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**A Review of the
Eckerd Family Foundation Scholarship Initiative,
2002-2006**

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Introduction

In 2002 the Eckerd Family Foundation (EFF) allocated \$224,250 to eleven youth-serving agencies in the greater Tampa Bay area for a new scholarship program. Prior to doing so, EFF had entered into discussion with many of its grantees about the possibility of providing flexible support to youth. The grantees made numerous suggestions. EFF then invited the agencies to participate in a new program. EFF asked each agency to develop an internal procedure to identify and screen youth who could then receive a flexible scholarship. The program is now entering its fifth year. The original EFF parameters of the program from 2002 are shown on the opposite page.

By design, there were two unusual aspects to this grant program. First, EFF asked that the grantee agency find a way to meaningfully involve youth in the design and management of the program. Second, the notion of “scholarship” was to be flexible: the funds could be used to cover any need a youth might have as long as it served the goals of the youth. This meant the scholarship could be used for rent, babysitters, bus fare, cars, computers, braces, musical instruments, medical care, camp fees, dance classes, or food.

This report summarizes the data of the first four years of the program and reviews the management of the scholarship process within the grantee agencies. It provides a few suggestions for minor tweaks of this highly regarded and well-managed grant program, most of them based on what appears to be emerging best practice out of the experience of the participating agencies.

This report is based on a review of all four years of grantee reports as well as conversations with EFF staff, two EFF Board members, and most of the managers of the program inside the recipient agencies. The reviewer also examined EFF’s own annual reports about the program and created a database of all youth who received grants from the grantee reports. Note that because of the way funds were counted, there are slight differences between statistics coming from the newly constructed database and those in the EFF annual reports. These are minor and do not affect the discussion here.

Box 1: Initial EFF Scholarship Policy from 2002-3

EFF will reserve \$100,000 in fiscal year 2002-2003 for the purpose of scholarships for youth who meet the eligibility criteria and who are served by EFF designated and qualifying organizations

Scholarship Parameters

Scholarship will include categories of support generally not considered to fall within the traditional or ordinary definition.

Scholarships will be defined as one or more of the following:

- Tuition (vocational school, community college, university)
- Student Fees, meals, housing, transportation
- Computer
- Health Insurance
- OED or SAT Prep classes
- Childcare
- Tutoring
- Apprenticeship or internship programs
- Special opportunities for growth such as summer programs, Outward Bound, etc.

Scholarships will be limited to no more than \$5000 annually for any student. A percentage of the scholarship may be considered a "loan" and that loan amount must be paid off in community service hours. Reapplication for successive years will be based on student performance.

Criteria for Eligibility of scholarship recipients

Youth must:

- Be between the ages of 14 and 24
- Establish economic need
- Have one or more risk factors
- Not be truant
- Be drug, alcohol, and crime free
- Should be volunteering or have some community service
- Have a GPA of at least 2.5

Sponsoring Organization Responsibilities

Organizations that may access the Scholarship Program for their Clients will:

- Be current or former EFF grant recipients in good standing
- Demonstrate the ability to manage the scholarship program, collect data, and report on results
- Establish a scholarship review committee that includes youth representation, for their organization.

Process

All prospective scholarship recipients will complete a standard application with required letters of reference. The organization's scholarship review committee will review all applications. All scholarship recipients will sign an agreement with the conditions of the scholarship. EFF will report on scholarship activities every 6 months to the Board of Directors and participating organizations.

Interpreting Donor Intent

The eligibility section of the policy statement in Box 1 (page 3) of this report was later revised in the second year of the program to emphasize that the listed conditions were “*guidelines* only.” Furthermore, EFF stated that: “each organization and its Scholarship Review Committee shall have the final discretion in determining the eligibility criteria for each applicant” (Year Two Guidelines, EFF). This was an important modification and an early indicator of how flexible this program is. The change came about in response to the request of some organizations that younger children be allowed to participate in the program and the feeling of some organizations that a 2.5 GPA was too stringent for the population of youth they served.

At first, most organizations gave a conservative interpretation of donor intent after reading the policy statement on the prior page. This is most likely due to the inevitable ambiguity in any written text. Although the term “flexibility” was in there along with the idea that the scholarship could be used for purposes “not considered within the ordinary definition” of a scholarship, the subsequent list of what the funds could be used for lent a mildly traditional tone to the explanation of donor intent. Most grantee organizations assumed the funds were to help youth better themselves via an academic or vocational pathway. People also assumed it was to be a merit scholarship *as well as* a financial need scholarship. This was natural, given the text asking for letters of reference, the good behavior clause, and the suggestion that recipients give back some of the scholarship through community service.

There was and continues to be a bit of difficulty with the request that youth be engaged in setting the criteria or process for the scholarship. Some agencies did not manage to do this. Others wanted to, but could not find a productive way to do it. A few agencies assumed it meant they should put youth on the scholarship selection committee and so a few raised objections that much of the application information ought to be confidential. They were concerned that the application forms contained information (GPAs, information on history with the juvenile justice system, etc.) that should not be revealed to a child’s peers.

