

**Mollie Davis Scholarship  
Program Review  
Report to Yakima Rotary Trust  
May 22, 2018**

The committee undertook a program review of the Mollie Davis Scholarship Program as requested the board of the Yakima Rotary Trust (YRT) to review the current program and to look at successes and opportunities. It is hoped that this report and recommendations are useful to the YRT and this terrific program.

**Background:**

In November 2008, Mary Monroe Davis "Mollie" Davis passed away leaving an educational bequest of \$20 million dollars to fund two and four-year scholarships to benefit residents of Yakima County. The Yakima Rotary Trust was designated the scholarship administrator and has awarded over 301 scholarships valued at over \$5.4 million dollars since 2010. As a part of its role as the designated scholarship administrator, the YRT has periodically undertaken a program review. The first program review was conducted at the one-year point. The next review was conducted in 2012 at the three-year point by a 16-member committee.

**Scholarship Review Committee and Process:**

In 2017, the YRT decided to move forward with its third program review to begin in the Winter of 2018. The committee was comprised of 11 members that included experts from a variety of areas including representatives from each of the three local colleges and the YRT.

**Committee Members:**

Jill Falk, Rotary Trust Chair/Program Review Chair  
Carolyn Flory, Executive Director, Yakima Rotary Club  
Neal Springer, Mollie Davis Scholarship Committee Chair  
Dr. Linda Kaminski, President, YVC  
Dr. Andrew Sund, President, Heritage University  
Steve Pilger, Principal, BBM Financial Services  
Pam Cleaver, CPA, Moss Adams, Auditor who manages and supervises audits for non-for-profit and higher education institutions.  
Dr. Teresa Rich, Vice President for Administrative Services, YVC  
Jan Jorgenson, Past Director of Annual Giving and Alumni, PNWU, and past Executive Director of Grays Harbor College Foundation  
Carol Wagar, CPA and Certified College Planning Specialist  
Oscar Verduzco, Financial Aid Director, YVC, and Past Director of Financial Aid and Scholarships at Heritage University

The Scholarship Review committee met in person on 1/31, 3/12 and 5/1. Some of the committee work was performed using e-mail.

Interviews were conducted with community leaders, Mollie Davis Scholars, scholarship experts and Yakima Valley Community Foundation Board Members and staff. Their insights and expertise were quite helpful to the committee.

Interviewees

Dr. Kathleen Ross, Founder of Heritage University and Board Member WGU Washington  
 Senator Curtis King, Business and Community Leader and 10 years in the state senate  
 Maureen Adkison, Recent past Yakima City Council member  
 Mollie Davis Scholars  
 Yakima Valley Community Foundation, Dave Edler, Ricardo Valdez and Lindsay Boswell  
 Jennifer Witherbee, Washington Apple Education Foundation  
 AnnRose Burch, International Scholarship and Tuition Services

The YRT also decided to engage Kim Stezala, Scholarship Design Expert of Design Group International, to assist the committee in their work. Ms. Stezala provided detailed assistance on some of the more technical areas and performed an overall review.

The committee began its process by reviewing the Mollie Davis Trust Document. A clear understanding was obtained about the parameters that would need to be followed. In addition, the committee was provided and reviewed all of the resources attached to this report. Each meeting was filled with healthy dialog about each of the topics.

The committee reviewed Mollie Davis Program Data and utilized a wide variety of resources to aid in the decision-making process. The National Scholarship Providers Association (NSPA) Scholarship Program Toolkit was a valuable resource. The committee was able to review data about the practices of most scholarship providers. The committee found that there is no one recognized universal list of best practices for scholarship programs. It was found that what may good for one program may not be for another. Each program and its goals are unique and, accordingly, so are the program designs.

The remainder of this report will address the major topic areas, the assessment and recommendations by the committee.

**Mollie Davis Trust Document:**

The committee undertook a review of the Mollie Davis Trust Document to obtain an understanding of the donor's stated intent and the parameters that were set forth for the scholarship program. It was confirmed that the current program has stayed true to the trust document.

**Mollie Davis Scholarship Program Mission:**

The committee then reviewed the mission.

Mission

*The purpose of the Mollie Davis Scholarship Program is to award renewable scholarships at a level that allows residents of Yakima County to pursue their undergraduate degrees.*

The objectives of the program are:

*Administer the Scholarship Program in a fair and impartial manner consistent with the scholarship criteria as set for in the Mollie Davis Trust document and donor intent.*

The committee noted that the selection process is blind to the YRT. This process makes the selection of scholarship recipients fair and unbiased. In review of Private Inurement and Private

Benefit guidelines for 501(c)(3) organizations, the committee recommends that children/step-children of YRT Board Members, children/step-children of all Rotarians serving on the Scholarship Committee, and children/step children of paid staff of the YRT not be eligible for the Mollie Davis Scholarship beginning in the 2019 class.

