Board.

#### **RECORDS MAINTENANCE**

CSF shall maintain books, records, documents, data, and other evidence relating to this contract and performance of the services described herein, including but not limited to accounting procedures and practices that sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this contract.

CSF shall retain such records for a period of six (6) years following the date of final payment. At no additional cost, these records, including materials generated under the contract, shall be subject at all reasonable times to inspection, review, or audit by the



WSAC, OS BOARD, the Office of the State Auditor, and federal and state officials so authorized by law, regulation, or agreement.

If any litigation, claim, or audit is started before the expiration of the six-year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

#### **REGISTRATION WITH DEPARTMENT OF REVENUE**

CSF shall complete registration with the Washington State Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.

#### **RIGHT OF INSPECTION**

CSF shall provide right of access to its facilities at all reasonable times, to the WSAC, OS BOARD, or to any other agent or official of the state of Washington or the federal government, authorized for these purposes, to monitor and evaluate performance, compliance, and/or quality assurance under this contract.

#### **SEVERABILITY**

The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.

#### **TAXES**

All payments accrued because of payroll taxes, unemployment contributions, any other taxes, insurance, or other expenses for CSF or its staff shall be the sole responsibility of CSF.

#### **WAIVER**

Waiver of any default or breach shall not be deemed a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this contract unless stated to be such in writing and signed by authorized representative of the WSAC.





**APPROVAL**

This contract shall be subject to the written approval of the WSAC'S authorized representative and shall not be binding until so approved. If this is a Sole Source Contract and unless otherwise exempt, it is not binding until approved by the Department of Enterprise Services, and until other posting requirements have been met. This contract was filed with DES on or before July 12, 2013, posted on the Washington State enterprise vendor registration and bid notification system on or before July 12, 2013, and posted on the WSAC's website on or before July 12, 2013. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

THIS CONTRACT, consisting of 10 pages is executed by the persons signing below, who warrant they have the authority to execute the contract.

**IN WITNESS WHEREOF**, the Washington Student Achievement Council, Executive Director, the Chair of the Opportunity Scholarship Board and the College Success Foundation Chief Executive Officer have executed this Contract on the dates indicated:

**Opportunity Scholarship Board**

**Washington Student Achievement Council**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**College Success Foundation**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

APPROVED AS TO FORM:

\_\_\_\_\_  
Assistant Attorney General

\_\_\_\_\_  
Date



## **COMPENSATION AGREEMENT**

### **BETWEEN THE WASHINGTON STATE OPPORTUNITY SCHOLARSHIP BOARD AND COLLEGE SUCCESS FOUNDATION**

The Washington State Opportunity Scholarship Board, hereinafter referred to as the WSOS Board; and the College Success Foundation, hereinafter referred to as CSF, agree, along with the Washington State Achievement Council (WSAC), to the terms and conditions contained in Contract No. 2015-CS040 for administration of the Opportunity Scholarship and Expansion Programs as outlined in RCW 28B.145.

#### **PURPOSE**

The WSOS Board provides oversight and guidance for the Opportunity Scholarship program as outlined in the statute and the contract between the WSAC, the WSOS Board, and CSF and dated February 14, 2012, which sets forth primary responsibilities of the WSOS Board.

CSF, serving as the WSOS Administrator, shall staff the WSOS Board and provide the duties and responsibilities as outlined in the statute and as set forth in the above referenced contract between the WSAC, WSOS Board, and CSF to manage the scholarship fund accounts and administer the scholarship program.

The purpose of this Compensation Agreement is to set forth total compensation the WSOS Board has agreed to pay CSF as WSOS Administrator for satisfactory performance of the work under the aforementioned contract for services rendered by CSF.

#### **WSOS Administrator Compensation**

Compensation payable to CSF shall be a Base Administrator Fee for satisfactory performance of the work under this Agreement, and the contract dated July 1, 2013, and as set forth in the attached Exhibit A, Scope of Work, and Exhibit B, 2013/2014 Budget; plus CSF shall be further reimbursed for Program Wrap-around Support Services, Marketing and Advocacy that are also included in Exhibit A, Scope of Work and Exhibit B, 2013/2014 Budget (collectively "Total Compensation").

1. Total Compensation due to CSF shall be paid to CSF on a monthly basis.
2. The above payments to CSF shall be made within 15 days of receipt of invoice from the CSF. The amount of the invoice will include the Total Compensation amount plus any other WSOS Board approved expenses that are not covered in Exhibit A, Scope of Work.
3. The cost of scholarships disbursed, Total Compensation, and any other WSOS Board approved expenses shall be paid from the Opportunity Scholarship Account and the Opportunity Endowment Account income or principal as appropriate under general accepted accounting principles and Washington State law.
4. Distributions to the WSOS Administrator for fees will be made from the Opportunity Scholarship Account and the Opportunity Endowment Account on a pro-rata basis based on level of effort, with respect to each account.

#### **WSOS Administrator Budget**

Attached as Exhibit B is the fiscal year 2013/2014 WSOS Administrator Budget approved by the WSOS Board. Not later than April 30 in the current performance agreement the WSOS Administrator will submit a budget for the next one-year period of performance to the WSOS Board for approval. The WSOS Board will approve the budget for WSOS Administrator for the



next one -year period of performance by June 15, 2013 and inform the WSOS Administrator of such approval.

**PERIOD OF PERFORMANCE**

The period of performance of this Agreement shall be from July 1, 2013, through June 30, 2014. This Agreement shall be renewed for successive one-year periods, provided Contract No. 2015-CS040 between the parties and the WSAC, or a successor service agreement, remains in place.

**ORDER OF PRECEDENCE**

Each of the exhibits listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- 1. Exhibit A - CSF Scope of Work
- 2. Exhibit B - 2013/2014 Budget

**APPROVAL**

This Agreement becomes binding and enforceable after signature by both parties. Signators represent and warrant that they have authority to execute this Agreement on behalf of each respective party. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

**ENTIRE AGREEMENT**

This contract, including referenced exhibits, represents all the terms and conditions agreed upon by the parties. No other statements or representations, written or oral, shall be deemed a part hereof.

**CONFORMANCE**

If any provision of this contract violates any statute or rule of law of the state of Washington, it is considered modified to conform to that statute or rule of law.

**IN WITNESS WHEREOF**, the WSOS Board members and the CSF Chief Executive Officer have executed this Agreement on the dates indicated on the page following:

**College Success Foundation**

By: \_\_\_\_\_  
Signature

Bob Craves, Chief Executive Officer  
Name/Title

\_\_\_\_\_  
Date



**Washington State Opportunity Scholarship Board**

By: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Name/Title (*please print*)

\_\_\_\_\_  
Date

Who certifies that this person is duly qualified and authorized to bind the Contractor so identified to the foregoing Agreement.

APPROVED AS TO FORM:

\_\_\_\_\_  
Assistant Attorney General

\_\_\_\_\_  
Date





## EXHIBIT A SCOPE OF WORK

### COLLEGE SUCCESS FOUNDATION 2013-2014

	COST	FTE
<b>DIRECT SCHOLARSHIP MANAGEMENT</b>		<b>3.92</b>
<p><b>Program Management and Coordination</b> Includes management of scholarship and program supports; provides oversight for relationships with colleges and universities, secondary schools and community partners.</p>	<b>\$82,365</b>	<b>0.60</b>
<p><b>Scholarship Selection, Awarding and Reporting</b> 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; provision of server infrastructure, secure web-based environment and website, email and other electronic communication tools, software development and data warehouse capacity; preparation of annual legislative reports.</p>	<b>\$402,357</b>	<b>3.32</b>
<b>WRAP AROUND SUPPORTS</b>		<b>3.00</b>
<p><b>Pipeline Supports in Middle and High School</b> Includes environmental scan to identify existing pre-college STEM-related programs and potential partners; STEM awareness campaign to ensure secondary students and teachers are aware of STEM opportunities and WSOS; coordination of scholars to serve as ambassadors to middle and high schools.</p>	<b>\$147,425</b>	<b>1.00</b>
<p><b>College and Career Supports</b> Includes development and implementation of frameworks for mentorship and internship programs; connection of scholars to paid internships, job opportunities and research experiences; enlistment of professors, graduate students and STEM professionals to serve as academic and career mentors; ensures other campus resources are available; evaluation of the impact of wrap around service support strategies.</p>	<b>\$208,118</b>	<b>2.00</b>



<b>LEADERSHIP/BOARD SUPPORT</b>		<b>2.69</b>
<p><b>General</b> Includes provision of general leadership and management for all functional areas to ensure coordination, efficiency and accomplishment of goals.</p>	<b>\$31,959</b>	<b>0.85</b>
<p><b>Marketing and Communication</b> Includes development and implementation of branding, messaging and outreach strategies to build visibility and awareness at state, regional and local levels; provision of content for the development and maintenance of an interactive website and all needed printed materials; social media used extensively to reach and engage key audiences (students, scholars, supporters, educators, partners and media); targeted email messages to high school and college scholarship contacts, influencers, applicants, donors, elected officials and scholars.</p>	<b>\$98,393</b>	<b>0.39</b>
<p><b>Fundraising Support</b> Includes hiring a consultant to develop a fundraising plan and to offer strategic guidance toward implementation; support in setting annual fundraising goals; employment of professionals to conduct major donor development, fundraising events and work place giving campaigns; support to the Board in soliciting funds from prospective donors.</p>	<b>\$253,227</b>	<b>1.45</b>
<b>FINANCE AND INVESTMENT MANAGEMENT</b>		<b>0.73</b>
<p><b>Investment Management</b> Includes support of the Investment Committee involving both Scholarship and Endowment Funds; preparation and maintenance of Investment Committee Charter; Investment Policy Statements and related Investment Guidelines; cash management, investment management, and management of investment managers; accounting and maintenance of custodial trust accounts; and preparation of investment reports.</p>	<b>\$84,545</b>	<b>0.73</b>
<b>INDIRECT</b>		
<p>Includes a portion of the salaries and related costs for accounting, human resources and information technology staff; rent; information technology infrastructure costs; financial systems, accounts payable and payroll processing, tax return filings, financial analysis and projections; donor tracking and related support.</p>	<b>\$240,414</b>	<b>-</b>
<b>CSF TOTAL</b>	<b>\$1,548,803</b>	<b>10.34</b>





Supporting the next generation of STEM & health care leaders

## EXHIBIT A

### PYRAMID COMMUNICATIONS 2013-2014

<b>FUNDRAISING COUNSEL</b> Includes research, counsel, coordination, collaboration with potential partners, and drafting of content.	<b>\$42,000</b>
<b>EVENTS</b> Includes planning and coordination of five events, event photography or videography as needed, and all event expenses.	<b>\$54,000</b>
<b>CREATIVE ASSETS AND MATERIALS</b> Includes revisions to existing background and event materials; design of year-end-report documents; and content and design for event, student facing, and fundraising materials as needed.	<b>\$44,000</b>
<b>COMMUNICATIONS COUNSEL</b> Includes oversight of inter-team communications, coordination, and project management, budget tracking; counsel for board presentations and engagements; counsel on ways to educate Washington State Opportunity Scholarship board about College Success Foundation's contributions; and counsel on website best practices as needed.	<b>\$65,000</b>
<b>MEDIA</b> Includes creative media counsel, material drafting and editing, and media support for events.	<b>\$12,000</b>
<b>TOTAL</b>	<b>\$217,000</b>





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## EXHIBIT A

### COCKER FENNESSEY 2013-2014

<p><b>GOVERNMENT RELATIONS</b> 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 to lobbyists, assistance with briefings with key legislative leaders, staff and governor's office. Also includes meeting preparation and event coordination as needed.</p>	<p><b>\$47,600</b></p>
<p><b>STRATEGIC COUNSEL SCOPE OF WORK</b> Includes strategic advice during communications planning and coordination with CSF and Pyramid; developing materials and messaging related to public affairs work, legislative relations and outreach, team meetings, project management, and project updates.</p>	<p><b>\$36,900</b></p>
<p><b>TOTAL</b></p>	<p><b>\$84,500</b></p>
<p><b>COCKER FENNESSEY AND PYRAMID TOTAL</b></p>	<p><b>\$301,500</b></p>
<p><b>CSF, COCKER FENNESSEY, AND PYRAMID GRAND TOTAL</b></p>	<p><b>\$1,850,303</b></p>





**EXHIBIT B**

**College Success Foundation  
Washington State Opportunity Scholarship  
Program Administrator  
2013 / 2014 Fiscal Year Proposed Expenditure Budget**

	Proposed		
	Budget	July	Budget
	1, 2013 - June	July 1, 2012 -	
	30, 2014	June 30, 2013	
CSF Base Administrator Fee	1,193,260	953,819	*
CSF Program Wrap-around Services	355,543	172,500	**
<b>Marketing and Advocacy</b>			
Pyramid	217,000	204,000	***
CoFen	84,500	84,500	***
Total Marketing and Advocacy	301,500	288,500	
<b>Total Non-Scholarship Expenditures</b>	<b>1,850,303</b>	<b>1,414,819</b>	

\* Approved at the 2/14/2012 WSOS Board Meeting. For a period of 12 months.

\*\* Approved at the 12/19/2012 WSOS Board Meeting. For a period of 6 months.

\*\*\* Approved at the 10/15/2012 WSOS Board Meeting. For a period of 9 months.





## Washington State Opportunity Scholarship Board Meeting

March 26, 2013

### Minutes

The Board of Directors meeting of the Washington State Opportunity Scholarship (WSOS) was called to order at 1:30 p.m. on March 26, 2013, at Microsoft headquarters in Redmond, Washington.

Board members present:

Brad Smith, Terry Gillespie, Kimberly Harris, Mack Hogans, Jim Sinegal, Jerry Grinstein *via telephone*.

This constituted a quorum.

Additional attendees: John Bowden, Jane Broom, Sue Byers, Bob Craves, Joe Gaffney, Bruce Marvin, John McDowell, Susan Pollack, Rebecca Swartz, Sam Whiting, Eric Whitaker, Deborah Wilds.

#### Meeting Called to Order

Brad Smith welcomed everyone and introductions were made. Mack Hogans moved the minutes of the December 19, 2012, meeting be approved. Kimberly Harris seconded the motion. The motion was unanimously approved.

The Board went into executive session at 1:36pm

Full board meeting started again at 1:49pm

#### Progress Reports

Outreach: Kimberly Harris shared with the board her experience at the lunch portion of the Day in Olympia and Evergreen events. In her opinion, the student stories were the best part of the day. Requests students shared were: chat rooms, places in person or online for them to meet other WSOS scholars in different field of studies, and an easy application process. Legislators were invited to lunch to view the WSOS video and meet scholars. Les Purce, Evergreen President, attended, along with Kimberly and Mack Hogans. Mack also participated in the legislative meetings in the morning with WSOS scholar Madeleine Beatty. The day began with two leadership meetings — one with Majority Leader Rodney Tom and the other with Speaker Frank Chopp. Hogans and Beatty updated them on the progress made in the first year.

Cohort Two/New Applications: Deborah Wilds reviewed the number and demographics of applications received for Cohort Two. Responding to why number of applicants was down from last year, Wilds explained a few of the changes to the application process required more time and energy to complete, particularly on a mobile device. Outreach to students has been the same as last year, if not more. Discussing the use of essay questions, Board consensus was the questions should remain but answer the core question: "Why do you want to go into this STEM field?" plus one additional question. The Board also questioned if schools with a lower number of Cohort 2 applications had Cohort 1 awards. Is the perception that WSOS is hard to obtain? Brad Smith asked CSF research and report results at the next board meeting. Smith then led the board in discussion on how to award for Cohort 2. He proposed changing the awarding to 500 freshmen, with the rest awarded weight-based on number of applications received. The board agreed.

UW Event: The next event will take place at the UW Seattle in early May with media coverage legislators attending.

Investment Committee: Hogans presented the investment committee report. The report included a request to elect a chair; increase committee size; identify and select a short-term fixed income fund manager; and identify and select a longer term endowment fund manager. Smith stated the board should be increased to seven with two board members on this committee. The chair can invite other members, and the committee can select fund managers. Harris moved Mack Hogans be Chair of the Investment Committee, and Jim Sinegal seconded the motion. The motion was unanimously approved.

Finance Reports: Financials were received without questions.

Ongoing work:

Legislation: Susan Pollack shared the new legislation has successfully passed the house, and she is confident it will be passed.

Opportunity Expansion Program: Smith reported the initial \$2 million contribution continues to grow, as the board waits to see if the tax credit will be extended by the legislature.

Fundraising:

*Public:* Pollack has asked for an additional \$10 million in forward funding. Smith asked the board to call Representative Ross Hunter to request additional funds in the new budget. Smith shared a few items from the Washington Roundtable study: in Washington we have 25,000 jobs with key skills that have been open for more than 90 days, and that number will double in five years. The study indicates expanded university capacity would have a positive impact on those numbers. Smith would like to host a King County legislator meeting with students.

*Private:* Bob Craves reported on a brainstorming meeting with Pyramid around fundraising. The group requested the board define what qualifies as a major gift. Grants from private donors will be requested as part of the strategy. Gaffney recommended WSOS participate in the Seattle Foundation Give Big program. Smith recommended a fundraising consultant be hired as soon as possible. Harris recommended we have a "WSOS face" that shows we are Washington State-focused.

Current Resources and Resourcing Model: Joe Gaffney shared with the board information on College Success Foundation, including, organizational charts and composition of the CSF Board and its committees. Gaffney expects to have a new CSF President & CEO by the end of June 2013. He would like this boards chair to participate in the interview process for the new CEO.

The board went into executive session at 3:40 p.m.

Respectfully submitted,  
Rebecca Swartz



## **Combined Recommendations and Observations UW WSOS Scholars and Leadership Roundtables**

**May 22, 2013**

The following feedback is summarized from the Student Roundtable and Leadership Meeting held at the University of Washington - Seattle. These events were attended by Washington State Opportunity Scholars, state legislators, UW administrators, WSOS board members, College Success Foundation board members and Foundation representatives.

