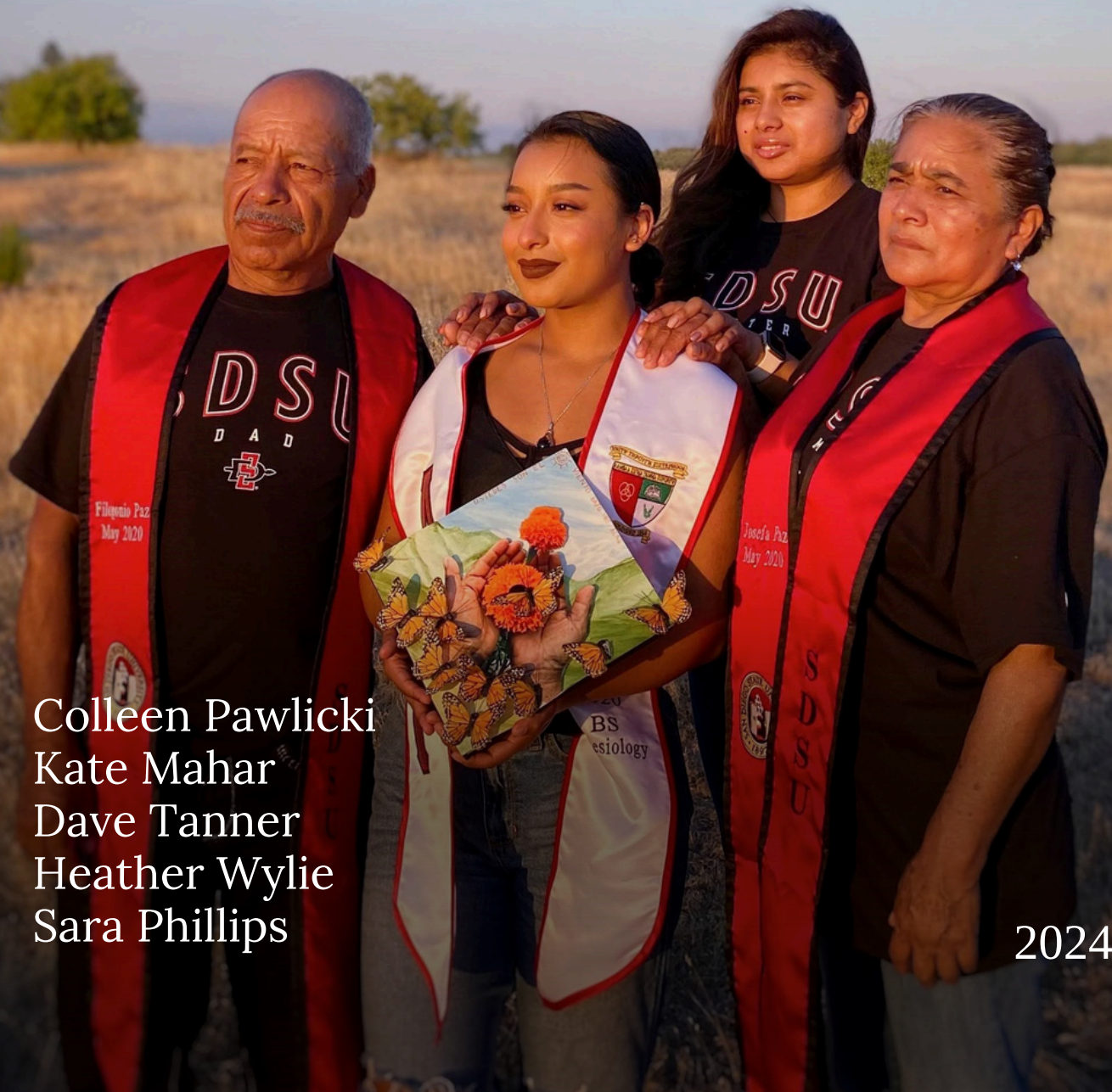


# UNDERSTANDING THE PHENOMENON

A QUALITATIVE INVESTIGATION  
OF THE MCCONNELL SCHOLARS PROGRAM



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2024





## The McConnell Foundation

Helping build better communities  
through philanthropy

## SCALE

Shasta College Attainment and  
Innovation Lab for Equity

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# CONTENTS



## **PAGE 6**

Executive Summary

## **PAGE 9**

Introduction, Context, and Approach

## **PAGE 21**

Equity, Deep Listening, and Merit Reimagined: Insights from Dave Tanner

## **PAGE 40**

Adjacent Inquiry

## **PAGE 49**

Insights for Philanthropy

## **PAGE 53**

Strategies and Tools

## **PAGE 66**

A Phenomenon Shared

## **PAGE 70**

About the Authors

## **PAGE 74**

Appendices



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This work would not have been possible without the vision and generosity of Leah and Carl McConnell. Leah, in particular, was a fierce advocate for education, and programs like the McConnell Scholars reflect her vision of expanding opportunities for all students.

Leah and Carl McConnell's commitment to community is evident in the current leadership at The McConnell Foundation, including President and CEO John Mancansola, COO Shannon Phillips, the Foundation staff, and the past and present Board of Directors. The generous funding for the McConnell Scholars program over the last 18 years (and counting), and the commitment to reflect on what is best for students and communities, have allowed the program design to emerge and grow alongside the changing dynamics of the communities that it serves.

We would also like to acknowledge the incredible leadership of Dr. Colleen Pawlicki and her Troy Street Professional Services team. Colleen brought an outside perspective, deep expertise on qualitative research, writing, and design, and an open heart to the process. She was able to hold us to a rigorous research design while still enabling the authentic voices of the McConnell Scholars students and staff to emerge. Special thanks to Troy Street staff members Hannah Keizer for her editing expertise and Sara Adkins for her technical feedback and support.

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We would also like to acknowledge Dave Tanner. Dave has been committed to the McConnell Scholars program, including past, current, and future students, for over 18 years. Dave was willing to participate in hours of interviews and additional work to tease out the key components of this study. As the second chapter says, Dave matters. We are grateful for his leadership, humility, and passion for growth.

Dave would be the first to say that there would be no program if not for the hope, hard work, and determination of the students who it serves. We hope that this book shares the scholars' stories and passion and spotlights what is possible when care, trust, and resources are combined for the individual and common good. Also, thanks to the countless community members who give their time and energy through selection committees and mentorship. Thank you for seeing and believing in what is possible.

As expressed by COO Shannon Phillips, "At the core of our giving is the shared desire by our board and staff to improve the quality of life for the people in the places we serve." The McConnell Scholars program is a perfect example of that commitment, and we hope that this book begins to tell the story of its impact, past, present, and future, on our students and communities.









# EXECUTIVE SUMMARY

This book tells the story of a phenomenon in far north California — the story of The McConnell Foundation’s scholarship program, the McConnell Scholars.

The goal of the McConnell Scholars program is to provide student recipients with the resources they need, both financial and non-financial, to succeed in college and in life. The purpose of the McConnell Scholars is the same as the mission of The McConnell Foundation: **to help build better communities through philanthropy.**

Student recipients, chosen senior year of high school by selection committees made up of local community members, receive \$30,000, distributed across their college journey. The award recipients are selected from the five-county region surrounding The McConnell Foundation, including Modoc, Shasta, Siskiyou, Tehama, and Trinity counties, as well as a small piece of Humboldt County that includes the Hoopa Valley Reservation and a small piece of Lassen County comprised of the Big Valley High School District.