*Encourage academic achievement and degree completion.*

The high-level award amount and renewable nature of the program increases student confidence for academic persistence and degree completion. Renewal rates and persistence of the Mollie Davis Scholars is high which is a strong indicator of degree completion.

*Encourage students to stay connected to Yakima County.*

The scholarship program continues to aspire to this objective knowing that students will make their own choices and that the goal is not measurable. The committee would like to continue with this objective and does have a suggestion that is outlined in a later section of the report.

*To achieve a high community profile.*

Extensive outreach and marketing is done each year in promoting the program and encouraging the submission of applications. Over 1,050 applications were started in the 2017-2018 application cycle. With promotions done by newspaper, television, social media and direct outreach to local colleges and high schools in the Yakima Valley, the Mollie Davis program has become a well-known, prestigious and much sought-after scholarship. This work will need to continue.

The scholarship program continues to meet the requirements of the trust document and donor intent. In addition, the mission and objectives of the trust document are being met as well.

**What does the Mollie Davis Scholarship Program Impact?**

The Mollie Davis Scholarship Program is making a difference in at least these six key areas and maybe more.

*Access to College:* In supporting low income students, the Mollie Davis Scholarship Program impacts access to a college education. Lack of funds for college is one of the biggest barriers to accessing a college education. The program's high-level awards and renewal opportunities are important factors in facilitating access to college.

*College Choice:* Mollie Davis Scholars are free to select the school that best suits their goals.

*Student Debt:* There is no doubt the Mollie Davis Scholarship Program is reducing student debt. The high level renewable award reduces the need for student loans.

*Working while attending college:* The program gives students more choice regarding whether to work and, if so, how much to work due to the high and predictable award levels. This allows students more time to focus on their studies.

*Persistence:* The program has a high level of renewals from year to year which confirms high persistence in seeking a degree.

*Degree Attainment:* Persistence and a high renewal rates are good indicators of degree attainment. It is believed that the Mollie Davis Program is likely impacting degree attainment in a positive way. However, graduation data is needed for a better understanding successful

degree attainment.

### **Changed Circumstances or Conditions:**

The committee fully addressed whether there are changed circumstances or conditions in the Yakima Valley in the areas of education, state or federal law, community need, or delivery of higher educational services that would impact the program and, therefore require changes to the scholarship program. Each person interviewed for the program review was asked this question.

While there are many changes identified, none were identified that warrant a specific change to the program. However, the committee does recommend some program changes for other reasons.

### **Mollie Davis Scholar Interviews:**

Two students were interviewed about their program experience. Both students stated that the process went well. They both received checks on time. They both reported good communication with the contracted scholarship administrator. Both indicated a great deal of pride in being a Mollie Davis Scholar, and they note their scholarship award on applications. Both students reported having a college mentor, and one of the students has two college mentors. One of the students has taken the LSAT and was working toward being admitted to law school, and the other has already been admitted to graduate school and will be pursuing teaching. Both scholars stated that the program eased their financial burden, reduced their need to work (but one did), and helped them to focus on their education. Both students indicated that they would like to have more interaction with Rotary and would be interested in community service and networking opportunities.

### **Program Data:**

Application and scholarship recipient data has been collected for each of the eight years of the program. To date, there have been 2,790 of applicants, and of those 301 have been recipients of scholarship awards. This reflects that for every 10 applicants, there is one award. \$5.4 million have been awarded. Sixty-nine percent of recipients are women, 28% are men and 3% did not report.

Ninety percent of recipients attend a four-year college or university and 10% attend a 2-year college. 48.5 percent of recipients are graduating high school seniors and 45.8 percent are students already attending college.

### **Mollie Davis Scholars - Ethnic Origin**

<b><u>Ethnic Origin</u></b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>Total</b>
<b>Asian</b>	0%	6%	2%	6%	0%	3%	5%	5%	3.3%
<b>African American</b>	0%	0%	2%	0%	0%	0%	0%	2%	0.7%
<b>Hispanic/Latino</b>	16%	25%	39%	29%	47%	45%	46%	39%	35.2%
<b>American Indian/Alask.</b>	0%	0%	2%	0%	3%	3%	3%	2%	1.7%
<b>Multi-Racial</b>	6%	6%	5%	13%	3%	3%	0%	5%	5.0%
<b>Hawaiian/Pacific Is.</b>	2%	0%	2%	0%	0%	0%	0%	0%	0.7%
<b>White</b>	72%	63%	44%	52%	47%	45%	46%	39%	51.5%
<b>Not Reported</b>	4%	0%	2%	0%	0%	0%	0%	7%	2.0%

(Due to automatic rounding from different sources, categories totals are between 98 and 100%)

In the first year of the program, 24% of recipients were from a minority group. In 2015 and 2016, that number had grown to 54%, and in 2017 it was 61%. This number has more than doubled in the last eight years. According to the 2016 census for Yakima County, minorities make up 57.7% of the county's population.