- **More Internships Needed**

- Connect WSOS Scholars to paid internships. (scholar recommendation)
- Increase accessibility to internship opportunities and have those opportunities listed in an easy to find space online so that scholars do not have to spend hours searching for a paid internship. (scholar recommendation)
- Provide paid internship experiences that allow scholars to not have to work a separate job and allow them to learn how the content they are learning applies to the real world. (scholar recommendation)
- Create more paid internships, especially during the summer, to ensure low-income STEM students have the money they need to meet their expenses and have the applied learning opportunities that internships afford. (administrator recommendation)

- **More Research Experiences Needed**

- Connect WSOS Scholars to paid research experiences, especially first-year students and sophomores. (scholar recommendation)
- Create more paid research experiences that will preclude WSOS Scholars from having to work a separate job and that will enable them to learn the real world applications of their studies. (scholar recommendation)
- Enlist professors and graduate students to serve as professional and academic mentors to increase interest and retention in STEM field studies. (scholars recommendation)
- Increase WSOS award, building in a required research experience to better anchor scholars to their majors and to serve as a launching pad for their careers; use Mary Gates Research Scholarships, ranging between \$2,000 and \$4,000, as an example. (administrator recommendation)

- **More Supports Needed**

- More supports are needed for students who enter STEM majors to ensure they complete their degrees, including mentoring, support groups or clubs and other accessible resources on their own campus. (administrator recommendation)
- More wrap-around supports are needed for STEM-related majors, both on campus and online, so that students are able to surmount the many obstacles of pursuing and obtaining a STEM degree. (legislator recommendation)

- **Reassess how the Scholarship is Structured**
  - Consider the trade-off between the number of awards and the size of awards. (administrator recommendation)
  - Collect more statistical data on impact, based on how the scholarship is structured. (administrator recommendation)
  - Change WSOS language that requires state residents to attend high school in WA; instead, require recipients to be WA residents. (administrator recommendation)
- **Importance of Faculty and Teachers**
  - Teachers are incredibly powerful when it comes to the impact on a student's interest in STEM and their belief about their ability to be successful in STEM. (scholar recommendation)
  - Ensure the teachers, of both high school and college, are aware of the WSOS and are prepared to equip students with the information they need to pursue it. (scholar recommendation)
  - Ensure teachers have received the appropriate training to teach engaging, authentic lessons that connect content to real world applications. (scholar recommendation)
- **Greater Outreach to Middle School and High School Students**
  - Require WSOS Scholars to serve as an ambassador for the WSOS at their high school and, more importantly, to share with younger students information about their majors and career paths. (scholars recommendation)
  - Outreach to high school and middle school students who are identified as being interested in and/or academically excelling in STEM content. (scholar recommendation)
  - Outreach to college students who have overcome personal obstacles and may have a difficult time paying for college, i.e. first generation, health concerns, etc. (scholar recommendation)
  - Use solution-based science as a strategy to inspire young people to want to enter STEM careers; a range of scientific approaches can be leveraged to inspire kids' discovery of solution-based science. (administrator recommendation)
- **Competitive Majors and Capacity Concerns**
  - Increase institutional capacity (seats) in competitive majors so that passionate and capable students are not turned away from competitive STEM majors. (scholar recommendation)
  - "B" and some "C" students could make it through STEM majors, but they are weeded out because of limited departmental capacity. (administrator observation)
  - Assess the incremental costs to families and students of inaccessibility to desired majors. (administrator recommendation)
  - Scholarships are important to ensure more students complete STEM degrees, but the lack of institutional capacity - especially at the UW, WSU and Western - remains the greatest challenge to increasing degree production. (administrator observation)
  - A greater percentage of PELL-eligible students (48%) are turned away from engineering programs compared to non-PELL-eligible students (24%) according to a recent study completed at the UW which revealed these disparities. (administrator observation)
- **Increase Legislative Support for WSOS and STEM in General**
  - Showcase entrepreneurial student STEM-related projects in Olympia to demonstrate that students are starting small businesses as a result of their STEM studies. (legislator recommendation)

- Create a major media campaign about WSOS and STEM education to generate more legislative support. (legislator recommendation)
- Require all WSOS recipients to write their legislators to thank them for the scholarship. (administrator recommendation)
- **Create an Integrated STEM Pipeline**
  - Develop a STEM opportunity clearinghouse that includes scholarships, internships, job opportunities, etc. (legislator recommendation)
    1. Support SB5754 which would create this kind of STEM clearinghouse through the Workforce Development Board (currently geared towards dropouts, but the focus could be broadened).
    2. Support HB1872 which would support a STEM alliance across the state to be created by WA STEM.
  - Acknowledge and address the systemic problem: no one has ownership of the STEM pipeline, and therefore it remains fractured. More ownership and accountability is needed to create an integrated STEM-focused P-20 system in our state; use the WSOS as a forcing function to create more systems coherence. (legislator recommendation)
  - Work with the National Science Foundation (NSF) to create a STEM consortium in WA similar to what exists in CA to create more integration and to better bridge the transition points between K-12 and higher ed. Contact at NSF for consortia work is Duncan McBride. (administrator recommendation)







## Cohort 2 Applicant Follow Up and Future Promotion Strategies June 2013

At the WSOS Board request of the March Board meeting, the College Success Foundation (CSF) Scholarship Services staff followed up with principals and scholarship counselors at high schools which had a decrease of seven or more applications submitted between year 1 (cohort 1) and year 2 (cohort 2).

Twenty high schools were identified and contacted. Thirteen high school representatives responded.

Reasons for Decline in Applications	
Students Procrastinated	46% (6)
Different Application Deadline	30% (4)
Essays	8% (1)
Lack of staff to promote WSOS	8% (1)
Other	8% (1)

CSF Scholarship Services staff also followed up with principals and scholarship counselors of high schools which had exhibited an increase of five or more applications submitted between year 1 (cohort 1) and year 2 (cohort 2).

Twenty high schools were identified and contacted. Seventeen high school representatives responded.

Reasons for Increase in Applications	Percentage
Coordinated Effort	65% (13)
Scholarship Website (combined strategy in 3 cases)	25% (5)
Video Announcements	5% (1)
Unknown	5% (1)
Email Listserv (combined strategy)	5% (1)
Remind 101 Texting Service (combined strategy)	5% (1)
Flyers in Science Lab	5% (1)

Combined strategies included:

- Coordination and website
- Coordination and video messaging
- Email Listserv and "Remind 101" texting service
- Website and flyers posted in science labs

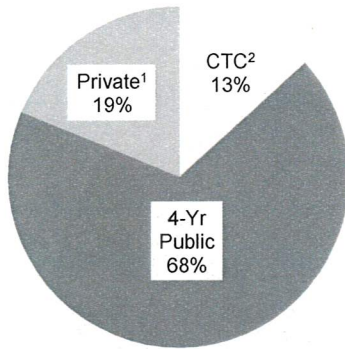
**CSF will employ the following strategies to promote the increase in the number of applicants in 2014:**

- Early promotion of application period and deadline for submission in advance of the application going live.
- Extend the application deadline to allow for greater time to complete the application without jeopardizing the ability to select recipients and send out select notifications in May.
- Reduce the number of essays to one.
- Continue to utilize print media, video promotions, social media, Facebook advertising, media relations, scholar profiles, and public service announcements to promote WSOS.
- Continue to provide eblast notification and frequent reminders to promote WSOS to high schools, colleges, college access providers, youth development organizations and partners.
- Continue to provide electronic collateral promotion materials for use by schools and colleges (i.e., posters and post cards)
- Provide a list of best practice strategies to high schools and institutions to increase the number of applicants (i.e., website announcements, development of listserv of seniors, use of texting service, assigning essays in classes, coordination of scholarship application nights supported by staff and partners).

## WSOS Cohort 2 Final Selects

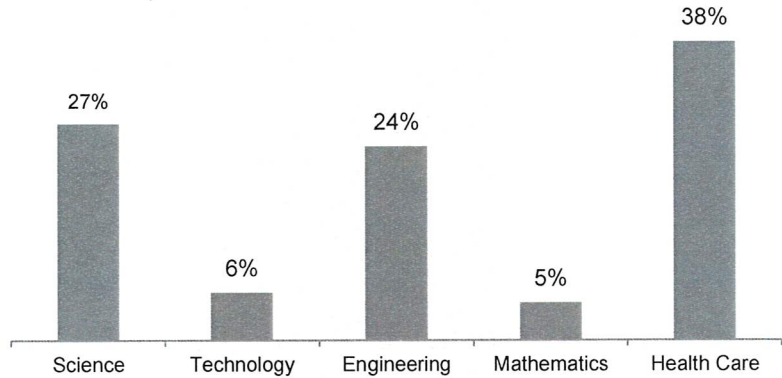
In total, 778 scholars were selected for Cohort 2 of the Washington State Opportunity Scholarship (WSOS).

### College Type

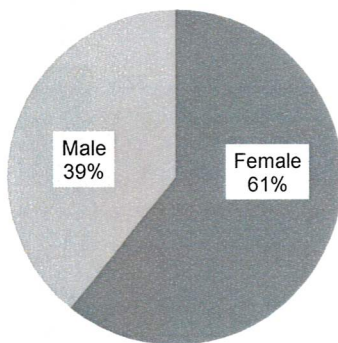


<sup>1</sup>Private or Independent College or University  
<sup>2</sup>Community or Technical College

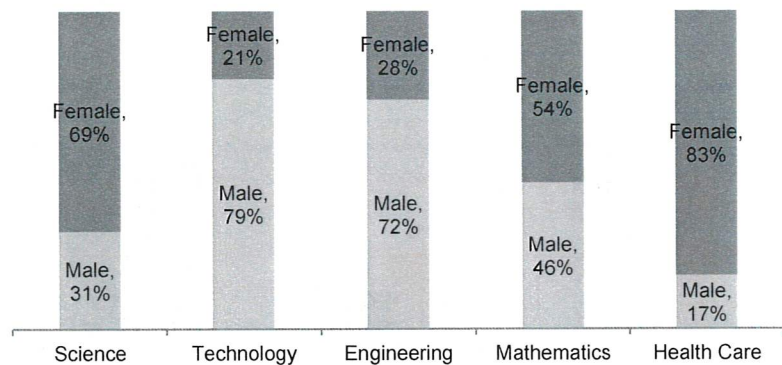
### Field of Study



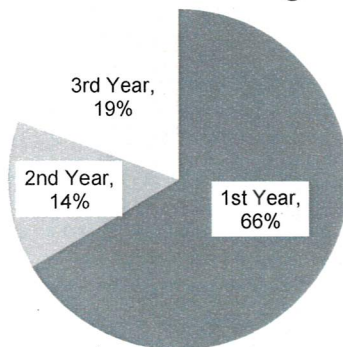
### Gender



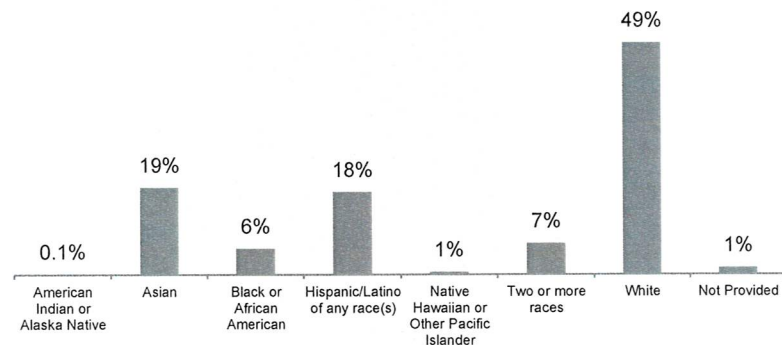
### Field of Study by Gender



### Fall College Class Standing



### Race or Ethnicity



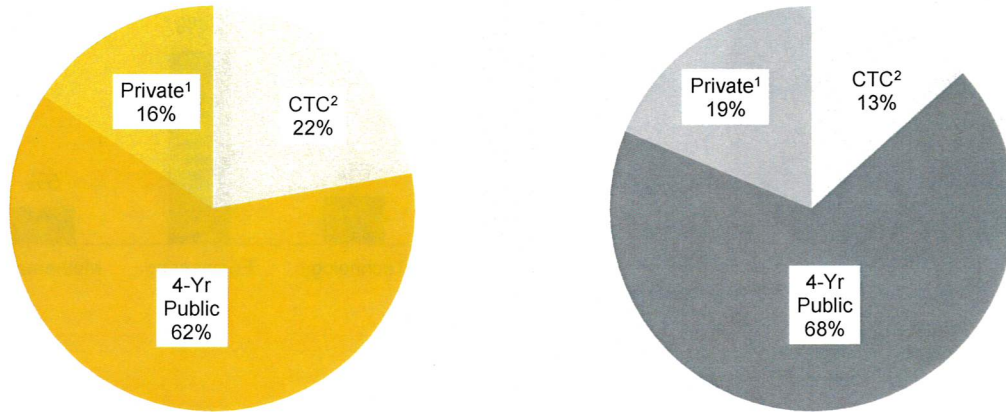


# WSOS C1 vs. C2 Final Selects

In total, 3,045 scholars were selected for Cohort 1 and 778 scholars were selected for Cohort 2 of the Washington State Opportunity Scholarship (WSOS).

Cohort 1 = ■ Cohort 2 = ■

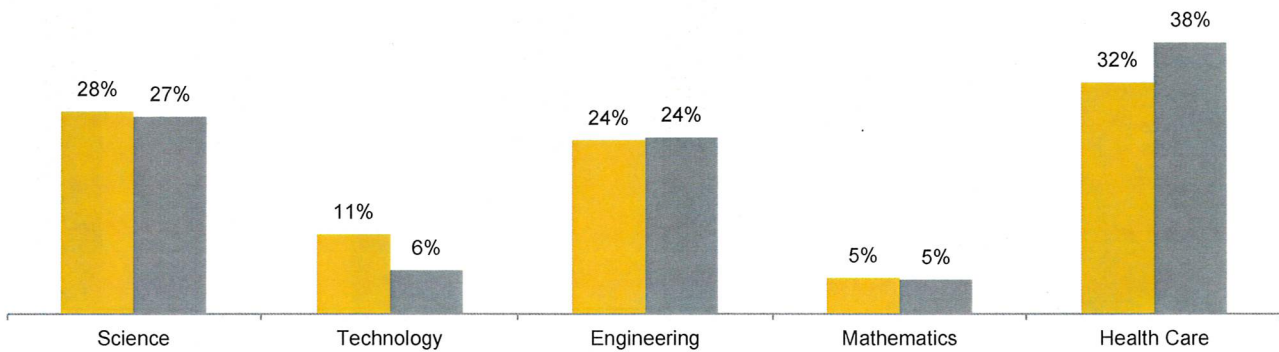
## College Type



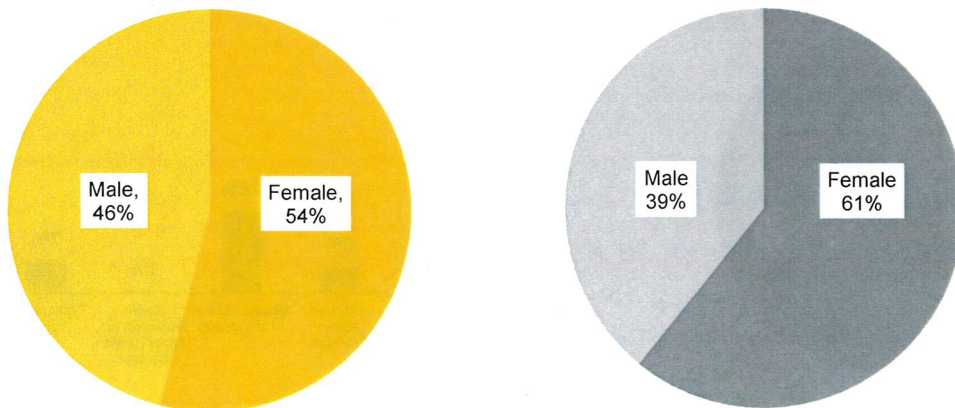
<sup>1</sup>Private or Independent College or University

<sup>2</sup>Community or Technical College

## Field of Study



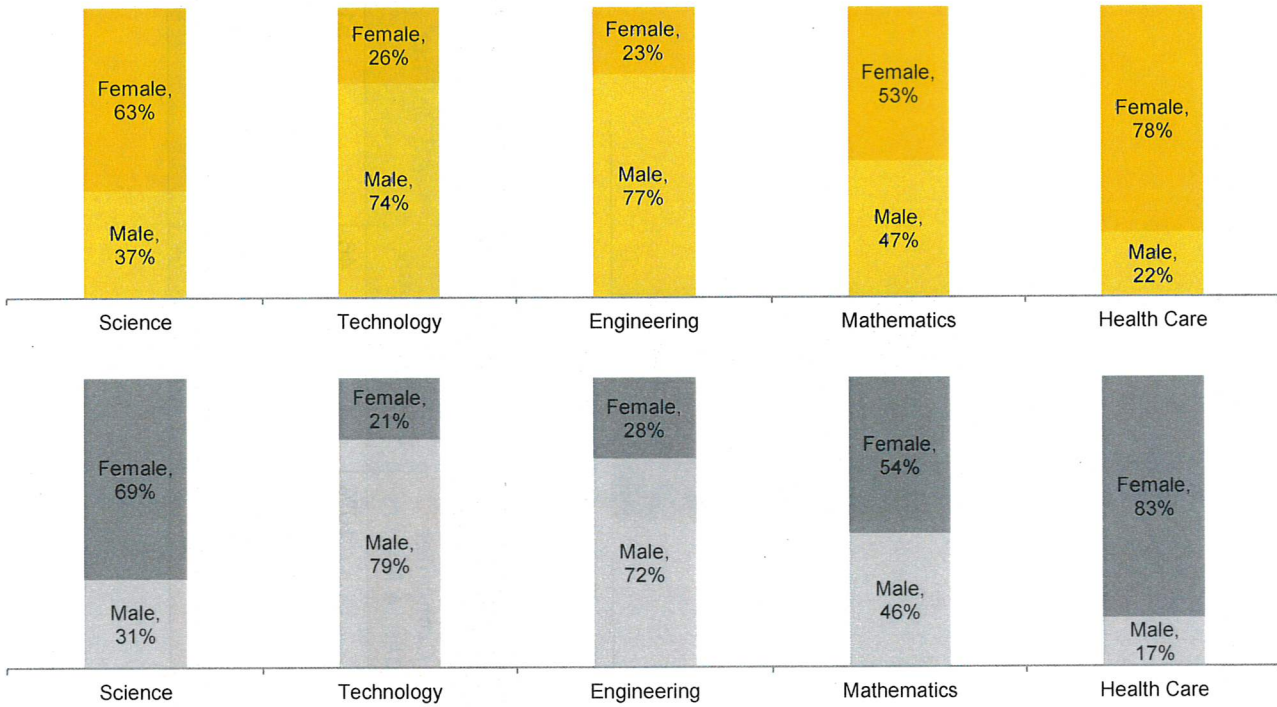
## Gender



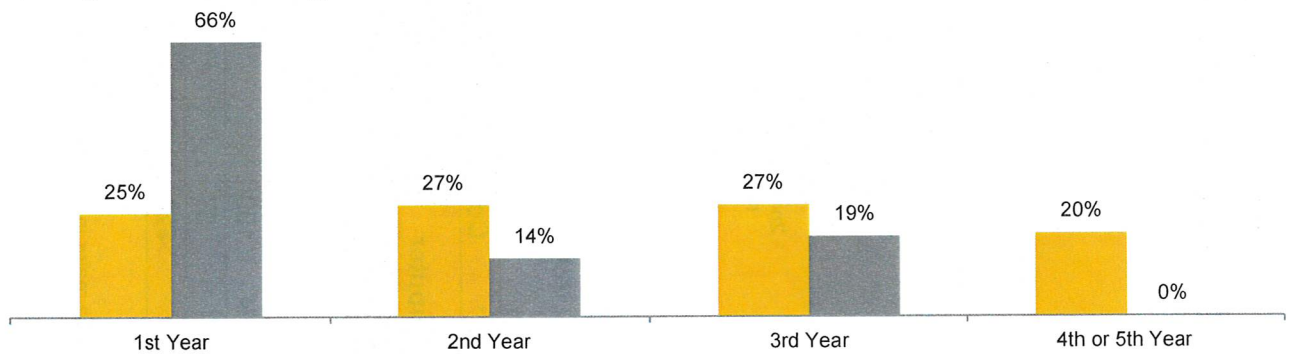
# WSOS C1 vs. C2 Final Selects

Cohort 1 = ■ Cohort 2 = ■

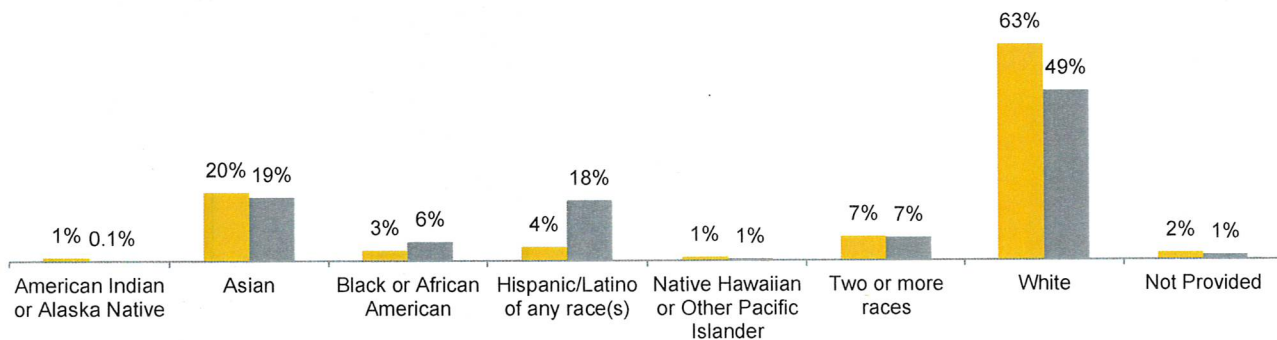
## Field of Study by Gender



## Fall College Class Standing

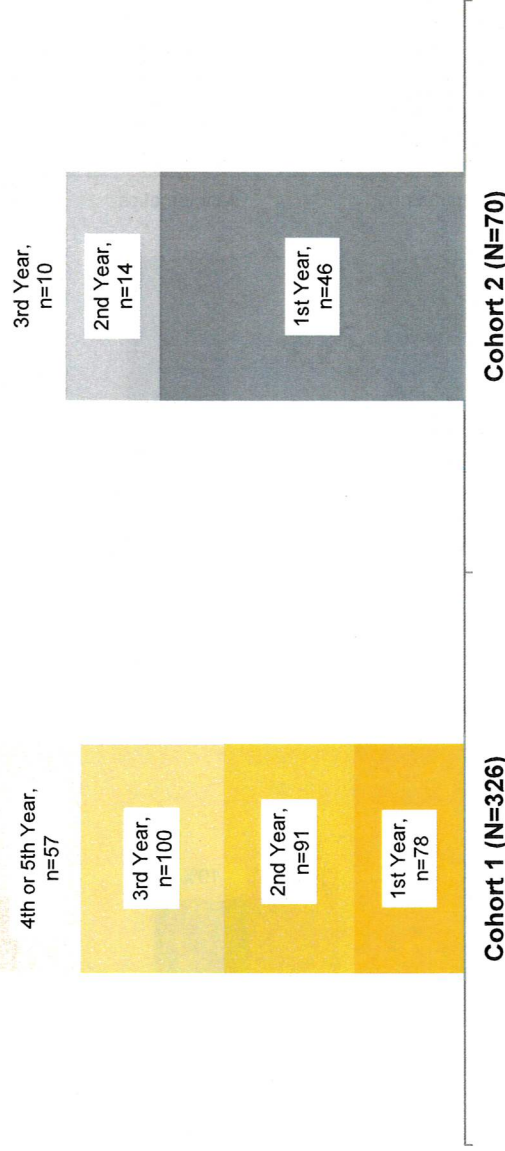


## Race or Ethnicity





# WSOS C1 vs. C2 Final Selects Computer Science Majors<sup>1</sup> by College Class Standing<sup>2</sup>



Fall College Class Standing	Cohort 1 Selected Scholars			Cohort 2 Selected Scholars		
	Computer Science Majors	All Selects	% All Selects Computer Science Majors	Computer Science Majors	All Selects	% All Selects Computer Science Majors
1st Year	78	775	10%	46	517	9%
2nd Year	91	824	11%	14	110	13%
3rd Year	100	836	12%	10	151	7%
4th or 5th Year	57	610	9%	NA	NA	NA
<b>Total Computer Science</b>	<b>326</b>	<b>3,045</b>	<b>10.7%</b>	<b>70</b>	<b>778</b>	<b>9.0%</b>

<sup>1</sup>Students self-report their actual or intended college major in the scholarship application.