Ninety-four percent of student awardees are graduates from public high schools, and students range in racial and ethnic background and represent the diversity of the five-county region. Of the 515 scholarship recipients since 2007, 51 percent identify as white, 29 percent as Hispanic, 7 percent as Native American, 5 percent as Asian and Pacific Islander, 2 percent as African American, and 8 percent as two or more races.

Over the last five years (2019-2023), those numbers have shifted toward greater diversity: 33 percent identify as white, 38 percent as Hispanic, 12 percent as Native American, 6 percent as Asian and Pacific Islander, 2 percent as African American, and 9 percent as two or more races. Eighty-five percent of the scholars are first-generation college students, outpacing the average at California institutions (p. 13), and 100 percent of student awardees meet at least the minimum eligibility for Pell, a federal grant program awarded only to undergraduate students who display exceptional financial need.

Since the McConnell Scholars began in 2007, students’ college persistence rate is 89 percent. Since 2012, that rate has increased to 96 percent, and since 2019, it has been 97 percent. Further, since 2007, McConnell students’ four-year graduation rate is an impressive 91 percent, far exceeding the 64 percent graduation rate at University of California and the 19 percent rate at California State University.

With these metrics alone, it is clear that the McConnell Scholars is working.



# This book tells the story of a phenomenon in far north California — the story of the McConnell Scholars.

## Methods and Approach

While graduation rates show the program's success, it is not only these metrics that make the McConnell Scholars a phenomenon. The true phenomenon happens in the *why* and *how*, the main inquiries of our investigative journey. Why is the McConnell Scholars working? Why do the McConnell Scholars students enter, persist in, and complete college at far higher rates than other low-income students in the state? In fact, why do they outperform students of all economic backgrounds? Why does the McConnell Scholars work here and now for these students and communities within this current time and context?

Our research team set out to answer the questions of why and how using qualitative research methods through a phenomenological lens (p. 18). Phenomenology, as a qualitative research approach, delves into the lived experiences of individuals to uncover the essence of a phenomenon, helping us understand the human experience by focusing on the perspectives of the people who are experiencing the phenomenon.

In the study, we interviewed the McConnell Scholars program officer Dave Tanner and collected survey data and feedback from selection committee members and past and current student awardees. We investigated the local context, including building a profile of the five-county region that the Scholars program serves. We also delved into relevant literature to explore inquiry adjacent to the findings.

## Findings

Over the course of our journey, we uncovered many aspects of why and how the McConnell Scholars works, including:

- Focusing on the social return on investment of the scholarship, instead of the economic ROI, and working to use the scholarship program to build better communities through philanthropy by empowering students (p. 25);
- Reconceptualizing the definition of merit for the scholarship by considering demonstrations of other-centeredness over traditional metrics, like test scores and grade point average (p. 27);
- Assembling a committee of community members to ultimately select the student awardees (p. 29);
- Committing to both learning approaches for diversity, equity, and inclusion and then teaching such approaches to the stakeholders involved in selecting students (p. 31);
- Providing students with non-financial support, mentoring, and personal development opportunities, thereby addressing issues of persistence that transcend financial barriers (p. 35); and
- Approaching students with an insistent care that builds their agency, autonomy, and affinity to succeed in college and beyond (p. 34).

These aspects of the why and how, when given the right conditions, space, and resources, culminate to create this phenomenon.



## Philanthropy's Role

While program officer Dave Tanner and the selection committees play a major role in the design and implementation of the program, it is their context, namely their place within The McConnell Foundation, that creates the conditions for success (p. 49). As a leader in the social ROI space, The McConnell Foundation is disrupting the status quo in a way that is tightly aligned to its core mission of building better communities. It departs from the often inequitable patterns of scholarship awards, choosing instead to fund students who have demonstrated that they can overcome barriers and, with the financial and non-financial support from the Foundation and its staff, can persist in college and potentially change the trajectory of their future, that of their family, and the community at large.

The McConnell Foundation distributes power so that community vitality is everyone's responsibility, creates the conditions in which Dave Tanner can grow in his leadership of the program, cultivates trust in local postsecondary institutions, and focuses the majority of their investments on local impact. When local philanthropy also gives locally, it proves that big things can come from small places. Specifically, the McConnell Scholars phenomenon has shown that talent is local. It has proved that people from the rural five-county region can be successful in higher education and that they have the desire to come back and live in the community.

## Implications and Tools

Over the course of the study, we uncovered countless tools and resources Dave and McConnell staff use to help make the program a success, including ways to assemble an equity-minded selection committee (p. 55), strategies and a timeline for providing non-financial support (p. 57), and aspects to consider when identifying friendly colleges (p. 63).

While a key tenet in phenomenology is that the phenomenon is situated in place, time, and context, some elements of the phenomenon can be translated beyond the five-county region (p. 67). Such applications include:

- Using elements of this book to inform policies and practices at other philanthropies doing scholarship work and higher education institutions, including approaches to case management, summer melt, and financial aid;
- Seeking contextual solutions to complex problems; and
- Reclaiming the meaning and measure of merit within communities' unique contexts.

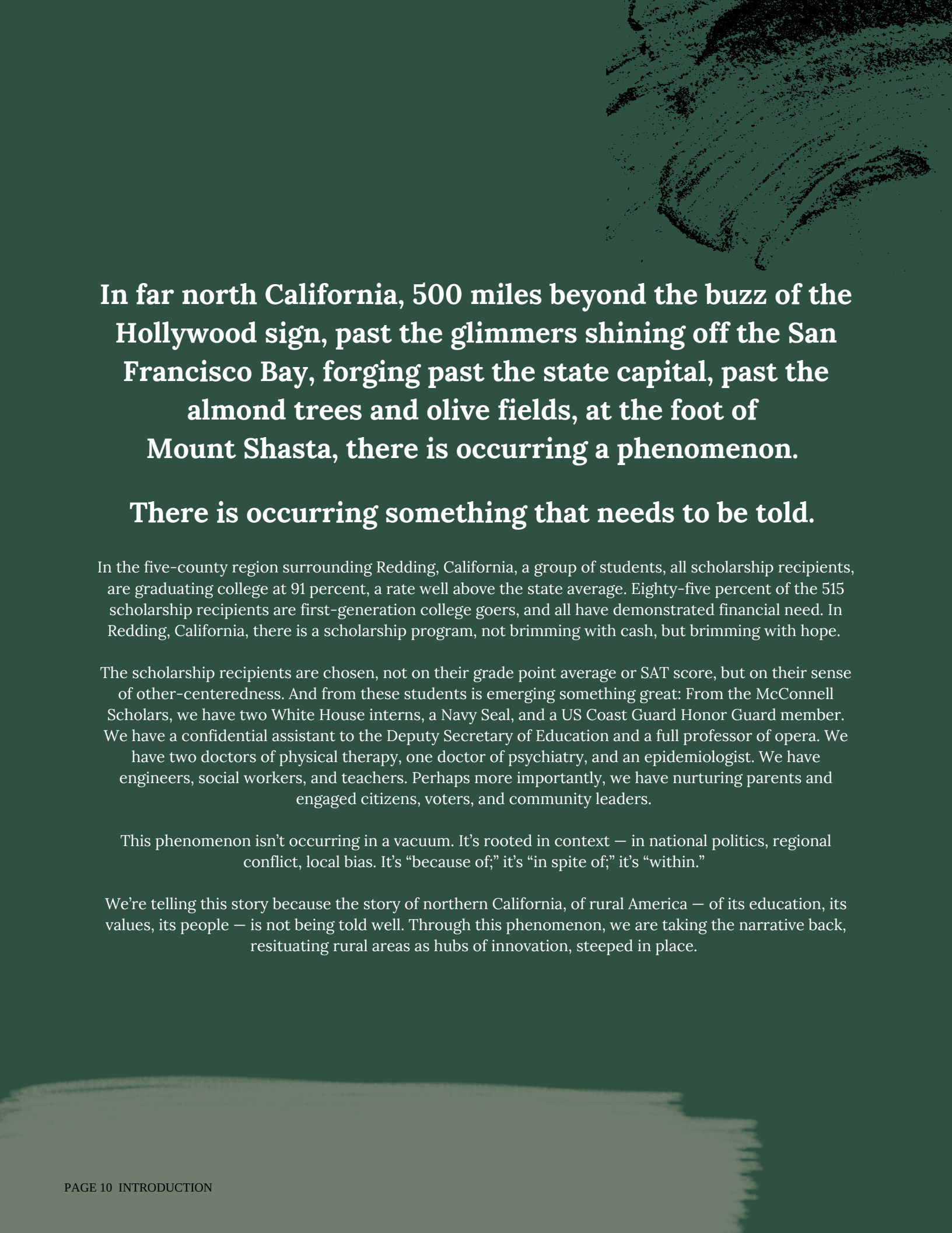
With this program, and as demonstrated through its outcomes, The McConnell Foundation is doing something different because it is thinking differently. Through this phenomenon, they are resituating rural areas as hubs of innovation, steeped in the unique place they call home.