The idea that youth should be involved somehow in setting some of the parameters of this scholarship program comes from a positive youth development philosophy. The hope is that participation in the design will help to instill confidence and maturity in youth. The idea is that youth could have a say in determining their needs rather than having adults determine those needs for them. As discussed elsewhere in this report, this part of EFF’s intent was tricky to carry out for a few of the agencies that received the grants. EFF is addressing the concern -- meaning the issue is likely to dissipate with time.

A Note on the Database of Youth Awards

All the reported demographics of youth receiving EFF awards in this program were entered into an Excel spreadsheet, along with year, purpose of award, and award amount.

Every child who received support, even for something as minor as a bus tour of a college, was entered into the database (leading to some very minor discrepancies between the database and the EFF annual reports). In cases where the same youth identifier was observed in the agency's reports over more than one reporting cycle, the reviewer tried to ascertain if the award was a duplicate or a second award to the same youth and then entered the data accordingly. It is possible that a few scholarships got double counted in this way. Also, some data in the grantee reports did not make it into a few of the EFF reports. Such are the normal challenges of building any type of database by hand.

Yet remarkably, the database figures match very closely those of the EFF annual reports. This suggests that the errors on both sides are minor. For example, there are some differences in totals taken from the new database compared to EFF's internal reports. In looking through the database, it is not clear where the small differences come from, although a best guess is that they come from "two reports per year" format which brings in the occasional duplicate data entry from different reporting years. The slight differences are of no cause for concern in reading through or interpreting the summary statistics about scholarship size and distribution.

How the Program Works

In the first year, the structure of the program was established. Nine of eleven agencies got a small grant of \$11,500, of which 15% was to be used for administrative expenses. The funds were to be re-granted to any number of youth for whatever the youth needed. Many agencies responded to this by setting up some kind of planning committee, occasionally with a youth from the agency's programs serving on it. The planning committee discussed all the details: how to spread the word about the scholarship, who might be eligible, what the money could be used for, and how to create an application process for the scholarship. In a few agencies, the youth who participated in this work also became part of a selection committee that reviewed the applications and decided who would get the awards.

Around this basic model there was considerable variability. For example, the largest agency received a starting grant of \$115,000. By comparison, the smallest agency got a grant of \$7,500. Some agencies did not involve youth at all in the design and selection process. Of those who did try to involve youth, some found it difficult to make youth involvement meaningful. Nonetheless, a few agencies responded quickly and creatively to the idea that this scholarship could be used flexibly. Others were more philosophically inclined to stick to the idea that the funds were for "college expenses."

The variability should be seen as a strength. In most cases it reflects the nature of the recipient organization's existing programs, the type of youth that agency served, as well as the philosophical inclinations of the program managers.

How the Money was Spent

Tables 1, 2 and Chart 1 provide most of the basic descriptive statistics for this program. Using EFF annual reports data from Table 1, you can see that \$1,386,000 was spent on the program over four years - including administrative costs and matching grants. Excluding the 15% administrative costs each agency used, \$1,178,100 ended up in the hands of 1,229 youth over the four years. The average grant size using EFF reports was \$958.

Table 1: Summary Data on the Program (from EFF Annual Reports)

	Yr 1	Yr 2	Yr 3	Yr 4	Total	Yr5 (Proposed)
Total EFF Funds Granted	224,250	224,250	253,000	518,500	1,220,000	1,055,000
Of which challenge grant				83,000	83,000	680,000
Additional funds leveraged				83,000	83,000	680,000
Total Funds in the Program				684,500	1,386,000	2,415,000
Total Funds Awarded to Youth (total, less 15% administrative costs)	190,612.5	190,612.5	215,050	581,825	1,178,100	2,787,250
Number of youth receiving grants	120	262	337	510	1,229	
Number of Agencies Participating	11	11	13	24	24	24
Average Grant Size to a Youth	1,588	727	638	1,141	958.58	

Using numbers out of the Excel constructed database, these figures change only slightly because the database includes a few matching funds and a few double-counted scholarships due to the “two reports per year” system. The differences are minor. The figures are useful to get a sense of overall trends in the program. Including the matching funds that agencies raised during year four of the program, \$1,300,294 was given out in grants to 1,262 youth. Average grant size from the data set (over the four-year period) was \$1,031. Removing the three largest grants of over \$10,000 each lowers the average grant size to \$999. Average grant size grew slightly over the four-year period. Year four shows the largest average grant size. That was the year when agencies found themselves with more money due to the matching grant program EFF offered.

More revealing than average grant size is the distribution of award sizes. Table 2 shows that distribution. Most awards were quite small: 72% were under \$1,000, with 46% under \$500. Only 13% of awards were greater than \$2,000. Only six agencies gave large awards of greater than \$4,000. Five of them did that only once. Only one agency frequently gave large awards, and all awards over \$5,000 were in that agency. It was also the only agency to give awards over \$10,000. Those large awards were for out-of-state tuition.