<sup>2</sup>College Class Standing refers to student-reported class standing in fall 2012 for Cohort 1 and transcript verified class standing in fall 2013 for Cohort 2.

## 2012-2013 SNAPSHOT

**\$3,000,000** disbursed to Cohort 1 scholars

**\$760,000** disbursed to Cohort 2 scholars

**800** calls to student support line

**850** interactions with help desk

Out of **5,680** applicants, **3,045** selected for Cohort 1

Out of **1,488** applicants, **788** selected for Cohort 2

**6,500** scholars reached through support services

**500** partners reached through support services

**90,178** unique visits to WSOS website

**9,453** Twitter followers and **3,009** Facebook likes

**61** media stories placed

Over **1,300** scholars surveyed about their needs



## SCHOLARSHIP ADMINISTRATION SNAPSHOT

College Success Foundation has served as the administrator of the Washington State Opportunity Scholarship, providing scholar recruitment and management, wraparound support services, support to board members and other key leadership, and investment management. **Below is an overview of items delivered between February 2012 and May 2013.**

### DIRECT SCHOLARSHIP MANAGEMENT

The program management and coordination; scholar selection, awarding, renewal, and disbursements; and data reporting.

- Established eligibility criteria and scholarship model
- Managed application process and selection of two cohorts
- Developed scholarship website
- Created CSF data warehouse

### WRAPAROUND SUPPORTS

The wraparound service supports to scholars, including pipeline from middle school to career planning.

- Expanded STEM networks
- Targeted support to underrepresented students
- Conducted STEM awareness campaign
- Conducted environmental scan
- Created STEM resource list
- Held six scholar receptions
- Conducted scholar needs assessment

### INVESTMENT MANAGEMENT

The management of investment accounts.

- Established investment accounts for scholarship fund and endowment fund
- Established Investment Committee and provided updates
- Monitored investments

### LEADERSHIP SUPPORT

The support for key leaders involved in scholarship, being liaison to board members, legislators, key corporations, and consultants.

- Planned, prepared, and coordinated five board meetings
- Coordinated meetings with legislators
- Testified on House Bill 1251, increasing size of board
- Served as liaison to Microsoft and Boeing
- Collaborated with consulting teams
- Served as point of contact for State Attorney General's Office
- Prepared reports and analysis in support of board decision-making

### MARKETING AND OUTREACH

The mechanisms to promote the Washington State Opportunity Scholarship to students, academic institutions, and STEM partners.

- E-news and e-blasts
- Scholar profiles
- Application and promotional materials
- Social media and media center
- Eight campus outreach support events
- Vision statement
- 2012 annual legislative report



## COMMUNICATIONS SNAPSHOT

Pyramid Communications has written, produced, and designed a multitude of assets for the Washington State Opportunity Scholarship. In addition to print collateral, video, and photos, we have also provided communications, media, and fundraising counsel; event planning and coordination; and overall project oversight. **Below is a gallery of the items delivered between October 2012 and May 2013.**



### BRAND AND MESSAGING

The stamp on all Washington State Opportunity Scholarship messaging and materials that provides a consistent and recognizable brand.

- Logo
- Tagline
- Messaging framework
- Brand guidelines



### VIDEO AND PHOTOGRAPHY

The dynamic, authentic story of the scholars and supporters of the Washington State Opportunity Scholarship sharing why the scholarship matters in their own words.

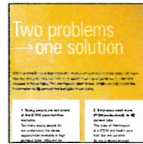
- Overarching scholarship video
- Gallery of scholar portraits
- Washington State University Vancouver event video



### BUSINESS PAPERS

The templates to equip College Success Foundation to apply the Washington State Opportunity Scholarship brand and messaging to its communications.

- PowerPoint master
- Stationery and document template
- Dashboard recommendations



### BACKGROUND MATERIALS

The rationale and benefits of the Washington State Opportunity Scholarship to entice greater investment from funders, advocacy from legislators, participation from students, and connection to employers.

- Brochure
- Legislative report
- At-a-glance one-pager
- Support and success strategies overview
- Map of scholarship distribution
- Visioning report



### EVENTS

The groundwork for outreach and collaboration among local campuses, scholars, board members, and legislators to fortify relationships and solicit feedback directly from scholars and leaders.

- Work plan
- Event scripts
- Nametags
- Posters
- Talking points



### FUNDRAISING

The long view for delivering on the public-private funding partnership by leveraging relationships and resources.

- Fundraising focus group luncheon
- Four-pronged strategy
- Collaboration discussion with WA STEM
- Joan Caine, fundraiser, engaged



## LEGISLATIVE SNAPSHOT

Cocker Fennessy has provided legislative counsel, outreach strategies, and Capitol event planning. **Below is an overview of activities conducted between November 2012 and May 2013.**

### LEGISLATIVE COUNSEL

The strategic approach to promote the scholarship statewide.

- Legislator engagement by region and committee
- Legislator and scholar connection by district
- Materials dissemination

### EVENTS

The venue to connect legislators to scholars.

- Legislative strategy and coordination
- Legislative outreach and follow-up
- Coordination of legislative meetings and Capitol luncheon

### CONTENT

The content to support the scholarship on the legislative stage.

- Legislative testimony
- PowerPoint presentation
- Legislative backgrounder
- Talking points
- Governor and legislator invitations

### MONITORING AND REPORTING

The oversight to keep the scholarship connected to influential legislative activity.

- HB 1251 (Proposed Expansion of WSOS Board)
- Higher Education Committee activity

## MEDIA SNAPSHOT

Mark Funk has provided media strategy, local and statewide coverage of events, coordination of interviews, drafting of press releases, and placement of editorials and news stories in local outlets. **Below is a comprehensive list of the outlets in which stories about the Washington State Opportunity Scholarship have been placed.**



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HOUSE BILL 1251

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State of Washington                      63rd Legislature                      2013 Regular Session

By Representatives Stonier, Carlyle, Seagquist, Harris, Maxwell, Takko, Kochmar, Vick, MacEwen, Fitzgibbon, Morrell, Tarleton, Haler, Riccelli, and Bergquist

Read first time 01/21/13. Referred to Committee on Higher Education.

1            AN ACT Relating to membership on the opportunity scholarship board;  
2            and amending RCW 28B.145.020.

3            BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF WASHINGTON:

4            **Sec. 1.** RCW 28B.145.020 and 2011 1st sp.s. c 13 s 3 are each  
5            amended to read as follows:

6            (1) The opportunity scholarship board is created. The opportunity  
7            scholarship board consists of (~~seven~~) nine members:

8            (a) Three members appointed by the governor. For two of the three  
9            appointments, the governor shall consider names from a list provided by  
10           the president of the senate and the speaker of the house of  
11           representatives; and

12           (b) (~~Four~~) Six foundation or business and industry  
13           representatives appointed by the governor from among the state's most  
14           productive industries such as aerospace, manufacturing, health  
15           sciences, information technology, and others. The foundation or  
16           business and industry representatives shall be selected from among  
17           nominations provided by the private sector donors to the opportunity  
18           scholarship and opportunity expansion programs. However, the governor

1 may request, and the private sector donors shall provide, an additional  
2 list or lists from which the governor shall select these  
3 representatives.

4 (2) Board members shall hold their offices for a term of four years  
5 from the first day of September and until their successors are  
6 appointed. No more than the terms of two members may expire  
7 simultaneously on the last day of August in any one year.

8 (3) The members of the opportunity scholarship board shall elect  
9 one of the business and industry representatives to serve as chair.

10 (4) Five members of the board constitute a quorum for the  
11 transaction of business. In case of a vacancy, or when an appointment  
12 is made after the date of expiration of the term, the governor or the  
13 president of the senate or the speaker of the house of representatives,  
14 depending upon which made the initial appointment to that position,  
15 shall fill the vacancy for the remainder of the term of the board  
16 member whose office has become vacant or expired.

17 (5) The opportunity scholarship board shall be staffed by the  
18 program administrator.

19 (6) The purpose of the opportunity scholarship board is to provide  
20 oversight and guidance for the opportunity expansion and the  
21 opportunity scholarship programs in light of established legislative  
22 priorities and to fulfill the duties and responsibilities under this  
23 chapter, including but not limited to determining eligible education  
24 programs for purposes of the opportunity scholarship program. Duties,  
25 exercised jointly with the program administrator, include soliciting  
26 funds and setting annual fund-raising goals.

27 (7) The opportunity scholarship board may report to the governor  
28 and the appropriate committees of the legislature with recommendations  
29 as to:

30 (a) Whether some or all of the scholarships should be changed to  
31 conditional scholarships that must be repaid in the event the  
32 participant does not complete the eligible education program; and

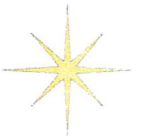
33 (b) A source or sources of funds for the opportunity expansion  
34 program in addition to the voluntary contributions of the high  
35 technology research and development tax credit under RCW 82.32.800.

--- END ---



PYRAMID COMMUNICATIONS

SIRIUS ADVICE  
*Fundraising and Nonprofit Management Counsel*



## **QUALIFICATIONS TO:**

**WASHINGTON STATE OPPORTUNITY  
SCHOLARSHIP BOARD**

Date: June 13, 2013

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## **WHO WE ARE**

**Pyramid Communications** is a full-service strategic communications and public affairs firm. For over 20 years, we've partnered with nonprofits, foundations, and government entities working in education, the arts, health, conservation, and on Native issues. We provide a wide range of services—from strategic communications, government, and media relations, to creative campaigns, editorial, graphic design, and interactive strategy and development. In all of our work, we're focused on providing sustainable tools to organizations driving positive social change.

**Sirius Advice** supports the efforts of nonprofits in building fund development capacity and achieving goals through strong and diversified philanthropy. We are inspired by the accomplishments of excellent nonprofit organizations through all sectors of our society and are dedicated to providing counsel that furthers their impact.

Together, we bring a commitment to causes and a long history of experience in helping our clients reach their fundraising and communications goals.

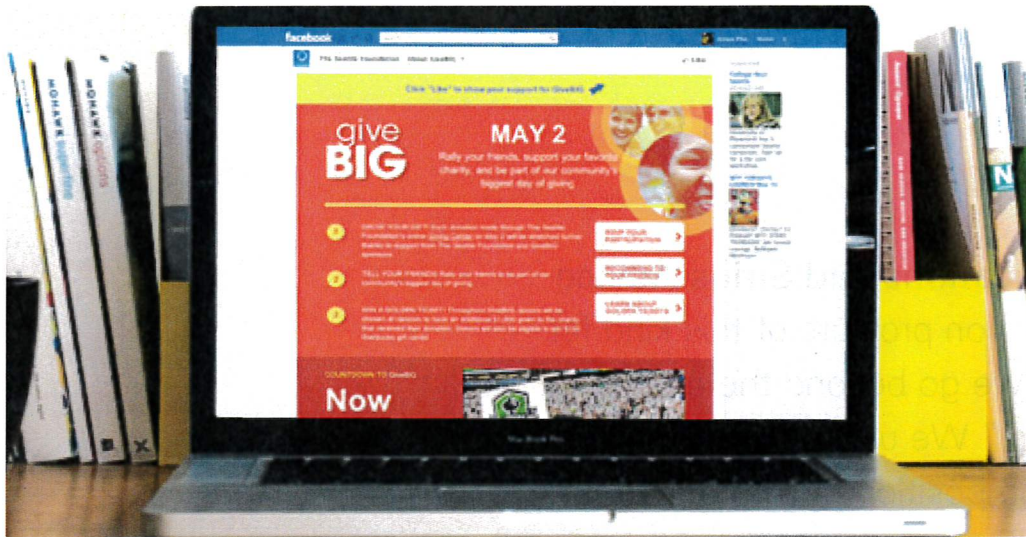




## **OUR APPROACH**

Pyramid Communications and Sirius Advice have been partnering on projects of this kind for 10 years. Together, we go beyond the question of “Whats the number?” We understand it’s crucial to incorporate story and position from the start, and our approach yields not only a strong assessment of the community’s capacity for support, but also a strategic recommendation on campaign position and key messages that will resonate.

We have had the opportunity to work together on fundraising and capital campaigns for the Washington Low Income Housing Alliance, Plymouth Housing Group, Capitol Hill Housing, and more. In the pages that follow, you will find a sampling of Pyramid and Sirius Advice’s work on fundraising and capital campaigns for clients large and small.



give  
**BIG**

 The Seattle Foundation

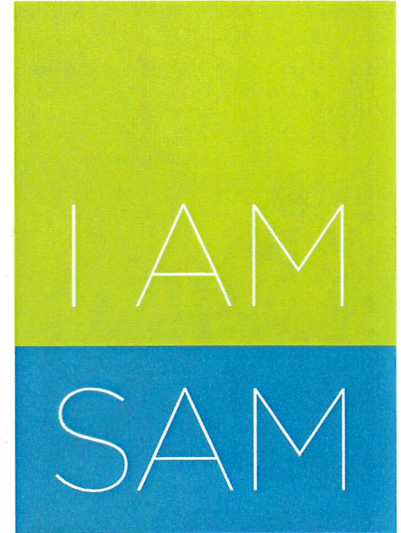
## THE SEATTLE FOUNDATION

After raising \$3.6 million in one day and being named “the best use of social media” in 2011, we’ve since helped The Seattle Foundation make the biggest day of giving in King County—GiveBIG—even bigger. In just 24 hours, the online challenge raised \$7.4 million for 1,200 nonprofits last spring and in 2013, the number increased to \$11.1 million—a total of \$22.1 million over three years. The Foundation provides a matching pool designed to motivate local giving even further.

After architecting the first GiveBIG campaign in 2011, we have since re-imagined the creative strategy and built new partnerships that leveraged a million-dollar campaign across web, social media, mobile, print, TV, and radio channels. In 2012, we even trended #1 on Twitter on the big day. The Sounders FC joined for a third year this year bringing their devoted fans. In 2012, The Seattle Foundation’s investment of \$120,000 returned a total promotional value of \$2.1 million and reached nearly 137 million individuals.

### SERVICES

- Advertising
- Campaign and creative strategy
- Editorial
- Graphic design
- Interactive strategy
- Media relations
- Social media strategy
- Sponsorship strategy



## SEATTLE ART MUSEUM

Seattle Art Museum's (SAM) multi-year expansion included three major capital projects totaling \$180 million. Seeking to build a broad base of lasting support, SAM partnered with Pyramid to conduct a community campaign that educated the public about the museum's transformation and encouraged support for its capital projects throughout the city's diverse communities.

Pyramid began work with an extensive research process that included focus groups, polling, interviews with diverse opinion leaders and SAM staff, and online surveys. The goal was to identify what it would take to engage people from the community who weren't already SAM members. As a result, Pyramid developed a comprehensive campaign plan and messaging to reach potential members and donors. We developed a campaign theme—I am SAM—and developed and implemented a full suite of campaign creative, including advertising, events, and more. We helped create a tangible sense of community ownership and pride in the museum and, by developing a new website and various campaign materials, gave people an easy way to contribute to and interact with the campaign.

### SERVICES

- Advertising
- Brand strategy and expression
- Campaign and creative strategy
- Earned media
- Editorial
- Event planning
- Graphic design
- Interactive
- Research



## UNIVERSITY OF PUGET SOUND

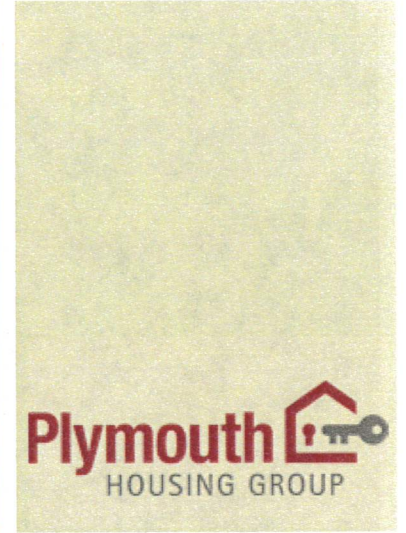
In 2011, University of Puget Sound launched the public phase of a multi-year campaign to invest in the future of the University, and chose Pyramid as its partner. Together we tackled the bold assignment of devising a campaign that could raise \$125 million and engage alumni, potential donors, parents, students, and faculty with new energy.

Pyramid joined UPS in an effort to bring the Puget Sound community together by establishing an emotional connection based on shared values that cut across decades. Our work together was built upon three interrelated goals: increased engagement, inspired investment, and raised visibility. We began by creating an inspiring, energetic, and memorable campaign theme—One [of a Kind]—that expresses the singularity of the place, the people, and their accomplishments.

Celebratory and aspirational, the One [of a Kind] theme creates an emotional hook for the campaign. Individual stories about the lives and impact of the Puget Sound community provide the backbone for the campaign theme. Throughout the course of the campaign, these stories will build the case for support and create an emotional journey for audiences. The theme anchors campaign communications and provides a road map for the development of language and design as the campaign unfolds over four years.

### SERVICES

- Brand strategy and expression
- Campaign strategy and implementation
- Editorial
- Event planning
- Graphic design
- Interactive
- Social media
- Strategic counsel
- Video



## **PLYMOUTH HOUSING GROUP**

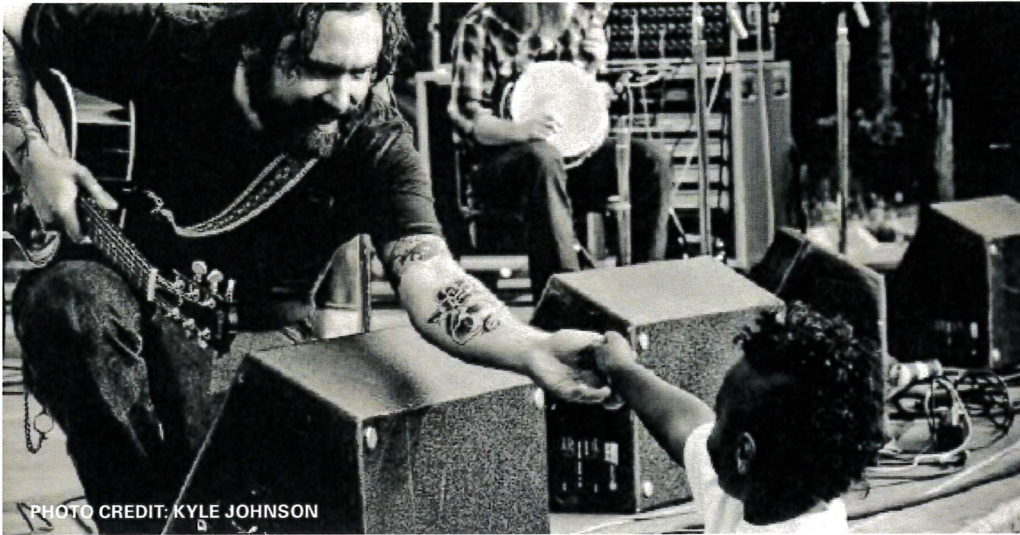
Plymouth Housing Group works to eliminate homelessness and address its causes by preserving, developing, and operating safe housing with supportive services, focusing on chronically homeless men and women throughout the downtown Seattle area. In 2003, Plymouth embarked upon its first capital campaign since its founding in 1980, resulting in two renovated buildings and one newly constructed building, providing nearly 300 new single occupancy apartments for formerly homeless individuals, including homeless seniors and veterans.

