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1. Introduction

In June, 2009, the Postsecondary Success (PS) team in collaboration with the Impact Planning and Improvement (IPI) division at the Bill and Melinda Gates Foundation (BMGF) launched a review of evaluations of three of the BMGF scholarship programs: the Gates Millennium Scholars (GMS) Program, the Washington State Achievers (WSA) Scholarship Program, and the DC Achievers Scholarship Program (DC Achievers). The purpose of this Scholarship Evaluation Look Back was to inform PS strategy and learning objectives, as well as to inform PS decisions around future scholarship evaluations.

To these ends, the following Scholarship Evaluation Look Back components were implemented:

- Assess and synthesize key findings from scholarship evaluations of GMS, WSA and DC Achievers over the past ten years, including program evaluations, scholar demographics and outcomes and other documents
- Understand how key stakeholders have been using the scholarship evaluation data (BMGF staff, scholarship grantee organizations, academic researchers, evaluation consultants)
- Assess opportunities to learn from future scholarship evaluation findings

The Scholarship Evaluation Look Back was guided by key questions about the three scholarship programs:

- Who are the Scholars and Achievers?
- What are Achievers high school transition rates to college?
- What are Scholars and Achievers persistence rates?
- What are Scholars and Achievers graduation rates?
- What are Scholars graduate school transition rates? (GMS funded areas including STEM, other areas)
- Are there any statistically significant differences in key outcomes vs. non-recipients across the cohorts?
- What are other key findings?
- What else do we need to learn from these scholarship evaluations to inform PS strategy and BMGF?

1.1. Overview of General Findings
The Scholarship Evaluation Look Back found many benefits of as well as ongoing issues with the Scholarship Programs and their evaluations.

Key findings of the GMS and WSA Scholarships include:

- GMS Scholars are still working in college but seem to be working fewer hours and taking on less debt than non-recipients\(^1\) (statistical significance unknown)

---

\(^1\) The Cohort 1 non-recipients who were asked to participate in the study are a representative sample of the GMS nominees who, like the Scholars, were selected from among thousands of applicants to the program and asked to go on to the Scholar confirmation/verification phase, but did not become Scholars for one or more reasons. For some it was because they did not submit all of the supporting documents in...
• The GMS Scholarship program does not appear to significantly impact Scholar graduation rates as compared to non-recipients (various methodologies result in different conclusions)
• GMS Scholars appear to be more likely to go on to graduate school (based on two cohorts); the reasons for this are yet unknown (e.g. students’ higher motivation, higher achievement, reduced debt burden) and the methodology used restricts this finding from being generalized to the full population of Scholars
• The WSA Scholarship appears to increase Achievers college enrollment probability by 14-19% (statistical significance unknown)
• More Achievers are enrolling in four-year vs. two-year institutions over time and a higher percentage of Achievers are enrolled in four-year vs. two-year institutions compared to non-recipients (statistical significance unknown)
• Achievers appear to be working about the same number of hours as non-recipients, but are taking on less debt than non-recipients (statistical significance unknown)

Issues around Scholarship evaluation usefulness and management follow:

• Very few published GMS findings show statistically significant results for Scholars vs. non-recipients for individual cohorts or across cohorts for any outcome (persistence, graduation rate, graduate school transition rate including to STEM and other BMGF funded fields); some reports found no statistical significance, while for other reports the statistical significance is unknown
• Because second follow-up data were collected on WSA Cohort 3 non-recipients over the summer 2009 and no analyses of these data have yet been commissioned, there are no published WSA findings that show results for Achievers vs. non-recipients across cohorts for any outcome (high school transition rate to college, persistence, graduation rate)

time or were unable to verify their self-reported high school GPA or financial need. For others it was because they were attending an institution that did not qualify. Still others did not have a Pell Grant in place at the time of the confirmation/verification phase. Finally, a small number of non-recipients were granted a scholarship but declined the offer.

Note: We did not find other descriptions of this non-recipient group; except that NORC states that in contrast to Cohort 1 non-recipients “In subsequent cohorts, the screening process was further refined and eliminated many more of the financially ineligible nominees.” (Michele Zimowski email communication to Dr. Helen Chen Kingston, 8/31/09).

Based on interviews with GMS research advisory council members and other academic researchers, four of the five interviewed believe the non-recipient group is not an appropriate comparison group due in part to the use of non-cognitive variables in selecting the Scholars (resulting in non-recipients by definition having lower non-cognitive scores which are believed by some to be a predictor for academic success and college completion). Given this, and if it is true that non-cognitive variables make a big difference, it should not be surprising if Scholars outperform non-recipients on outcomes such as persistence, graduation rates, graduate school transition rates, and leadership and community service outcomes as well.

• Existing GMS studies conducted by numerous academic researchers and evaluation firms use different methodologies making it difficult to identify conclusive findings (e.g. varying study samples, timeframes, statistical methods to calculate graduation rates)
• Both GMS and WSA Scholarship grantees find the current approach of reporting analyses by cohort (instead of cross-cohort) difficult to understand or use to inform their own work
• With multiple studies being conducted by different individuals and institutions, dissemination of key findings for GMS and WSA has been uncoordinated between and among BMGF, individual researchers and evaluation firms
• For GMS, individual researchers, scholarship grantees and evaluation firms are sometimes duplicating each others’ work in data collection, data analyses, and report generation
• BMGF’s evolving theories of change regarding scholarships and staff turnover in scholarships and scholarship evaluation have contributed to an overall lack of direction for and coordination of the scholarship evaluation efforts

2. Methodology

2.1. Scholarship Evaluation Look Back Components
This Scholarship Evaluation Look Back synthesis paper is based on interviews with 26 key stakeholders involved with the scholarship programs and evaluation (Appendix A); a review of published and unpublished scholarship evaluation-related documents (Appendix I); and discussions about findings and implications with IPI and PS for the Bill and Melinda Gates Foundation.

The document review process involved identifying, locating, and reviewing 53 documents from the NORC public website, including 27 scholarship evaluation reports, 7 studies by academic researchers, and 19 presentations by academic researchers. Further, 88 additional documents not on the NORC public website were identified, located, and reviewed. This included 23 published scholarship evaluation reports; 54 publications commissioned by BMGF; and 11 internal BMGF and GMS documents, presentations, and spreadsheets.

Table 1 highlights the types of scholarship data collected and methods used for data collection to date for each of the three scholarship programs.

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2 Published refers to any document that has been made publicly available. This includes any document on the NORC public access website, peer-review journal publications, presentations made at academic conferences, and any document posted on a public website.
<table>
<thead>
<tr>
<th>GMS</th>
<th>WSA</th>
<th>DC</th>
<th>Data</th>
<th>Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Scholar satisfaction with program</td>
<td>Focus groups, interviews, web-based</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td></td>
<td>Baseline data on scholars and non-recipients</td>
<td>Web-based and paper surveys</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>Follow-up data on scholars and non-recipients</td>
<td>Web-based and paper surveys</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>In-depth life histories</td>
<td>Telephone interviews, focus groups</td>
</tr>
<tr>
<td></td>
<td></td>
<td>X</td>
<td>Baseline data on quality and reach of GMS marketing efforts</td>
<td>Online surveys</td>
</tr>
</tbody>
</table>
2.2. Limitations
The key findings in this paper are from existing analyses of the GMS, WSA and DC Achievers data. No additional data collection or analyses were performed to present new findings or to add to the existing body of research. Instead, this paper is a comprehensive review of the existing research conducted by research institutes, stakeholders, and individual researchers. Table 2 describes the types of scholarship documents produced to date, including various evaluations, reports, and briefs.

TABLE 2. Types of Scholarship Documents Produced to Date

<table>
<thead>
<tr>
<th>GMS</th>
<th>WSA</th>
<th>DC</th>
<th>Documents</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Program implementation evaluations</td>
<td>AIR/TMG</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Impact evaluations</td>
<td>AIR</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Methodology reports</td>
<td>AIR</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>Reports on Scholar and Achiever outcomes</td>
<td>NORC</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Synthesis reports</td>
<td>IHEP</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>Issue briefs</td>
<td>IHEP</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Case studies on Achievers experiences</td>
<td>SRI</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td></td>
<td>Baseline, program evaluation, and final project evaluation reports</td>
<td>Fouts</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Reports on Achiever outcomes</td>
<td>Pell</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Report on Achiever schools baseline data</td>
<td>Westat</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>Peer-reviewed journal articles</td>
<td>Academic researchers</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td></td>
<td>Presentations</td>
<td>Academic researchers</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Data snapshots on Scholar outcomes compared with non-recipients</td>
<td>AIR</td>
</tr>
</tbody>
</table>

3. Background on the GMS Program

3.1. The GMS Program in Historical Context
By the 1970’s in the U.S., it was generally agreed that financial aid was essential to ensuring equal opportunity for low-income students to enroll in college, and federal student aid programs (including the Pell Grant) had been established and
implemented. In the 1980’s, there was a shift in federal policy from grants to loans, which was more effective in providing financial aid to middle-income rather than low-income students. This period also saw a shift in focus to academic preparation for college, such as access to good public high schools for all students and examining the impact of parental education on student outcomes. This shift toward more loan-based financial aid packages, along with increases in tuition, resulted in reduced opportunities for low-income students.