<i>Demographics</i> (Source: U.S. Census Bureau QuickFacts)	Yakima County
Race/ethnicity, 2015	
White, not Hispanic or Latino	44.3%
Black	1.5%
American Indian, Alaskan Native	6.2%
Asian, Native Hawaiian, Other Pacific Islander	1.7%
Hispanic or Latino, any race	48.3%
Total minority population	57.7%

It is recommended that the Mollie Davis Scholarship Committee continue to review these data each year.

### **Scholarship Eligibility Requirements:**

Most of eligibility requirements derive from the trust agreement.

Applicants must:

- 1) be able to establish that Yakima County is the primary residence at the time of the application;
- 2) be enrolled in two or four-year school, private or public, situated in the US and the school must be accredited to confer two and/or four-year degrees;
- 3) be pursuing an associate's or bachelor's degree;
- 4) be a U.S. citizen; and
- 5) be a high school graduate or hold a GED.

No changes are recommended.

### **Scholarship Selection Criteria:**

The committee thoroughly reviewed the current selection criteria and considered where changes could or should be made to continue to strive toward the program's goals. Since the implementation of the program in 2010, the scholarship has been weighted at 40% Financial Need, 30% Academics, and 30% Leadership plus includes an essay.

The National Scholarship Providers Association (NSPA) Membership Survey Results 2016-17 (unpublished data), which represents 10,527 programs, 115,474 scholarships, and 585,194,808 in awards, reveals that financial need is the most common selection criteria with 77% of scholarship providers considering this factor. The Mollie Davis Scholarship program utilizes the most popular selection criteria.

### **Financial Need:**

The committee discussed each of the current criteria and the weighting. After careful consideration of the trust agreement, program goals and outside interviews, the committee decided to recommend that greater weight, 50%, be given to financial need in the selection process.

The committee also recommends that the program continue to use Expected Family Contribution (EFC) as the primary factor in assessing financial need. EFC, a measure of a family's financial strength, is calculated according to a formula established by federal law. A family's taxed and untaxed income, assets, and benefits (such as unemployment or Social Security) are all considered in the formula. Based on our committee's deliberations, in which the educational institution members were quite helpful and informative the committee decided that EFC continues to be the best indicator of financial need for the program. The students with the lowest EFC will continue receive the highest points in the scoring process.

In addition to EFC, the student is given an opportunity to explain special financial circumstances in this section and receive additional points.

#### Academics:

The committee recommends that academics move to a weighing of 25% with the greatest emphasis on either high school or college GPA depending on their educational status at the time of application. It is also recommended that applicants continue receive points for International Baccalaureate, Advanced Placement, Honors and Running Start programs. Past academic success is a good indicator of future success.

The committee recommends discontinuing collecting ACT/SAT scores as not all students take these tests which makes scoring difficult. In addition, the committee recommends discontinuing collecting information about whether a high school transcript is weighted or unweighted and student ranking as they are not necessary to the evaluation process and are difficult to score.

#### Resume: (Community Service, Extracurricular Activity and Employment)

The committee recommends that resume section now be weighted at 25% with equal emphasis on community service, extracurricular activity and employment. It recommended that honors and awards be discontinued in the scoring.

Under Community Service, emphasis will be placed on service activities, community work, church activities and club service. The scoring will be focused on frequency and duration.

Under Extracurricular Activities, emphasis will be placed on school leadership, school clubs and sports, etc. The scoring will be focused on frequency and duration.

Under employment, emphasis will be placed on paid and volunteer work, internships and assisting the student's own family in a significant way. The scoring will be focused on frequency and duration.

#### Essay

(15%)

All students submit an essay. Each essay is reviewed and scored by five Rotarian judges. Each essay reviewer signs a conflict of interest statement.

## Essay Question

*Write a short essay that describes areas in your life where you demonstrated leadership and overcame obstacles either through your school, social, or family life.*

The essay will be scored based on the story, the complete answering of the question and grammar.