# INTRODUCTION, CONTEXT, AND APPROACH

There is  
occurring a  
phenomenon.



**In far north California, 500 miles beyond the buzz of the Hollywood sign, past the glimmers shining off the San Francisco Bay, forging past the state capital, past the almond trees and olive fields, at the foot of Mount Shasta, there is occurring a phenomenon.**

**There is occurring something that needs to be told.**

In the five-county region surrounding Redding, California, a group of students, all scholarship recipients, are graduating college at 91 percent, a rate well above the state average. Eighty-five percent of the 515 scholarship recipients are first-generation college goers, and all have demonstrated financial need. In Redding, California, there is a scholarship program, not brimming with cash, but brimming with hope.

The scholarship recipients are chosen, not on their grade point average or SAT score, but on their sense of other-centeredness. And from these students is emerging something great: From the McConnell Scholars, we have two White House interns, a Navy Seal, and a US Coast Guard Honor Guard member. We have a confidential assistant to the Deputy Secretary of Education and a full professor of opera. We have two doctors of physical therapy, one doctor of psychiatry, and an epidemiologist. We have engineers, social workers, and teachers. Perhaps more importantly, we have nurturing parents and engaged citizens, voters, and community leaders.

This phenomenon isn't occurring in a vacuum. It's rooted in context — in national politics, regional conflict, local bias. It's "because of;" it's "in spite of;" it's "within."

We're telling this story because the story of northern California, of rural America — of its education, its values, its people — is not being told well. Through this phenomenon, we are taking the narrative back, resituating rural areas as hubs of innovation, steeped in place.



## About the McConnell Scholars *Understanding the Vista Program*

The McConnell Foundation took a few tries at a scholarship program before landing on its current iteration.

Its first attempt awarded \$2,200 to students going to four-year colleges and universities, with an optional one-year renewal. For several reasons, including a low return on investment, McConnell discontinued the scholarship in 2005. After much research, including focus groups, conferences, and visits with colleagues, McConnell program officer Kelly Salter proposed that McConnell take a more active role in student success. Salter suggested designing a new program that would increase financial support, with a new program officer to manage the program from awarding through college completion. The board agreed, and Dave Tanner was hired as program officer in 2006 to build and run the new scholarship program, the McConnell Scholars.

The revised McConnell Scholars program launched in 2007, which was a last-dollars-in scholarship that provided 90 percent of unmet need for four years, up to \$40,000 for the recipient's undergraduate. This virtually dissolved any financial barriers to college for students.

That same year, the Foundation introduced a new program aimed at students who were "at risk of falling through the cracks" — a statement met with derision from the population it aimed to serve as well as from the professionals who served them. This program, called the McConnell Vista Program, intended to serve students who had experienced trauma in life and were seeking an associate degree or certificate program at College of the Siskiyous or Shasta College. It offered the exact same terms as the earlier version of the McConnell Scholars program — \$2,200 with an option to renew for one additional year.

With these two scholarship programs, the distinction was clear: Vista was for the "high risk" students, and the McConnell Scholars was for the "high achieving," four-year-bound students.

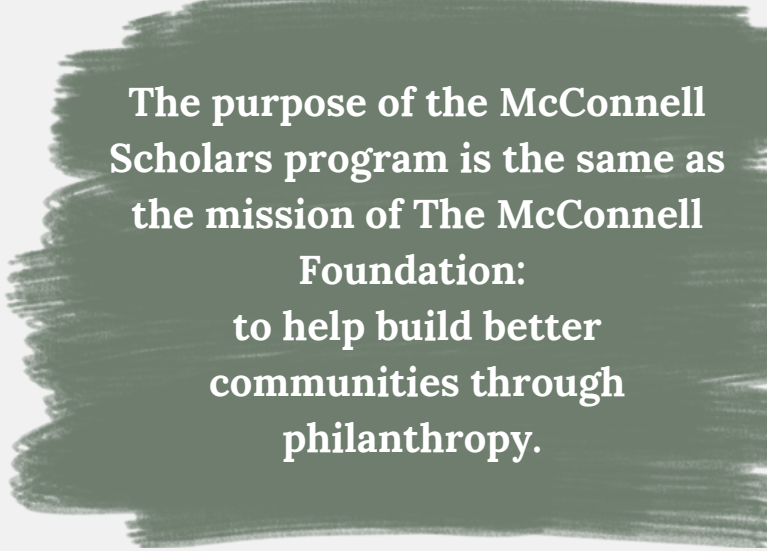
Perhaps unsurprisingly, the Vista Program failed. Out of 12 original Vista recipients, only four ever graduated. Part of the failure was the insufficient award. The \$2,200 scholarship amount had been determined under the assumption that Vista students would be living at home, unlike their four-year university counterparts. However, Vista students often didn't want to live at home because the things that made them "high risk" originated in their homes.

Further, Vista students weren't the only ones overcoming barriers; students in the McConnell Scholars program were presenting evidence that they too were overcoming trauma that would indicate high risk. As early as 2009, Dave and staff began realizing that "high risk" and "high achievement" weren't mutually exclusive; they were occurring in both groups.

As such, in 2009, Dave proposed that Vistas and Scholars should receive the same scholarship award, which was approved by the board. When Vista students and Scholars were put on a level playing field, the results leveled as well: Given more funding, Vista students graduated at nearly the same rates as the Scholars.

## *About the Current McConnell Scholars Program*

The goal of the McConnell Scholars program that we know today is to provide student recipients with the resources they need, both financial and non-financial, to succeed in college and in life. The purpose of the McConnell Scholars is the same as the mission of The McConnell Foundation: to help build better communities through philanthropy. They work toward this purpose in three ways: providing students financial and non-financial support, selecting students intentionally, and assembling community-based selection committees.



**The purpose of the McConnell  
Scholars program is the same as  
the mission of The McConnell  
Foundation:  
to help build better  
communities through  
philanthropy.**

The McConnell Scholars program awards recipients \$30,000 to use towards college costs over six years. If students complete their undergraduate degree without exhausting their funds or time, they can use the unspent portion towards their next higher degree at a qualified institution.