In the 1990s, there was a movement in research toward seeking a greater balance between need-based aid and academic preparedness in making postsecondary education more accessible. In 1999, the GMS Program was launched within this educational policy context to provide grants to low-income, high achieving minority students to encourage them to obtain bachelor’s degrees and attend graduate school in fields in which minorities have been historically underrepresented.

3.2. Goals of the GMS Program

Established in 1999, the GMS Program was initially funded by a $1 billion grant from the Bill and Melinda Gates Foundation to promote academic excellence and to provide an opportunity for outstanding minority students with significant financial need to reach their highest potential by:

- Reducing financial barriers for African American, American Indian/Alaska Native, Asian Pacific Islander American and Hispanic American students with high academic and leadership promise who have significant financial need;
- Increasing the representation of these target groups in the disciplines of computer science, education, engineering, library science, mathematics, public health and the sciences, (STEM and other GMS funded fields) where these groups are severely underrepresented, especially at the graduate level;
- Developing a diversified cadre of future leaders for America by facilitating successful completion of bachelor's, master's and doctoral degrees; and
- Providing seamless support from undergraduate through doctoral programs, for students selected as Gates Millennium Scholars entering target disciplines.

3.3. GMS Program Description

The GMS Scholarship Award provides support for the cost of education by covering unmet need and self-help; renewable awards for Gates Millennium Scholars maintaining satisfactory academic progress; graduate school funding for continuing Gates Millennium Scholars in the STEM and other GMS funded areas; and leadership development programs with distinctive personal, academic and professional growth opportunities.

The GMS Scholarship is a last dollar award that impacts college and career pathways by increasing options for college enrollment and college completion. The award period is up to five years for undergraduate studies and four years for graduate studies. A one year deferment is allowed during the award period. GMS is administered by the United Negro College Fund (UNCF) in partnership with the American Indian Graduate Center Scholars, the Asian Pacific Islander American Scholarship Fund, and the Hispanic Scholarship Fund.
4,000 scholarships were awarded in the first year of the program in 2000 to students entering and continuing college and graduate school (Cohort 1 freshmen consisted of 1424 students). 1,000 Scholars were selected each year after that, from 2001 – 2016. To date, the GMS Program has funded more than 13,000 Scholars attending more than 1,500 colleges and universities.

3.4. The GMS Selection Process
The selection process is based on identifying outstanding students by using a combination of traditional and non-traditional criteria. Traditional criteria include a minimum high school GPA of 3.3, the strength of the high school curriculum, and the student’s essay. Non-traditional criteria center on the use of a battery of non-cognitive items that measure dimensions of character. These include positive self-concept; realistic self-appraisal; ability to understand and handle racism; preference for long-term goals rather than immediate needs; availability of a strong support person; successful leadership experience; demonstrated community service; and knowledge required in a field. Finally, students must demonstrate financial need by being eligible for a Pell Grant.

3.5. Original Goals of Research Framework
The GMS research framework consisted of two basic strands of research:

- Basic and applied research, to be performed by the National Opinion Research Center (NORC) at the University of Chicago, and
- Program evaluation, to be performed by The McKenzie Group (TMG), which was later acquired by The American Institutes for Research (AIR)

The primary purpose of the research and evaluation was to determine the outcomes and impact of the GMS program and its implementation. These two strands of research were to address the following topics regarding the Scholars:

- Social, cultural and economic background
- Academic preparation
- High school achievement and educational context
- Rigor of high school curriculum
- Relevance of civic and other extra-curricular leadership opportunities
- College choice
- Transition to college and the role of financial aid
- College attendance: type and level
- Major field choice and persistence
- Undergraduate academic, cultural and social experience
- College graduation
- Graduate education: academic, cultural and social experience
- Employment experience: high school through post graduate career
- Civic engagement
- Values, opinions, attitudes and perceptions

3.6. Data Collection Methodology and Plan
Data for the first strand of research, basic and applied research, were collected from the full populations of Scholars and a sample of non-recipients in the form of web-
based surveys. Baseline and follow-up surveys were collected from Cohorts 1, 2, 3, 5, 9 (currently at baseline), 13, and 17. Baseline surveys were conducted during the freshman year of college, the first follow-up was at the 3rd year out of high school, the second follow-up was at the 5th year out of high school, the third follow-up was at the 8th year out of high school, the fourth follow-up was at the 13th year out of high school, and the fifth follow-up was at the 18th year out of high school. Data analysis was performed by the GMS Research Advisory Committee (RAC) and NORC.

Data for the second strand of research, program evaluation of operations and administration, consisted of responses to web surveys, focus groups, personal interviews, and relevant document review. These data addressed perceptions of the program from scholars, program administrators, partner organizations, BMGF, and the GMS advisory council (AC). The primary purpose of the evaluation was to help the foundation improve the design and delivery of the GMS program. Data analysis was performed by The McKenzie Group (TMG), and American Institutes for Research (AIR), after AIR acquired TMG.

3.7. GMS Scholarship Evaluation in Context

Over the past ten years since GMS was first implemented, there has been a fair amount of turnover among the foundation staff, scholarship grantees and other individuals involved with the program implementation and evaluation. Given the far-reaching scope and complex nature of the GMS Program implementation and evaluation, the amount of turnover among key GMS stakeholders is relevant to the following findings. For a brief but comprehensive history of the GMS Program’s administrators, partners, and research/evaluation agenda please see Appendix B.

4. Gates Millennium Scholars Key Research Findings

4.1. Overview of General Findings

A review of GMS program evaluation findings over a decade showed that overall, BMGF, GMS/UNCF, and partner organizations are highly dedicated to the GMS program and GMS Scholars report that the GMS award reduces their financial burden. There remain, however, three consistent opportunities for improvement since the program’s inception, including streamlining the financial aid process (specifically the timing of Scholar identification and award disbursement); improving the use of technology within GMS/UNCF and the partner organizations; and improving GMS-sponsored leadership development opportunities.

A review of available GMS Scholar outcome findings showed that after a decade of program implementation and evaluation, there are very few published findings that show statistically significant results for Scholars vs. non-recipients for individual cohorts or across cohorts. The existing findings represent a variety of timeframes, study samples and analytical methodologies. Overall, there is a lack of coordination regarding the GMS data collection process, data analysis and document generation process and the dissemination of findings. It is possible the amount of turnover among key GMS stakeholders over the years has contributed to this situation.
Despite this lack of conclusive findings for GMS, there are specific findings regarding Scholar demographics, financial-related findings, graduate school transition rates, persistence rates, and graduation rates.

### 4.2. Scholars Demographics

Scholars are from one of four racial/ethnic groups: American Indian/Alaska Native, Asian/Pacific Islander American, Hispanic American, or African American. Please refer to Table 3 for a breakdown of Scholars distribution by ethnicity.

**TABLE 3. Scholars Distribution by Ethnicity**

All the GMS Scholars are citizens or permanent residents of the U.S., are full-time students entering college or university, and have been nominated by a teacher or school administrator to participate in the program. The majority of Scholars are from urban and rural public schools (not magnet or private schools) with a higher percent of racial/ethnic diversity than non-recipient schools. The majority of Scholars are female (about 70% female vs. 30% male), and more Scholars attend public than private postsecondary institutions (about 60% public vs. 40% private) across the first decade of the program.