### **Scholar Selection Process:**

Students complete the on-line application with the contracted scholarship administer. Students have a 2 ½ month window from 12/1 to 2/22 to complete the application process and provide the supporting documents. The entire scoring process is blind to YRT and the Scholarship Committee. The contracted scholarship administer uses the eligibility and scoring criteria to select the top 80 candidates who are identified numerically rather than by name.

All students submit an essay. The essay scores are then added to the scores and a final list of top candidates is generated.

Students are awarded in ranked order until the scholarship dollar allocation for the year is exhausted.

The list of recipients, including the names and financial criteria, are then reviewed and approved by the YRT Board.

Students are notified whether or not they received a scholarship award by e-mail. The program goal is to have the checks mailed in late July to accommodate the variety of college start dates.

### **Award Amount:**

The current award amount has been \$7,500 at four-year schools and \$3,000 at two-year schools since the beginning in 2010.

According to the College Board, 2017-18 Tuition and Fees at Public Four-Year Institutions by State and Five-Year Percentage Change In-State Tuition and Fees, the State of Washington has had the single largest tuition decrease (by a 12% margin) of any state over the last five years. The decrease in tuition is 16%. The average tuition is \$9,480.

The College Board also reported that the 2017-18 Tuition and Fees at Public Two Year Institutions by State and Five-Year Percentage Change In-State Tuition and Fees, the State of Washington has decreased tuition by 3% over the last five years. Washington is one of only six states to reduce tuition at two-year colleges. The average cost is \$4,380.

The committee feels that the predetermined, specific scholarship award is important for students and their confidence in pursuing and completing their education. It was noted that the current award amount for two-year schools was 68% of the average cost of tuition and fees, but the current rate for four-year schools was 79% of the average cost of tuition at four-year schools.

The committee recommends that the two-year scholarship rate be changed to \$3,500 to make the awards for two and four-year schools more balanced in the amount of award compared to cost of tuition, books and fees at state schools. This bring both awards to 79% of the cost of

average cost of tuition and fees.

The average scholarship amount nationally is \$2,000. This program is clearly designed to make a much greater impact. The program gives a lower number of awards at higher amounts that are renewable to significantly impact access, choice, success, the need to work and student debt reduction.

### **Award Renewal:**

All Mollie Davis Scholars are currently eligible to renew their scholarships up to four and, in some rare cases, five years. The current program allows for four-year scholarships at a four-year school. It also allows two-year scholarships at the community college level and two additional years at a four-year college or university.

The committee acknowledges that many programs at community colleges take longer than two years to complete due to program prerequisites. This is especially true in the medical, technical and engineering programs. These prerequisites do not include remedial work that is often needed in English and Math.

The committee feels that community college is a very good value for the scholarship dollars and that an additional year of eligibility at the community college level could increase the likelihood of graduation. The committee recommends that community college students continue to be eligible for four years total, but that the scholarship program be expanded to allow up to three years at the community college level of the four-year eligibility.

The committee recommends that the renewal requirement of a 2.75 cumulative GPA be maintained, as required by the trust agreement, and further, that proof of full-time attendance and that the student has not yet attained a bachelor's degree remain the same.

### **Award Deferment:**

Currently Mollie Davis Scholars are able to defer the scholarship award up to one year due to serious medical issues or hardship. Deferrals are not currently allowed if the student simply wishes to put off attending college.

The NSPA Membership Survey Results 2016-17 shows that 45% of providers do not allow any deferment, 11% allow for a one semester deferral, and 26% allow up to a 1-year deferral.

The educators on the committee noted that when students leave school, there are a high number of students who are unable or do not return. The committee recommends that momentum and persistence in a student's education should be encouraged through this policy.

The committee believes that deferral is appropriate up to one year due to serious medical issues or hardship. No changes are recommended.

### **Award Use:**

The Mollie Davis Trust Document allows the scholarship award to be used for books, tuition, fees a computer, room and board. The current program allows for tuition, books and fees. Consideration of additional allowable expenses was thoroughly researched and discussed within the committee, with interviewees and with scholarship experts.

The NSPA Membership Survey Result 2016-17 show that the number one allowable use of funds



is for tuition and fees. The second category most allowed under award use is for books and supplies. The Mollie Davis program's funding is in line with the majority of those surveyed. The majority of providers do not allow for room and board expenses.

In considering room and board, it also was noted that this would be taxable to the student and could create a tax burden on the student. Tuition, books and fees are not taxable. Another concern is that, according to the trust document, if the program were to allow for room and board, direct payments would have to be made to colleges, private providers, and individual landlords. Adding room and board to the program would create a significant administrative burden and cost along with the potential for an unfavorable tax situation for the student.