McConnell staff had learned through their previous scholarship program models that students needed more than financial help; they needed non-financial support and mentoring from a caring adult throughout their college journey. As such, Dave changed his scholarship program officer role to include regular check-ins with students, maintaining contact and relationships with students long after the initial award night was over. Since 2007, scholarship recipients receive mentoring and personal development opportunities throughout each year of their participation.

Second, to Dave and McConnell staff, one of the most powerful ways they can improve the community through philanthropy is by choosing student awardees whose success is going to make the biggest difference in the community. They seek students who have both the ability to succeed and the desire to use that success to benefit others. This sense of other-centeredness replaced grade point average (GPA) requirements, SAT scores, and intangible criteria like “work ethic.” Ideal candidates have significant financial need, are among the first in their family to pursue higher education, are committed to college as their pathway to success, and have already demonstrated that they value giving back to and caring for others. Special consideration is given to those who have overcome significant challenges, such as homelessness, participation in the foster care system, or multi-generational poverty.

Last, The Foundation selects students using selection committees composed of a diverse panel of community members. Dave conducts selection committee trainings and instituted the policy that The McConnell Foundation staff do not vote on the ultimate student selection.

### *About the Students*

The McConnell Scholars award recipients are selected from the five-county region surrounding The McConnell Foundation, including Modoc, Shasta, Siskiyou, Tehama, and Trinity counties, as well as a small piece of Humboldt County that includes the Hoopa Valley Reservation and a small piece of Lassen County comprised of the Big Valley High School District. To put in perspective, this five-county region is as big as Delaware, Massachusetts, New Hampshire, and Vermont combined.

Ninety-four percent of awardees are graduates from public high schools, whose total enrollments range from 26 students to more than 1,500. Since 2007, 70 percent of students in the program identify as female and 30 percent as male. Twenty-nine of the total 515 students have been foster youth, and 52 students had experienced homelessness.

Students range in racial and ethnic background and represent the diversity of the five-county region. Of the 515 scholarship recipients since 2007, 51 percent identify as white, 29 percent as Hispanic, 7 percent as Native American, 5 percent as Asian and Pacific Islander, 2 percent as African American, and 8 percent as two or more races. Over the last five years (2019-2023), those numbers have shifted toward greater diversity: 33 percent identify as white, 38 percent as Hispanic, 12 percent as Native American, 6 percent as Asian and Pacific Islander, 2 percent as African American, and 9 percent as two or more races. Overall, when it comes to racial and ethnic representation, the awarded students outnumber the percent of residents in the five counties of the same racial or ethnic category (excluding white), demonstrating McConnell’s commitment to equity.

## Scholarship Logistics

**Scholarship Amount:** \$30,000 to use over the course of the student recipient’s college experience, up to six years.

**Selection Committee:** Students are selected by a diverse selection committee, made up of community members. Foundation staff do not vote on the final student selection; the scholars are chosen only by the community selection committees.

**Selection Criteria:** There is no GPA or SAT requirement for students. Ideal candidates have significant financial need, are among the first generation in their family to pursue higher education, are committed to college as their pathway to success, and have already demonstrated the values of giving back and caring for others.

**Service Area:** Students are selected from the five-county region surrounding McConnell, including Modoc, Shasta, Siskiyou, Tehama, and Trinity counties, as well as a small piece of Humboldt County that includes the Hoopa Valley Reservation and a small piece of Lassen County comprised of the Big Valley High School District.



Further demonstrating an equity imperative, 100 percent of student awardees meet at least the minimum eligibility for Pell, a federal grant program awarded only to undergraduate students who display exceptional financial need. Eight-five percent of McConnell Scholars are first-generation college students.<sup>1</sup> This figure far outpaces the average in California institutions, where only 37 percent of students at University of California (UC) and 31 percent of California State University (CSU) are first-generation college goers.

*Does the New Scholarship Model Work?*

When the previous scholarship program was discontinued in 2005, it was in part due to an unknowable return on investment. Students would not return for the second year of funding, so McConnell and its board had no way of knowing if the students continued with school and eventually graduated, let alone if they went on to impact their community.

This all changed with the reimagined McConnell Scholars program.

Because of the non-financial support provided throughout recipients’ college experience, McConnell can better track student data. From its reimagining in 2007, the McConnell Scholars students’ college persistence rate is 89 percent. Since 2012, the persistence rate has been 96 percent, and since 2019, it has been 97 percent.

Further, students are graduating at high rates. Since 2007, McConnell students’ four-year graduation rate is an impressive 91 percent, far exceeding the four-year graduation rates at UC (64 percent) and CSU (19 percent).

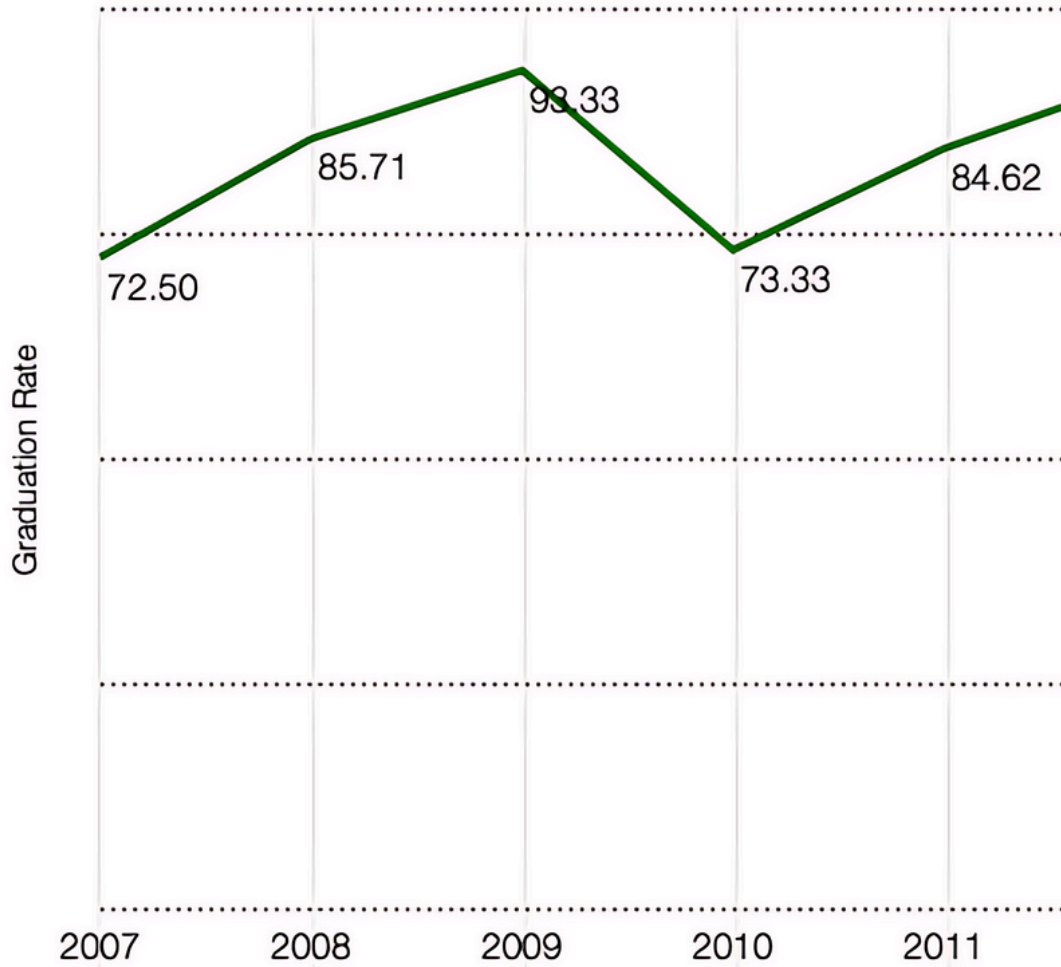
**Racial and Ethnic Backgrounds of the McConnell Scholars, 2007-2023**

	2007-2023	2007-2023	2007-2018	2019-2023
	Five-county Region	McConnell Scholars	McConnell Scholars	McConnell Scholars
White	74%	51%	58%	33%
Hispanic	16%	29%	24%	38%
Native American	4%	7%	4%	12%
Asian and Pacific Islander	2%	5%	4%	6%
African American	1%	2%	2%	2%
2 or more	4%	8%	7%	9%

<sup>1</sup> This figure is based on the University of California definition (2024) of ‘first generation students.’