Prior to the campaign, Pyramid and Sirius Advice partnered to conduct a feasibility study to set the stage for a successful campaign. Sirius Advice went on to provide counsel through the span of the campaign from 2004 to 2007. In addition to raising the total project goal of \$52 million, including \$12 million in private funding, the capital campaign enabled Plymouth Housing Group to significantly boost organizational awareness, dramatically expand the donor base, and establish new partnerships.

### **SERVICES**

Campaign counsel

Research



## **KEXP**

Seattle's independent, listener-supported radio station is breaking the boundaries of traditional radio by bringing a huge array of music into people's lives, while connecting with the local and national music community through free performances, podcasts, and remote broadcasts all over the world. Since 2008, Pyramid has partnered with KEXP and has offered a wide net of communications support—website redesign, media relations, messaging, and more. Currently, Pyramid provides strategic support on all communications related activities, forging and cementing a long-term partnership, and serves as a close ally in KEXP's effort to build a new home at the Seattle Center.

In December 2010, Seattle Mayor Mike McGinn and Councilmember Sally Bagshaw announced their recommendation for KEXP to build a new home at Seattle Center's Northwest Rooms, a move that will revitalize the Seattle Center campus and bring new energy to the Uptown neighborhood. In shaping and bringing the new home vision to reality, Pyramid has been an integral part of the team, navigating everything from garnering public support to providing strategic counsel on the lease agreement and facilitating a visioning process. Seattle Center and the City Council's unanimous acceptance of the lease allows KEXP to move forward to build their new home.

### **SERVICES**

- Brand strategy
- Communications strategy
- Earned media and media relations
- Editorial
- Government relations
- Interactive
- Partnership support
- Strategic planning and facilitation



PHOTO CREDIT: THE SEATTLE TIMES



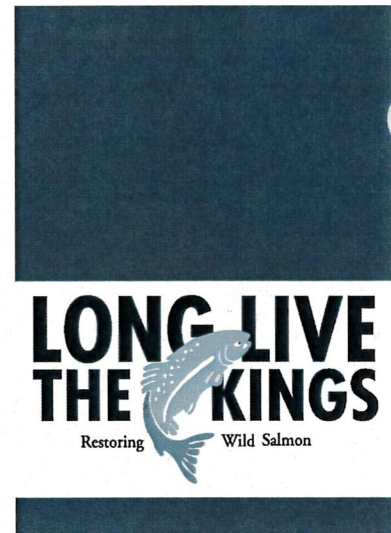
## **MERCER SLOUGH ENVIRONMENTAL EDUCATION CENTER**

Located on a biologically diverse 320-acre fresh water wetland reserve in the heart of urban Bellevue, the Mercer Slough Environmental Education Center is a collaboration between the City of Bellevue, the Pacific Science Center, and Puget Sound Energy. The Center serves children ages four through eighteen in experiential education focusing on environmental stewardship, wetland ecology, and nature awareness. Sirius Advice was selected to develop and coordinate a capital campaign to expand the facility and its programs.

Under Sirius Advice's counsel, the project successfully reached its campaign goal of \$13 million, including \$6 million in private funding. The campaign was designed around a unique public/private/corporate partnership focused on raising awareness of the Center as well as securing the campaign fundraising goal.

### **SERVICES**

Campaign counsel  
Research



## LONG LIVE THE KINGS

Long Live the Kings (LLTK) contracted with Pyramid Communications to undertake a comprehensive strategic planning exercise. Out of that process, Pyramid provided a series of recommendations to the LLTK board, including the need to conduct a fundraising assessment. Per Pyramid's advice, LLTK contracted with Sirius Advice to move forward with a fundraising assessment in an effort to build its major gifts, develop fundraising and outreach events, and build internal capacity.

As a component of the fundraising assessment, thought leaders and community members outside of the environmental space were asked to participate in a series of brainstorming sessions to enlist their feedback and help broaden LLTK's reach. Throughout the process, Sirius Advice provided invaluable counsel to LLTK on board engagement, capacity building, and strategies for making greater use of its existing donors. As a result, LLTK was able to grow its number of major donors, increase gift amounts, and invest in a communications staff person to strengthen LLTK's relationship with its donor base.

### SERVICES

- Capacity building
- Fundraising assessment
- Fundraising plan



# 100 YEARS 100% SEATTLE



## PIKE PLACE MARKET

Gearing up for its Centennial in 2007, Seattle's Pike Place Market was still viewed as "the soul of Seattle." At the same time, the Market needed to raise awareness of the necessity for major structural improvements to its facilities. With a vote on capital improvements slated for 2008, it was important to tell the story of the Market's Centennial in a way that increased community support.

To achieve this, Pyramid collaborated with Market staff to build a comprehensive community awareness campaign that was festive, informative, educational and true to the personality of the Market. During the six month campaign, we helped raise money and in-kind support, created and implemented direct mail and interactive strategies, produced special events, captured media attention, and engaged opinion leaders. To cap off the festivities, we organized a concert that attracted more than 10,000 people. The campaign engaged people from all walks of the city's life—from government officials to preschoolers from the Market's daycare center—and ventured beyond its own nine acres to have a presence in every neighborhood of Seattle.

### SERVICES

- Campaign and creative strategy
- Community outreach
- Earned media
- Event planning
- Graphic design
- Opinion research
- Sponsorship cultivation
- Strategic planning



## **CONCLUSION**

We bring a unique team with impressive skill sets and a 10-year history of collaboration. We come together because we believe in the importance of structuring a campaign that, from the start, marries careful planning and deep analysis with storytelling—allowing us to build capital campaigns and other fund development efforts that resonate with a full spectrum of potential donors.

Please reach out to John Hoyt at 206.792.0409 or Joan Caine at 206.380.2795 with any questions. We look forward to hearing from you.

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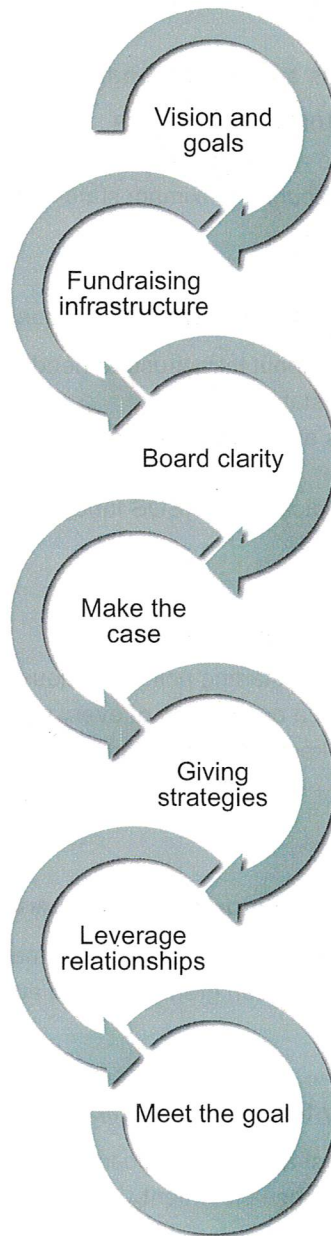
WASHINGTON STATE  
**OPPORTUNITY**  
SCHOLARSHIP

Supporting the next generation of STEM & health care leaders

## WSOS FUNDRAISING ACTION PLAN

AS OF 6/26/2013

### KEY ELEMENTS OF THE WSOS FUNDRAISING ACTION PLAN



## KEY ELEMENTS OF THE WSOS FUNDRAISING ACTION PLAN

### VISION AND GOALS

#### **Create fundraising vision – What does success look like?**

- When WSOS is successful, 20 years from now, what will we have achieved in Washington State?
- How does WSOS become a national model?
- How does Washington become a magnet state for promising STEM students? Employers?

#### **Develop clear fundraising goals and corresponding timeline**

- Confirm need to raise \$10M by end of 2013
- Determine amounts to be raised annually and structure to do it
- Plan how to guarantee securing maximum state match

### FUNDRAISING INFRASTRUCTURE

#### **Determine fundraising leadership necessary for successful campaign**

- WSOS needs to be clear about infrastructure needed to undertake one of the largest fundraising efforts in the state
- Once fundraising targets are in place, the infrastructure needed to be successful can be determined
- Likely to need a team dedicated to WSOS fundraising

### BOARD CLARITY

#### **Give the board clarity on fundraising expectations**

- Use June board meeting as starting point to seriously focus on fundraising
- Have fundraising become a central part of every meeting moving forward
- Need to address how to keep board regularly updated about fundraising progress/needs
- Identify initial asks

### MAKE THE CASE

#### **Need to address the promise of mentorship and its part of the fundraising narrative**

- Mentorship's vision, planning, infrastructure, and manpower are still missing
- Mentorship is the bridge between graduation and employment; should accompany funding asks

#### **Provide language and strategy for major gift solicitations**

- Must be successful as first asks set a precedent
- Need to have compelling case statement

## **GIVING STRATEGIES**

### **Develop workplace-giving strategies**

- Determine most effective models
- Focus on Boeing, Microsoft, and Puget Sound Energy
- Develop list of second tier companies to focus on

## **LEVERAGE RELATIONSHIPS**

### **Understand continuum of STEM education and mentorship in WA**

- Determine how WSOS and WA STEM can align around messaging and fundraising
- Explore joint fundraising opportunities with WA STEM

### **Understand how WSOS fits into CSF's general fundraising and how it stands alone**

- Need to identify what WSOS can leverage within CSF
- Need to know what WSOS should pursue as a stand-alone with specific aims





# WASHINGTON STATE OPPORTUNITY SCHOLARSHIP PLAN FOR FUNDRAISING RECOMMENDATIONS



## DISCOVERY AND PLANNING

**Phase I: (completed)** Conducted initial focus group with Bob Craves and community leaders, held strategy session between WSOS and WA STEM, explored and researched possible WSOS campaign co-counsel resulting in contract with Joan Caine.

**Phase II: (current)** Continued research into four areas of interest to yield fundraising recommendations and actionable items. Likely completed prior to September board meeting.

### 1. MAJOR GIFT SUPPORT STRATEGY

#### Activities:

- Joan Caine and Pyramid to develop strategy and rationale for major gifts
- Research targets, giving timeline, and tools needed
- Conversations with board members about involvement in making "asks"

#### Result/Benefit:

- Targeted plan with recommendations on major gift strategy and timeline
- Actionable plan that leads to funds raised in 2013 and beyond
- Recommended internal structure for implementing fundraising

### 2. EMPLOYER DRIVEN FUNDRAISING

#### Activities:

- Explore engaging STEM & health care employers statewide in giving campaign
- Develop employer/employee giving model following research on what other effective national models exist
- Determine if effort could be based on some form of United Way, Microsoft 1-2-4, or GiveBig models
- Research if first wave of engagement could be around mentorship and internships

#### Result/Benefit:

- Recommendation on feasibility of employee/employer campaign model
- Possible test with one or two companies in the fall
- Company engagement, sending important message to legislature and students

### 3. COLLABORATION WITH WA STEM

#### Activities:

- Continue to explore areas of collaboration with WA STEM (including fundraising, communications and marketing, research, and corporate engagement) through meetings and research
- Explore telling seamless story of continuum of STEM needs and opportunities

#### Result/Benefit:

- Targeted plan with recommendations on aligned funding strategies and timeline
- Coordinated plan that keeps organizations from stepping on each others' toes
- Added strength through actionable plan that benefits STEM in Washington state

### 4. STATEWIDE STEM AWARENESS CAMPAIGN

#### Activities:

- Explore possible ROI on statewide awareness campaign
- Research other effective models conducted around country
- Develop possible campaign framework to put out to bid with companies
- Determine potential costs of campaign

#### Result/Benefit:

- Awareness campaign recommendations including next steps
- Opportunity to position Washington state as national leader in STEM
- Reframes STEM as cutting-edge and desirable
- Company engagement, sending important message to legislature and students

## PRESENT RECOMMENDATIONS AND ACTIONS TAKEN TO DATE AT SEPT. WSOS BOARD MEETING

A framework will be provided that will outline the path to successful fundraising and awareness, increasing engagement for the years to come.





Draft

**Washington State Opportunity Scholarship  
Investment Committee Meeting  
Minutes**

June 17, 2013

Puget Sound Energy Corporate Office, 11<sup>th</sup> Floor  
10885 NE 4<sup>th</sup> St., Bellevue, WA

**Committee Members Present:** Mack Hogans, Bob Moser, George Zinn, Theresa Gillespie, Pete Harvey, Joe Gaffney, and Carolyn Kelly (via speakerphone).

**CSF Program Administrator Staff Present:** John McDowell, John Sparks

The meeting convened at 10:05 am with Mack Hogans, Chairman, presiding.

**I. Introductions and WSOS overview**

As this was the first meeting of the full WSOS Investment Committee, each Committee member and staff gave a brief background introduction of themselves to the other members of the Committee. Mack Hogans presented a brief overview of the WSOS program, its purpose, and proposed financing.

**II. Review of Ten Month YTD 4/30/2013 Investment Results & Financial Projection Projections**

John M. reviewed WSOS investment results, income statement, and balance sheet as of April 30, 2013 with additional projected results as of June 30, 2013. He noted the investment results are unfavorable as to budget due to investment rates of return lower than what had been budgeted. The investment balances consist of approximately \$10 million each in the regular Scholarship Fund and the Endowment Fund. The Scholarship Fund investment balances are \$3.5 million in a US Bank checking account and \$6.5 million in Oppenheimer, with the \$10 million of Endowment Funds entirely in Oppenheimer.

Funds in US Bank checking account are earning approximately 10 bpts, while the funds invested in Oppenheimer have been conservatively invested in two month T-bills and earning approximately 2 bpts. The funds at Oppenheimer have been conservatively invested in T-bills pending the formation of the WSOS Investment Committee and the hiring of investment managers.

With regard to the remaining State portion of cash contributed of \$3.5 million and future State contributions, Joe G. reviewed the State investment requirements that require State contribution amounts be invested in US Treasuries or State approved banking institutions, as opposed to non-federal fixed income securities or equities. This is an issue for both the Scholarship Fund and the Endowment Fund, but of more concern for the long-term (endowment) portion of WSOS investments. Joe G. said he is working with the State Attorney General to determine a solution to the State requirement relating to State contributed funds that currently exists in the WSOS law and the State constitution.

George Z. asked whether projected scholarship contributions and investment earnings would meet expectations for the WSOS budget, specifically Cohort 2 scholarship award letters. John M explained that Cohort 2 scholarship awards letters have been sent out this month and will cost approximately \$7.4 million over five years. On a cash basis, the scholarship funds available for 2014 will cover the cash outlay for FY 2014, but for accrual accounting purposes the scholarship net assets in the Scholarship Fund portion of WSOS will be in a negative position if the budgeted contributions of \$10 million are not pledged by December 31, 2013. Joe G explained that it is the policy of CSF not to commit scholarship dollars without the funds to cover these commitments and Mack H. stated the WSOS Board would also act with this caution. Terry G. indicated the Board Chairman, Brad Smith, is also aware of the potential for the over commitment of scholarship awards and of the need for fundraising.

### **III. Investment Management Contract with Pugh Capital Management**

John M. indicated that it would be preferable to immediately approve the WSOS engagement of Pugh Capital Management to manage the short-term investment balance of the Scholarship Fund via fixed income instruments with any suggested modifications by the Committee so that funds may begin to be managed by Pugh beginning July 1, 2013.

While the Committee expressed some concern over the projected low rate of return for the Scholarship Funds, due to investments being primarily in money market funds for FYE 2014, it was noted that Pugh is only charging 20 basis points for its fee. In addition, Pugh will only charge this fee on actively managed funds, not on money market fund balances.

Mack H. asked if all had reviewed the draft investment management contract with Pugh. As there was no further discussion or comment, Bob M. moved that WSOS engage Pugh Capital Management for fixed income management of the Scholarship Fund investments; execute a contract with Pugh; and move Scholarship Fund investments to the new custodial account. Joe G. seconded the motion which was approved by a unanimous Committee vote.

While the Committee approved the contract with Pugh, the Committee delegated the timing of the actual decision on the implementation of the engagement with Pugh to the Committee Chair with input from John McDowell and other committee members.

### **IV. Discussion of Draft Investment Committee Charter**

Mack H. noted that the final wording of the Charter would not need to be decided at today's meeting, but would be prepared for approval by the Board at its September 10, 2013 meeting and asked members for comment.

Committee members made several comments and recommendations on the Draft Investment Committee Charter. John M. documented the recommendations, which included:

- Deletion of Section IV.B.2, provision for a substitute chairperson, as unnecessary.
- Section IV.D. Conflicts of Interest should be changed to require disclosure each year by all Committee members. Peter H. to provide a sample template for this disclosure.
- Section VII.B. should be revised to indicate indemnification for Committee members will be to the maximum extent allowed by law.
- Section VIII.A.2, should further clarify when the Charter should be reviewed.
- Section III.A. should state the required number of WSOS Board members on the Committee as 2.
- Section I, Introduction, indicating the Committee's intention to maximize investment returns using language that is in the WSOS legislation.
- Request that the CEO and CFO of the Program Administrator be present on the Committee as an ex-officio member to facilitate the functioning of the Committee.

Mack H. requested that John M. edit the Charter based on the comments received and distribute the revised red-line draft to the Committee members for review and further comment.

### **V. Discussion of Draft Scholarship Fund and Endowment Fund Investment Policy Statements**

Mack Hogans suggested that further work on the IPS's should be deferred until we get clear direction from the State of Washington as to how WSOS can invest State contributed funds. As noted previously Joe G. is working with the State Attorney General to get this question resolved.

### **VI. Investment Custodial Accounts**

John M. stated that custodial trust accounts had been set up at US Bank for the WSOS Scholarship Fund and for the WSOS Endowment Fund. US Bank will be charging an annual fee of 5 bpts and has waived all account trading fees. Non-State investments from the Scholarship Fund account will be moved into the custodial

account by June 30, 2013, and from the Endowment Fund account when an investment manager has been selected.

## **VII. Investment Status of Endowment Funds**

Bob Moser circulated copies to the Committee of a draft RFP for the investment manager search for the WSOS Endowment Funds with recommended questions for the Committee to ask potential investment managers. He also handed out a draft list of potential investment managers, all of which he described as discretionary institutional consulting managers (as opposed to brokers). Bob M agreed to circulate these documents to the Committee in electronic format and is looking forward to feedback from Committee members.

## **VIII. Adjourn**

Mack Hogans stated the next Committee meeting would be organized for September prior to the WSOS Board Meeting.

Mack informed the Committee that he would share an advanced copy of his draft Committee report to the WSOS board and will accept Committee input on the draft.

Mack H adjourned the meeting at 11:25 am and Committee members went into Executive Session.

## **IX. Executive Session**

Mack H reported that during the Executive Session there was discussion about the possibility of the WSOS Scholarship and Endowment account investments, both private and State funds, being managed by the Washington State Investment Board. The Investment Committee endorsed George Z suggestion to contact Theresa Whitmarsh of the WSIB to see if this was a possibility from the State's perspective and report back to the Committee.