Table 2: Distribution of Award Sizes

Range in Dollars	Number of Awards	Percent
Under 500	580	46%
501-999	333	26%
1,001-1,999	175	14%
2,000-2,999	79	6%
3,000-3,999	28	2%
4,000-4,999	58	5%
5000-10,000	4	0.32%
Over 10,000	4	0.32%
Total	1261	100%

In terms of gender, boys had a slight edge, getting 52% of awards. African American youth represented 46% of recipients, followed by white youth at 36% and Hispanic youth at 4.5%. No ethnic data was reported for eleven percent of recipients.

Most awards were for education expenses. Specifically:

- 59% (745) of awards were for education-related expenses such as tuition, books, fees, tutoring, college trips, and vocational-oriented extracurricular activities such as music instruction or SAT prep classes
- 24% (303) of awards were for personal needs, such as rent, clothing, childcare, dance classes, swim classes, or bus passes
- 13% (165) of awards were for equipment, mostly computers, although more than a few awards were for used cars
- 3.9% (45) were for unclassifiable “other” needs such as the amount spent by an agency to send a staff member to a professional development workshop.

Of all of these, 17% (219) of awards had multiple purposes, usually a combination of personal needs with education expenses.

By the second year of the program, most agencies seemed to relax into a more flexible spirit about how to use the money, as shown by the types of awards granted. In those cases, the reports show a great variety of award purposes ranging from babysitting needs to cheerleading camps to plane tickets to braces. This variety is an indicator of an agency’s willingness to support the diversity of needs among youth.

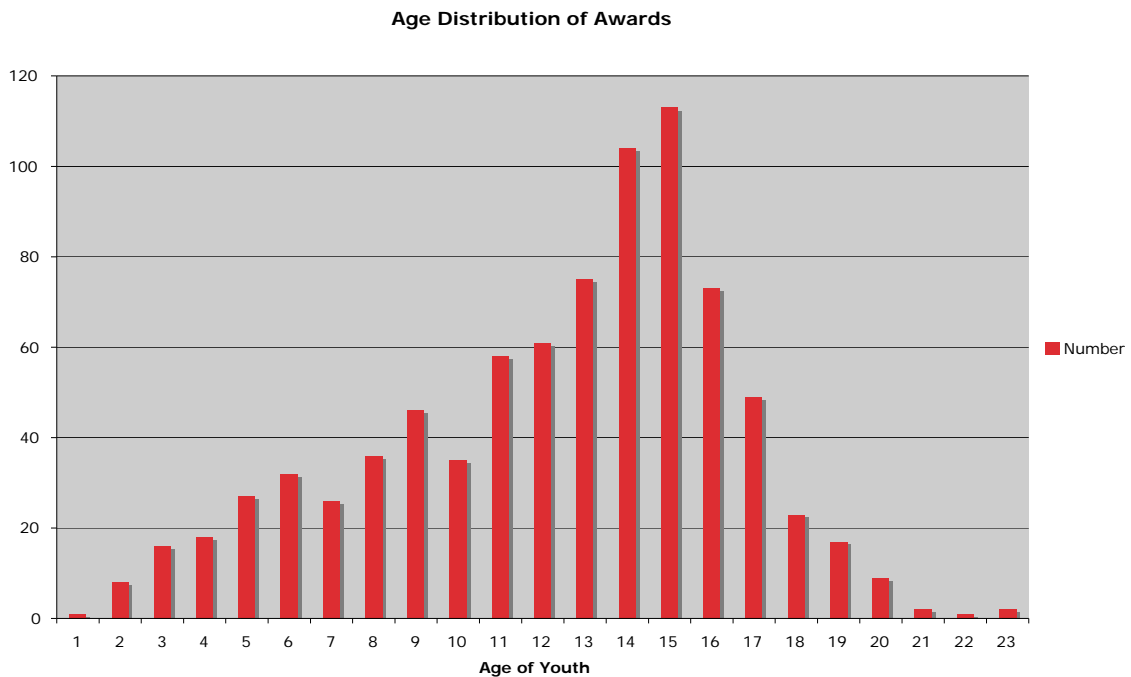
The agencies that serve children in foster care appear to have had the easiest time in making the scholarship flexible. One foster care agency manager said that the fund allowed foster care youth to “ask for what they actually wanted” for simple things that “a middle class parent might just routinely buy for their child” and as such, it allowed “normalization” to happen for children who would never ask their foster care parents for money. Conversations with program managers suggest that this ease with flexibility arises out of the very close and often long-term relationship the programs have with the youth in foster care, a relationship not possible, say, in an after-school program.

Just a few agencies showed a mild impulse to fold the scholarship funds into their existing programs and activities. This meant they lost a chance to encourage youth to think about a goal and request support to achieve it. This was more the case in early years, when some of the annual reports show agencies awarding a series of tiny “scholarships” for in-house swim classes at the agency’s pool, for camp fees for in-house summer or after-school camps, or for in-house behavioral counseling (counseling which was already part of the agencies program of service). In my view, these award patterns are not a problem. All of the awards served a good purpose within the broader intent of

EFF. In most cases there is always a reasonable explanation, such as a group serving younger children, or the awkward timing of the award and reporting schedule for that agency. In one case, an agency had an opportunity to match funds with an existing scholarship program so it was necessary to fold the EFF funds into that program. Occasionally of course, these patterns could mean that the agency did not understand the nature of the grant. Or, in some cases, the program managers needed a stronger signal from EFF that they were indeed free to stir up their imaginations on how these funds could be used – often by learning what use other agencies made of the money. For the record, the EFF program officer did stay on top of these issues as they arose.