### 4.3. Financial-Related Findings

One of the primary goals of the GMS Scholarship Program was to reduce financial barriers for high-achieving, low-income minority students. Findings related to this goal include the following:
• The majority of Scholars who participated in focus groups said they would have pursued postsecondary education even without the GMS award\(^3\).
• Scholars are still working in college, but appear to spend less time working than non-recipients.
• The type of work Scholars engage in appears to be more career and academic-related than non-recipients.
• The scholarship substantially reduces the debt load of Scholars, especially for African Americans.
• The award allows Scholars to attend more selective and private colleges and universities.
• For Cohorts 1 and 2, GMS funding seems to have positive implications for persistence for Scholars.
• For Cohort 1, GMS awards were associated with enrollment in 4-year as opposed to 2-year colleges.
  o Starting in 2-year college was negatively associated with continuous enrollment and change of college.
  o Receiving a GMS award improved the odds of continuous enrollment.
• The scholarship reduces amount parents contribute to college education, especially for Asian Americans.
  o Anecdotally it appears that Asian Americans are less likely to enter stereotypical STEM fields because of perceived freedom from parental contribution.

These findings indicate that overall, although the scholarship award helped reduce debt burden for Scholars, these are students who would have likely been motivated and academically prepared to pursue postsecondary education even without the award.

### 4.4. Scholars Graduate School Transition Rates

Another primary goal of the scholarship program was to increase the representation of targeted high-achieving, low-income minority groups in the disciplines of computer science, education, engineering, library science, mathematics, public health and the sciences (STEM and other GMS funded fields) where these groups are severely underrepresented, especially at the graduate level. To this end, evaluations showing Scholars’ graduate school transition rates were examined.

Scholars’ graduate school transition rates, including all GMS funded areas that were STEM and non-STEM fields, ranged from 37% to 49%. There are only reported findings on graduate school transition rates for STEM fields for Cohort 1. Graduate school transition rates varied according to different calculation methodologies and cohorts selected. An unpublished report tracking graduate school transition rates to GMS-funded areas from 2001 to 2008 suggests that Scholars were more likely to pursue graduate studies in the field of education than other fields.\(^4\)

---

\(^3\) Note: The number of participants and methodology for focus groups is unknown.

\(^4\) Program Performance Report 5-13-09. (Internal GMS document).
Table 4 highlights key differences in graduate school transition rate calculation methodologies from unpublished findings that were reviewed, and Table 5 tells us what questions each methodology allows us to answer.

### TABLE 4. Graduate School Transition Rate Calculation Methodology

<table>
<thead>
<tr>
<th>GMS</th>
<th>NORC</th>
<th>AIR</th>
<th>BMGF</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Graduate School Transition Rates Calculated</strong></td>
<td><strong>Cohort 1</strong></td>
<td><strong>Cohort 2</strong></td>
<td><strong>In 2007-2008, number of Scholars in STEM fields by year:</strong></td>
</tr>
<tr>
<td>2001 – 13%</td>
<td>-49% Scholars</td>
<td>-38% Scholars</td>
<td>-freshman 45.4%</td>
</tr>
<tr>
<td>2002 – 24%</td>
<td>-56% African American</td>
<td>-29% Non-Recipients</td>
<td>-sophomore 35.1%</td>
</tr>
<tr>
<td>2003 – 19.7%</td>
<td>-44% Hispanic</td>
<td>Cohort 3</td>
<td>-junior 35.1%</td>
</tr>
<tr>
<td>2004 – 12.4%</td>
<td>-48% Asian/Pacific Islander</td>
<td>-37% Scholars</td>
<td>-senior 32.8 %</td>
</tr>
<tr>
<td>2005 – 17.9%</td>
<td>-50% American Indians</td>
<td>-29% Non-Recipients</td>
<td>-all bachelors 36.9%</td>
</tr>
<tr>
<td>2006 – 16.5%</td>
<td>Transition rates to GMS-funded areas only by year</td>
<td><strong>Cohort 1</strong></td>
<td>-Masters 33.8%</td>
</tr>
<tr>
<td>2007 – 14.4%</td>
<td>Of the 49% who went to graduate school:</td>
<td></td>
<td>-PhD 51.4%</td>
</tr>
<tr>
<td>2008 – 16.9%</td>
<td>-57% Masters</td>
<td><strong>Cohort 2</strong></td>
<td></td>
</tr>
<tr>
<td>Transition rates to GMS-funded areas only by year</td>
<td>-15% PhD</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>-28% professional degree</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Of the 72% Masters and PhD, 70% in STEM and other GMS-funded areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Denominator</strong></td>
<td>All Scholars from baseline survey (includes inactives) who have graduated with a bachelor's degree</td>
<td>Subsample of each cohort's active and inactive Scholars using propensity score methodology</td>
<td>All active Scholars in 2007-2008 by year</td>
</tr>
<tr>
<td><strong>Numerator</strong></td>
<td>All Scholars who transition into a GMS-funded graduate program</td>
<td>All Scholar respondents to 2nd follow-up survey</td>
<td>Same as NORC</td>
</tr>
<tr>
<td><strong>Limitations</strong></td>
<td>Results only by year and for GMS-funded areas. Numerator possibly calculated by hand using multiple data sources</td>
<td>Results represent only 2nd follow-up survey respondents</td>
<td>Results represent subsample of cohorts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Results only by year and numerator possibly calculated by hand using multiple data sources</td>
</tr>
</tbody>
</table>

**Sources:**
- Melinda T. Tuan telephone conversation and email communication with Carlos Adrian, GMS/UNCF. August 3, 2009.
### TABLE 5. What Questions Does Each Graduate School Transition Rate Calculation Methodology Allow Us to Answer?

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Of Scholars who stayed active with the GMS Scholarship, how many went on to graduate school?</td>
<td>GMS Program Performance Report 5-13-09 – but only by academic year and not by cohort&lt;sup&gt;5&lt;/sup&gt;</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many went on to graduate school? (total percentage, by ethnicity, by type of graduate degree and by graduate degree in STEM)</td>
<td>NORC presentation 3.12.09 for Cohort 1&lt;sup&gt;6&lt;/sup&gt;</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many went to graduate school compared to all the non-recipients?</td>
<td>AIR interim report May 2009 for Cohorts 2 and 3&lt;sup&gt;7&lt;/sup&gt;</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many went to graduate school compared to all the non-recipients with results that are statistically significant and can be generalized to the entire GMS population?</td>
<td>None</td>
</tr>
</tbody>
</table>

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Other inconclusive findings indicate that although the GMS program appeared to encourage students who intended to major in a STEM discipline to do so at higher levels than non-recipients with similar interests, the overall effects of the program are mixed and differ by cohort.\(^8\)

It is also notable that GMS did not seem to impact choice of major as Scholars and non-recipients in Cohorts 2 and 3 had similar rates of majoring in GMS key fields of study (no statistically significant differences were found). Finally, for Cohorts 2 and 3, Scholars were significantly more likely to aspire to attend graduate school compared to non-recipients (\(p < .05\)).\(^9\) Therefore, it appears that Scholars are more likely to aspire to attend graduate school, though the actual transition rate to graduate school is difficult to determine based on various calculations and methods.

### 4.5. Scholars Persistence Rates

Unpublished findings indicate a variety of college persistence rates for Scholars, ranging from 72% to 99%. These rates reflect persistence for selected cohorts and are based on different definitions of persistence. For example, one unpublished study finds that for Scholars in Cohort 1, 99.54% were still enrolled in college roughly two years after they graduated from high school, and 96% were still enrolled as undergraduate or graduate students roughly four years after they graduated from high school.\(^10\) Another unpublished report finds that 72% of Scholars from Cohorts 1, 2, and 4 were still enrolled in college in 2005, while 94% of those not enrolled in school reported receiving at least a Bachelor’s degree.\(^11\) Therefore, it is difficult to ascertain what the persistence rate is for Scholars for an individual cohort or across cohorts. Of the documents reviewed for this paper, no additional data on persistence rates for individual cohorts, across cohorts, or comparing Scholars to non-recipients were identified.

### 4.6. Scholars Graduation Rates

Similarly, different graduation rates are reported for the Scholars, ranging from 67% to 88%. These different rates are based on variations in calculation methods, as noted in Table 6. Table 7 tells us what questions each methodology allows us to answer. Like graduate school transition rates and persistence rates, the precise nature of Scholars graduation rates is difficult to determine based on existing analyses and methodologies.

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\(^10\) NORC. *The Inaugural Cohort of Gates Millennium Scholars the 1st Few Years after High School.* December 2006. p. 66.

One unpublished finding compares Scholars from Cohort 1 to non-recipients six years after starting college, showing that Scholars graduate at a statistically significant higher rate (88% for Scholars vs. 85% for non-recipients). For Cohort 2, Scholars’ five-year graduation rates are also significantly higher than non-recipients (67% for Scholars vs. 60% for non-recipients). However, the report’s authors note that their use of propensity score methodology means the results cannot be applied to the broader GMS population.