## Washington State Opportunity Scholarship Comparative Balance Sheets

	As of		
	<u>6/30/2012</u>	<u>4/30/2013</u>	<u>6/30/2013</u>
<b><u>Assets</u></b>			
Cash	5,001,067	3,806,415	3,500,000
Investments	14,666,250	17,344,871	22,058,786
Pledges Receivable	-	29,347,625	24,407,299
<b>Total Assets</b>	<b><u>19,667,317</u></b>	<b><u>50,498,911</u></b>	<b><u>49,966,085</u></b>
<b><u>Liabilities and Net Assets</u></b>			
<b><u>Liabilities</u></b>			
Accounts Payable	394,772	377,083	157,715
Scholarship Commitments	-	19,652,593	26,402,589 (A)
<b>Total Liabilities</b>	<b><u>394,772</u></b>	<b><u>20,029,676</u></b>	<b><u>26,560,304</u></b>
<b><u>Net Assets</u></b>			
Temporarily Restricted Net Assets	11,772,545	5,577,925	(1,783,311) (B)
Permanently Restricted Net Assets	7,500,000	24,891,310	25,189,092
<b>Total Net Assets</b>	<b><u>19,272,545</u></b>	<b><u>30,469,235</u></b>	<b><u>23,405,781</u></b>
<b>Total Liabilities and Net Assets</b>	<b><u>19,667,317</u></b>	<b><u>50,498,911</u></b>	<b><u>49,966,085</u></b>

**Notes:**

- (A) Scholarship Commitments of \$26,402,589 is comprised of: scholarships awarded to Cohort #1 students of \$22,256,338 less net scholarship disbursements paid through April 30, 2013 of \$2,904,145 and less \$324,141 discount to present value of future long-term scholarship liabilities, plus scholarships awarded to Cohort #2 in May 2013 of \$7,374,537.
- (B) Temporarily Restricted Net Assets is temporarily negative until Fundraising Revenue budgeted for 7/1/13 - 12/31/13 is received, or the allocation of Pledges Receivable is changed to accommodate a revised fundraising timeline.







## Washington State Opportunity Scholarship Income Statements

	Ten Months ended April 30, 2013			FYE June 30, 2013			Budget FYE June 30, 2014
	Actual	Budget	Variance Fav (Unfav)	Actual	Budget	Variance Fav (Unfav)	
<b>Revenue</b>							
Private	\$ 34,771,351	\$ 35,000,000	\$ (228,649)	\$ 34,771,351	\$ 35,000,000	\$ (228,649)	(A) \$ 14,217,701 (E)
Public	-	-	-	-	-	-	
Investment Income	11,028	65,416	(54,388)	13,000	78,365	(65,365)	(B) 884,594 (F)
<b>Total Revenue</b>	<b>34,782,379</b>	<b>35,065,416</b>	<b>(283,037)</b>	<b>34,784,351</b>	<b>35,078,365</b>	<b>(294,014)</b>	<b>15,102,295</b>
<b>Expense</b>							
Scholarship	22,553,739	22,897,713	343,974	29,303,735	30,272,250	968,515	(C) 9,986,321 (G)
Professional Fees (CSF, Pyramid & CoFen)	1,031,950	1,113,050	81,100	1,347,380	1,432,680	85,300	(D) 1,850,303 (H)
<b>Total Expense</b>	<b>23,585,689</b>	<b>24,010,763</b>	<b>425,074</b>	<b>30,651,115</b>	<b>31,704,930</b>	<b>1,053,815</b>	<b>11,836,624</b>
<b>Net Income (Loss)</b>	<b>\$ 11,196,690</b>	<b>\$ 11,054,653</b>	<b>\$ 142,037</b>	<b>\$ 4,133,236</b>	<b>\$ 3,373,435</b>	<b>\$ 759,801</b>	<b>\$ 3,265,671</b>

**Notes:** See attached Notes to the Income Statement for further explanation of variances and amounts.



# Washington State Opportunity Scholarship Program

## Income Statements

### Notes

- (A) Unfavorable Variance in Forecasted Revenue of \$228,649 is due to the adjustment in April 2013 of the Pledge Receivable Discount to Present Value as a result of decreasing the discount rate from 4% to 2%.
- (B) Unfavorable Variance in Forecasted Investment Income of \$65,365 is due to lower than budgeted investment returns on funds invested in T-Bills pending contracting with an investment manager. It is anticipated that contracts with the Scholarship Account and Endowment Account investment managers will be completed by the end of June 2013 and September 2013 respectively.
- (C) Favorable Variance in Forecasted Scholarship Expense of \$968,515 is due to actual scholarship commitments being less than originally projected in 2012 and also reflects the recording of the discount to Present Value on Scholarship Commitments Payable.
- (D) Favorable Variance in Professional Fees of \$85,300 is due to lower expenses than budgeted for Pyramid and Cocker Fennessey as a result of a several month delay in the commencement of some of their work.
- (E) FYE 2014 Budgeted Revenue of \$14,217,701 is from new unidentified private donors and needs to be received by December 31, 2013 to avoid a Scholarship Fund Net Asset deficit as of that date and in CSF's calendar year-end audited financial statements.
- (F) FYE 2014 Budgeted Investment Income of \$884,594 is based on Scholarship Fund earnings rate of .30% and Scholarship Endowment Fund average earnings rate of 5.50%. The increase in budgeted investment income compared to FYE 2013 is due to higher investment balances and enhanced investment returns from the hiring of investment managers for all or a major portion of FYE 2014.
- (G) FYE 2014 Budgeted Scholarship Expense of \$9,992,071 is the amount of projected accepted awards for Cohort 3 to be awarded in May 2014, which will fund 971 students compared to the \$29,303,735 projected accepted awards for Cohorts 1 and 2, which funded 2,905 and 762 students, respectively.
- (H) FYE 2014 Budgeted Professional Fees Expense of \$1,850,303 is for services to be performed by CSF, Pyramid and Cocker Fennessey. For detail see Professional Fees Budget attached. The increase in FYE 2014 Budget compared to the FYE 2013 Forecast is due primarily to the addition of Cohort 2, a full year of Programmatic Wrap-around Supports and increases in Pyramid and Cocker Fennessey budgets to also cover a full year of expenses.





## Washington State Opportunity Scholarship Budget

July 1, 2013 to June 30, 2014

	<u>Scholarship</u>	<u>Endowment</u>	<u>Total</u>
<b><u>Revenue</u></b>			
Private: New Contributions (Non Boeing/Microsoft)	14,217,701	-	14,217,701 (A)
Public	-	-	-
Investment Income	49,331	835,263	884,594
<b>Total Revenue</b>	<b>14,267,032</b>	<b>835,263</b>	<b>15,102,295</b>
<b><u>Expenses</u></b>			
<b>Scholarship</b>			
Cohort 2		-	- (B)
Cohort 3	9,992,071	(5,750)	9,986,321
<b>Total Scholarship Expenditures</b>	<b>9,992,071</b>	<b>(5,750)</b>	<b>9,986,321</b>
<b>CSF Program and Administrative Expenses</b>	<b>1,548,803</b>	<b>-</b>	<b>1,548,803</b>
<b>Marketing and Advocacy</b>			
Pyramid	217,000	-	217,000
CoFen	84,500	-	84,500
<b>Total Marketing and Advocacy</b>	<b>301,500</b>	<b>-</b>	<b>301,500</b>
<b>Total Non-Scholarship Expenditures</b>	<b>1,850,303</b>	<b>-</b>	<b>1,850,303</b>
<b>Total Expense</b>	<b>11,842,374</b>	<b>(5,750)</b>	<b>11,836,624</b>
<b>Net Income (Loss)</b>	<b>2,424,658</b>	<b>841,013</b>	<b>3,265,671</b>
<b>Projected Net Assets:</b>			
<b>Beginning of Year 7/1/2013</b>	<b>(1,783,310)</b>	<b>25,189,092</b>	<b>23,405,782</b>
<b>End of Year 6/30/2014</b>	<b>641,348</b>	<b>26,030,105</b>	<b>26,671,453</b>

**Notes:**

(A) Assumes that New Private Contribution Pledges are received by 12/31/2013.

(B) Cohort 2 scholarships are awarded and accrued in May 2013 and Cohort 3 in May 2014.





**COLLEGE SUCCESS FOUNDATION 2013-2014**

	COST	FTE
<b>DIRECT SCHOLARSHIP MANAGEMENT</b>		3.92
<p><b>Program Management and Coordination</b> Includes management of scholarship and program supports; provides oversight for relationships with colleges and universities, secondary schools and community partners.</p>	\$82,365	0.60
<p><b>Scholarship Selection, Awarding and Reporting</b> 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; provision of server infrastructure, secure web-based environment and website, email and other electronic communication tools, software development and data warehouse capacity; preparation of annual legislative reports.</p>	\$402,357	3.32
<b>WRAP AROUND SUPPORTS</b>		3.00
<p><b>Pipeline Supports in Middle and High School</b> Includes environmental scan to identify existing pre-college STEM-related programs and potential partners; STEM awareness campaign to ensure secondary students and teachers are aware of STEM opportunities and WSOS; coordination of scholars to serve as ambassadors to middle and high schools.</p>	\$147,425	1.00
<p><b>College and Career Supports</b> Includes development and implementation of frameworks for mentorship and internship programs; connection of scholars to paid internships, job opportunities and research experiences; enlistment of professors, graduate students and STEM professionals to serve as academic and career mentors; ensures other campus resources are available; evaluation of the impact of wrap around service support strategies.</p>	\$208,118	2.00

<b>LEADERSHIP/BOARD SUPPORT</b>		<b>2.69</b>
<p><b>General</b> Includes provision of general leadership and management for all functional areas to ensure coordination, efficiency and accomplishment of goals.</p>	<b>\$31,959</b>	<b>0.85</b>
<p><b>Marketing and Communication</b> Includes development and implementation of branding, messaging and outreach strategies to build visibility and awareness at state, regional and local levels; provision of content for the development and maintenance of an interactive website and all needed printed materials; social media used extensively to reach and engage key audiences (students, scholars, supporters, educators, partners and media); targeted email messages to high school and college scholarship contacts, influencers, applicants, donors, elected officials and scholars.</p>	<b>\$98,393</b>	<b>0.39</b>
<p><b>Fundraising Support</b> Includes hiring a consultant to develop a fundraising plan and to offer strategic guidance toward implementation; support in setting annual fundraising goals; employment of professionals to conduct major donor development, fundraising events and work place giving campaigns; support to the Board in soliciting funds from prospective donors.</p>	<b>\$253,227</b>	<b>1.45</b>
<b>FINANCE AND INVESTMENT MANAGEMENT</b>		<b>0.73</b>
<p><b>Investment Management</b> Includes support of the Investment Committee involving both Scholarship and Endowment Funds; preparation and maintenance of Investment Committee Charter; Investment Policy Statements and related Investment Guidelines; cash management, investment management, and management of investment managers; accounting and maintenance of custodial trust accounts; and preparation of investment reports.</p>	<b>\$84,545</b>	<b>0.73</b>
<b>INDIRECT</b>		
<p>Includes a portion of the salaries and related costs for accounting, human resources and information technology staff; rent; information technology infrastructure costs; financial systems, accounts payable and payroll processing, tax return filings, financial analysis and projections; donor tracking and related support.</p>	<b>\$240,414</b>	<b>-</b>
<b>CSF TOTAL</b>	<b>\$1,548,803</b>	<b>10.34</b>



## PYRAMID COMMUNICATIONS 2013-2014

<b>FUNDRAISING COUNSEL</b> Includes research, counsel, coordination, collaboration with potential partners, and drafting of content.	\$42,000
<b>EVENTS</b> Includes planning and coordination of five events, event photography or videography as needed, and all event expenses.	\$54,000
<b>CREATIVE ASSETS AND MATERIALS</b> Includes revisions to existing background and event materials; design of year-end-report documents; and content and design for event, student facing, and fundraising materials as needed.	\$44,000
<b>COMMUNICATIONS COUNSEL</b> Includes oversight of inter-team communications, coordination, and project management, budget tracking; counsel for board presentations and engagements; counsel on ways to educate Washington State Opportunity Scholarship board about College Success Foundation's contributions; and counsel on website best practices as needed.	\$65,000
<b>MEDIA</b> Includes creative media counsel, material drafting and editing, and media support for events.	\$12,000
<b>TOTAL</b>	<b>\$217,000</b>

## COCKER FENNESSEY 2013-2014

<b>GOVERNMENT RELATIONS</b> 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 to lobbyists, assistance with briefings with key legislative leaders, staff and governor's office. Also includes meeting preparation and event coordination as needed.	\$47,600
<b>STRATEGIC COUNSEL SCOPE OF WORK</b> Includes strategic advice during communications planning and coordination with CSF and Pyramid; developing materials and messaging related to public affairs work, legislative relations and outreach, team meetings, project management, and project updates.	\$36,900
<b>TOTAL</b>	<b>\$84,500</b>
<b>COCKER FENNESSEY AND PYRAMID TOTAL</b>	<b>\$301,500</b>
<b>CSF, COCKER FENNESSEY, AND PYRAMID GRAND TOTAL</b>	<b>\$1,850,303</b>





## Washington State Opportunity Scholarship Contribution Revenue Scholarship vs Endowment

Inception July 1, 2011 through June 30, 2013

	<u>Scholarship Fund</u>	<u>Endowment Fund</u>	<u>Total</u>
<b><u>Private Revenue: Cash Received</u></b>			
Microsoft	\$ 7,500,000	\$ 7,500,000	\$ 15,000,000
Boeing	5,000,000	5,000,000	10,000,000
Other	178,726	178,727	357,452
<b>Total Private Revenue: Cash Received</b>	<b>12,678,726</b>	<b>12,678,727</b>	<b>25,357,452</b>
<b><u>Private Revenue: Pledges Receivable O/S</u></b>			
Microsoft Remaining Pledge	5,000,000	5,000,000	10,000,000
Boeing Remaining Pledge	7,500,000	7,500,000	15,000,000
Other Remaining Pledges	470	470	940
<b>Total Private Pledge Revenue</b>	<b>12,500,470</b>	<b>12,500,470</b>	<b>25,000,940</b>
<b>Total Cumulative Private Revenue</b>	<b>25,179,196</b>	<b>25,179,197</b>	<b>50,358,392</b>
<b><u>Public Revenue: Cash Received</u></b>			
State of Washington	5,000,000	-	5,000,000
<b>Total Cumulative Public Revenue</b>	<b>5,000,000</b>	<b>-</b>	<b>5,000,000</b>
<b>Total Recorded Revenue</b>	<b>\$ 30,179,196</b>	<b>\$ 25,179,197</b>	<b>\$ 55,358,392</b>
<b>Total Contingent State Matching Fund Revenue Not Yet Recorded as Revenue (A)</b>	<b>\$ 20,179,196</b>	<b>\$ 25,179,197</b>	<b>\$ 45,358,392</b>
<b>Total Private and Public Revenue <u>plus</u> Contingent State Matching Fund Revenue</b>	<b>\$ 50,358,391</b>	<b>\$ 50,358,393</b>	<b>\$ 100,716,785</b>

**Notes:**

- (A) "Total Contingent State Matching Revenue Not Yet Recorded" will be recorded when certain State of Washington tax revenues exceed by ten percent the amounts collected from these taxes for the fiscal year ended June 30, 2008 (= \$12.5 billion).





**RESOLUTION – 2013 -1**

WSOS Board Resolution to extend College Success Foundation contract as the WSOS Program Administrator for one year.

RESOLVED:

The Washington State Opportunity Scholarship Board hereby approves the extension of the College Success Foundation contract as the WSOS Program Administrator for one year effective July 1, 2013 through June 30, 2014 for work to be performed in accordance with the related scope of work.



# Wrap Around Support Strategy







## WSOS Wrap Around Support Strategy Update

June 2013

To address the barriers affecting the number of students who are interested in STEM fields and who enroll, persist and complete STEM degrees, the WSOS, partnering with College Success Foundation (CSF), is implementing approaches to create a more diverse pool of qualified and talented students seeking STEM degrees and to build an effective statewide integrated system of supports that are cost efficient, scalable, sustainable and data-driven. This document provides a high level overview of progress made between January and May 2013.

### Pipeline Supports in Middle and High School

Collaborated with STEM partners to expand and strengthen STEM networks to provide targeted support to underrepresented students (students of color, first generation students, females, and low-income students) to increase students' confidence, interest and preparation in STEM.

- **STEM AWARENESS.** Conducted a STEM awareness campaign and advocated for STEM education effectiveness resulting in outreach to over 500 partners; 6500 students; and linked WSOS website with other scholarship websites.
- **ENVIRONMENTAL SCAN.** Conducted an environmental scan to identify existing STEM-related programs, events, and related opportunities resulting in a resource list of supports shared with over 400 partners statewide.
- **STEM EXPERIENTIAL LEARNING.** Enhanced authentic STEM-focused learning experiences resulting in partnering with colleges and businesses to assist over 1200 middle and high school students statewide through STEM Institutes and workshops and Expanding Your Horizons and other programming.

### College and Career Supports

Leveraged relationships with colleges, universities and existing STEM-related programs to ensure WSOS Scholars receive additional academic and career support when necessary.

- **ASSESSED WSOS SCHOLARS' NEEDS.** Conducted an assessment of scholars' academic, personal and career/internship needs. Identified challenging courses; needs for academic support and professional mentors; financial support; and research, internship, and employment opportunities.
- **WSOS SCHOLAR RECEPTIONS.** Collaborated with colleges to connect WSOS Scholars to supports and retention programming designed to build personal networks. Conducted six WSOS Scholar Receptions co-sponsored by host colleges and universities to connect scholars with college administration and services, provide opportunities to network and learn more about the scholarship and wrap-around service supports available through CSF. College Presidents, Chancellors or Vice Provosts hosted the receptions. Over 400 participated (WSOS Scholars and other students, college administration and staff, legislators, and WSOS Board and staff) in the events.

Of special note, the event at the University of Washington-Seattle was unique as a larger combined event. CSF worked with our partners at UW-Seattle, Pyramid Communications, and Cocker Fennessy to host a three-part event and invited scholars and staff from seven different institutions of higher education in the Seattle area to attend. The first part provided a resource fair to highlight college services and support; the second, a student roundtable facilitated by WSOS Board President Brad Smith, WSOS Board Member Mack Hogans, and Majority Leader Rodney Tom. President Michael Young welcomed WSOS Scholars and guests, who included President Kenyon Chan, UW-Bothell, WSOS Board member, Terri Gillespie, legislators Representative Gerry Pollet, Senator Jeanne Kohl-Welles, Representative Marcie Maxwell, Representative Reuven Carlyle and Senator Larry Frock, and university staff. Students were encouraged to ask questions of the panel focusing on six key areas: (1) request for more internships and research opportunities, (2) the need for financial supports, (3) the importance of a teacher's influence on students' beliefs about their abilities to be successful in STEM, (5) the need for outreach to middle and high school students, and (6) the competitive nature of STEM majors.

Brad Smith facilitated the last part of the event, a Leaders Meeting, and was joined by WSOS Board Members, legislators and university leadership. Participants were asked for their feedback on the first year and ideas about the second year. Eight key areas were raised as recommendations or issues of concern: (1) the need for more paid internships and research opportunities, (2) the need for more wrap-around supports, (3) the need to reassess how the Scholarship is Structured, (4) the need for greater outreach to middle and high school students, (6) the impact of the competitive nature of STEM majors and lack of capacity, (7) the need to increase legislative support for WSOS and STEM in general, and (8) the need to create an integrated STEM Pipeline.

	Washington State University	Eastern Washington University	Gonzaga University	Western Washington University	University of Washington-Seattle	University of Washington-Tacoma	Total
Total In Attendance	119	37	35	47	132	51	421

Colleges have asked that we host the receptions in the fall as students begin the school year. A schedule will be developed and shared with the WSOS Board.

- **Collaborating with colleges and businesses** to identify and promote available internships, fellowships, and research, mentoring and employment opportunities. Campus Career Services were represented at the Resource Tables at the WSOS Scholar Receptions. WSOS Scholars participated in the CSF Career Institute in March at Microsoft.
- **Collaborating with businesses and colleges** to identify an electronic tool for tracking and monitoring.

Collaboration  
Opportunities Between  
WSOS and WA STEM





## **MEMORANDUM**

**To:** Jane Broom, Microsoft, and Sam Whiting, Boeing  
**From:** John Hoyt, Pyramid Communications  
**Date:** May 17, 2013  
**Re:** Collaboration opportunities between Washington State Opportunity Scholarship and Washington STEM

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On May 3, 2013, Pyramid Communications hosted a joint meeting between the Washington State Opportunity Scholarship (WSOS), represented by Susan Pollack and Dave Sharp, and Washington STEM (WA STEM), represented by Patrick D'Amelio. The participants discussed opportunities for collaboration between the two organizations. This memo is a brief summary of the findings, opportunities and recommendations gained from that meeting.