Chart 1 shows how awards were distributed by age. Although EFF requested that awards be given to youth between the ages of 14 and 24, 245 youth age 13 and under received awards. But on average, agencies respected EFF's age guidelines. The average age of an EFF scholarship recipient was 15.6, and 50% of the youth were 16 or younger. Only 3 were over age 24. There was no age data reported for 147 recipients.

Chart 1: Age Distribution of Awards



A Review of Each Step

Planning for the Scholarship Program Inside the Agency

In all cases, the grantee organization created a planning group of some kind. As Table 4 illustrates, the membership of these planning groups varied. A key element of this variation was how the agency coped with the EFF request to involve youth in a role above and beyond that of recipient. A few agencies could not find a way to do this. Many did appoint a youth to the planning committee, but more than a few encountered problems even when they did so. The obstacles in doing this seemed to be a combination of several elements:

- There was often a conflict of interest: the most appropriate youth to serve on the committee also wanted to apply for a scholarship.
- Staff believed that much of the information asked of potential applicants was confidential (GPA, family income, transcripts, recommendations) and should not be open to the sight of a child's peers.
- The selected youth could not attend meetings during work hours or else had so many other school, sport, work, and volunteer obligations that it was unrealistic to ask them to do more committee work.
- Youth did not have the means to travel to meetings.
- Even with all the above difficulties surmounted, the selected youth did not have much to say about the procedures or guidelines.

In what appears to be an emerging best practice, one agency solved these issues while still respecting donor intent on youth participation. First, they made the planning process separate from the decision-making process, so that those who participated in the design and establishment of the program were not necessarily the same people who decided who would get a scholarship. The agency convened one or more focus group meetings of youth in their program. In those meetings, youth discussed the program's guidelines, the content of an application form, how the money should be used, spending caps and limitations, and how to get the word out to potential applicants. Then a three-person staff team helped the applicants prepare requests. The staff team made sure each application was complete. The team then made its own recommendations to the agency's Board. The Board made the final decisions.

Most agencies kept the committees to a reasonable size. The few that had large committees had excellent reasons for doing so. Children's Home for example, had merged the EFF scholarship program with an existing scholarship fund that had been created by another family. That family participated with staff of Children's Home on the scholarship committee. EYA had a large committee just so as to have a quorum: in practice, fewer people attended each meeting than the eleven official members.

Table 4: Who is a Member of the Scholarship Committee?

(size of committee in parentheses)

Staff and Board Members	Staff Only	Youth, Staff and Board Members (# of youth + # of adults)
Children’s Home (11) Computer Mentors (3) Pace-P (8)** RCMA Sarasota Y (6)*	AALC (3) All Sports (4) B&GC (2) EYA (10) Young Life (3) Zonta (2)	ABEC (1 + 8) Center for Girls (1 + 4) Youth Alive! (2 + 3)* CAP (1 + 8) Cby25 (1 + 4)* Cornerstone (1 + 4) Crosswinds (4 + 3) HEP (1 +6)* Pace-H (3+3)* SCMI (1+5) TBAH (1 +7) YMCA-Suncoast (3 +2) YWCA-Tampa Bay (1 +3)
* youth member position unfilled/youth member in advisory role only/confidential information not shared with youth member ** Staff screen applications, then recommends to Board of agency		

There does not appear to be a correlation between the committee structures and how the agencies used the funds. For example, those agencies that did not have youth on the decision-making committee still used the funds for a wide range of awards that reflect real sensitivity to youth needs.

Spending Priorities

There was a bias in the first year or two for using the funds as traditional academic scholarships. A few agencies loosened up in subsequent years, possibly after discussion with the EFF program officer. But a large number of small awards continue to be granted for books and supplies for college.

The tendency to use the scholarship in a traditional sense for college costs did lead to some unexpected challenges. These are noted below.