An additional unpublished report examines Cohort 1 Scholars’ six-year graduation rate by ethnicity, showing a rate of 97% for Asian Pacific Islanders, 89% for African Americans, 86% for Hispanics, and 67% for American Indians. This report did not show any analyses for Scholars vs. non-recipients by ethnicity.

A different report indicated there were no statistically significant differences in outcomes between the four racial/ethnic groups or between males and females in Cohorts 2-3 for any of the GMS program impacts studied. This included the likelihood of Scholars graduating from college or being on track to graduate from college compared to non-recipients; the choice of Scholars’ college major or choice to pursue GMS key fields of study compared to non-recipients; the likelihood of Scholars aspiring to attend graduate school compared to non-recipients; and the likelihood of Scholars to continue their education beyond their undergraduate program compared to non-recipients.

In yet another unpublished report, preliminary findings indicate that there are no statistically significant differences in the four-year college graduation rates for Scholars vs. non-recipients for the overall sample or the racial/ethnic subgroups for Cohort 2. However, not too much should be read into these results until more data (Cohort 3) are available to improve the precision of statistical tests.

In short, the Scholarship Evaluation Look Back document review revealed different graduation rates based on different calculation methodologies, with no published

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12 Michele Zimowski, Ph.D., Senior Survey Methodologist, NORC at the University of Chicago. 

13 Note: In the absence of an experimental design, propensity scores can be used to reduce the selection bias between two groups (scholars and non-recipients) by estimating the probability that a student will become a Scholar given his or her set of pre-treatment variables. In the case of GMS, minority group, parents’ home ownership at the time the student graduated from high school, non-cognitive scores, and high GPA are all examples of possible pre-treatment variables (NORC Technical Proposal 2007). The authors of this particular GMS report caution that because these are estimations, results cannot be generalized to the broader population. (Windham, A., de los Reyes, I., and Amos, L. (AIR). (2009) *Delivering on the Promise: An impact evaluation of the Gates Millennium Scholars program interim report.* Prepared for the Bill and Melinda Gates Foundation, p. 11).


findings showing statistically significant differences between Scholars and non-recipients across cohorts.

**TABLE 6. Graduation Rate Calculation Methodology**

<table>
<thead>
<tr>
<th>Graduation Rates Calculated</th>
<th>GMS</th>
<th>NORC</th>
<th>DesJardins &amp; McCall</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cohort 1 Five-Year</strong></td>
<td>-80% Scholars</td>
<td><strong>Cohort 1 Six-Year</strong></td>
<td>-88% Scholars</td>
</tr>
<tr>
<td><strong>Cohort 1-2 Five-Year</strong></td>
<td>-77.6% Scholars</td>
<td>-85% non-recipients</td>
<td>p &lt; 0.05</td>
</tr>
<tr>
<td><strong>Cohort 1-3 Five-Year</strong></td>
<td>-78.2% Scholars</td>
<td><strong>Cohort 2 Five-Year</strong></td>
<td>-67% Scholars</td>
</tr>
<tr>
<td><strong>Cohort 1-4</strong></td>
<td>-79.9% Scholars</td>
<td>-60% non-recipients</td>
<td>p &lt; 0.05</td>
</tr>
<tr>
<td><strong>Cohort 1 Six-Year</strong></td>
<td>-88% Scholars</td>
<td><strong>Cohort 2 Subsample Four-Year</strong></td>
<td>-72% Scholars</td>
</tr>
<tr>
<td></td>
<td>-85% non-recipients</td>
<td>-61.3% non-recipients</td>
<td>p &lt; 0.001</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Denominator</th>
<th>All active GMS Scholars</th>
<th>All GMS Scholars from baseline survey (includes inactives)</th>
<th>Same as NORC</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Numerator</th>
<th>Multi-step calculation from 4 data sources:</th>
<th>All Scholar respondents to 2nd follow-up survey</th>
<th>Same as NORC</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>review transcripts</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>review GMS renewal forms</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>run report against NSC database</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>count Scholars transitioning to graduate school</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Limitations</th>
<th>Does not include inactive scholars</th>
<th>Results represent only 2nd follow-up survey</th>
<th>Results to date only for subsample of Cohort 2 given larger sample sizes needed to conduct regression discontinuity analyses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cohort 1</strong></td>
<td>-13%</td>
<td><strong>Cohort 1</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Cohort 2</strong></td>
<td>-12%</td>
<td><strong>Cohort 2</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Cohort 3</strong></td>
<td>-10%</td>
<td><strong>Cohort 2</strong></td>
<td></td>
</tr>
</tbody>
</table>

NSC (National Student Clearinghouse) database includes only 90% of all colleges and universities and participation varies by year.

Cohort 1 non-recipients tended to come from families which were more highly educated and well off than Scholars families.

Results to date only for subsample of Cohort 2 given larger sample sizes needed to conduct regression discontinuity analyses.

TABLE 7. What Questions Does Each Graduation Rate Calculation Method Allow Us to Answer?

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Of Scholars who stayed active with the GMS Scholarship, how many graduated?</td>
<td>GMS Program Performance Report 5-13-09(^{17})</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many graduated?</td>
<td>NORC longitudinal data for Cohorts 1 (Six-Year) and 2 (Five-Year)(^{16})</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many graduated compared to all the non-recipients?</td>
<td>NORC longitudinal data for Cohorts 1 (Six-Year) and 2 (Five-Year)(^{19})</td>
</tr>
<tr>
<td></td>
<td>DesJardins/McCall for Cohort 2 (Four-Year)(^{20})</td>
</tr>
<tr>
<td>Of Scholars who ever received a GMS Scholarship, how many graduated compared to all the non-recipients with results that are statistically significant using a large enough sample size to make conclusions?</td>
<td>NORC longitudinal data for Cohorts 1 (Six-Year) and 2 (Five-Year)(^{21})</td>
</tr>
</tbody>
</table>


\(^{19}\) Ibid.


4.7. Perspectives on the GMS Program Research Framework, Data Collection, Analysis, Document Generation and Dissemination

Members of the GMS RAC have been involved in the GMS scholarship evaluation efforts from the very beginning. The RAC members designed the GMS research framework, selected the evaluation consultants (NORC), and applied for funding from BMGF to conduct research based on the research framework and priorities they developed. Other academic researchers also participated. One academic researcher stated, 

“[BMGF] didn’t ask us to do anything [for them]. We’re the ones who pitched a proposal and they’ve always said ‘Yes.’”

With regard to the GMS research framework, almost all the RAC and AC members interviewed are delighted to have been a part of the GMS program. However, almost all GMS key stakeholders expressed frustration with the evolving theories of change at BMGF regarding the goal and role of scholarships. Almost all scholarship grantees, academic researchers and evaluation consultants expressed confusion and concern regarding BMGF’s decision to disband the RAC. Many GMS key stakeholders expressed frustration with the high level of BMGF staff turnover in the foundation point person role for the scholarship evaluation work.

Key GMS stakeholders reviewed the GMS data collection process with positive feedback as well as areas that needed improvement. On the positive side, all scholarship grantees report that participating in the data collection/evaluation efforts is not time-consuming. Areas of improvement noted by many GMS stakeholders include a lack of coordination in data collection (many organizations involved with data collection: GMS program, scholarship grantees doing their own surveys of scholars, NORC, AIR, IHEP, etc.).

With regard to GMS data analysis and documents, most scholarship grantees find the AIR reports regarding program implementation to be helpful in improving and refining their program delivery. In contrast, all scholarship grantees find the NORC main findings reports by cohort difficult to understand, and almost all BMGF staff and many of the academic researchers interviewed find the IHEP synthesis documents and issue briefs to be of low quality. Additionally, there is a lack of coordination in data analysis and document generation (many organizations and individuals are involved with analyzing Scholar data and each is coming up with different statistical methods and results – GMS, BMGF, NORC, AIR, IHEP, etc.).