**At the highest level, there is an opportunity to explore shared coordination around fundraising, as well as to leverage the relationships both organizations have that may benefit both organizations. Other possible areas of collaboration are outlined below. And, because the gathering was brief, we believe more time will need to be spent exploring each of the opportunities that exist for collaboration. At a minimum, coordination between WSOS and WA STEM should take place in some form moving forward.**

### **THE FINDINGS: WA STEM AND WSOS ALIGN AT MULTIPLE POINTS**

The two entities:

- **Contribute to the school-to-STEM pipeline at different stages**  
Both organizations play an important role in the STEM continuum. Both organizations have strong communications and outreach programs that effectively reach targeted audiences. WA STEM has made important in-roads into the business community through strong communications and outreach, while WSOS has a built-in audience of scholars and participating colleges and universities throughout the state.
- **Have boards with overlapping membership**  
With Mike Delaney and Brad Smith on the WA STEM board and Mike likely to join the WSOS board, there would appear to be synergy at the board level. Both boards are relatively small, and with Microsoft and Boeing providing strong staff support, there may be areas of collaboration and coordination.
- **Are engaging in fundraising and development efforts**  
Both organizations are looking at raising substantial funds to support the work they do. The organizations will look for strong support at the board level, and through partnerships with the business community, to support their development efforts. And, while WSOS is at the early stages of

fundraising, and WA STEM has had a functioning development operation for some time, both organizations are still in the relatively early stages of development.

- **Conduct important research to better understand the STEM playing field**  
WSOS provides solid and ongoing research and data around its scholars, while WA STEM has conducted important and compelling research to inform the STEM field in Washington state.
- **Share deputies of major STEM corporations**  
Both organizations have strong ties to business, academic and political audiences. WSOS is gaining strong and solid relationships with legislators, colleges and universities and their key staff, while WA STEM continues to build strong awareness among the business community, as well as with opinion leaders.

#### **RECOMMENDATIONS: EXPLORE WAYS TO COLLABORATE AND COORDINATE THAT BENEFIT BOTH ORGANIZATIONS AND THE FIELD**

The two entities should spend more time exploring ways in which they may be able to work together. And at a minimum, both entities should coordinate efforts so as to not step on each others toes. Some of the recommended areas to explore include:

- **Explore ways to coordinate around fundraising.** It is likely that some of the same organizations and individuals may be asked to support both organizations. And, with relatively small boards, we believe it is essential to determine if there are ways to coordinate efforts that allow for a clear menu of opportunities that benefit all donors and both organizations. Can funders donate and know they are supporting the STEM continuum and not just an organization?
- **Review communications functions to see if there is alignment around messaging and the overall STEM story.** At a minimum, there should be one clear story that highlights the STEM education pipeline.
- **Exchange research to build the arsenal of data about STEM in Washington.** And with compelling research, share the story between the two organizations, as well as other entities throughout the state that are doing STEM work.
- **Look at ways to coordinate efforts with employers around the state.** WSOS will likely look at ways to secure and connect educational and career experiences for students through STEM educators and employers. WA STEM is working effectively to connect with employers and opinion leaders about STEM. Is there a way to connect the pipeline work of both organizations that benefits both?

#### **CONCLUSION**

While the WA STEM and WSOS meeting was brief, there are clearly some opportunities—and some excitement—around prospective ways to collaborate and coordinate that should be explored. It is too early to know if any of these opportunities are possible, but we believe taking the next step to better understand some of the areas of potential collaboration listed above is worth the effort.

# WSOS Final Selection Data for Cohort 2







# Washington State Opportunity Scholarship Final Selection Data for Cohort 2

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May 29, 2013

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## WSOS Cohort 1 Non-Senior Selects vs. Cohort 2 Selects & Applicants

Table 1. WSOS Cohort 1 and Cohort 2 Selects & Applicants by College Class Standing

Income Quartile	Cohort 1 Non-Senior Selects		Cohort 2 Selects		Cohort 2 Eligible Applicants		Cohort 2 All Applicants	
	#	%	#	%	#	%	#	%
First Year	775	25%	517	66%	665	68%	813	55%
Second Year	824	27%	110	14%	136	14%	212	14%
Third Year	836	27%	151	19%	184	19%	271	18%
Fourth Year	610	20%					192	13%
<b>Total</b>	<b>2,435</b>	<b>100%</b>	<b>778</b>	<b>100%</b>	<b>985</b>	<b>100%</b>	<b>1,488</b>	<b>100%</b>

- In total, 778 scholars were selected for Cohort 2 of the Washington State Opportunity Scholarship (WSOS).
- With upcoming college fourth years no longer eligible to apply for the Washington State Opportunity Scholarship (WSOS), we compare the proportion of eligible applicants and selects by class standing to see that the proportion of selected scholars is within 1.5% relative to eligible applicants. (Percentages are rounded to the nearest whole number.)

Table 2. WSOS Cohort 1 and Cohort 2 Selects & Applicants by Income Quartile

Income Quartile	Cohort 1 Non-Senior Selects		Cohort 2 Selects		Cohort 2 Eligible Applicants		Cohort 2 All Applicants	
	#	%	#	%	#	%	#	%
Bottom Quartile	739	30%	243	31%	269	27%	458	31%
Second Quartile	662	27%	209	27%	252	26%	355	24%
Third Quartile	558	23%	181	23%	234	24%	311	21%
Top Quartile	476	20%	145	19%	230	23%	364	24%
<b>Total</b>	<b>2,435</b>	<b>100%</b>	<b>778</b>	<b>100%</b>	<b>985</b>	<b>100%</b>	<b>1,488</b>	<b>100%</b>

- WSOS Cohort 2 selects represent the same proportion of students by income quartile as Cohort 1 non-senior selects within 0.5% for each quartile. (Percentages are rounded to the nearest whole percentage.)



**Table 3. WSOS Cohort 1 and Cohort 2 Selects & Applicants by Race or Ethnicity**

Race or Ethnicity	Cohort 1 Non-Senior Selects		Cohort 2 Selects		Cohort 2 Eligible Applicants		Cohort 2 All Applicants	
	#	%	#	%	#	%	#	%
American Indian or Alaska Native	22	1%	1	0.1%	3	0.3%	9	1%
Asian	474	19%	145	19%	170	17%	257	17%
Black or African American	61	3%	43	6%	59	6%	94	6%
Hispanic/Latino of any race(s)	91	4%	137	18%	166	17%	242	16%
Native Hawaiian or Other Pacific Islander	15	1%	4	1%	6	1%	10	1%
Two or more races	166	7%	52	7%	64	6%	114	8%
White	1,555	64%	385	49%	504	51%	744	50%
Not provided	51	2%	11	1%	13	1%	18	1%
<b>Total</b>	<b>2,435</b>	<b>100%</b>	<b>778</b>	<b>100%</b>	<b>985</b>	<b>100%</b>	<b>1,488</b>	<b>100%</b>

- WSOS Cohort 2 Selects are more diverse compared to Cohort 1 non-senior selects by race/ethnicity: Cohort 1 non-senior selects represent 34% students of color, while Cohort 2 selects 50% students of color. (Percentage of students of color equals 100% minus percentage White minus percentage Not Provided.)

**Table 4. WSOS Cohort 1 and Cohort 2 Selects & Applicants by GPA**

GPA	Cohort 1 Non-Senior Selects		Cohort 2 Selects		Cohort 2 Eligible Applicants		Cohort 2 All Applicants	
	#	%	#	%	#	%	#	%
Less than 3.00	0	0%	21	3%	77	8%	169	11%
3.00 to 3.24	160	7%	40	5%	91	9%	176	12%
3.25 to 3.49	435	18%	103	13%	157	16%	254	17%
3.50 to 3.74	644	26%	180	23%	220	22%	322	22%
3.75 to 4.00	1,196	49%	433	56%	439	45%	558	38%
GED			1	0.1%	1	0.1%	7	0%
No GPA provided							2	0%
<b>Total</b>	<b>2,435</b>	<b>100%</b>	<b>778</b>	<b>100%</b>	<b>985</b>	<b>100%</b>	<b>1,488</b>	<b>100%</b>

- WSOS Cohort 2 selects represent a higher average GPA relative to Cohort 1 non-senior selects: Cohort 1 non-senior scholars had an average GPA of 3.68 with 75% 3.50 GPA or higher, while Cohort 2 selects have an average GPA of 3.71 with 79% 3.50 GPA or higher. (Average GPA removes GED scores.)



**Table 5. WSOS Cohort 1 and Cohort 2 Selects & Applicants by Field of Study**

Field of Study	Cohort 1 Non-Senior Selects		Cohort 2 Selects		Cohort 2 Eligible Applicants		Cohort 2 All Applicants	
	#	%	#	%	#	%	#	%
Science	636	26%	212	27%	262	27%	387	26%
Technology	261	11%	47	6%	60	6%	115	8%
Engineering	569	23%	190	24%	241	24%	360	24%
Math	114	5%	37	5%	46	5%	65	4%
Health Care	855	35%	292	38%	376	38%	561	38%
<b>Total</b>	<b>2,435</b>	<b>100%</b>	<b>778</b>	<b>100%</b>	<b>985</b>	<b>100%</b>	<b>1,488</b>	<b>100%</b>

- WSOS Cohort 2 selects represent each field of study proportionately relative to Cohort 2 eligible applicants.
- Compared to WSOS Cohort 1 non-senior selects, fewer Cohort 2 selects are pursuing Technology fields and more students are pursuing Science, Engineering and Health Care fields. The same proportions are pursuing Mathematics.



## Cohort 2 Selects

**Table 6: WSOS Cohort 2 Selects by Gender and Field of Study**

Gender	Science		Technology		Engineering		Mathematics		Health Care		Grand Total	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Female	147	69%	10	21%	53	28%	20	54%	243	83%	473	61%
Male	65	31%	37	79%	137	72%	17	46%	49	17%	305	39%
<b>Grand Total</b>	<b>212</b>	<b>100%</b>	<b>47</b>	<b>100%</b>	<b>190</b>	<b>100%</b>	<b>37</b>	<b>100%</b>	<b>292</b>	<b>100%</b>	<b>778</b>	<b>100%</b>

- Among WSOS Cohort 2 selected scholars, 61% are female and 39% male.
- Science, Mathematics and Health Care are more heavily represented by females, while Technology and Engineering are more heavily represented by males.

**Table 7: WSOS Cohort 2 Selects by Grade Point Average and Field of Study**

GPA	Science		Technology		Engineering		Mathematics		Health Care		Grand Total	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Less than 3.00	4	2%	1	2%	6	3%	3	8%	7	2%	21	3%
3.00-3.24	10	5%	2	4%	9	5%	1	3%	18	6%	40	5%
3.25-3.49	24	11%	6	13%	23	12%	4	11%	46	16%	103	13%
3.50-3.74	51	24%	13	28%	35	18%	8	22%	73	25%	180	23%
3.75-4.00	123	58%	25	53%	116	61%	21	57%	148	51%	433	56%
GED					1	0.5%					1	0.1%
<b>Grand Total</b>	<b>212</b>	<b>100%</b>	<b>47</b>	<b>100%</b>	<b>190</b>	<b>100%</b>	<b>37</b>	<b>100%</b>	<b>292</b>	<b>100%</b>	<b>778</b>	<b>100%</b>

- Overall, 79% of selected WSOS Cohort 2 scholars have earned a cumulative GPA of 3.50 or above.
- By field of study, 82% of Science majors, 81% of Technology, 79% of Engineering, 79% of Mathematics and 76% of Health Care majors have earned a cumulative GPA of 3.50 or above.



**Table 8: WSOS Cohort 2 Selects by Class Standing and Field of Study as of Fall 2013**

Class Standing	Science		Technology		Engineering		Mathematics		Health Care		Grand Total	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
1 <sup>st</sup> Year	139	66%	27	57%	132	69%	23	62%	196	67%	517	66%
2 <sup>nd</sup> Year	29	14%	10	21%	23	12%	8	22%	40	14%	110	14%
3 <sup>rd</sup> Year	44	21%	10	21%	35	18%	6	16%	56	19%	151	19%
<b>Grand Total</b>	<b>212</b>	<b>100%</b>	<b>47</b>	<b>100%</b>	<b>190</b>	<b>100%</b>	<b>37</b>	<b>100%</b>	<b>292</b>	<b>100%</b>	<b>778</b>	<b>100%</b>

- By class standing, 66% of WSOS Cohort 2 selected scholars will be 1<sup>st</sup> Year students in fall 2013, 14% will be 2<sup>nd</sup> Years and 19% will be 3<sup>rd</sup> Years.
- Relative to all selected scholars by class standing, the following fields of study are represented more heavily by each group:
  - 1<sup>st</sup> Years: Engineering and Health Care
  - 2<sup>nd</sup> Years: Technology and Mathematics
  - 3<sup>rd</sup> Years: Science and Technology



Table 9: WSOS Cohort 2 Selects by Class Standing, GPA and Field of Study as of Fall 2013

Class Standing	GPA	Science		Technology		Engineering		Mathematics		Health Care		Total by Grade Level
1 <sup>st</sup> Year	Less than 3.00		0%	1	4%	1	1%	1	4%	2	1%	5
	3.00 to 3.24	3	2%	1	4%	4	3%		0%	6	3%	14
	3.25 to 3.49	10	7%	4	15%	10	8%		0%	23	12%	47
	3.50 to 3.74	27	19%	6	22%	21	16%	8	35%	51	26%	113
	3.75 to 4.00	99	71%	15	56%	95	72%	14	61%	114	58%	337
GED		0%			0%	1	1%		0%		0%	1
<b>1<sup>st</sup> Year Subtotal by Field of Study</b>		<b>139</b>	<b>100%</b>	<b>27</b>	<b>100%</b>	<b>132</b>	<b>100%</b>	<b>23</b>	<b>100%</b>	<b>196</b>	<b>100%</b>	<b>517</b>
2 <sup>nd</sup> Year	Less than 3.00	1	3%		0%	2	9%		0%	2	5%	5
	3.00 to 3.24	2	7%	1	10%	3	13%		0%	7	18%	13
	3.25 to 3.49	4	14%		0%	4	17%	3	38%	7	18%	18
	3.50 to 3.74	13	45%	3	30%	7	30%		0%	6	15%	29
	3.75 to 4.00	9	31%	6	60%	7	30%	5	63%	18	45%	45
<b>2<sup>nd</sup> Year Subtotal by Field of Study</b>		<b>29</b>	<b>100%</b>	<b>10</b>	<b>100%</b>	<b>23</b>	<b>100%</b>	<b>8</b>	<b>100%</b>	<b>40</b>	<b>100%</b>	<b>110</b>
3 <sup>rd</sup> Year	Less than 3.00	3	7%		0%	3	9%	2	33%	3	5%	11
	3.00 to 3.24	5	11%		0%	2	6%	1	17%	5	9%	13
	3.25 to 3.49	10	23%	2	20%	9	26%	1	17%	16	29%	38
	3.50 to 3.74	11	25%	4	40%	7	20%		0%	16	29%	38
	3.75 to 4.00	15	34%	4	40%	14	40%	2	33%	16	29%	51
<b>3<sup>rd</sup> Year Subtotal by Field of Study</b>		<b>44</b>	<b>100%</b>	<b>10</b>	<b>100%</b>	<b>35</b>	<b>100%</b>	<b>6</b>	<b>100%</b>	<b>56</b>	<b>100%</b>	<b>151</b>
<b>Grand Total by Field of Study</b>		<b>212</b>		<b>47</b>		<b>190</b>		<b>37</b>		<b>292</b>		<b>778</b>
<b>% by Field of Study</b>		<b>27%</b>		<b>6%</b>		<b>24%</b>		<b>5%</b>		<b>38%</b>		<b>100%</b>

- Relative to the overall proportion by class standing, the following fields of study are more heavily represented by students from the highest GPA category (3.75 to 4.00):
  - 1<sup>st</sup> Year: Science and Engineering
  - 2<sup>nd</sup> Year: Technology, Mathematics and Health Care
  - 3<sup>rd</sup> Year: Technology and Engineering





**Table 10. WSOS Cohort 2 Selects by Class Standing, Parent College Attendance and Field of Study**

Parent Attended College (Yes or No)?	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by Class Standing	
	#	%	#	%	#	%	#	%	#	%	#	%
<b>1<sup>st</sup> Year</b>	139	100%	27	100%	132	100%	23	100%	196	100%	517	100%
Yes	91	65%	18	67%	84	64%	18	78%	103	53%	314	61%
No	48	35%	9	33%	48	36%	5	22%	93	47%	203	39%
<b>2<sup>nd</sup> Year</b>	29	100%	10	100%	23	100%	8	100%	40	100%	110	100%
Yes	13	45%	7	70%	16	70%	6	75%	16	40%	58	53%
No	16	55%	3	30%	7	30%	2	25%	24	60%	52	47%
<b>3<sup>rd</sup> Year</b>	44	100%	10	100%	35	100%	6	100%	56	100%	151	100%
Yes	24	55%	5	50%	24	69%	4	67%	24	43%	81	54%
No	20	45%	5	50%	11	31%	2	33%	32	57%	70	46%
<b>Grand Total by Field of Study</b>	212	100%	47	100%	190	100%	37	100%	292	100%	778	100%
Yes	128	60%	30	64%	124	65%	28	76%	143	49%	453	58%
No	84	40%	17	36%	66	35%	9	24%	149	51%	325	42%

- Overall, 42% of WSOS Cohort 2 selects indicate that they are first-generation students, defined in the scholarship application as neither their birth nor adoptive parents has ever attended college.
- By class standing, a higher proportion of WSOS Cohort 2 2<sup>nd</sup> Year students are first-generation (47%) compared to 46% of 3<sup>rd</sup> Year and 39% of 1<sup>st</sup> Year college students.
- By field of study, a higher proportion of WSOS Cohort 2 Health Care students are first-generation (51%), compared to 40% Science, 36% Technology, 35% Engineering and 24% Mathematics.



**Table 11: WSOS Cohort 2 Selects by Race and Ethnicity and Field of Study**

Race and Ethnicity	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by Race and Ethnicity	
	#	%	#	%	#	%	#	%	#	%	#	%
American Indian or Alaska Native	1	0.5%									1	0.1%
Asian	33	16%	9	19%	37	19%	8	22%	58	20%	145	19%
Black or African American	12	6%	2	4%	10	5%	1	3%	18	6%	43	6%
Hispanic/Latino of any race(s)	32	15%	5	11%	29	15%	5	14%	66	23%	137	18%
Native Hawaiian or Other Pacific Islander					1	1%			3	1%	4	1%
Two or more races	8	4%	4	9%	13	7%	3	8%	24	8%	52	7%
White	124	58%	24	51%	97	51%	20	54%	120	41%	385	49%
Not provided	2	1%	3	6%	3	2%			3	1%	11	1%
<b>Grand Total by Field of Study</b>	<b>212</b>	<b>100%</b>	<b>47</b>	<b>100%</b>	<b>190</b>	<b>100%</b>	<b>37</b>	<b>100%</b>	<b>292</b>	<b>100%</b>	<b>778</b>	<b>100%</b>
<b>% by Field of Study</b>		<b>27%</b>		<b>6%</b>		<b>24%</b>		<b>5%</b>		<b>38%</b>		<b>100%</b>

- In total, WSOS Cohort 2 scholars represent 50% students of color: American Indian or Alaska Native (0.1%), Asian (19%), Black or African American (6%), Hispanic/Latino of any race(s) (18%), Native Hawaiian or Other Pacific Islander (1%), Two or more races (7%), White (49%), and Not provided (1%).
- Relative to the overall proportion of WSOS Cohort 2 selects by race or ethnicity, the following fields of study are more heavily represented by the following groups of scholars: Science (American Indian or Alaska Native and White), Technology (Two or more races, White, Not provided), Engineering (White and Not provided), Mathematics (Asian, Two or more races and White), and Health Care (Asian, Hispanic/Latino of any race(s) and Two or more races).