- Most students are in need of a multi-year scholarship, not a one-year scholarship. Agencies could not promise such support and had to warn college-going applicants that the award might just be a one-time deal. This raises a question as to how useful an extremely modest one-time college scholarship award really is. One agency decided to renew awards on a semester-by-semester basis, creating an unintended bit of uncertainty for the youth and a patch of bureaucracy for the agency.
- Giving out tuition and fee scholarships created an inevitable managerial burden for the agency that granted the scholarship. The agency felt the responsibility to extensively document financial need, academic achievement, ongoing enrollment, and the absence of alternative scholarship funds. Some requested tax returns, transcripts, multiple typewritten recommendations, proof of enrollment, proof of additional financial aid and so on, often for scholarships that did not exceed \$1,000 in value.
- Tracking scholarship recipients also created a set of challenges. Most of the youth who received support for college costs are at-risk for not finishing college, often due to weak academic preparation. Good follow up means offering additional services to the youth to support on-time graduation and connecting that youth to the many on-campus support programs tailored to this population. Also, given the need for privacy on some of the information sought during follow up, much of the follow-up work needs to be done by an adult staff person rather than a youth aide.
- Another challenge with a traditional scholarship is how to mesh the giving of a scholarship with Florida's Bright Futures program. Bright Futures gives all Florida youth generous scholarships based on modest academic achievement indicators, such as GPA thresholds and minimum scores on the SAT exam. The scholarships are worth at least 75% of costs, but can cover 100% of costs plus a stipend. Many of the agencies giving traditional scholarships were not aware of the Bright Futures program or its requirements or did not know if any of the EFF recipients were also eligible for Bright Futures. Most agencies did have students with reported GPAs high enough to qualify for Bright Futures support. The few who were aware of Bright Futures reported that the youth they served do not qualify for Bright Futures assistance because their GPA or SAT scores were too low.

What this suggests is that academic use of the scholarship might need to be tweaked a bit to better leverage existing state resources. A good idea might be to target academic support to those first and second year high school students at-risk for not meeting the Bright Futures minimums.

A couple of agencies handled the scholarship issue differently. Rather than give out a traditional scholarship they gave \$1,000 awards (in cash or in the form of a savings bond) to low-income students who were headed for college. The students were not asked to justify their use of the money other than a generic request for "college expenses." They

were not asked for tax returns to justify need, but were asked to furnish proof that they were enrolled in a school lunch program during their senior year – a simple enough indicator of need.

Other grantees simply wrapped the EFF funds into their existing programs.

Those agencies that expanded the scholarship beyond the traditional usage also faced some challenges, especially when it came to requests for cars and computers. In the case of cars, the need was often overwhelming, but the small award could only buy a scarcely functioning used car. In at least one case, the car was inoperable within six months because the youth could not afford to repair it. The agency with that experience decided to not accept any more requests for cars. That was a great case of learning by doing.

Computers were also tricky. Everyone wants a computer and as one agency discovered, the parents of many youth also want one. It wasn't always clear that a computer was essential. Obviously, college-bound youth needed a laptop, but the requests for computers were more numerous than that. There were worries about students who might just hock their computers for cash. And in some cases, as the agency dug deeper into individual cases, the computer was often not really an urgent need that fit the vision of the EFF program. Agencies got good at figuring out when a computer really mattered or not.

Those agencies that served foster care youth had perhaps the easiest time in deciding what the money could be used for. The needs of their youth were often obvious and well known to a caseworker and the argument for the need overwhelming. There were many requests for transition funds to establish independent living situations. On the other hand, one agency reported that it was very difficult to follow up on youth who used the grants to make themselves independent: once out of the foster care system, some youth wanted to stay away from any controlling, bureaucratic presence in their lives.

All agencies praised EFF for giving them the leeway to figure out how best to use the funds with the particular population of youth they served.

One agency that did not give out traditional “college costs” scholarships reported a useful set of criteria for prioritizing the many different requests from the youth in their program. Their criteria might represent best practice.

- First priority was given to urgent needs that affected a youth's basic ability to function in school, at home, or at work (rent, food, childcare costs, bus passes, new baby items, braces, etc.)
- Second priority was given to requests that moved a youth forward in a positive direction toward an academic or vocational goal. This meant things like job interview clothes or other items that simply supported the capacity of youth to stay engaged in school or work. Favor might be given to requests that had the potential to be “life-changing” such as the

costs to participate in a summer internship in Washington or the costs of going on a school field trip to Europe.

- If funds still remained, the requests that were more “fun” in character could be granted. Examples might be karate or swim classes or a prom dress.

How much to give?

Most agencies felt the need to spread the funds around rather than give a few large awards. This shows up in the statistic that 72% of awards were less than \$1,000 and 26% under \$500.

This is a kindly instinct and a fair one. The results are fine. However, a reported disadvantage to spreading the funds around is that it tends to keep the youth and the agency focused on very small needs rather than bigger requests that go farther to solving underlying problems or situations. Of course, with small grants from EFF in the initial years, the tendency to think on a smaller scale is natural.

One of the tricks in making useful smaller awards that are not traditional tuition scholarships is having a deep understanding of a child’s situation. Best practice might be to combine the in-house, deep understanding that an agency has with a process that engages children in a dialogue about what they might do with the money. So instead of just accepting a request for a computer because “every child needs one,” someone familiar with the child helps the child think through what might be really useful and what is possible. A couple of agencies did a particularly good job with this. If children wanted to do karate for example, the program manager who knew the youth asked the child to go find a karate center close to his house and bring back an estimate of how much a year’s worth of karate classes would cost. In the doing, the child realized that it would be logistically impossible to attend karate classes and so altered his request. In one case, the program manager engaged each and every child with a similar discussion of costs, logistics, ambitions, and needs rather than just take each child’s initial request at face value. She found that the requests got more pertinent over time. Interestingly enough, that program manager also came to realize through this process how great was the problem of logistics and transport affecting the youth she served. This was another example of great learning going on in the program within the agencies.