In consideration of a computer purchase, it was discussed that it would not be possible to objectively know whether there is a true need for a computer. In addition, the expense and type of computer needed could vary greatly depending on the student course of study.

The committee felt that the best use of the funds continues to be as originally identified, that of tuition books and fees. These are clear true needs of each student. The high-level award applied to books, tuition and fees allows the students to spend other grants, scholarships, work opportunities or loans on their other college expenses. No changes are recommended.

### **First Dollar Scholarship:**

For the last eight years, the Mollie Davis Program has been a first dollar scholarship. The advantages are that it can be awarded earlier rather than last minute, it is more predictable, and provides students with a higher level of confidence in funding.

The committee reviewed last dollar scholarships. These are intended to be paid after all other financial aid resources have been awarded. These scholarships award an amount based on the gap of what a student may need to cover the Cost of Attendance (COA). Last dollar programs require the program administrator to become involved with each student at their selected college and to track and collect detailed cost and financial information for each student. They also require a signed consent from the student before a financial aid office can share award information with the scholarship provider. This would need to be done for over 100 scholars each year and would be administratively onerous. In addition, the last dollar award could not be assessed until the financial package was in place at the college or university. Last dollar scholarships are less predictable to the student, the college, parents and scholarship providers. Last dollar scholarships can be misunderstood by the public and are difficult to explain in the marketing or the program.

The NSPA Membership Survey Results 2016-17 data reveals that 40% of scholarship programs provided first dollar awards.

The committee recommends that the program continue to award first dollar scholarships as this method provides greater confidence and certainly to students, is more easily understood by the public, and requires far less administration. In addition, first dollar awards have worked well over the last eight years.

### **Award Displacement:**

Award displacement occurs when a college or university reduces the institutional need-based grants and institutional scholarships that it awarded to a student when the student receives a private, external scholarship. This might mean no net financial gain to the student despite

winning a scholarship and, therefore, no improvement in outcomes for the specific student funded by the private, external scholarship. Award displacement can also occur without an over award situation.

There are no universal policies at colleges or universities regulating how private, external scholarships are incorporated into a student's financial aid package. However, colleges and universities have flexibility in how they adjust or revise a student's financial aid package to eliminate an over award, and whether they will practice award displacement.

The committee reviewed the 2013 NSPA Executive Summary of Impact of Award Displacement on Students and their Families: Recommendations for Colleges, Universities, Policymakers and Scholarship Providers. Information was also collected from YVC, Heritage University, Washington State University, University of Washington and Central Washington University and about their displacement policies. In addition, there was a consultation with Kim Stezala an expert in scholarship design. YVC Financial Aid Director Oscar Verduzco was instrumental in leading the conversation on this complex topic.

The committee recommends that the students and their family be informed about award displacement so as to empower them to understand and navigate the financial aid process. Mollie Davis Award winners are informed about award displacement in the scholarship award letter and are encouraged to contact their college financial aid offices about the issue. Starting in June 2018, the topic will be also discussed with the scholars during orientation prior to the scholarship luncheon.

### **Program Enhancements:**

After the program review, the committee turned its attention to determining whether additional services or enhancements would be needed to meet donor intent, the mission or program objectives. When considering a program enhancement, we must consider what problem is being solved and undertake a cost/benefit analysis. We also must consider "need" verses "nice." The Mollie Davis Scholarship program endeavors to assist students to persist in their education and support their attainment of a degree. The cost of any enhancement was a paramount consideration as any money spent on enhancements would take away from scholarship dollars for students. Additional significant program expenses should only be incurred with clear evidence of a measurable outcome meeting program objectives.

Colleges and universities are more focused than ever on student success and have a variety of programs to support students. Support services that are already available to students should not be duplicated by the Mollie Davis Scholarship Program.

The NSPA Membership Survey Results 2016-17 data shows that 41% of scholarship providers do not offer any program enhancements but rather just offer scholarship awards.

Over the last eight years, the persistence/renewal rate of the Mollie Davis Scholars has been very high at 94%. There were 442 renewals and only 27 non-renewals. According to the National Student Clearinghouse, Yearly Success and Progress Rates, Spring 2017, of all students who started college in 2015, there was a 73.4% persistence rate at any institution and 61.1 % of students were retained at the original institution. The Mollie Davis Scholars are persisting at a far greater level, 20% higher than the national rate. It is clear that most of the Mollie Davis Scholars have the support and resources necessary to continue successfully in college and obtain a degree.