**Table 12: WSOS Cohort 2 Selects by Income, GPA and Field of Study**

WSOS Income Quartiles	GPA		Science		Technology		Engineering		Mathematics		Health Care		Grand Total by Quartile		
	Less than 3.00	3.00-3.24	2	3%	1	7%	4	8%	3	33%	3	3%	13	5%	
<b>Bottom Quartile</b> Maximum Income by Household Size: 2-person: \$17,400 4-person: \$25,575 6-person: \$33,750	3.00-3.24	3.25-3.49	6	8%	1	7%	6	12%	1	11%	8	8%	22	9%	
	3.50-3.74	3.75-4.00	7	10%			11	22%	1	11%	22	23%	41	17%	
	GED		23	32%	5	33%	10	20%	1	11%	36	38%	75	31%	
			34	47%	8	53%	19	37%	3	33%	27	28%	91	37%	
			<b>72</b>	<b>100%</b>	<b>15</b>	<b>100%</b>	<b>51</b>	<b>100%</b>	<b>9</b>	<b>100%</b>	<b>96</b>	<b>100%</b>	<b>243</b>	<b>31%</b>	
<b>Second Quartile</b> Maximum Income by Household Size: 2-person: \$34,800 4-person: \$51,150 6-person: \$67,500	Less than 3.00	3.00-3.24	1	2%			2	4%			2	2%	5	2%	
	3.25-3.49	3.50-3.74	2	4%	1	7%	2	4%			7	9%	12	6%	
	3.75-4.00	GED	7	14%	5	36%	8	16%	1	8%	12	15%	33	16%	
			12	24%	1	7%	13	25%	6	50%	18	22%	50	24%	
			29	57%	7	50%	26	51%	5	42%	42	52%	109	52%	
<b>Second Quartile Subtotal by Field of Study &amp; GPA</b>			<b>51</b>	<b>100%</b>	<b>14</b>	<b>100%</b>	<b>51</b>	<b>100%</b>	<b>12</b>	<b>100%</b>	<b>81</b>	<b>100%</b>	<b>209</b>	<b>27%</b>	
	<b>Third Quartile</b> Maximum Income by Household Size: 2-person: \$52,200 4-person: \$76,725 6-person: \$101,250	Less than 3.00	3.00-3.24	1	2%			1	2%			1	2%	2	1%
		3.25-3.49	3.50-3.74	1	2%			2	4%			3	5%	5	3%
		3.75-4.00	GED	2	4%	1	11%	2	4%	1	8%	7	11%	13	7%
				13	25%	4	44%	5	11%	1	8%	11	17%	34	19%
			34	67%	4	44%	38	83%	10	83%	41	65%	127	70%	
<b>Third Quartile Subtotal by Field of Study &amp; GPA</b>			<b>51</b>	<b>100%</b>	<b>9</b>	<b>100%</b>	<b>46</b>	<b>100%</b>	<b>12</b>	<b>100%</b>	<b>63</b>	<b>100%</b>	<b>181</b>	<b>23%</b>	
	<b>Top Quartile</b> Maximum Income by Household Size: 2-person: \$69,600 4-person: \$102,300 6-person: \$135,000	Less than 3.00	3.00-3.24									1	2%	1	1%
		3.25-3.49	3.50-3.74	1	3%			2	5%	1	25%	5	10%	16	11%
		3.75-4.00	GED	3	8%	3	33%	7	17%			8	15%	21	14%
				26	68%	6	67%	33	79%	3	75%	38	73%	106	73%
			<b>38</b>	<b>100%</b>	<b>9</b>	<b>100%</b>	<b>42</b>	<b>100%</b>	<b>4</b>	<b>100%</b>	<b>52</b>	<b>100%</b>	<b>145</b>	<b>19%</b>	
<b>Top Quartile Subtotal by Field of Study &amp; GPA</b>			212	100%	47	100%	190	100%	37	100%	292	100%	778	100%	
	<b>Grand Total by Field of Study</b>			27%		6%	24%	5%			38%		100%	100%	

- Based on household income and family size, 31% of WSOS Cohort 2 selected scholars represent the bottom income quartile, 27% second quartile, 23% third quartile, and 19% top quartile.
- By income quartile the following proportions of scholars report a GPA at or above 3.50: bottom quartile (68%), second quartile (76%), third quartile (89%) and top quartile (87%).



**Table 13: WSOS Cohort 2 Selects by Income, Race and Ethnicity, and Field of Study**

WSOS Income Quartiles	Race and Ethnicity	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by Quartile	
		Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage		
<b>Bottom Quartile</b> Maximum Income by Household Size: 2-person: \$17,400 4-person: \$25,575 6-person: \$33,750	American Indian or Alaska Native	10	14%	4	27%	15	29%	3	33%	28	29%	60	25%
	Asian	7	10%	1	7%	7	14%	1	11%	9	9%	25	10%
	Black or African American	14	19%	1	7%	8	16%	2	22%	32	33%	57	23%
	Hispanic/Latino of any race(s)	1	1%	2	13%	2	4%	1	11%	4	4%	10	4%
	Native Hawaiian or Other Pacific Islander	39	54%	7	47%	17	33%	2	22%	22	23%	87	36%
	Two or more races	1	1%	1	2%	1	2%	1	100%	1	1%	3	1%
	White	72	100%	15	100%	51	100%	9	100%	96	100%	243	31%
<b>Bottom Quartile Subtotal by Field of Study &amp; Race/Ethnicity</b>													
<b>Second Quartile</b> Maximum Income by Household Size: 2-person: \$34,800 4-person: \$51,150 6-person: \$67,500	American Indian or Alaska Native	12	24%	2	14%	6	12%	1	8%	19	23%	40	19%
	Asian	3	6%	1	7%	2	4%	2	17%	7	9%	13	6%
	Black or African American	8	16%	2	14%	16	31%	2	17%	15	19%	43	21%
	Hispanic/Latino of any race(s)	4	8%	0%	0%	4	8%	1	8%	5	6%	14	7%
	Native Hawaiian or Other Pacific Islander	24	47%	7	50%	23	45%	8	67%	35	43%	97	46%
	Two or more races	2	4%	2	14%	2	4%	2	17%	2	2%	8	4%
	White	51	100%	14	100%	51	100%	12	100%	81	100%	209	27%
<b>Second Quartile Subtotal by Field of Study &amp; Race/Ethnicity</b>													



**Table 13 (cont'd): WSOS Cohort 2 Selects by Income, Race and Ethnicity, and Field of Study**

WSOS Income Quartiles	Race and Ethnicity	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by Quartile
		1	2%	0%	0%	8	17%	3	25%	9	14%	
<b>Third Quartile</b> Maximum Income by Household Size: 2-person: \$52,200 4-person: \$76,725 6-person: \$101,250	American Indian or Alaska Native	1	2%	0%	0%	0%	0%	0%	0%	0%	0%	1
	Asian	4	8%	33%	3	8	17%	3	25%	9	14%	27
	Black or African American	2	4%	0%	0%	0%	0%	0%	0%	1	2%	3
	Hispanic/Latino of any race(s)	6	12%	11%	1	4	9%	1	8%	11	17%	23
	Native Hawaiian or Other Pacific Islander		0%	0%	0%	0%	0%	0%	0%	2	3%	2
	Two or more races	1	2%	11%	1	4	9%	1	8%	4	6%	11
<b>Third Quartile Subtotal by Field of Study &amp; Race/Ethnicity</b>	White	37	73%	44%	4	30	65%	7	58%	34	54%	112
	Not provided		0%	0%	0%	0%	0%	0%	0%	2	3%	2
	<b>Grand Total by Field of Study &amp; Race/Ethnicity</b>	<b>51</b>	<b>100%</b>	<b>100%</b>	<b>9</b>	<b>46</b>	<b>100%</b>	<b>12</b>	<b>100%</b>	<b>63</b>	<b>100%</b>	<b>181</b>
	American Indian or Alaska Native											
	Asian	7	18%	0%	0%	8	19%	1	25%	2	4%	18
	Black or African American		0%	0%	0%	1	2%	0%	0%	1	2%	2
<b>Top Quartile</b> Maximum Income by Household Size: 2-person: \$69,600 4-person: \$102,300 6-person: \$135,000	Hispanic/Latino of any race(s)	4	11%	11%	1	1	2%	0%	0%	8	15%	14
	Native Hawaiian or Other Pacific Islander		0%	0%	0%	0%	0%	0%	0%	1	2%	1
	Two or more races	2	5%	11%	1	3	7%	0%	0%	11	21%	17
	White	24	63%	67%	6	27	64%	3	75%	29	56%	89
	Not provided	1	3%	11%	1	2	5%	0%	0%	0%	0%	4
	<b>Grand Total by Field of Study &amp; Race/Ethnicity</b>	<b>38</b>	<b>100%</b>	<b>100%</b>	<b>9</b>	<b>42</b>	<b>100%</b>	<b>4</b>	<b>100%</b>	<b>52</b>	<b>100%</b>	<b>145</b>
<b>Total</b>	American Indian or Alaska Native	1	0.5%	0%	0%	0%	0%	0%	0%	0%	0%	1
	Asian	33	16%	19%	9	37	19%	8	22%	58	20%	145
	Black or African American	12	6%	4%	2	10	5%	1	3%	18	6%	43
	Hispanic/Latino of any race(s)	32	15%	11%	5	29	15%	5	14%	66	23%	137
	Native Hawaiian or Other Pacific Islander		0%	0%	0%	1	1%	0%	0%	3	1%	4
	Two or more races	8	4%	9%	4	13	7%	3	8%	24	8%	52
	White	124	58%	51%	24	97	51%	20	54%	120	41%	385
	Not provided	2	1%	6%	3	3	2%	0%	0%	3	1%	11
	<b>Grand Total by Field of Study</b>	<b>212</b>	<b>100%</b>	<b>100%</b>	<b>47</b>	<b>190</b>	<b>100%</b>	<b>37</b>	<b>100%</b>	<b>292</b>	<b>100%</b>	<b>778</b>
	<b>% by Field of Study</b>		<b>27%</b>	<b>6%</b>			<b>24%</b>		<b>5%</b>		<b>38%</b>	<b>100%</b>

- Relative to the overall proportion of WSOS Cohort 2 selects by race or ethnicity (Total), the following groups of scholars are more heavily represented in the following income quartiles:
  - Bottom Quartile: Asian, Black or African American and Hispanic/Latino of any race(s)
  - Second Quartile: Hispanic/Latino of any race(s)
  - Third Quartile: American Indian or Alaska Native and White
  - Top Quartile: Two or more races, White and Not provided.



**Table 14: WSOS Cohort 2 Selects by Institution and Field of Study as of Fall 2013**

College Type & College Name	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by College	% Total Selects
	Count	%	Count	%	Count	%	Count	%	Count	%		
<b>Four-Year Public</b>	<b>165</b>	<b>31%</b>	<b>27</b>	<b>5%</b>	<b>144</b>	<b>27%</b>	<b>25</b>	<b>5%</b>	<b>167</b>	<b>32%</b>	<b>528</b>	<b>100%</b>
Central Washington University	8	30%	3	11%	4	15%	6	22%	6	22%	27	100%
Eastern Washington University	14	35%	2	5%	6	15%	2	5%	16	40%	40	100%
The Evergreen State College	2	67%					1	33%			3	100%
University of Washington-Bothell	6	46%	2	15%	1	8%	1	8%	3	23%	13	100%
University of Washington-Seattle	68	26%	15	6%	90	34%	9	3%	82	31%	264	100%
University of Washington-Tacoma	7	50%	2	14%					5	36%	14	100%
Washington State University	30	28%	1	1%	32	30%	3	3%	41	38%	107	100%
Washington State University-Spokane	1	25%			1	25%			2	50%	4	100%
Washington State University-Tri-Cities					3	60%			2	40%	5	100%
Washington State University-Vancouver	10	67%			2	13%			3	20%	15	100%
Western Washington University	19	53%	2	6%	5	14%	3	8%	7	19%	36	100%
<b>Private or Independent</b>	<b>24</b>	<b>16%</b>	<b>11</b>	<b>8%</b>	<b>27</b>	<b>18%</b>	<b>11</b>	<b>8%</b>	<b>73</b>	<b>50%</b>	<b>146</b>	<b>100%</b>
DigiPen Institute of Technology			5	100%							5	100%
Gonzaga University	1	8%			7	54%	1	8%	4	31%	13	100%
Heritage University	1	20%					1	20%	3	60%	5	100%
Northwest University	1	13%					1	13%	6	75%	8	100%
Pacific Lutheran University	6	15%	2	5%	4	10%	2	5%	25	64%	39	100%
Saint Martin's University					3	50%			3	50%	6	100%
Seattle Pacific University	4	22%	1	6%	1	6%	1	6%	11	61%	18	100%
Seattle University	4	24%	2	12%	5	29%	1	6%	5	29%	17	100%
Trinity Lutheran College	1	100%									1	100%
Walla Walla University							1	50%	1	50%	2	100%
Whitman College	3	60%	1	20%			1	20%			5	100%
Whitworth University	3	11%			7	26%	2	7%	15	56%	27	100%
<b>Community or Technical College</b>	<b>23</b>	<b>22%</b>	<b>9</b>	<b>9%</b>	<b>19</b>	<b>18%</b>	<b>1</b>	<b>1%</b>	<b>52</b>	<b>50%</b>	<b>104</b>	<b>100%</b>
Bellevue College	2	18%			3	27%			6	55%	11	100%
Bellingham Technical College									1	100%	1	100%
Cascadia Community College					1	100%					1	100%
Centralia College					2	40%			3	60%	5	100%
Clark College			1	20%					4	80%	5	100%
Clover Park Technical College									1	100%	1	100%
Columbia Basin College	1	50%							1	50%	2	100%
Edmonds Community College									1	100%	1	100%



**Table 14 (cont'd): WSOS Cohort 2 Selects by Institution and Field of Study as of Fall 2013**

College Type & College Name	Science		Technology		Engineering		Mathematics		Health Care		Grand Total by College	% Total Selects	
	Count	%	Count	%	Count	%	Count	%	Count	%			
Community or Technical College (cont'd)	23	22%	9	9%	19	18%	1	1%	52	50%	104	100%	14%
Everett Community College	1	17%	3	50%					2	33%	6	100%	0.8%
Grays Harbor College					1	25%			3	75%	4	100%	0.5%
Green River Community College	2	50%							2	50%	4	100%	0.5%
Highline Community College					1	50%			1	50%	2	100%	0.3%
Lake Washington Institute of Technology	1	25%	2	50%					1	25%	4	100%	1%
Lower Columbia College									2	100%	2	100%	0.3%
North Seattle Community College	1	100%									1	100%	0.1%
Olympic College	1	25%			1	25%			2	50%	4	100%	1%
Peninsula College					1	100%					1	100%	0.1%
Pierce College at Fort Steilacoom									1	100%	1	100%	0.1%
Pierce College at Puyallup	1	100%									1	100%	0.1%
Renton Technical College	1	100%									1	100%	0.1%
Seattle Central Community College	3	43%			2	29%			2	29%	7	100%	1%
Skagit Valley College	1	33%			1	33%			1	33%	3	100%	0.4%
South Puget Sound Community College			1	20%					4	80%	5	100%	1%
South Seattle Community College	2	67%							1	33%	3	100%	0.4%
Spokane Community College					1	50%			1	50%	2	100%	0.3%
Spokane Falls Community College	1	33%					1	33%	1	33%	3	100%	0.4%
Tacoma Community College	2	20%	1	10%	3	30%			4	40%	10	100%	1%
Walla Walla Community College									3	100%	3	100%	0.4%
Wenatchee Valley College	1	25%			1	25%			2	50%	4	100%	1%
Whatcom Community College	1	50%							1	50%	2	100%	0.3%
Yakima Valley Community College	1	25%	1	25%	1	25%			1	25%	4	100%	1%
<b>Grand Total</b>	<b>212</b>	<b>27%</b>	<b>47</b>	<b>6%</b>	<b>190</b>	<b>24%</b>	<b>37</b>	<b>5%</b>	<b>292</b>	<b>38%</b>	<b>778</b>	<b>100%</b>	<b>100%</b>

- Overall, 68% of WSOS Cohort 2 selects will attend four-year public colleges or universities, 19% private or independent colleges or universities, and 14% community or technical colleges in fall 2013.
- While 50% of WSOS Cohort 2 selects attending private or independent colleges and universities and community or technical colleges, respectively, will pursue Health Care, only 32% of students attending four-year public colleges or universities will pursue a Health Care degree. Instead, a higher proportion of students at four-year public institutions will pursue degrees in Science (31%) and Engineering (27%).
- The largest proportions of WSOS Cohort 2 selects will attend the following institutions: University of Washington-Seattle (34%), Washington State University (14%), Eastern Washington University (5%) and Western Washington University (5%).



**Table 15: WSOS Cohort 2 Selects by Institution and Class Standing as of Fall 2013**

Institution Type College or University	1 <sup>st</sup> Year		2 <sup>nd</sup> Year		3 <sup>rd</sup> Year		Institution Total	
	#	%	#	%	#	%	#	%
<b>Four-Year Public</b>	<b>366</b>	<b>69.3%</b>	<b>63</b>	<b>11.9%</b>	<b>99</b>	<b>18.8%</b>	<b>528</b>	<b>100%</b>
Central Washington University	19	70.4%	4	14.8%	4	14.8%	27	100%
Eastern Washington University	23	57.5%	9	22.5%	8	20.0%	40	100%
The Evergreen State College	1	33.3%	1	33.3%	1	33.3%	3	100%
University of Washington-Bothell	8	61.5%	2	15.4%	3	23.1%	13	100%
University of Washington-Seattle	197	74.6%	21	8.0%	46	17.4%	264	100%
University of Washington-Tacoma	7	50.0%	1	7.1%	6	42.9%	14	100%
Washington State University	68	63.6%	20	18.7%	19	17.8%	107	100%
Washington State University-Spokane	3	75.0%			1	25.0%	4	100%
Washington State University-Tri-Cities	3	60.0%			2	40.0%	5	100%
Washington State University-Vancouver	9	60.0%	3	20.0%	3	20.0%	15	100%
Western Washington University	28	77.8%	2	5.6%	6	16.7%	36	100%
<b>Private or Independent</b>	<b>104</b>	<b>71.2%</b>	<b>14</b>	<b>9.6%</b>	<b>28</b>	<b>19.2%</b>	<b>146</b>	<b>100%</b>
DigiPen Institute of Technology	2	40.0%	2	40.0%	1	20.0%	5	100%
Gonzaga University	10	76.9%	1	7.7%	2	15.4%	13	100%
Heritage University	1	20.0%	3	60.0%	1	20.0%	5	100%
Northwest University	6	75.0%			2	25.0%	8	100%
Pacific Lutheran University	22	56.4%	4	10.3%	13	33.3%	39	100%
Saint Martin's University	4	66.7%	1	16.7%	1	16.7%	6	100%
Seattle Pacific University	13	72.2%	1	5.6%	4	22.2%	18	100%
Seattle University	13	76.5%	1	5.9%	3	17.6%	17	100%
Trinity Lutheran College					1	100.0%	1	100%
Walla Walla University	2	100.0%					2	100%
Whitman College	5	100.0%					5	100%
Whitworth University	26	96.3%	1	3.7%			27	100%
<b>Community or Technical College</b>	<b>47</b>	<b>45.2%</b>	<b>33</b>	<b>31.7%</b>	<b>24</b>	<b>23.1%</b>	<b>104</b>	<b>100%</b>
Bellevue College	5	45.5%	5	45.5%	1	9.1%	11	100%
Bellingham Technical College					1	100.0%	1	100%
Cascadia Community College	1	100.0%					1	100%
Centralia College	5	100.0%					5	100%
Clark College	4	80.0%			1	20.0%	5	100%
Clover Park Technical College	1	100.0%					1	100%
Columbia Basin College	1	50.0%			1	50.0%	2	100%
Edmonds Community College	1	100.0%					1	100%





**Table 15 (cont'd): WSOS Cohort 2 Selects by Institution and Class Standing as of Fall 2013**

Institution Type	1 <sup>st</sup> Year		2 <sup>nd</sup> Year		3 <sup>rd</sup> Year		Institution Total	
	#	%	#	%	#	%	#	%
College or University	47	45.2%	33	31.7%	24	23.1%	104	100%
Community or Technical College	4	66.7%	2	33.3%			6	100%
Everett Community College			1	25.0%	3	75.0%	4	100%
Grays Harbor College			3	75.0%	1	25.0%	4	100%
Green River Community College			1	50.0%	1	50.0%	2	100%
Highline Community College			2	50.0%	2	50.0%	4	100%
Lake Washington Institute of Technology			1	50.0%			2	100%
Lower Columbia College					1	100.0%	1	100%
North Seattle Community College					4	100.0%	4	100%
Olympic College							1	100%
Peninsula College	1	100.0%					1	100%
Pierce College at Fort Steilacoom			1	100.0%			1	100%
Pierce College at Puyallup			1	100.0%			1	100%
Renton Technical College					1	100.0%	1	100%
Seattle Central Community College	4	57.1%	1	14.3%	2	28.6%	7	100%
Skagit Valley College	3	100.0%					3	100%
South Puget Sound Community College	1	20.0%	3	60.0%	1	20.0%	5	100%
South Seattle Community College	1	33.3%	2	66.7%			3	100%
Spokane Community College	2	100.0%					2	100%
Spokane Falls Community College			2	66.7%	1	33.3%	3	100%
Tacoma Community College	5	50.0%	5	50.0%			10	100%
Walla Walla Community College	1	33.3%	1	33.3%	1	33.3%	3	100%
Wenatchee Valley College	3	75.0%	1	25.0%			4	100%
Whatcom Community College	1	50.0%			1	50.0%	2	100%
Yakima Valley Community College	2	50.0%	1	25.0%	1	25.0%	4	100%
<b>Grand Total</b>	<b>516</b>	<b>66.3%</b>	<b>110</b>	<b>14.1%</b>	<b>151</b>	<b>19.4%</b>	<b>778</b>	<b>100%</b>

- By institution type, a higher proportion of 1<sup>st</sup> Years are present at Four-Year Independent or Private (71.2%) or Four-Year Public (69.3%) institutions, compared to Community or Technical Colleges (45.2%).