Eligibility and Announcing the Scholarship Opportunity

Several agencies did not announce the existence of the scholarship fund. The point was to let the staff or agency CEO hand-select the recipients. In a couple of cases the agency

accomplished this by being very discrete about which youth even received an application to be begin with. Speed could also be used. One agency rushed the application and selection process over a six-week period just so as not to get the word out. In that case they feared being deluged with inappropriate requests. All these means served to allow staff discretion in picking applicants. In these cases, it looks as if agencies tended to favor youth who were already involved in their programs, many of whom had volunteered for years or who had been employed as tutors, lifeguards, or camp counselors in prior years. However, it is possible that in the long run, such an approach might be thought of as unfair by the youth who did not get a chance to apply.

A few agencies took a more open approach. They put the word out through emails and newsletters and staff meetings. Several agencies, in what appears as best practice, created a simple one-page flyer to announce the program and made sure all the youth they served had a chance to know about the program. As an example of this, the Zonta flyer is attached in Annex 1 to this report. The reviewer has included it because the flyer reflects youth input into its design (originally from the Crosswinds program). The use of this kind of flyer generates an open process so that in theory at least, anyone can apply. The flyer also reflects accurately EFF's intent for this program. The Zonta version is noteworthy in that it only requires one reference. The only improvement the reviewer might suggest to these flyers is minor and certainly not a rigid recommendation: mention that no scholarship can be greater than \$5,000. Demystifying the amount that a youth can request might have the effect of making youth bold enough to think bigger about their needs.

At least one agency reported that they used the scholarship opportunity as a means to attract youth into their programs. Money turned out to be reasonably effective as a recruiting tool. Some agencies realized however that they needed to require youth to be already part of their program before they applied for EFF funds.

The use of the EFF funds as a recruiting tool does have a possible downside. Could it be that the program had difficulty recruiting because the program itself was not very useful in the eyes of youth? If so, adding in an EFF scholarship component to a weak program may not make the program stronger. This issue might need to be followed over time by the EFF program officer.

Application Forms

Some of the agency-developed application forms seem long and require considerable investment of time on the part of the applying youth. One form had the following elements:

- 3 short essays

- 3 typewritten recommendations, not from agency staff
- a four-page application form
- copy of transcripts to verify GPA
- tax return of parents or guardian or a signed “tax statement”
- proof of college enrollment
- copy of financial aid forms from the school
- tracking forms to monitor community service requirements
- pledge to remain drug, crime, and alcohol free.

Some agencies also required youth to write personal thank-you notes to the Eckerd family.

While the agency’s need to conduct due diligence is appreciated, perhaps some consideration should be given to whether extensive paperwork and procedure could be reserved for cases when the awards are on the larger side (say over \$3,000) or where there is an underlying issue of not duplicating other funding, or in cases where the agency just does not know who is eligible or not. For the vast majority of small awards under \$1,000, a simpler process might do just as well. And if an agency knows its youth well, they can be presumed to know the underlying financial situation of a youth’s family.

Several agencies did make it simple. They used one- or two-page application forms and a minimum of accompanying documentation. Best practice might be one recommendation, preferably from a staff member of the agency, a one or two page data form with a built-in behavior pledge and a simple letter or essay describing the request. Proof of need could be eliminated for small grants, or limited to proof of participation in school lunch programs. Other accompanying documentation could be limited to invoices, bills, estimates, or receipts.

The Community Service Requirement

Many agencies followed EFF policy guidelines on community service. The idea was that part of the scholarship could be considered a loan that could be repaid in service. Agencies did comply, although in some cases the service requirement was pro-forma in character (a day of beach clean up, for example) and sometimes it looks as if the actual service did not match the intent of the service requirement. Quite a few agencies did find a convenient way to comply: ask the youth to volunteer as a peer mentor for younger children in the agency’s other programs. Some of these peer mentors even got stipends for their service. That appears to be a great solution to the service requirement.

Overall, the service requirement might need some rethinking. It is not clear that the nature of the service activities were such that a spirit of helping others was nurtured and instilled. In some cases the child had to perform a routine or at times even a burdensome task, the scale of which had weak correspondence to the size of the award the youth received. It might be worth asking again why part of the money should to be considered

a loan. Most grants (72%) were under \$1,000. For an award this size, perhaps a service requirement is unnecessary, whereas with a larger grant of several thousand dollars, a service requirement might make more sense. There is also a question about whether the service requirement achieved its goal. If the loan idea is to encourage youth not to see the scholarship as charity, it is not obvious that they got that message.

There is a great deal of virtue to nurturing a spirit of community service in youth, but a more nuanced approach might be a more effective way to do it. A few of the agencies in the program had good ideas about this service element, all of which are worth considering. Here are three different ideas that surfaced:

- Limit the scholarships to youth who are already doing service of some kind inside the agency, thus, eligibility for the scholarship is a reward rather than a quid pro quo;
- Only require the service component of those who receive large scholarships and turn that into a modest internship within the agency over the holiday breaks or summer months;
- Eliminate the service component for all grants under \$1,000.