Mentorship Program:

According to the NSPA Scholarships Program Toolkit, mentoring can offer more comprehensive support and networking and is especially helpful to at-risk students. Mentorship programs are thought to be helpful to first generation students. However, quality programs come at significant time and cost. NSPA recommends a caseload of no more than 50 students for each mentor with supervision and training for the mentors. Background checks are essential. Some providers use a model where mentors see students face to face two times a month for the first three months. Mollie Davis Scholars attend school all over the U.S. For the scholarship program to offer a mentorship program, it would require at least two and maybe three full-time employees along with office space and other administrative and overhead costs. It could easily add up to over \$100,000. Adding a mentorship program would not be cost effective and if implemented would reduce available scholarship dollars.

Mollie Davis Scholars are persisting in their education far beyond the national average with a 94% persistence rate. These numbers do not support adding a mentorship program. While it may be a nice enhancement, it is not needed.

Due to a lack of data supporting the need for a mentorship program, the significant cost and the likelihood of duplication of services already provided at colleges, the committee recommends that a mentorship program not be pursued. The committee recommends that scholarship renewals and persistence continue to be measured and reviewed to be sure the students are persisting at a good rate.

Alumni Program:

The committee considered an alumni program but did not feel it would be a good fit for the program. The committee could not see enough of a benefit to students to warrant the cost and effort required for such a program.

Jobs Program:

A jobs program was considered. This would be a significant undertaking with staff and expenses. In addition, connecting students to jobs while "nice", it is outside of the stated goals of the trust agreement and the mission and objectives of the program.

The committee does not support a mentoring program, alumni or jobs program at this time.

Networking Event:

The committee was most interested in looking into the possibility of having a networking event for all Mollie Davis Scholars. Attendees would be community leaders, Rotarians and all Mollie Davis Scholars.

The goals could be:

- a) To meet other Mollie Davis Scholars for networking and support;
- b) To meet Rotarians and community leaders for networking internships, employment and community resources;
- c) To encourage Mollie Davis Scholars to remain in the Yakima Valley; and
- d) To encourage Mollie Davis Scholars to participate in community service.

The cost of this type of event would likely be less than a few thousand dollars and would provide students with access to and one-on-one time with the top leaders and employers in the Yakima

Valley. The Mollie Davis Scholars interviewed for this program review indicated an interest in such an opportunity.

The committee recommends that YRT consider testing a networking event.

### **Program Data Collection:**

Over the years, a good deal of data has been collected. Currently, data is collected primarily through the application and monitoring process. This data has been helpful and should continue to be collected. Further data collection should be done with clear goals in mind. Data needs to be used informationally to assess program goals and to inform the scholarship committee, YRT board, other interested parties, and the community.

### **Current Data Collection:**

The collection of data includes name, address, permanent address, phone numbers, e-mail addresses, gender, ethnicity, proof of citizenship, proof of residency, education level, college name, degree choice, major, high school name/location, anticipated graduation date, two/four college, GPA, AP/IB/Honors/Running Start classes, EFC, community service/extracurricular activity, employment information and renewal/persistence rates, number of started and completed applications, application rate and information about how the applicant heard about the program.

### **Collection of Additional Program Data:**

The committee considered what other data would be useful. The committee is focused, again, on "need" verses what would be "nice" to know.

One area that was considered was graduation. Measurement of graduation rates are a relatively new phenomenon. The first graduated data were collected in 1996 by the Department of Education.

According the National Student Clearinghouse Research Center, Yearly Success and Progress Rates Report, of the students who began college as first-time degree seekers in the Fall of 2011, 42.1% completed a post-secondary credential, and by the end of year six, 63.1% had graduated. 27.4 % students left college without earning a credential.

Some programs do not measure graduation rates. To what degree the Mollie Davis Scholarship Program can take credit for scholars' graduation rates is not clear. However, it is worth measuring to know more about their graduation rates. Measurement should occur at several intervals.

It is further recommended that along with the confirmation of graduation, the name of the college, year of graduation and degree earned be collected.

Based on the research, first generation college students face greater barriers to college completion. To date, the Mollie Davis Program has not measured first generation students, and it is unknown the degree to which this population is represented in the Mollie Davis Scholar program. It is recommended that this data be collected on the application and reviewed.

The committee considered measuring additional areas but decided that the items selected were the most meaningful for the program at this time.

It is felt that these new data points are good first steps in additional data collection. As program goals and data collection evolves, further data could be collected. The above can be measured with minimal cost and time. A cost benefit analysis would need to be performed for any other significant data collection efforts.

### **Cost of Program Administration:**

While keeping program costs low to maximize scholarship award dollars is not a stated objective, it has been a high priority for YRT over the last eight years. The Mollie Davis Scholarship program has operated with very low overhead which has resulted in the highest number of scholarships possible being awarded.