# The McConnell Scholars Graduation Rates 2007-2018



## Activity Timeline

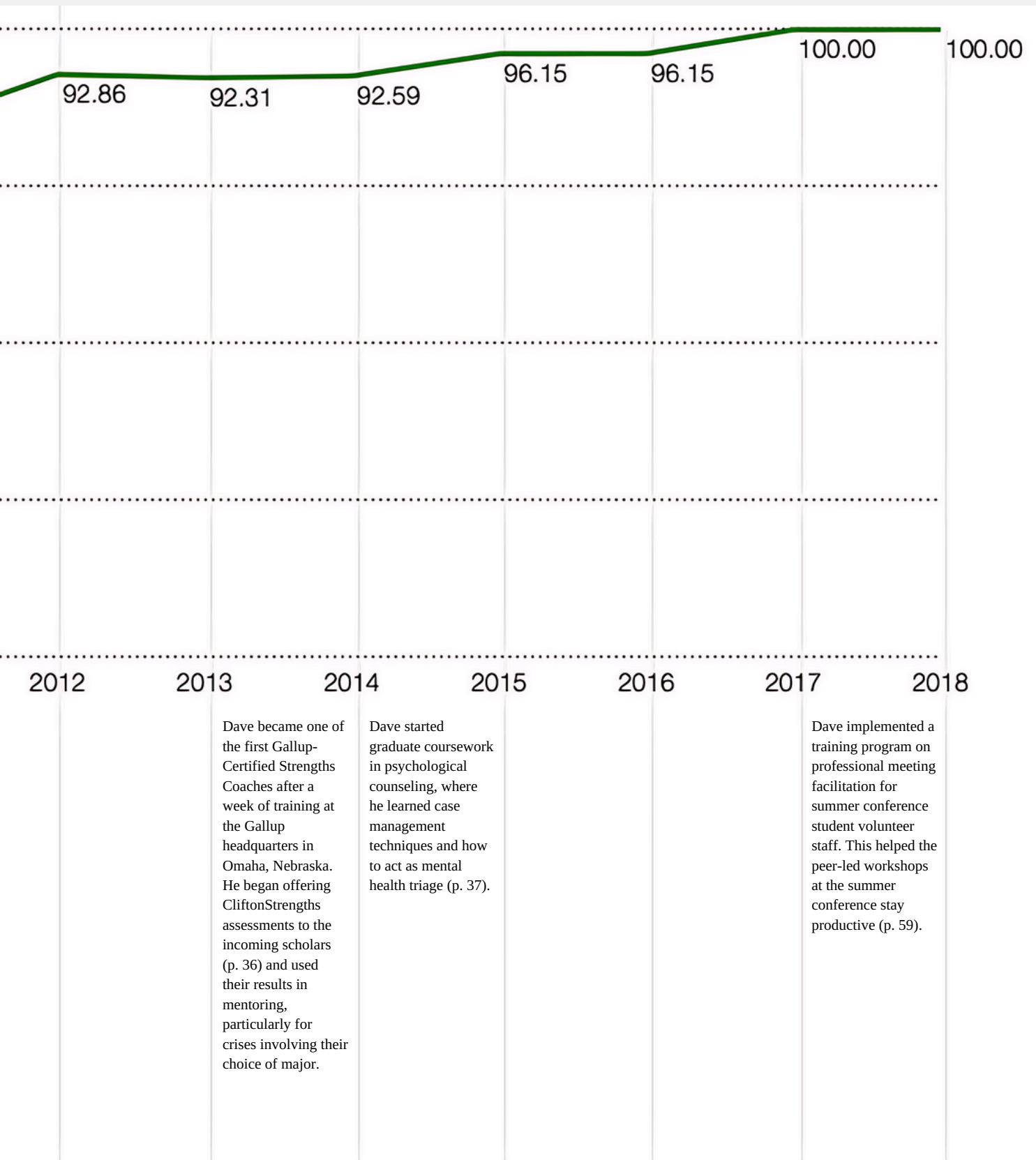
The Vista program's inaugural year failed. McConnell awarded 12 students, but only four persisted to a second year. The original award was \$2,200 for two years, while Scholars got 90 percent of unmet need up to a maximum of \$10,000 per year for four years.

The McConnell Scholars started using Sedlacek's qualitative non-cognitive variables (p. 55) as selection criteria to predict success in what he termed "non-traditional college students," meaning anyone who is not white, not male, or not a first-generation college goer. The program started focusing on other-centeredness in student selection (p. 28).

Vista students began getting awarded the same amount as Scholars, and their scholarships were no longer limited to two-year colleges.

Following a challenging year for students' persistence rates, Dave wanted to be more prepared to help students with non-financial barriers. He did a deep dive into student success literature from the publishing arm of the Center for the First Year Experience and Students in Transition housed at the University of South Carolina, including *Thriving in Transitions: A Research-Based Approach to College Student Success* (p. 38).





Dave became one of the first Gallup-Certified Strengths Coaches after a week of training at the Gallup headquarters in Omaha, Nebraska. He began offering CliftonStrengths assessments to the incoming scholars (p. 36) and used their results in mentoring, particularly for crises involving their choice of major.

Dave started graduate coursework in psychological counseling, where he learned case management techniques and how to act as mental health triage (p. 37).

Dave implemented a training program on professional meeting facilitation for summer conference student volunteer staff. This helped the peer-led workshops at the summer conference stay productive (p. 59).

# About the Region

The McConnell Scholars program serves students who live or attend high school in The McConnell Foundation service area, which includes Modoc, Shasta, Siskiyou, Tehama, and Trinity counties. This five-county service area is located in the northeastern and north-central sections of the state bordering Oregon and Nevada, including far northern parts of the Central Valley and touching down to the Sierra Nevada mountain range.

Many people throughout California and, even more so, the nation, don't realize that this region even exists — when “northern California” is mentioned, people often think of San Francisco, which is several hours to the south and very geographically and culturally different. The far north, offering a blend of natural beauty, rural charm, and outdoor adventure opportunities, is truly a unique and diverse area within California.

County lines are blurred in the region. At approximately 20,000 square miles, this region is vast in size but shares common characteristics including: rurality; changing labor markets requiring further skills and credentials; strong Tribal communities; lack of educational options; shared values towards economic development; and a strong commitment to regional health and vitality. In addition to The McConnell Foundation, several of the region's largest service entities in support of public safety, hospital services, workforce investment, higher education, and philanthropy collaborate across the five counties. Tribal nations also blur county lines, another impetus for classifying this region as one united geographic focus.