Reporting, Follow up, and Impact

EFF required reporting twice a year. The format is useful. Few agencies had notable problems with it. At most, the first six-month report might be trimmed down to a simple narrative report, followed by the full end-of-year report. Simplifying reporting in that way might reduce some of the minor duplication and double-counting errors that creep into the end-of-year reports.

Overall, some of the agencies had a difficult time doing *long-term* follow up on the youth who received scholarships. One of three problems was often mentioned as the problem:

- The size of the grant was so small that it did not seem worth it to spend a lot of time tracking down the recipient a year or two later and it wasn't clear why tracking them down was important.
- The youth had been in foster care, and once aged out of the system, did not wish to be contacted again by the social service agency.
- The agency was short staffed and did not have the time to make the repeated calls necessary to track down college students who were no longer active in the social service agency's programs.

My view is that the agencies appear to be doing a credible job of follow up, despite the inherent difficulties. Short-term follow up appears adequate.

The impact issue is trickier. Few of the grants were of a size to have a dramatic impact on the course of a teenager's life. And even if the child's life turned around after getting

an EFF scholarship, there is no reliable way to determine if that impact was due to the scholarship, the child's inherent character, other forces in the child's life, or to the other services the child was receiving from the grantee agency.

That said, there are many great things to be said for this program in terms of impact, many of them cited by the program managers. First, it did improve the quality of support an agency could offer low-income youth, particularly foster care youth, and especially foster care youth aging out of the system. Agency morale was also boosted in some cases due to the enhanced ability of the staff to help out the youth they served. Some agencies also witnessed firsthand the virtue of allowing youth to define their own needs for this program. It provided the agencies themselves with a flexible way to support the youth in their programs, a flexibility rarely encountered in the donor community. EFF was widely praised for this flexibility.

The money was in almost all cases used fruitfully regardless of the demographics of the youth who received awards. It should also be stated that even in the rare cases where the funds were perhaps not used optimally, the agency staff learned a great deal from their mistakes, such as in the car example cited earlier. The program also gave a point of reference and allowed informal dialogue between the EFF program officer and the recipient agency's program manager, itself a useful if unexpected outcome. The learning that took place about youth development and youth needs is an excellent positive outcome of this program.

Last, there is always room for straightforward, charitable "good works" in any philanthropy even if there is no larger strategic outcome, goal or statistical proof of impact. The scholarship program is a good program, widely appreciated, and it does the right thing by the many youth it serves. Kudos should also go to the EFF program officer monitoring this program. Many agencies appreciated the program officer's willingness to hear them out on any problems they had as well as her ability to proactively offer useful suggestions on managing the program.

Suggestions

Every agency thought the program had multiple good outcomes, on the children and on themselves as service providers. The program has a great deal of support among the program managers. It would be a good use of EFF funds to scale it up, both in terms of the amounts of money each agency receives and the number of agencies that participate. For the latter type of scale up, EFF's natural caution is a good thing. Caution here means giving a new agency a small grant for a year or two until they have figured out the best way to manage the program. The matching grant program that some agencies participated in is also an excellent use of the EFF's funds.

The list of suggestions that follows here is more in the spirit of *minor tweaking* of what is a very fine and widely respected program to begin with.

- Consider winding down use of the funds for traditional “college costs” grants unless the youth is not eligible for Bright Futures support and even then, give this kind of award only if a multiyear commitment can be made. Even in those cases, it might be worth trying to scale up the average size of award so that it makes a long-term difference for the youth over a college career. Consider using traditional scholarships to support whatever Bright Futures does not cover. EFF’s proposal to give agencies a crib sheet on the Bright Futures program is also an excellent idea.
- When possible, target more of the academic intervention support money to younger high school youth at risk for not meeting Bright Futures eligibility requirements, with the goal of helping them to maintain their eligibility or obtain it in the first place.
- Minimize the paperwork and application process. A way to do this has already been found by some of the agencies. Use a one- or two-page application form with a minimum of supplementary documentation. Make proof-of-need easy, such as evidence of participation in a school lunch program. Consider requiring just one letter of reference and even then, allow that letter to be from an agency staff member. Of course, if the scholarship is going to be big, say over \$3,000, then do go ahead and ask for more documentation and references.
- Coach each applying youth through the application process to make sure requests are adequately thought out. Have the applicants be the ones to check on comparative prices and logistics for the classes or projects they want to take on.
- Copycat the annual youth focus group idea that some agencies use. It is an excellent way to get youth input into the program.
- Copycat the one-page flyer concept now used by several of the agencies. See Annex 1 for an example.
- Consider dropping the service requirement for small grants.
- Depending on the agency’s youth population and the nature of the program, consider only awarding larger grants to youth already participating in some service element of the agency’s program.
- Encourage youth and staff to think bigger about needs. While small awards can do good things, many of the children have complex and

multiple needs that larger awards could support. This is especially the case for foster care youth. More awards could thus end up over the \$1,000 mark. That would be a good outcome in my view, but is by no means a serious problem with the program.