**Table 16: WSOS Cohort 2 Selects by County**

County	#	%
ADAMS	3	0.4%
ASOTIN	1	0.1%
BENTON	10	1.3%
CHELAN	14	1.8%
CLALLAM	4	0.5%
CLARK	40	5.1%
COWLITZ	15	1.9%
DOUGLAS	3	0.4%
FERRY	2	0.3%
FRANKLIN	10	1.3%
GRANT	13	1.7%
GRAYS HARBOR	9	1.2%
ISLAND	8	1.0%
JEFFERSON	2	0.3%
KING	232	29.8%
KITSAP	19	2.4%
KITTITAS	6	0.8%
KLICKITAT	5	0.6%
LEWIS	6	0.8%
LINCOLN	4	0.5%
MASON	4	0.5%
OKANOGAN	14	1.8%
PACIFIC	6	0.8%
PEND OREILLE	1	0.1%
PIERCE	98	12.6%
SAN JUAN	3	0.4%
SKAGIT	14	1.8%
SNOHOMISH	64	8.2%
SPOKANE	53	6.8%
STEVENS	8	1.0%
THURSTON	23	3.0%
WALLA WALLA	5	0.6%
WHATCOM	21	2.7%
WHITMAN	13	1.7%
YAKIMA	45	5.8%
<b>Grand Total</b>	<b>778</b>	<b>100.0%</b>



## Data Definitions and Notes

- **Cohort 1 Non-Senior Selects:** Of the 3,045 students selected for WSOS Cohort 1, 610 were upcoming college seniors. Since upcoming college seniors are no longer eligible to apply for WSOS, we compare WSOS Cohort 1 non-senior selects (n=2,435) to WSOS Cohort 2 selects.
- **Cohort 2 Selects:** 778 students were selected based on GPA, income quartile and first-generation status by class standing.
- **Cohort 2 Eligible Applicants:** 985 applicants were eligible for the WSOS based on GPA, income and class standing.
- **Cohort 2 All Applicants:** 1,488 submitted applications for the WSOS 2013-14 (Cohort 2).
- **Income Quartile:** Based on reported household size and total family income (adjusted gross income plus all untaxed income for 2012), each applicant was categorized by income quartile based on the maximum income allowed by household size (e.g., family of 4 maximum of \$102,300), where the bottom quartile is the 1<sup>st</sup> quartile and top quartile is the 4<sup>th</sup> quartile.
- **Race or Ethnicity:** Following state and federal guidelines, students were asked the following two questions: "Are you of Hispanic/Latino descent (a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture/origin, regardless of race)?" If "Yes," students were coded as "Hispanic/Latino of any race(s). If "No," students were coded based on their response to the second question: "Additionally, what race(s) do you consider yourself?" If a student marked two or more races, the student was coded as "Two or more races," otherwise the student was coded as one of the following: American Indian or Alaska Native (a person having origins in any of the original peoples of North and South America, including Central America, and who maintains a tribal affiliation or community attachment), Asian (a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam), Black or African American (a person having origins in any of the black racial groups of Africa), Native Hawaiian or Other Pacific Islander (a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands), White (a person having origins in any of the original peoples of Europe, the Middle East, or North Africa).
- **Grade Point Average:** All selected students' GPAs are transcript verified, while the GPAs for all eligible applicants are transcript-verified when available and student-reported when a transcript was not provided. Students were asked the following questions: "Your cumulative grade point average (GPA) through fall quarter/semester 2012 must be a minimum of 2.75 (on a 4.0 scale). Enrolled in high school - If you have not yet graduated from high school, enter your high school cumulative GPA through fall quarter/semester 2012. If you are a Running Start student check with your high school to ensure that your Running Start credits for fall quarter are included. Enrolled in college/university - If you are currently enrolled in college/university report your college/university cumulative GPA through fall quarter/semester 2012. If you attended more than one college, list the GPA from the college where you earned the most credit. (Note: If your most current GPA is from The Evergreen State College fall 2012 please select The Evergreen State College from the drop down menu below and your academic progress will be verified with the college). Graduated from high school, but have not yet enrolled in college - enter your high school cumulative GPA. Graduated from high school, attended college, but not enrolled fall



quarter/semester 2012 – Enter your most recent college/university cumulative GPA from the college/university from which you earned the most credit.  
Received your GED – Enter the score.”

- **Field of Study:** Field of study is based on the student’s response to the following prompt: “Select the one program of study that best describes your educational plans.” Options were Science, Technology, Engineering, Mathematics or Health Care.
- **Class Standing:** Class standing for fall 2013 was verified by College Success Foundation Scholarship Services based on student high school or college transcripts.
- **First-Generation:** Students were coded as First-Generation if they answered “No” to the following question: “Did either of your (biological or adopted) parents attend college?”
- **College:** College name is based on the student’s response to the following prompt: “Name of Washington college or university where you will be enrolled during the fall 2013.”
- **County:** County based on mailing address zip code. When mailing address zip code was not available, mailing address city was used to code county.

# Media



## Scholarships aim to encourage students to study science, engineering

By Glenn Farley

Posted on May 22, 2013 at 7:33 PM

Updated Wednesday, May 22 at 7:40 PM

SEATTLE - Boeing, Microsoft and Washington State want to encourage more students to enter engineering and scientific fields. The shorthand for these careers is "STEM," standing for jobs in Science, Technology, Engineering and Math. This month another 800 scholarships worth up to \$17,000 per student were issued.

Those scholarships come in the second year of the Washington State Opportunity Scholarship program. The program started awarding grants last year to 3,000 students. The initial awards are \$1,000 in the freshman and sophomore years that go to \$5,000 a year once that student declares a major in one of the STEM fields, which include some 400 majors.

Where's the money coming from? Both Microsoft and Boeing are each kicking in \$25 million to get the program rolling. The State of Washington matching. So far the companies have invested \$10 million each and the state \$5 million. Right now it's envisioned the Washington State Opportunity Scholarship could award \$1 billion to deserving students.

The program was developed as Washington's tech sector found that it couldn't find enough qualified candidates to fill thousands of jobs. Earlier in 2013, the Washington Roundtable, a business group, commissioned a study which found there are 25,000 unfilled tech jobs at Washington companies, a number that's expected to grow until state universities like the University of Washington can crank out more graduates.



University of Washington first-year engineering student David Coven talks about the WSOS.





## **Editorial: Students help expand scholarship opportunities**

**Washington state's Opportunity Scholarship program is right to turn to its scholars for help broadening and deepening the program's reach.**

*Seattle Times Editorial*

Originally published Thursday, May 23, 2013 at 4:05 PM

WASHINGTON state Opportunity Scholarship students are in a unique position to help broaden and deepen the program's impact.

These students come from low- and middle-income families and are selected to receive scholarships to help them prepare for careers in science, technology, engineering, math and health-care studies. They understand the challenges faced by bright, hardworking students in underrepresented groups.

Scholars told their stories during a useful feedback session Wednesday at the University of Washington. The College Success Foundation, which administers the scholarship, brought together students in the program and members of the scholarship program's board, including its chair, Brad Smith, executive vice president of legal and corporate affairs at Microsoft, and board member Mack Hogans, a former senior vice president of Weyerhaeuser.

The result was critical insight.

Students with little experience in higher education are more likely to be influenced by their peers, said Wilder Garcia, a freshman at South Seattle Community College and scholarship recipient. Deploying scholarship recipients to speak to high schools would resonate.

"I feel like my peers will listen to me," Garcia said.

Sobia Sheikh, a UW math major, suggested stronger efforts to educate middle- and high-school students on the academic requirements for science, technology, engineering, math or health-care majors as a way to prepare them for the rigors of college.

Lorelei Clark, a Seattle Central Community College student headed to Washington State University to study veterinarian science, was one of several students calling for internships to better connect STEM studies with real careers.

The suggestions are doable and could bolster the scholarship fund created by the Legislature and secured with a \$50 million combined commitment from Microsoft and Boeing.

The program is ramping up, awarding nearly 800 new scholarships this week. That is on top of 3,000 handed out last year. The award amounts have also been increased from \$1,000 to \$5,000 for juniors and seniors, a compassionate response to academic workloads that do not often leave time for outside jobs.



## In Our View: Washington Opportunity Scholarship

### The first cohort of scholars

Published: Thursday, May 23, 2013, 12:01 a.m.

The paradox of Washington's public universities is the dual mission of serving as a research powerhouse while attracting brainy but often low-income students from Edmonds to Everett.

Tapping the private sector's appetite for professional, tech-savvy grads is one remedy for the tuition squeeze. The pipeline from university to marketplace already exists, but the system demands a funding boost to benefit qualified students who don't have the dinero for school.

To goose access, Washington's business community paired with the state in 2011 to create the Washington State Opportunity Scholarship. The mission is to provide scholarships to 5,000 Washington students annually, maxing to \$17,000 over the course of a college career. The area of study must be either health-related or STEM (Science, Technology, Engineering, and Math.)

Policymakers and big donors recognize the demand for STEM grads, and home-grown trumps imported talent. Cost-prohibitive tuition remains a stumbling block for qualified students, with less than a third of Pell-grant recipients finishing their associate degree within four years. Scholarships mortar the funding cracks and bolster graduation rates.

Boeing and Microsoft are ponying up \$50 million for the WSOS and the state kicked in \$5 million. The goal is to raise \$500 million in private funds matched with state support for a total of \$1 billion by 2020. The campaign has already yielded impressive results, with 3,000 students awarded \$1,000 scholarships in the spring of 2012 (the gift ramps up to \$5,000 for seniors and juniors.)

On Wednesday UW President Michael Young hosted 150 WSOS Scholars -- the first cohort -- from UW, Seattle University, Bellevue College and Seattle Community College. In 2012, more than 3,000 students pursuing STEM and health care degrees were awarded the WSOS.

There are 25,000 unfilled jobs in Washington related to STEM and health care, according to a report from the Washington Roundtable and Boston Consulting Group.

"Washington is the ass end of the donkey in just about every aspect of education," said UW's Ed Lazowska, Bill and Melinda Gates Chair in Computer Science and Engineering. The WSOS is a laudatory exception to Lazowska's wisdom.

Individuals and companies in Snohomish and Island counties can contribute to scholarship funds that are then matched by the state and fully tax-deductible. More significantly, the WSOS establishes a tax-exempt endowment that can't be drained like the state's tobacco-settlement funds.

The WSOS is a partial salve to Washington's tuition crunch. It merits strong support.





## State's science, tech students see new opportunity at home

The state, Microsoft and Boeing are working together to prepare young people for jobs in the growing STEM fields. But it's too early to say how big a difference a public-private effort will make.

By Vanesha Manuturi

Dated: June 04, 2013

**Redmond-native Ameen Tabatabai** was set to go to the University of Washington in 2010. Despite the doctor's diagnosis of his chronic and progressive liver disease when he was only 10 years old, Tabatabai pushed through middle school and high school with flying colors. But shortly after his enrollment, his condition worsened and Tabatabai had to postpone his studies.

On Dec. 20, 2010, Tabatabai went into a surgery for liver transplant at the University of Washington Medical Center.

Having faced the reality of medical bills, the cost of college tuition became even more of a concern. But when he came back to school in fall 2011, the UW sophomore found out from the financial aid office about the Washington State Opportunity Scholarship. He took his chances, applied and received a scholarship.

The Washington State Opportunity Scholarship is the fruit of a public-private partnership created back in 2011 by the Washington State Legislature to address rising tuition at Washington colleges and universities. The program specifically focuses on Washington state residents looking to pursue a major in science, technology, engineering and mathematics (STEM), as well as health. So far, the WSOS board is supporting a total of 3,000 STEM and health students; more than 750 scholarships were awarded across the state this year alone. The scholarship students attend dozens of public and private universities and community colleges in the state.

Earlier in March, a study by the Washington Roundtable and the Boston Consulting Group reported that there are 25,000 jobs unfilled in Washington – a large portion of which are in the science, technology, engineering and mathematics or health care sectors.

“We need all the help we can get,” said Brad Smith, general counsel and an executive vice president, at Microsoft, a member of the Washington State Opportunity Scholarships board of directors.

The creation of the scholarship program gave local corporations a new way to be involved in the efforts to close the “skills gap” Funds for the scholarship largely came from Boeing and Microsoft ,with \$50 million combined, and the state contributed the initial \$5 million fund.

This model of public-private partnership is the first of its kind in the nation, according to state Sen. Rodney Tom, D-Medina.

According to Smith, another state that comes close to comparison is Georgia, but what Georgia offers are state scholarships. Therefore, scholarships are influenced heavily on the state's economy. To ensure the continuity of the program, the WSOS board plans to create an endowment that will withstand any economic weather.

Whether or not the program is making a dent on the "skills gap" is still unclear; the data available is mostly anecdotal, Smith said. "What we know right now is that scholarships make a difference in students' lives," said Smith.

That much is clear when students took the opportunity to share their opinions of the program to the WSOS board and several lawmakers in attendance at a recent University of Washington event.

University of Washington senior Sobia Sheikh, a mathematics major, used to work two jobs — one for experience, the other to help pay tuition and house utilities. She was feeling burnt out, but the scholarship enabled her to quit one of her jobs and focus on excelling in her studies.

Sheikh, who's also a part of University of Washington's Dream Project reaching out to help low-income students apply for college, suggested that the Washington State Opportunities Scholarship board should increase the awareness in specific schools like Cleveland High School. High school students in lower-income neighborhoods are often conflicted about the thought of higher education because of their financial circumstances.

Other students simply expressed gratitude, but many, like Sheikh, offered feedback from the capacity constraints of STEM programs to internship opportunities.

In responding to the students' feedbacks and the program, Tom noted that the nature of the public-private partnership enables the program to act as a supplement to what the state is working on.

Smith said, "Take internships, for example, we can't do that as a state alone, but capacity constraints in programs are something that we are working on. We do our part. You do your part."

Addressing the "skills gap" in Washington, according to the Washington Roundtable report, could significantly cut the state's unemployment as well as raising state and local tax revenues by more than \$1 billion annually within five years. In the long run, the WSOS board hopes that the scholarships encourage the growth of home-bred STEM employees who will later continue to work in-state.

Staying local is definitely a strict principle for Ameen Tabatabai, who plans to continue to graduate school at University of Washington after his bachelor's degree.

"No relocation [for me] — I'm all about Washington state," said Tabatabai. "I want to give back to the state and help improve Washington state as a tech center."

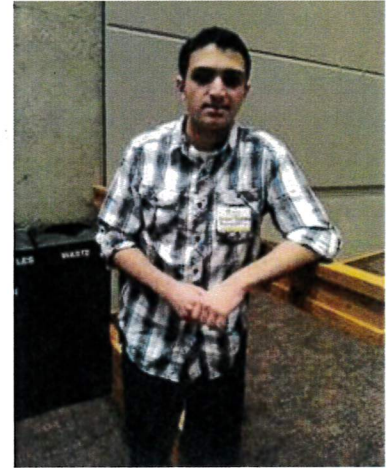


Photo: Vanesha Manuturi

After his liver transplant in 2010, University of Washington sophomore Ameen Tabatabai is now back in school, with a \$5,000 scholarship.

## Local News

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# State's students flocking to computer-science programs

Students are flocking to computer science and engineering majors, even as the state sets aside \$18 million to grow those programs at state universities. But the money may not be enough.

By Katherine Long

Seattle Times higher education reporter



For the past few years, educators and parents have been imploring students to consider careers in science, technology, engineering and math — the so-called STEM fields.

It looks like they're listening.

Public universities across the state are seeing a big increase in the number of students who want to major in computer science, engineering and other high-tech fields.

The number of incoming freshmen who listed computer science as their desired major has more than doubled in just three years at the University of Washington, which has one of the nation's top computer-science schools. Western Washington University has seen the number of its computer-science majors and pre-majors double in two years.

At Eastern Washington University, computer science and engineering have become such popular majors that the programs are

physically running out of room, even though they're in the newest building on campus.

"The field is hot again," said Ed Lazowska, who holds the Bill & Melinda Gates Chair in Computer Science and Engineering at the University of Washington.

The Washington Legislature has appropriated \$18 million to boost engineering and computer-science programs at the UW, WWU and Washington State University. But interest is growing so fast that the money almost surely won't be enough.

At the UW, where hundreds of students are turned away from the computer-science program every year for a lack of space, the money "still won't meet the demand," Lazowska said by email. "But every journey begins with a few steps, and these are important steps."

Meanwhile, a new state effort to recognize computer science is likely to expose even more high-school students to the subject. Legislation approved by lawmakers gives high-school math or science credit to students who pass Advanced Placement (AP) computer science, and helps schools with equipment and training.

Its sponsor, Rep. Cyrus Habib, D-Bellevue, says it was sorely needed; currently, only 35 of the state's 771 high schools offer AP computer science. He acknowledged that the legislation might actually worsen the university bottleneck for a time, as more high-school students become interested in the field.

Michaela Montstream is one of those students. A student at Holy Names Academy, an all-girl Catholic school in Seattle, she signed up for AP computer science — “kind of a small, unheard-of elective,” she said by email. Many students were hesitant to enroll in the class because its subject matter was unfamiliar, she added.

But almost immediately, Montstream was taken with the field. An internship at Microsoft last summer cemented her interest, and she was admitted directly into the UW's Computer Science & Engineering program, where she'll start her freshman year this fall.

“The kids were ready for it,” said Holy Names math teacher Sam Procopio, who began teaching the class in 2011 and now has more than 70 girls signed up for three classes this fall. The numbers are especially noteworthy because girls' involvement in computer science lags significantly, both in high school and in the industry.

After they take the Holy Names AP class, nearly half say they're considering it as a major or minor in college, Procopio said. And more than a third of his students are doing full-time, paid internships this summer.

Lazowska, with the UW, said he thinks students are realizing that, “Computer science has ‘change the world’ potential like no other field.” Montstream, for example, hopes to use her degree to help improve rural health care in developing countries.

Students are also seeing that both computer science and “computational thinking,” a problem-solving method that uses computer-science techniques, is valuable in many fields, Lazowska said. Many of UW's computer-science grads go on to study such fields as biology, law, medicine and bioengineering, he said.

And of course, the degree can lead to a good job. All of EWU's spring computer-science grads — about 90 students — were offered jobs in the Spokane area, and many of those jobs start at \$80,000 a year, said Steve Simmons, computer-science professor emeritus. Not bad for a bachelor's degree, he said.

Business leaders have long complained about a dearth of highly skilled tech workers in Washington and called for more state money to try to bridge the training gap. A March study released by the business group Washington Roundtable said 25,000 high-skill jobs have remained vacant for three months or longer because qualified workers can't be found to fill them.

Nirupama Suneel's school, Skyline High in the Issaquah district, didn't offer computer science last year, but Suneel learned programming after she joined the school's robotics team. Working with robots has “piqued my interest in problem solving and creative thinking, and as a result, programming,” she said by email. She also has been admitted directly to the UW's computer-science program as a freshman this fall.

And so has Payton Quinn, who took an introductory programming class online through Stanford University because his Catholic school, Seattle Preparatory, didn't offer AP computer science.



Interest in computer science flagged somewhat around 2008, when the economy tanked. “We were still suffering under the crash of the dot-coms, as if the whole industry went away,” said EWU’s Judd Case, dean of the College of Science, Health and Engineering.

But that has changed. The UW’s College of Engineering — of which computer science is a part — produces about 1,426 degrees a year and hopes to increase that by about 340 degrees a year with the new money approved by lawmakers.

WWU expects to triple the number of computer-science grads, to about 135 by 2015-16, said spokesman Paul Cocke. WWU will also use the money to turn its engineering technology program into a fully accredited engineering program.

Growing STEM programs when money is limited is a challenge because it costs more to educate STEM students: Lab work can require expensive equipment, and there’s a need for one-on-one mentoring and smaller class sizes.

“It’s a big, interesting, complicated problem that no other state has figured out how to fix,” said state Rep. Drew Hansen, D-Bainbridge Island, who sponsored the AP computer-science bill along with Habib.

“Hopefully, we made some progress this year,” he said.

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