Although this five-county region makes up nearly 20 percent of California's land mass, it accounts for less than 1 percent of the state's population. In all, there are 309,000 people living in the five counties, with 90,000 of those living in the region's largest city, Redding, in Shasta County.

## *Racial, Ethnic, and Socioeconomic Diversity*

While it shares commonalities, the region is diverse in its politics,<sup>2</sup> its racial and ethnic composition, and its socioeconomic status.

Tehama is the most diverse of the five counties at 64 percent white, not Hispanic. The other four counties have white, non-Hispanic populations of approximately 75 percent. Rates for Hispanic populations range from 8 percent (Trinity) to 28 percent (Tehama). Other demographics are relatively more consistent across the five counties: 5 percent of residents identify as Native American, 2 percent as African American, 2 percent as Asian and Pacific Islander, and 5 percent as two or more races. While less diverse than many other areas of California, the region has equity populations, including Hispanic, African American, and Asian (Hmong, Mien, Vietnamese), that are experiencing growth.

The Native American population in the region is substantial. There are currently 21 federally and locally recognized Tribes in the region, including the Hoopa, Karuk, Maidu, Modoc, Okwanuchu, Paiute, Paskenta Nomlaki, Pit River, Shasta, Winnimem Wintu, Wintu, Yana, and Yurok tribes and sub-groups of those tribes. Overall numbers of the Native American population are sometimes statistically smaller than other ethnic groups by comparison, but the impact that they have on the region is economically, historically, and culturally profound.

<sup>2</sup> See Hubler, S. (2022, September 16). The California County where Maga took control. The New York Times. <https://www.nytimes.com/2022/09/16/us/california-shasta-maga-trump.html>



Poverty rates range from 13.9 percent (Shasta) to 16.8 percent (Trinity). The region has a higher poverty rate — nearly 15 percent — compared to the state average (12 percent). On average, 63 percent of all students in the region qualify for free and reduced lunch.

### Education in the Five-County Region

The five-county region is considered an education desert. It does not have a single four-year public university, and students often must leave the region or state if they would like to attend a four-year school. However, the region boasts two strong community colleges, College of the Siskiyous and Shasta College, that serve as the primary avenue for higher education, offering pathways in general education, transfer, and career education.

Educational attainment in the service area varies but generally tends to be lower compared to statewide averages. The region has an educational attainment rate (i.e., adults completing associate, baccalaureate, and advanced degrees) of approximately 33 percent, with individual counties ranging from 25.2 percent in Trinity County to 34.8 percent in Siskiyou County. This is compared to 45 percent statewide. Rates of residents over age 25 with a bachelor's degree or higher range from 18.2 percent in Tehama County to 23.8 percent in Modoc County, compared to 35.9 percent statewide (U.S. Census Bureau, 2022).

Approximately one in three adults in the region have some college but no degree, compared to one in five statewide. In four of the counties (excluding Siskiyou), the population of adults with some college but no degree exceeds the number of adults with associate and bachelor's degrees combined. For example, in Shasta County, 31.4 percent have some college but no degree, compared to 27.3 percent of those with associate and bachelor's degrees combined.

While educational attainment levels in far northern California may lag behind statewide averages, there are many ongoing efforts to enhance educational opportunities that support the academic success of residents in the region. Partnerships, such as North State Together, Shasta College Attainment and Innovation Lab for Equity (SCAILE), and College OPTIONS (all programs funded by The McConnell Foundation), offer innovative programming to address the educational disparities in far northern California.

## Five-County McConnell Service Area



## Our Approach and Methods

When The McConnell Foundation first approached this team about conducting an evaluative study of the McConnell Scholars program, we, the researchers, thought it would be just that — an evaluation. We set out to answer the question: “Is this program working?” However, we quickly realized that the unequivocal answer to the question was “Yes!”

The better question, we soon realized, was *why*. Why is the McConnell Scholars working? Why do the McConnell Scholars students enter, persist, and complete college at far higher rates than other low-income students in the state? In fact, why do they outperform students of all economic backgrounds? Why does the “summer melt” phenomenon, where students who intended to go to college in the spring end up not enrolling come fall, not seem to apply to the McConnell Scholars students?

Our hunch was that the answer wasn’t found only in the scholarship award; it was clear that The McConnell Foundation was not simply setting out a barrel of cash.

We followed that hunch, and what started as an evaluative study became an investigative journey. Beyond the scholarship dollars, what exactly is going on with this program, with these people, in this community, within this Foundation, that is changing the lives of the students whom it serves? And what, if any, impact is it having on the community itself?

To answer these questions, we needed reinforcements in the form of an expanded investigative team. We needed an experienced leader and convener of the work: Kate Mahar. We needed quantitative help from an expert of the program and the region: Sara Phillips. We needed someone who could help set the context of postsecondary education in rural environments with a strong qualitative research background: Heather Wylie. We needed Dave Tanner, the McConnell Scholars program officer, to offer insights into the program. And, we needed a strong, experienced researcher and author to help shepherd the team: Colleen Pawlicki. We also needed Colleen because Sara, Heather, and Kate all had known and adored Dave for years. A report by the three of them resulting in praise for Dave would not meet the standard of rigorous research that we were seeking. Colleen’s outsider view and research experience was necessary to glean what was happening with the McConnell Scholars, including the elements of the design and implementation that are key to its success.

## Research Orientation

While quantitative data enhanced our understanding of the program’s outcomes, it did not illuminate what makes the program so successful. Understanding the “why” — that is, the dynamics of the program that lead to its student outcomes — would be helpful for several reasons:

1. We would be able to document the strategies, tools, and activities of the McConnell Scholars and tease out possible correlations between strategies and outcomes;
2. We would be able to assess which services seemed to help students the most;
3. We would be able to identify key aspects that might be shared with other people trying to do this work;
4. If Dave won the lottery tomorrow, we would have the “what and whys” of the program documented for his successor; and,
5. We would be able to understand the program through the lens of its stakeholders.

The last point was very important to the group. We were given the gift of time and creativity with our investigative journey. We didn’t have to rush to any conclusions, and we wanted to use that unique opportunity to dig deeper into this unique program and the stakeholders it serves.

Often in research, we work hard to isolate the dependent and independent variables so we can seek conclusions that can be shared more universally. This is not what we wanted to do with our study. Instead, we wanted to dig into the variables. Far northern California is unique in its geography, politics, and history, and we wanted to tell that story. Context is everything. We don’t want to isolate context; we want to elevate it.





## *Phenomenology*

To understand the phenomenon that is the McConnell Scholars program, including retaining its rich context, we adopted a **phenomenological approach as the research design**. Phenomenology delves into the lived experiences of individuals to uncover the essence of a phenomenon (Creswell, 2013). It helps us understand the human experience by focusing on the perspectives of the people who are experiencing the phenomenon at hand (Giorgi, 2009). By returning to the phenomena as they are given in lived experience, researchers can access a deeper understanding of reality (Husserl, 1970). Key to this kind of research is the importance of adopting a “phenomenological attitude”: openness, curiosity, and a dedication to understanding the richness of subjective experience (Husserl, 1970).

**Phenomenology, as a qualitative research approach, delves into the lived experiences of individuals to uncover the essence of a phenomenon.**

Our research team chose this approach because we were committed to understanding the McConnell Scholars from the perspective of the stakeholders who were impacted by it. We did not want to assume we understood what was happening, and we wanted the process to unfold as we learned more about it from Dave, the students, the alumni, the selection committees, and the Foundation that funds it. In sincere phenomenological form, the team committed to being open, curious, and dedicated to the goal of understanding the perspectives of the participants while working to limit bias or preconceived assumptions.