Regarding stakeholder perspectives on GMS document dissemination, RAC members have been disseminating their findings through peer reviewed journals and presentations at academic conferences. However, RAC efforts to generate and disseminate findings have slowed down considerably since 2005 when IHEP took over the coordinating role for research and dissemination. There has also been a lack of coordination in the dissemination of IHEP findings (e.g., IHEP synthesis reports and issue briefs have been distributed without coordination with BMGF communications/advocacy team). Almost all GMS key stakeholders interviewed would like to see BMGF do more around disseminating the key scholarship evaluation findings in order to inform higher education policy.
5. Background on Washington State Achievers (WSA)

5.1. History and Goals of the WSA Program
The WSA Program was founded in 2001 by the College Success Foundation (CSF; formerly Washington Education Foundation) and BMGF to address the disparities in college participation in the state of Washington by working comprehensively with 16 high schools serving large low-income populations. To date, WSA has funded close to 4,000 Achievers, with 500 Achievers selected each year from 2001 – 2010. The goals of the program are as follows:

- Encourage school redesign that facilitates high academic achievement and increased college enrollment among all students at the selected high schools,
- Identify and reduce financial barriers to college for talented, low-income students who have overcome difficult circumstances and who are motivated to attend college,
- Provide mentoring to ensure academic support is available to students once they are enrolled in college, and
- Develop a diverse cadre of college-educated citizens and leaders in Washington State.

5.2. WSA Program Description
The WSA Program is part of an initiative by BMGF and administered by CSF to fund and support 16 high schools in Washington State as they redesign themselves to increase academic achievement for all their students. Each year for ten years (2001-2010), approximately 500 Achievers are selected from among students who attend the 16 Achiever high schools. This is an annual scholarship of up to $10,000 per year\(^\text{22}\) for up to five years. The Achievers Hometown Mentors Program pairs Achievers with mentors from the spring of junior year in high school through the first two months in college. Achievers also participate in the Achievers College Experience (ACE), a four-day summer program on a college campus prior to their senior year in high school, and the College Mentor Program requires that Achievers meet with an on-campus mentor at least once a month during their freshman and sophomore years in college.

5.3. WSA Selection Process
To be selected, students must graduate from high school, demonstrate financial need, and apply for need-based financial aid at their colleges. There is no minimum GPA requirement, however, Achievers are selected based on non-cognitive variables such as self-esteem and self-efficacy. Achievers must be Washington State residents attending one of the 16 participating high schools. For the first 2 years of college, funds must be used in approved 2- or 4-year in-state institutions; then students may use the funds at an out-of-state institution. Recipients may apply for a leave of absence and re-enroll within a year after they address family or personal challenges.

5.4. Original Goals of Research Framework

The original research framework for the WSA Program focused on outcomes at three levels: student, classroom, and school outcomes. For the purposes of this paper, only the student outcomes are within the scope of the Scholarship Evaluation Look Back.

In 2007, a renewed research program prospectus was put forth, guided by four primary research questions:

1. To what degree has school reform been implemented over time in Achievers high schools? What outcomes have been achieved school-wide?
2. What are the primary factors that influence the success of the WSA Program? Does pairing scholarship with school reform promote better reform, and if so how?
3. What are the outcomes for Achievers in college? What is the range of Achievers program implementation models seen across participating colleges in Washington State? What models are associated with stronger student outcomes?
4. What range of activities has the advocacy program been conducting to date in its focus districts? What outcomes and lessons learned are emerging from the advocacy work in each district?

Only the findings related to the third set of research questions regarding student outcomes above falls within the scope of this paper.

5.5. Data Collection Methodology and Plan

BMGF contracted with Fouts & Associates, LLC to conduct annual evaluation reports, collecting data at three levels (school, classroom, and student). In addition, several studies on the Achievers touch on aspects of the program implementation:

- NORC longitudinal studies—role of mentors in their lives
- Institute for Higher Education Policy (IHEP) studies—impact of mentors on college persistence, impact of high school culture on college enrollment
- SRI International (SRI) focus groups—life histories and barriers prior to college

Data collection also included a web-based survey of Achievers and non-recipients, as well as baseline and follow-up surveys on Cohorts 1, 3, 5, 7, 10. The baseline survey was conducted one year post-high school, the 1st follow-up at three years post-high school, the 2nd follow-up at six years post-high school, the 3rd follow-up at nine years post-high school, and the 4th follow-up at thirteen years post-high school (only cohorts 1, 3, 5 will receive 4th follow-up under the current research design).

6. Washington State Achievers Key Findings

6.1. Overview of General Findings

Achievers were generally satisfied with how the WSA Program is run. The majority of Cohort 1 Achievers with mentors reported that their mentors helped them with the transition to college, encouraged them to stay in college, and were important to
them in their first year of college. Suggestions for improvements to the WSA Program include reviewing the financial requirements with students, clarifying the scholarship distribution process, and creating a senior bridge program.

A review of published and unpublished documents shows that while various analyses have been performed, there are either no findings that show statistically significant results, or there are findings that do not specify whether or not there is statistical significance for Achievers vs. non-recipients for individual cohorts or across cohorts (second follow-up data on non-recipients have not yet been collected). Available findings represent a few different timeframes and study samples.

Notable findings are that Achievers are still working in college but seem to be taking on less debt than non-recipients, and Achievers are working less and taking on less debt than low-income students nationally.

### 6.2. Achievers Demographics

Achievers are selected in 11th grade from one of 16 Achievers High Schools in Washington State. They do not need to meet a minimum GPA requirement but must demonstrate strong non-cognitive skills, and have plans to obtain a bachelor’s degree. Achievers come from families that have and will continue to have an annual income level that is in the lowest third of WA family income levels and have low or modest family assets. They are mostly first-generation college-going students and are not specifically from a minority population.

In Cohorts 1-5, approximately 60-65% of Achievers were female. Racial/ethnic breakdowns for these cohorts show that they were approximately 40% White, 20% Asian/Pacific Islander, 15% Hispanic, 15% Black, and 10% Multi-Racial or Other. These cohorts represented a more racially diverse student population than the Washington State population from ages 17 to 39 and the college-going student population in Washington State.

### 6.3. Achievers High School Transition Rates to College

Achievers from Cohort 4 enrolled in four-year colleges at a rate of 65%, compared to 29% for non-recipients and 22% for non-applicants in that cohort. The statistical significance of these differences is unknown.

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23 WSA non-recipients were selected using basically the same methodological approach as the GMS non-recipients. The main difference is that WSA non-recipients could be deemed ineligible for the award if they went to a non-eligible postsecondary institution (students had to attend college in the state of Washington for at least the first two years in order to receive the scholarship). “Non-funded” Achievers (or non-recipients) refers to individuals who qualified for the Achievers Scholarship, but did not actually receive the award due to either attending a non-eligible postsecondary institution or failing to meet some other eligibility requirement. Non-applicants refers to students from Achievers High Schools who did not apply for the Achievers Scholarship program. (The Pell Institute (2006). Expanding Access and Opportunity: The Washington State Achievers Scholarship. Washington DC: The Pell Institute for the Study of Opportunity in Higher Education, p. 11.).

Of the Achievers from Cohorts 1-5, 43% enrolled at public 4-year institutions, 19% enrolled in private 4-year institutions, and 38% enrolled in public 2-year institutions. Compared to low-income students nationally, more Achievers attended either public or private 4-year institutions than the national average, though the comparability of these two datasets is currently unknown.\footnote{Ibid.} A further positive trend is that from Cohort 1 through Cohort 5, Achievers enrolled in 2-year institutions at progressively lower rates, while simultaneously increasing their rates of enrollment at 4-year public and private institutions.\footnote{Ibid.} This is a positive outcome because starting at 2-year institutions rather than 4-year institutions is negatively associated with persistence.\footnote{St. John, E. and Chung, C. (2004). The impact of GMS on financial access: Analyses of the 2000 freshman cohort. In E. St. John (Ed.), Readings on Equal Education, Volume 20 Improving access and college success for diverse students: Studies of the Gates Millennium Scholars program, 115-152.}

6.4. Achievers Persistence Rates
Achievers reported persistence rates ranging from 26% to 96%, depending upon cohorts examined as well as definitions and calculations of persistence. 53% of college-going Achievers in Cohort 1 interrupted their undergraduate studies at least once. The top four primary reasons included for such interruptions are family/personal reasons (59%), need/want to work (22%), health (16%), and financial issues (16%). 72% of all Cohort 1 Achievers with children who deferred cited family or personal considerations as one of their reasons for deferring.