- Don't give in to the temptation to give cars, but make thoughtful exceptions.
- If an agency finds itself stuck (over a period of more than a year) in a particular spending pattern such as awarding lots of standard-issue grants, ask the agency staff to retreat for an afternoon to rethink how to make more innovative use of the funds. Invite youth who have not already had an award to participate in such a retreat. The existing pattern may turn out to be fine, but it is worth exploring the issue a bit more.
- Confidentiality concerns are justified in many cases. Hence, it is not a bad idea to keep the decision-making committees small and staff-dominated. The most useful process appears to have a rolling application deadline (monthly perhaps) such that staff keep preparing and screening applications for separate agency Board-approval until the funds run out. Monthly approval meetings are a good idea, if the Board meets that frequently anyway.
- EFF might also engage each program manager in a discussion about what programmatic needs emerged or were highlighted during the management of the program. Consider then additional grant funds to those agencies to meet those needs.
- Consider additional funding or allowing agencies the flexibility to also award grants to families so that underlying family needs can be addressed - not just those of an individual child.
- Allow agencies with similar funds (such as the "Foster Care Angels Fund") to mix best practice so that the in-house management burden is minimized.
- Consider tweaking the two reports per year format. Have the first report be purely narrative in character to describe procedures and formats and intent. Ask that the end-of-year report be more complete, with all the necessary data in an Excel file.
- Requests to hire additional staff to manage the awards program should not be accepted. The bureaucratic processes for managing these grants should intentionally be kept to the 15% administrative budget. If an agency can't

do that, it probably means they have made the process too cumbersome and might need some advice on how to simplify it.

- Consider announcing upfront to youth the dollar limits to the awards, if any. If more youth knew they could ask for \$5,000, would there have been more such requests?
- Consider giving scholarship funds directly to successful tutoring enterprises with good track records (like Kumon or Sylvan) so they can directly enroll low-income youth at free or reduced rates.
- Consider convening another roundtable of grantee agencies to review their experiences and practice with this program. The last roundtable was successful and doing it again might be useful for those who could not participate the first time. This might also be an appropriate venue for promotion of EFF's philosophy in this program about positive youth development.
- Most agencies succeeded admirably with the matching grant that EFF offered. It would be useful in the next round of discussions with each of those agencies to ask if the matching program was as useful as hoped or if it diverted from their general fundraising efforts. While no agency raised this during the open-ended discussions of this review, there might be some who would feel this way if specifically asked.

Annex 1: Flyer for the Award Program

WHAT'S YOUR DREAM?

IS THERE SOMETHING THAT WILL HELP YOU ACHIEVE YOUR DREAMS?

- Are you currently a student in the Greater Marathon community enrolled in the grades 7 through 12?
- Are you drug, alcohol, and crime free?
- Are you involved in volunteer activities or community service?
- Has your family suffered financial hardship due to the recent hurricanes?

If you answered yes to any of these questions, then you can apply for the Zonta Eckerd Family Foundation Youth Scholarship Program.



Funds are available for the following:

School Tuition	Computer Needs
Vocational Training	Art, Dance, and Music Education
Driving Education	Clothing
Tutoring & GED/SAT Prep Classes	Sports & Recreational Programs
... and anything else that will help you achieve your goals ...	

To apply:

- Fill out an application telling us about your future goals and dreams and how this scholarship could help.
- Ask someone who knows you to complete a short reference form.



Help is available if you need assistance in filling out your application. If you have any questions, just ask your school guidance counselor or call Cindy Durkin, Zonta Eckerd Family Foundation Scholarship at (305) 731-3086.

APPLICATIONS ARE DUE Friday, January 6, 2006

They can be dropped off at the UPS Store or mailed to:

Zonta Eckerd Family Foundation Scholarship
5409 Overseas Highway #118 • Marathon, FL 33050

Annex 2: List of Agencies in the Program

African American Leadership Council (AALC), Clearwater, Florida

All Sports Community Service (ASCS), Tampa, Florida

Asheville-Buncombe Education Coalition, Asheville, North Carolina

Boys & Girls Clubs of the Suncoast (BGCS), St. Petersburg, Florida

Center for Girls, Tampa, Florida

Children's Home Society (CHS) of Brevard County, Melbourne, Florida

Children's Museum, "Youth Alive!" Program, Tampa, Florida.

Computer Mentors Group (CMG), Tampa,

Connected by 25 (Cby25), Hillsborough County

Cornerstone Kids, Tampa, Florida

Diamond Community School (DCS), Palm Bay,

Eckerd Youth Alternatives (EYA), Clearwater, Florida

Homeless Emergency Project (HEP), Clearwater, Florida

Nativity Preparatory School of Wilmington, Delaware

PACE-Pinellas, Pinellas Park

PACE-Hillsborough

Redlands Christian Migrant Association (RCMA), Winauma, FL

Sarasota Family YMCA, Sarasota, Florida

Space Coast Marine Institute (SCMI), Melbourne, Fl.

YMCA of the Suncoast, Clearwater, Florida

Young Life Greater Tampa Bay Region, Largo, Florida

YWCA of Tampa Bay, St. Petersburg, FL

Zonta Club of Marathon, Marathon, Florida