We also felt that phenomenology was a fitting approach for the rural context in which the program is situated. Whereas there are not specific studies about the connection between phenomenological research and research in rural areas, the goal of studying lived experience embraces context and honors the complexities and unique characteristics of rural life (Casey, 1996).

## **Interviews with Dave**

Since Dave has been leading the McConnell Scholars since 2007 and has been responsible for shaping it into the program we know today, it was clear that we needed to focus a substantial portion of our data collection on capturing his perspective. We anticipated he would be able to share the origins of the McConnell Scholars, insights on how he came to shape it, including the application and selection process, and background on the elements that make the program successful, including his interactions with students and his own thought processes.

Considering his long tenure in the position and wealth of knowledge, Dave met with researcher and team member Colleen Pawlicki for seven (7), 90-minute interviews held virtually over Zoom. Details about their interviews can be found in the Appendix.

## **Selection Committee Surveys**

In addition to interviews with Dave, our team disseminated selection committee surveys. The objective of the selection committee member survey process was to gather information about the committees’ composition and to gauge members’ impressions of the impact of the McConnell Scholars program on its recipients and the larger community. Details about the selection committee surveys, including an overview of findings, can be found in the Appendix.

## **Student Surveys**

Perhaps most critically, we sought student input through survey data. The objective of the student survey process was to gather recipients’ demographic information, document their lived experience, and determine potential impacts of the program on participating students and potential impacts on secondary stakeholders, family members, and the greater community. Details about the student surveys, including an overview of findings, can be found in the Appendix.

Together, the input from Dave, the selection committees, and students helped us understand the phenomenon of the McConnell Scholars.

## Our Positionality

In addition to our (the researchers' and authors') biographies, found on page 71, we offer our positionality related to this study. According to Jørgensen and Phillips (2022), it is important for researchers "to give an account of the position in which one is standing" (p. 210) in an effort to be transparent about the subjectivities and biases we come with to this work.

This in mind, we wrote this book in such a way that places us within it. We use first-person pronouns to show that we are not separate from the work but instead are by necessity key partners within it. We also disclose that we are deeply vested in the postsecondary access and attainment of northern California residents.

Our personal identities match some of those you will see within this research, including identities as lifelong learners and students, as professionals in higher education, as community members of the five-county region, and as rural-centered citizens. Each of us has a degree in higher education, including bachelor's, master's, and doctoral degrees, and some of us work directly in higher education fields in the five-county region of this study. We each currently live or grew up in rural spaces, with the majority of the team currently residing in one of the five counties highlighted in the book. Further, Dave Tanner is a major part of the research team, and he of course holds a profound stake in the outcome of this work.

Such identities demonstrate areas of potential bias and subjectivity in our work. By assembling a diverse team of varying backgrounds and areas of expertise, we worked to control our biases, but true objectivity is unattainable. Further, it's important to note that our identities provide us important insight, allowing us to investigate this work as an insider, something of great value in qualitative research. Such identities also demonstrate our vested interest in services and programs claiming to positively impact students and their futures, and this interest fuels our desire to truly find what works with the McConnell Scholars and why.

## Reading this Book

From rates of college persistence and graduation alone, it is clear that the McConnell Scholars is working. **As such, the goal of our research and this book is to show *how* it works and *why***, using qualitative measures. This book uncovers the themes (p. 21), qualities, and context (p. 40) at play that make the McConnell Scholars a success. We share key tools and strategies (p. 53) that have been implemented by Dave and others to help students succeed. We also provide key insights for philanthropy (p. 49), practical applications for the findings (p. 67), and ideas for future research (p. 69).

While we recommend that you read this book in full and in order, we invite you to review the sections most pertinent to your needs.







# EQUITY, DEEP LISTENING, AND MERIT REIMAGINED:

INSIGHTS FROM DAVE TANNER

Pieces that come together to build better communities.



**There are layers to the McConnell Scholars' success. In this chapter, we'll see evidence of equity, of deep listening, of merit reimaged – pieces that come together to help build better communities through philanthropy.**

While other sections of this book provide tools or highlight broader contextual factors at play, the themes in this chapter hone in specifically on the voice of the McConnell Scholars program officer, Dave Tanner. Dave has been the leader of the McConnell Scholars for over 18 years, crafting it into the program we know today. Derived from seven, 90-minute interviews with Dave, corroborated with a collection of artifacts that Dave has authored and excerpted quotes from students and selection committee members, this chapter centers Dave's insight, experience, and perspective on the McConnell Scholars, its success, and the levers that make it so.

From these conversations with Dave, we uncovered six key themes of why and how the McConnell Scholars works, including:

1. The McConnell Scholars program elements work in concert to **debunk myths – even lies – embedded in higher education.**
2. The McConnell Scholars is ultimately about **improving communities by empowering the community's students.**
3. The McConnell Scholars **redefines merit**, looking beyond traditional metrics and centering students' other-centeredness.
4. The McConnell Scholars ensures that community vitality is the responsibility of all community members – not just one foundation – by **distributing power to community members** to make student selections that lead to the continuous renewal of future generations.
5. **Equity can be learned** – by Dave, by the Foundation, and by the community.
6. **Dave is inextricably linked** to the success of the program.





# Theme 1: The McConnell Scholars is debunking myths – even lies – embedded in higher education.

*Because of its unique point of view on scholarship awards, its holistic approaches to students, and its people-first approach, the McConnell Scholars is debunking myths – even lies – embedded in higher education.*

In an early interview, when asked to tell the story of the McConnell Scholars, Dave introduced the notion of “debunking lies” from a narrative writing perspective. He shared: “I read in a book<sup>3</sup> that the main character [of fiction epics] always starts out believing a lie. The whole story is about [...] disabusing yourself of this false idea that you have.”

Higher education is laden in myths, many of which are shared to create stories about who is ready for or “worthy” of college. Consider the myth that students need to be “college-ready” instead of colleges being student-ready. Consider the myths in the long-held practice of using simple and incomplete metrics like standardized test scores or grade point averages as core determinants of college acceptance, or even the myth that “college isn’t for everyone.” The myths – the lies – of higher education are pervasive.

Dave explained:

*[A myth in higher education] is the narrative that we’re all on a level playing field, and that with talent, pluck, and determination, we’ll be able to pull ourselves up by our bootstraps and achieve something great — an ‘equality of opportunity,’ implying that differences in results are due to an individual’s lack of ambition or some kind of character flaw.*

Dave revealed that the idea of “equality of opportunity” is itself a myth; if we award scholarships to “college-ready” students without taking into account their unique contexts, we’re usually rewarding students who are already greatly resourced. He explained: “Some of our students are working full-time and are financially self-supporting. So their GPA absolutely is not going to be a reflection of their academic ability.”

Over time, students come to believe the myths of higher education. Students, especially from racially and economically minoritized backgrounds, can go through school believing the lie that they’re not college material. He reflected: “[Students might think]: ‘I’m not what a scholarship recipient looks like.’”

<sup>3</sup> Weiland, K. M. (2017). *Creating character arcs: The masterful author’s guide to uniting story structure, plot, and character development*. Smashwords Edition.

This can be especially true for first generation college goers. Dave stated: “What first generation college students have to contend with is that idea that this is not for you. This is not what we do. So the amount of energy I think it takes to overcome that is a huge amount.”