The NSPA Membership Survey Results 2016-2017 states that the average administrative cost of a scholarship program is 13%. The Mollie Davis Scholarship program has operated with very low overhead which has resulted the highest number of scholarship possible being awarded. Countless volunteer hours are spent in the program administration including, awarding, marketing, outreach, data collection, reading essays, putting together the award luncheon so much more.

History of Administrative Program Expenses – Mollie Davis Scholarship Program

	2010	2011	2012	2013	2014	2015	2016
Contracted Administer Fee	\$23,000	\$25,360	\$21,798	\$22,007	\$24,180	\$25,130	\$26,465
Rotary Expenses	\$1,065	\$1,259	\$1,586	\$1,694	\$2,528	\$2,657	\$2,338
Total Program Expenses	\$24,065	\$26,619	\$23,384	\$23,701	\$26,708	\$27,797	\$28,803
Scholarship Awards	\$319,400	\$522,000	\$675,750	\$696,000	\$741,000	\$709,500	\$789,750
Expense to Awards Ratio	7%	5%	3%	3.4%	3.6%	3.9%	3.6%

These numbers do not include the stipend provided to the YRT per the trust agreement. It is clear that the program has been run with overall very low costs. It is noted that although paid staff are utilized to run the program, no staff time has even been charged to the program. Staff time is reasonable administrative cost. With some of the anticipated program improvements, it is expected that expenses will go up for which there is reasonable room to accommodate.

### **Program Financial Management:**

Each year, per the trust agreement, the Mollie Davis Scholarship Program undergoes an accounting procedure called Agreed Upon Procedures (AUP) which is performed by an external CPA firm. Year after year, the AUP reveals no substantive recommendations.

### **Scholarship Management Services:**

From the beginning, the Mollie Davis Scholarship Program has been served by a professional scholarship administration service. The first provider was Scholarship America. More recently, the program was transferred to International Scholarship and Tuition Services (ISTS). With that change, the move was made to an on-line application. These professional services allow high quality scholarship program administration and continuous professional resources and guidance.

### **Scholarship Processing Timelines:**

The Mollie Davis Scholarship Application opens December 1<sup>st</sup> and closes February 22<sup>nd</sup>. Students are notified in May. Students are asked to accept in late May. The program goal is to have the award checks to the schools in July as many colleges begin classes in August.

The NSPA Membership Survey Results 2016-17 shows that that Mollie Davis program timelines are similar to most other scholarship programs.

No changes are recommended.

### **Scholarship Application:**

The committee recommends shortening the scholarship application with the goal of increasing the number of completed applications being submitted. The scholarship application will be shorter if the committee's recommendations contained in this report are approved.

**Application Rate:** The rate of completed applications to awards is about 1 of 10. This is thought to be a good number. There is no magic number. The promotion of the program creates an adequate but not over populated pool of applicants.

### **Marketing:**

The Mollie Davis Scholarship program undertakes and requires significant marketing. The marketing program is adjusted and improved each year. In the most recent application cycle, a new record high number of started applications was documented. It seems that the marketing is driving the students to the site to start the process.

Scholarship Applications	Started	Completed
2017-18 Applicants	850	288
2018-19 Applicants	1077	337

The scholarship committee undertakes outreach and scholarship promotion that includes direct contact with all high schools/counselors (on-site visits, e-mails blast and posters) and local colleges. In addition, there were e-mail blasts, Facebook posts, Twitter posts through the Yakima School District and Public Service Announcements. Information is also provided to reach non-traditional students through providing posters and information. Those include Employment Security, La Casa Hogar, Yakima On-line School, Yakima YMCA, Yakima Home Link and employers including Yakima Valley Farmworkers Clinic and others.

In 2017, the YRT (without charge to the scholarship program) provided funds to Washington Apple Education Foundation for promotion of the Mollie Davis Scholarship Program. Over 15 schools and 1,429 students in the Yakima Valley were provided training on applying for scholarships and specific information about the Mollie Davis Scholarship Program.

In December of 2017, a newspaper ad was placed called a "A Report to the Community" which announced the opening of the scholarship program, profiled Mollie Davis Scholars and provided an update on the overall program and its successes. These types of reports are a way to keep the community awareness high.

During the most recent application cycle, two new separate marketing videos were developed and used on television and social media.

In the fall of 2017, YRT voted to begin using "Mollie Davis Scholarship Program", dropping the

use of Mary Monroe Davis, in all communications. It was found that there was confusion in the use of both names. In addition, the board voted to refer to the students in the program as Mollie Davis Scholars.