6.5. Achievers Graduation Rates
There is a range of findings for Achievers graduation rates. For those receiving Bachelor’s degrees the rate is from 13% to 48%, and for those receiving Associate’s degrees the rate is from 50% to 78%. Of the 530 Achievers in Cohort 1, 48% graduated from college within six years after high school. Graduation rates for Cohort 1 by ethnicity spanned 63% for Asian Pacific Islanders, 51% for White/Caucasian, 50% for Other, 35% for African American, and 25% for Hispanic Achievers.\footnote{Source: NORC. The Gates Millennium Scholars and Washington State Achievers Longitudinal Studies. Presentation to Postsecondary Success at BMGF. March 12, 2009. pp. 46, 56. (Internal BMGF document). Melinda T. Tuan compilation of findings.} Cohort 1 Achievers six-year bachelor degree attainment rates differed for those who started at 2-year versus 4-year institutions. Across all ethnicities, those who had started at 4-year institutions graduated at higher rates than those who had started at 2-year institutions.\footnote{NORC. The Gates Millennium Scholars and Washington State Achievers Longitudinal Studies. Presentation to Postsecondary Success at BMGF. March 12, 2009. pp. 41, 52. (Internal BMGF document). Melinda T. Tuan compilation of findings.} The reasons for this difference in graduation rates may be attributed to the college-readiness of those students who choose to enter 4-year versus 2-year institutions, although further research is required to determine a causal relationship of this nature.

Another graduation rate was calculated for Achievers from Cohorts 1 and 2, showing that 18.8% of Achievers from Cohort 1 graduated in four years, and 44.3% graduated in five years. In contrast, 25% of Achievers from Cohort 2 graduated in
four years, while the five-year rate was not available. It is noteworthy that these rates were all higher than national graduation rates (based on a national low-income sample).  

An excerpt from the school reform evaluations conducted by Fouts & Associates show that high school graduation rates for all students at Achiever schools (including scholarship recipients and non-recipients) have generally followed the trend of the Washington State average. Although the scholarship program was implemented in 2001, overall high school transition rates to college by the graduates of Achievers schools (including scholarship recipients and non-recipients) as of 2007 have remained flat.

6.6. Other Key Findings
Other key findings related to Achievers demographics include the following:

1. 19% of Achievers from Cohort 1 took one or more remedial courses as an undergraduate
2. While only one of twenty Achievers was a parent within about a year after high school, almost one out of five Achievers was a parent within about three years after high school
3. 43% of Achievers who interrupted their studies had at least one child

These last two findings highlight some issues regarding Achievers’ family planning choices and the impact of those decisions on their postsecondary success. Additional data collection and analyses may provide more insight into the specific financial and other support needs of students who are parents.

The Scholarship Evaluation Look Back review also uncovered findings related to Achievers’ finances. Approximately half of the students who participated in focus groups said that without the scholarship, they would not have gone to college. Receiving the Achievers scholarship increased a student’s enrollment probability by nearly 14 to 19 percentage points (depending on the cohort), controlling for family background, school characteristics, aspirations, and educational experiences in high school.

Further, Achievers are working about the same number of hours as non-recipients, but Achievers are working less than low-income students nationally (59% of 2001 Achievers, 52% of 2003 Achievers, and 75% of low-income students nationally). Achievers are more likely to have lower levels of debt than non-recipients or full-time/full-year undergraduates who borrow to fund their education. 19% of 2001 Achievers had a median loan amount of $3,250, 35% of 2003 Achievers had a

32 Note: The number of participants and methodology for focus groups is unknown.
median loan amount of $4,160, and 50% of full-time/full-year undergraduates had a median loan amount of $6,200.

6.7. Perspectives on the WSA Program Research Framework, Data Collection, Analysis, Document Generation and Dissemination

Members of the WSA RAC have been involved in the WSA evaluation efforts from the beginning. The WSA research framework was met with overwhelmingly positive responses from RAC members, and all of those interviewed are delighted to have been a part of the WSA program. There have been, however, challenges as well. For example, almost all scholarship grantee staff expressed frustration with the evolving theories of change at BMGF regarding the goal and role of scholarships, and some scholarship grantee staff observed that there is a lack of clarity as to who is the consumer of the WSA research. In addition, all RAC members interviewed expressed confusion regarding the lack of RAC involvement in WSA over the past two years.

With regard to the WSA data collection process, all scholarship grantee staff report that participating in the data collection/evaluation efforts is not time-consuming. When asked about challenges related to data collection, no challenges were mentioned by any of the scholarship grantee members or RAC members. All interviewees expressed a great desire to continue and expand data collection for both WSA and DC Achievers.

For data analysis and documents, all scholarship grantee staff and RAC members interviewed found the Fouts reports regarding school reform to be helpful in improving and refining their school reform efforts and scholarship grantee staff mentioned the Fouts reports were very timely. On the other hand, all scholarship grantee staff mention there is a backlog of about 3 years on the NORC main findings reports and they wish there were more syntheses of the WSA findings. Finally, all scholarship grantee staff wish NORC would do cross-cohort comparisons.

Regarding WSA document dissemination, RAC members have been disseminating their findings through peer reviewed journals and presentations at academic conferences. WSA has also been building its own capacity to disseminate its key findings. However, RAC efforts to generate and disseminate findings have slowed down considerably since 2005 when IHEP took over the coordinating role for research and dissemination. Further, there is a lack of coordination in the dissemination of findings (i.e. WSA is disseminating its own reports; IHEP report distributed without coordination with BMGF communications/advocacy team), and all WSA key stakeholders interviewed would like to see BMGF do more around disseminating the key scholarship evaluation findings in order to inform higher education policy.

7. Background on DC Achievers

7.1. History and Goals of DC Achievers Program

The DC Achievers Program was founded in 2006 by BMGF and the DC College Success Foundation (DC CSF) to expand the pipeline of low-income and underrepresented students who complete a baccalaureate degree by working with six high schools in two of the economically neediest sections of the city. 250 DC
Achievers are selected each year, and the first cohort of DC Achievers funded entered college in 2008.

The goals of the program are multifold:

- Redesign schools to emphasize a college preparatory curriculum for all students delivered in small communities that ensure a supportive learning environment
- Reduce financial barriers for talented, low-income students who are motivated to attend college
- Use non-traditional indicators other than GPA and standardized test scores to identify students with the potential to earn bachelor’s degrees and to select them for scholarships
- Increase college enrollment among all students at DC Achievers schools
- Develop a diverse cadre of college-educated citizens and leaders

7.2. DC Achievers Program Description
Like its sister program in Washington State, the DC Achievers Program aims to establish a college-ready or college-going culture in the DC Achievers high schools among all groups of students, not just those receiving scholarships. To this end, the program is committed to infusing these schools with the “new 3Rs”:

- Rigor – challenging curriculum,
- Relevance – coursework and projects relevant to students’ lives and aspirations,
- Relationships – fostering strong relationships between adults and students to create a college-going culture.

DC CSF collaborates with the DC College Access Program to administer the program, which includes six DC Achievers High Schools. DC Achievers are paired with mentors from the spring of junior year in high school through the first two months in college through the Hometown Mentors Program. They participate in a four-day summer program, the Achievers College Experience (ACE), on a college campus prior to their senior year in high school. The College Mentor Program requires that DC Achievers meet with on-campus mentors at least once a month during their freshman and sophomore years. The DC Achiever scholarship is an annual last dollar scholarship for up to five years.

7.3. Original Goals of Research Framework
The primary goals of the baseline study performed by Westat on the DC Achievers Program were to examine college-going culture in DC Achievers schools and a set of comparison schools; examine student behaviors related to college-going; and explore issues related to implementing and establishing the DC Achievers Program.

7.4. Data Collection and Methodology and Plan
The baseline study conducted by Westat addressed the original goals through a mix of qualitative and quantitative data on the six DC Achievers high schools and five high schools where the DC Achievers Program was not in operation. These data describe the status and environments of the schools, highlight key elements of the
DC Achievers Program, and lay the foundation for future evaluation of program impacts.

There is currently no confirmed or funded data collection plan to track demographics or outcomes on the individual DC Achievers. NORC recommends any methodology for collecting longitudinal data on DC Achievers mirror that of the Washington State Achievers to be able to compare results.

8. DC Achievers Key Findings

8.1. DC Achievers Demographics
DC Achievers graduated from one of six DC Achievers high schools in Washington, DC. Almost all DC Achievers are African American and the majority have mothers who did not attain a college education. Selected students demonstrated strong non-cognitive skills, had plans to obtain a bachelor’s degree, and attended an eligible public or independent college or university. DC Achievers’ families have and will continue to have an annual income level that is in the lowest third in the District of Columbia, and they have low or modest family assets.

8.2. Key Findings
DC Achievers and comparison schools varied in their college-going cultures, falling in the categories of weak, developing, or strong. Schools with strong college-going cultures had higher attendance rates; high school graduation rates; percentages of students taking AP courses and tests, applying for college, and being accepted to college; combined SAT scores; and GPA’s. Public charter schools were found to have stronger college-going cultures than the traditional public schools. Finally, DC Achievers and comparison schools were not very different in their baseline college-going cultures in that DC Achievers schools did not all have strong college-going cultures.

9. Discussion

9.1. Implications for PS Strategy and Learning Questions
Findings from the Scholarship Evaluation Look Back indicate overall positive experiences of Scholars, Achievers, and DC Achievers. Stakeholders and researchers indicate high hopes for positively impacting the education and professional outcomes of scholarship recipients.

Findings also lead to questions about the direction of the scholarship programs, their evaluation, and PS strategy going forward. Given GMS’s focus on high-achieving students, and results that seem to indicate that high-achieving students, whether Scholars or non-recipients, have relatively high rates of persistence and graduation; it does not seem that GMS fits in well with the current PS strategy. However, there are important unanswered questions to confirm for GMS and WSA (e.g. true rates of persistence and graduation across cohorts compared to non-recipients).

Given WSA’s focus on low-income students and school reform, Achievers may fit in well with the current PS strategy. Future evaluation of WSA may prove useful in demonstrating that middle-school and high school reform, together with
scholarships, positively impact college enrollment, persistence, and graduation for students who might not otherwise attend postsecondary institutions.

Given DC Achiever’s focus on low-income students and the college-going culture of their high schools, tracking this population may inform PS and BMGF strategies on better pathways, supports, and information to help low-income young adults overcome barriers to attaining a postsecondary education. A parallel strategy of action, research and evaluation with WSA initiatives may be even more useful for analyses than the WSA data alone.

10. Future Research

10.1. What Further Analysis of Existing Data Would Be Useful?
Many important unanswered questions can be answered by further analysis of existing GMS and WSA data (Scholars/Achievers compared to non-recipients, national rates, by gender, race/ethnicity):

- What are the high school transition rates to college for Achievers across all cohorts?
- What is the persistence rate of Achievers and non-recipients from Cohort 3?
- What is the graduation rate of Achievers and non-recipients from Cohort 3?
- What are the persistence rates of Scholars across all cohorts?
- What are the graduation rates of Scholars across all cohorts?
- What are the graduate school transition rates of Scholars across all cohorts (and specifically into STEM)?

10.2. What Further Data Collection and Analysis Would Be Useful?
Many important unanswered questions can only be addressed by further GMS and WSA data collection and analysis:

- What are the persistence rates of Achievers and non-recipients across all cohorts?
- What are the graduation rates of Achievers and non-recipients across all cohorts?
- What percentage of Scholars and Achievers had to take remedial courses when they went to college?
- Do Scholars remain in STEM fields post-graduate school and what is their impact on such fields?
- For Scholars and Achievers who persisted, what factors helped them complete their postsecondary education?
- What happened to the inactive GMS Scholars?
- What is the relationship between Achievers having children and their persistence rates?

34 If BMGF continues to collect data on WSA cohorts as indicated by the initial research framework described in Section 5.5., these questions may be answered. It is also possible these questions may be answered with less data collection than planned; it might be helpful to engage some longitudinal research experts in determining the minimal dataset required to answer these questions.
10.3. **What Questions Cannot Be Answered by the GMS and WSA Data?**
A few important unanswered questions cannot be answered by the GMS and WSA data:

- How do we get young adults to build the intrinsic belief, commitment, and motivation to enroll in and complete their degree programs?
- What are the most effective outreach and support strategies to recruit and retain low-income students not currently enrolled in college? Are some strategies more/less effective for different populations?

10.4. **Why Are There Important Unanswered Questions?**
There are many reasons that important unanswered questions remain. We do not have published and publically available findings with analyses that are statistically significant, or analyses which show whether statistical significance was tested, across all the cohorts for which data have been collected to date for WSA regarding high school transition rates to college; GMS and WSA regarding persistence and graduation rates; or GMS regarding graduate school transition to STEM and non-STEM fields for Scholars/Achievers vs. non-recipients.

For GMS, pieces of these analyses have been conducted by different organizations and individual researchers using varying data samples and methodologies. Results of multiple research efforts, sample selections and methodologies for GMS are mixed and inconclusive. In addition, many published articles and presentations by academic researchers on GMS provide overlapping findings. For example, there are six articles/presentations to examine the GMS Program’s impact on STEM fields (narrow in focus, esoteric in scope); and there are seven articles/presentations to address financial aid/access and its impact on college success. Overall, the GMS reports are varied in their level of quality and clarity.

For WSA, these analyses have not yet been conducted because data were not collected for non-recipients for Cohort 1; and for Cohort 3, second follow-up data collection on Achievers and non-recipients (which would provide persistence and graduation rate data) was conducted during summer 2009 and analyses of these data have not yet been commissioned.

11. **Conclusion**
Based on the GMS, WSA and DC Achievers Scholarship Evaluation Look Back, it is clear that very few published GMS findings show statistically significant results for Scholars vs. non-recipients for individual cohorts or across cohorts for any outcome (persistence, graduation rate, graduate school transition rate including to STEM and other BMGF funded fields). In other words, there are findings that show no statistical significance, findings that do show statistical significance, and there are other findings that do not indicate whether or not the results are statistically significant. Additionally, because no analyses of the recently collected second follow-up data have yet been conducted on WSA Achievers and non-recipients, there are no published WSA findings that show results for Achievers vs. non-recipients across cohorts for any outcome (high school transition rate to college, persistence, graduation rate).
Depending on what BMGF’s current and future goals are regarding the role of scholarships in the postsecondary success strategy and the foundation overall, it may be that BMGF would benefit from knowing the conclusive answers to the basic questions about Scholars persistence rates, graduation rates, and transition rates to graduate school, as well as Achievers persistence and graduation rates. In addition, there remains an opportunity to further explore the impact of the WSA and DC Achiever programs through additional data collection and analyses.

If the foundation decides to continue evaluating GMS, WSA and/or DC Achievers, BMGF should more closely coordinate and streamline the overall scholarship evaluation data collection, data analyses, document generation and dissemination efforts. In so doing, BMGF will be able to better ensure the quality of each step of the process and produce conclusive findings for the foundation and the field regarding the impact of these scholarship programs on the lives of the scholarship recipients.

12. Authorship and Research Credits

This report was written and researched by Dr. Helen Chen Kingston and Melinda T. Tuan.

**Helen Chen Kingston**
Helen is an independent consultant who works for non-profit and philanthropic organizations to research and evaluate best practices for effective program implementation. In addition to her work with the Bill and Melinda Gates Foundation, her clients include SixSeeds Foundation, an organization dedicated to equipping family-based service and giving through domestic and international initiatives. Prior to working as a consultant, Helen worked in the financial sector in New York City, rating mortgage-backed securities.

She holds a B.A. in History from Columbia University and an Ed.D from Harvard University. Her research interests include first- and second-language acquisition and literacy acquisition in the broader context of children’s social and cognitive development, as well as reading pedagogy and literacy research methods.

**Melinda T. Tuan**
Melinda is an independent consultant who works with the senior leadership of philanthropic organizations to research and create content regarding strategies for thoughtful and effective philanthropy. In addition to her current work with the Bill & Melinda Gates Foundation, Melinda recently completed four years as a Senior Fellow with Rockefeller Philanthropy Advisors and two years as a Special Advisor to Bridgestar/The Bridgespan Group. Other past clients include Grantmakers for Effective Organizations and the Eagles Youth Partnership, the philanthropic arm of the Philadelphia Eagles Football Team.

Previously, Melinda co-founded and managed REDF (formerly The Roberts Enterprise Development Fund) with Jed Emerson and George Roberts of KKR. REDF is a social venture capital fund that works with a portfolio of nonprofit organizations employing formerly homeless and low-income individuals in market-based business ventures. While at REDF, Melinda invested in a portfolio of fifteen nonprofit organizations running over thirty different businesses employing over 2,000 formerly homeless and
low-income individuals over a seven-year period. In addition, she coordinated the design and development process for REDF’s social return on investment (SROI) framework which was architected by Jed Emerson, and managed the development of REDF’s ongoing assessment of social impacts (OASIS).

Prior to REDF, Melinda was a manager at a national healthcare nonprofit and a management consultant specializing in growth strategies for Fortune 500 companies. Melinda has volunteered with numerous community-based organizations in Honolulu, Boston, and the San Francisco Bay Area that serve homeless and very low-income populations. Additionally, she co-founded Boston Cares, a nonprofit volunteer service organization, and was involved in the start-up of a social-mission driven company called Dayspring Technologies in San Francisco.