The YRT is undertaking a complete website update with the goal of making the site friendlier for mobile devices and the scholarship applicants.

Marketing of the program is going well, and the same effort should continue.

### **Conclusions:**

There is no universal list of best practices for scholarship programs. What might be great for one program may not be great for another. Scholarship programs have a variety of goals, methods and practices that they select to meet their unique program goals.

The Mollie Davis Scholarship is impacting access to college, college choice, student debt, working while attending college, persistence and likely degree attainment.

The program has a very high persistence rate of 94% which is a strong indicator that students are progressing well toward graduation.

While there are several recommendations, the committee believes that the program is vibrant, working well and is meeting the intent of the trust document and the program mission and objectives. This can be attributed to the comprehensive work done in the original scholarship design, the careful program management over the years, the continuous improvement approach and the passion shown by Rotary for the program.

The committee feels that the review process was very thorough and that they had access to the data and information that was needed for decision making.

The Mollie Davis Scholarship Program has been and continues to be a success for its scholars and our community.

### **Summary of Recommendations:**

1) The committee recommends that the two-year scholarship award rate be changed from \$3,000 to \$3,500 to make the awards for two and four-year schools more balanced in the amount of award compared to cost of tuition, books and fees. This brings both awards to 79% of the average cost of tuition and fees at state colleges in Washington State.

2) The committee recommends that community college students continue to be eligible for four years but that the program be expanded to allow up to three years at the community college level of the four-year package.

3) The committee noted that the current selection process is blind to YRT until the process is complete making it more fair and unbiased. The committee recommends that children/step-children of YRT Board Members, Rotarians on the Scholarship Committee/Essay Review Committee, and all children of paid staff of YRT not be eligible for the Mollie Davis Scholarship award beginning in the 2019 class.

4) It is recommended that Financial Need be weighted at 50%, Academics at 25%, and Resume

at 25% including an essay.

5) The committee recommends discontinuing collecting ACT/SAT scores as not all students take these tests which makes scoring difficult. The committee also recommends discontinuing collecting information about weighted and unweighted high school transcripts and student ranking as they are not necessary to the process and are difficult to score.

6) It is recommended that the program begin to collect data be collected on the number of first generation students in the program, college graduation rates among the scholars, names of the colleges from which students graduate, and the names of degrees awarded.

7) The committee recommends that the scholarship program consider testing a networking event, or something similar, to further reach its stated goals of the program.

The committee sincerely hopes that the program review report will be useful for the scholarship program and that it continues to thrive for the greater good of the students and our community.



Jill Falk



Dr. Linda Kaminski



Neal Springer



Dr. Andrew Sund



Pam Cleaver



Oscar Verduzco



Carolyn Flory



Dr. Teresa Rich



Steve Pilger



Carol Wagar



Jan Jorgenson



**Attachments:**

- 1) Mollie Davis Scholarship Program Data – 2010 to 2017
- 2) Scholarship Program Evaluation by Kim Stezala, Design Group International, June 2018
- 3) Mollie Davis Scholarship Scoring, May 2018
- 4) Mollie Davis Scholarship Program Timeline
- 5) National Scholarship Providers Association, Membership Survey Results 2016-17, Unpublished Report
- 6) National Student Clearinghouse Report, Signature Report 14 Completing College: A National View of Student Completion Rates – Fall 2011 Cohort, Executive Summary
- 7) Going Away to College: Data Dive on 350,000 High School Graduates
- 8) 2017-18 Tuition and Fees at Public Two Year Schools, College Board, Annual Survey
- 9) 2017-2018 Tuition and Fees at Public Four Year Schools, College Board, Annual Survey
- 10) Average Estimated Undergraduate Budgets, 2017-18, College Board, 2017-18
- 11) National Student Clearinghouse Yearly Success and Progress Rates, Spring 2017
- 12) National Student Clearinghouse Research Center, First Year Persistence and Retention, Spring 2017
- 13) National Scholarship Providers Association, Scholarship Program Toolkit, Retrieved from agency website.
  - Award size and scope
  - Last Dollar or First Dollar Scholarship Programs
  - Criteria Development List
  - Mentoring
  - Fair and Objective selection Process/Scoring Rubric
  - Using the FAFSA and the SAR to Determine a Student’s “Need”
- 14) Executive Summary, Impact of Award Displacement on Students and their Families: Recommendations for Colleges, Universities, Policymakers and Scholarship Providers, 2013
- 15) 2017-18 Mollie Davis Scholarship Program Application
- 16) Mollie Davis Trust Agreement