Melinda is recognized nationally for her work in high engagement philanthropy, foundation effectiveness, evaluation, nonprofit capacity-building, and social enterprise. She has lectured at leading business schools in the country including Stanford and Wharton, and published articles, business school cases, and a book chapter entitled “Cultivating a Culture of Measurement” in *Funding Effectiveness* by Grantmakers for Effective Organizations. Melinda currently serves on the Board of Managers for Evergreen Lodge, a social-purpose destination resort located just outside Yosemite National Park, and the Advisory Council for REDF.

Melinda graduated from Harvard University *magna cum laude* with an AB in Social Studies focusing on urban poverty and homelessness and she holds an MBA and certificate in nonprofit management from the Stanford Graduate School of Business. She resides in Narberth, Pennsylvania with her husband and three children.
APPENDIX A: KEY STAKEHOLDERS INTERVIEW LIST

- **Bill & Melinda Gates Foundation (BMGF)**
  - Margot Tyler, Senior Program Officer, Education
  - Ian Rowe, Deputy Director, Public/Private Partnerships
  - Marie Groark, Senior Program Officer
  - Eli Yim, Program Officer

- **United Negro College Fund (UNCF)**
  - Larry Griffith, Vice President, Gates Millennium Scholars
  - Carlos Adrian, GMS Research/Data Analyst, Gates Millennium Scholars

- **American Indian Graduate Center Scholars (AIGCS)**
  - Sam Deloria, Executive Director
  - Joan Currier, Chief Operating Officer
  - Christa Moya, Director of Financial Aid/Student Services

- **Asian Pacific Islander American Scholarship Fund (APIASF)**
  - Neil Horikoshi, Executive Director

- **Hispanic Scholarship Fund (HSF)**
  - Sid Landman, Sr. VP-Operations and CFO
  - Cathy Makunga, Sr. Director Program Operations

- **College Success Foundation (CSF)**
  - Deborah Wilds, President and COO
  - Sue Byers, Chief Academic Advisor, DC College Success Foundation
  - Lorraine Solaegui, Director, Scholarship Selection and Evaluation

- **GMS Advisory Council**
  - Jim Larimore, Former Dean of Students, Swarthmore College
  - Piedad Robertson, Former President, Education Commission of the States

- **GMS Research Advisory Council/WSA Research Advisory Council**
  - Shirley Hune, Associate Dean for Graduate Programs, UCLA
  - Ed St. John, Professor of Higher Education, School of Education, University of Michigan
  - Bill Sedlacek, Professor Emeritus, College of Education, University of Maryland
  - Bill Trent, Professor of Educational Policy Studies and Sociology, University of Illinois, Urbana Champaign

- **Institute for Higher Education Policy (IHEP)**
  - Alisa Cunningham, Vice President of Research and Programs
  - Jennifer Ramsey, Project Researcher

- **NORC**
  - Ray Lodato, Project Director, WSA
  - Bronwyn Nichols, Project Director, GMS
• **Other Academic Researcher**
  - Steve DesJardins, Professor, University of Michigan
## APPENDIX B: History of Key GMS and WSA Events

<table>
<thead>
<tr>
<th>Year</th>
<th>BMGF</th>
<th>GMS Partners</th>
<th>GMS Research/Evaluation</th>
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<tbody>
<tr>
<td>1999</td>
<td>BMGF launches GMS, Deborah Wilds program officer for scholarships</td>
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<td>GMS Advisory Council formed; Deborah Wilds point person for evaluation</td>
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<tr>
<td>2000</td>
<td></td>
<td>UNCF primary GMS administrator/grantee; Adalberto Andino executive director of GMS; scholarship partners include: American Indian Graduate Center Scholars (AIGCS), Hispanic Scholarship Fund (HSF), Organization of Chinese Americans (OCA), United Negro College Fund (UNCF)</td>
<td>GMS Research Advisory Council (RAC) formed</td>
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<td>2001</td>
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<td></td>
<td>NORC awarded contract for longitudinal study. The McKenzie Group engaged to conduct 3-year program evaluation</td>
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<td>2002</td>
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<td>Interim executive director for GMS at UNCF</td>
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<tr>
<td>2003</td>
<td></td>
<td>Margot Tyler becomes executive director of GMS at UNCF</td>
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<tr>
<td>2004</td>
<td></td>
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<td>RAC drafts first GMS research framework</td>
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<td>2005</td>
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<td></td>
<td>Peter Bloch Garcia and Victor Kuo point people for evaluation GMS research framework finalized BMGF contracts with IHEP to manage RAC and pass-through funding for research</td>
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<tr>
<td>2006</td>
<td>Deborah Wilds leaves BMGF to run College Success Foundation and WSA; Margot Tyler moves from GMS at UNCF to become program officer for scholarships at BMGF</td>
<td>Asian Pacific Islander American Scholarship Fund replaces OCA as scholarship partner; Margot Tyler moves to BMGF</td>
<td>Victor Kuo point person for evaluation</td>
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<td>2007</td>
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<td>Larry Griffiths joins UNCF as vice president of GMS at UNCF</td>
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<tr>
<td>2008</td>
<td></td>
<td></td>
<td>Jana Carlisle, IPI working with Margot Tyler as point people for evaluation RAC disbanded by BMGF</td>
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</table>
APPENDIX C: GMS ADVISORY COUNCIL MEMBERS

- Dr. Gilberto Cardenas, Assistant Provost, Institute of Latino Studies at University of Notre Dame
- Dr. David Chang, Chancellor, Polytechnic University
- Mr. James Larimore, former Dean of Students, Swarthmore College
- Dr. Piedad Robertson, former President, Education Commission of the States
- Dr. David V. Taylor, Provost, Morehouse College
- Margaret Daniels Tyler, Senior Program Officer, Education, Bill & Melinda Gates Foundation
APPENDIX D: GMS RESEARCH ADVISORY COUNCIL MEMBERS

- Walter Allen, Professor, Graduate School of Education and Information Studies, UCLA
- *Shirley Hune, Visiting Professor, Educational Leadership & Policy Studies, University of Washington and Associate Dean for Graduate Programs, UCLA
- Sylvia Hurtado, UCLA Higher Education Research Institute
- Bronwyn Nichols, Vice President and Director, NORC
- *William E. Sedlacek, Professor of Education (emeritus), University of Maryland
- *Edward St. John, Center for the Study of Higher and Postsecondary Education, University of Michigan
- John Tippeconnic, Pennsylvania State University
- *William T. Trent, College of Education, Department of Educational Policy Studies, University of Illinois, Urbana Champaign

*Also serves on WSA RAC.
APPENDIX E: WSA RESEARCH ADVISORY COUNCIL
MEMBERS

- Duane Baker, President, The Berc Group (formerly with Fouts and Associates)
- Fred Campbell, Emeritus Dean, Emeritus Professor, University of Washington
- *Shirley Hune, Visiting Professor, Educational Leadership & Policy Studies, University of Washington and Associate Dean for Graduate Programs, UCLA
- Kathleen Ross, Founding President, Heritage University
- *William Sedlacek, Professor Emeritus of Education, University of Maryland
- *Edward St. John, Center for the Study of Higher and Postsecondary Education, University of Michigan
- *William T. Trent, College of Education, Department of Educational Policy Studies, University of Illinois, Urbana Champaign

*Also serves on GMS RAC.
APPENDIX F: CONSULTING FIRMS/CONSULTANTS INVOLVED WITH GMS

- American Institutes for Research (AIR/The McKenzie Group)
- Institute for Higher Education Policy (IHEP)
- The National Opinion Research Center (NORC) at the University of Chicago
APPENDIX G: CONSULTING FIRMS/CONSULTANTS INVOLVED WITH WSA

- Fouts and Associates, LLC
- Institute for Higher Education Policy (IHEP)
- SRI International
- The National Opinion Research Center (NORC) at the University of Chicago
- The Pell Institute for the Study of Opportunity in Higher Education
APPENDIX H: CONSULTING FIRMS/CONSULTANTS INVOLVED WITH DC ACHIEVERS

- Westat
APPENDIX I: BIBLIOGRAPHY


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Tuan, M. (2009). Interview notes with Marie Groark, Senior Program Officer; Eli Yim, Program Officer; Bill and Melinda Gates Foundation. Internal document.


Tuan, M. (2009). Interview notes with Shirley Hune, GMS Research Advisory Council member, Associate Dean for Graduate Programs, UCLA. Internal document.


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Dr. Helen Chen Kingston and Melinda T. Tuan
Bill & Melinda Gates Foundation—Postsecondary Success
Gates Millennium Scholars and Washington State and DC Achievers Scholarship Evaluation Look Back