*“When I got the email saying that I qualified to be a Scholar, I literally cried in class. I applied for the scholarship and they wanted to interview me. It was so cool [to get the scholarship] because college wasn’t really like an option for me. I don’t really know what I would have done otherwise if I hadn’t gotten it. It opens up a lot of doors – I’ve done so many cool jobs, explored so many interests. Without it I would never have gotten to experience those things.”*

–McConnell Scholars student survey respondent

For Dave, debunking these lies is no small focus of the McConnell Scholars:

*I have a deep-seated belief that everyone has natural gifts. I feel like I'm missing out if somebody doesn't have a chance to capitalize on what they can do. [...] That idea of, ‘Okay, college is for some people, and it's not for others.’ That's a lie. ‘College is for this type of person, not for that type of person.’ Those are all little inner dragons we have to conquer or vanquish.*

In the following themes, we’ll discuss how McConnell debunks these lies through several approaches — reimagining merit, measuring other-centeredness, teaching equity, and centering community, to name a few — factors that, together, can indeed conquer dragons.

## DIGGING DEEPER

The myths of higher education take many forms for students, especially those who have been intentionally marginalized by systems of higher education. Stereotype threat and confirmation bias are two especially destructive concepts that work in insidious and often unacknowledged ways to undermine student success (Owens & Massey, 2013). Stereotype threat can be thought of as that little voice whispering doubts about whether you’re good enough when taking on a new challenge. For students who have been systemically denied access to higher education, this “voice” comes from the apprehension they feel when worrying about confirming a negative stereotype about their social group. Confirmation bias is the tendency to interpret, seek, and remember information in a way that confirms pre-existing beliefs. Both “inner dragons” have been shown to negatively impact a student’s sense of self and, by extension, their academic performance (Beasley & Fischer, 2012; Owens & Massey, 2013).

## Discussion Questions

1. What are some lies or myths you see in higher education?
2. What policies and/or practices exist that support the recognition and inclusion of students' diverse experiences?
3. How can the institution's culture promote an inclusive environment that embraces the variety of student experiences both inside and outside the classroom?





## Theme 2: The McConnell Scholars is ultimately about improving communities by empowering the community's students.

*What is the return on investment for a scholarship program? For the McConnell Scholars, it's probably not what you think.*

Of course, the McConnell Scholars wants students to graduate college. But for McConnell, financially helping students who go on to complete college is an output – a highly worthwhile and rewarding output – contributing to the ultimate outcome for The McConnell Foundation: improving communities. Through students, McConnell strives towards a different kind of return on investment, something they call social ROI.

The idea of **social ROI** was introduced to Dave Tanner at a conference. While attending the National Scholarship Provider Association conference in 2007, a keynote speaker was asked a common question in philanthropy: When it comes to scholarships, what is your return on investment?

Instead of following this question with the typical talking points, the conference speaker answered: “If you give a scholarship to a student who would've been fine without your help, your net return on investment is zero. You've done nothing with your money. It's gone and you wasted it.”

To Dave, this keynote was a catalyst. He recounted: “That one comment made me start to rethink that a scholarship is an investment, and then if it's an investment, what is a return on investment? What does that mean?”

He had a solid starting point with The McConnell Foundation's mission: to build better communities through philanthropy. Leaning on the Foundation's mission, he questioned: How could the scholarship build better communities?

Scholarships traditionally reward one student, one family. But to fulfill the Foundation's mission, the scholarship had to reach beyond individuals; it had to envelop communities. This hit Dave: “[The scholarship] is not something we can do to a student anymore. This is something we are doing **through** students.”

From this, he coined a core McConnell Scholar tenet, social ROI. He explained:

*The idea is we're trying to get a social return on our investment. Our return on investment is not necessarily graduation, although that's awesome. The idea is, if you give an individual access to more power, more wealth, and more influence, which a college degree does to a certain extent or it can, what are they going to do with it?*

## Dave Had to Get to Know the Five-County Region

His challenge was set: Using social ROI as a guide, how could McConnell ensure scholarships issued to students go on to impact an entire community? First, Dave had to relearn the community. In his first year at McConnell, he worked to establish relationships with high school counselors, community college counselors, and community members who would be willing to serve on selection committees. Dave shared: “It was a great introduction to this area. We’re in this huge area, but in some ways, it’s like a small town.”

The five-county McConnell service region is massive, and he was determined to get to know it all. He called the local Chambers of Commerce. He called every single high school. With over 70 high schools in the area, he tried to have a contact person at each one to learn about their school and students and to share information about the scholarship and application. He visited every single school. In the five-county region, this is no small feat; visiting every school takes about 5,000 miles round trip and just shy of 100 hours.

The miles didn’t daunt Dave. He explained: “It was a lot of fun, and it was terrifying because I have a little bit of social anxiety, so I go into these strange places wondering, ‘How am I going to be received?’”

While he was often warmly welcomed, Dave wasn’t always met with an immediate embrace. Coming years before from a city-setting in downstate California, some north-state residents were skeptical of him. He recounted: “I go to these little, small towns and sometimes the reception was pretty frosty – ‘Who are you, Mr. Big City?’ – a little bit of that. And it took a little while to break in, which was fine.”

To get involved even more, Dave joined a professional program for Shasta County called Leadership Redding. In the program, people from all kinds of organizations would come together to learn about the different departments and organizations in Redding, including private industry, banking, health, and human services.

From his efforts, Dave got to know a wide range of people and their lived experience in the five-county region. Doing so changed his mind a lot about what social ROI is in the area. Particularly, it became clear to him that he should not be defining social ROI by himself. The community would need to help.

*“My community has directly benefited from my academic success. Without McConnell, I may not have felt as grateful to return home after college. It’s extremely hard to find and hire college educated individuals in the north state for niche industries like mine (land use planning) that want to stick around for a while and provide the benefits of a long-term retained employee. By helping to fund my education and my natural love for Trinity, I chose to come back and work and live up here to help my communities move into the modern realm of land use planning and environmental protection. Now I’m project lead on [community zoning plans and projects] that will help shape the future goals of Trinity. I also work with a local LGBT group to advocate for LGBT youth and adults.”*

-McConnell Scholars student survey respondent

## Discussion Questions

1. What is social ROI in your context? Who gets to decide?
2. If social ROI is undefined in your context, what methodical process might you use to invite the community to the table to create a definition?
3. How can you better know and understand your own community?





## Theme 3: Redefining Merit

*The McConnell Scholars has — intentionally, intensely — not just expanded the persona of students worthy of a college scholarship; it has expanded the persona of students worthy of college. It implores: “What is merit, and who gets to decide?”*

While embedding himself in the community, the question emerged: What is social ROI in this five-county context? Dave needed to reimagine what ROI is in the local area in partnership with the community. To pivot from economic return on investment to social ROI, Dave started by redefining who was worthy of a scholarship. He reflected on what is usually seen as merit in a scholarship program:

*It’s still a persistent thing where like the kid who can present himself really well and who’s in all the leadership positions in the school, that is such a powerful, attractive student to want to award or reward.*

Merit can be misleading. Dave clarified: “I think the things that look like merit to people, like GPA and test scores and a sparkling community service resume, are actually just indicators of belonging to the middle class.”

He saw early on in the scholarship process that it is easy and even comfortable to grant scholarships based on indicators of belonging. Traditional scholarships can become a reward for past behavior or for ‘belonging to’ — somebody who’s similar to the donor.

Dave explained:

*[A scholarship applicant] might ‘belong’ to the group: ‘Okay, this person has a firm handshake and they have eye contact. They know how to put on a nice outfit and they have good grammar,’ all the things that are markers of the middle and upper middle class. I would sometimes jokingly refer to those as all the gang signs of the middle class, which is the most terrifying gang of them all. That’s what I see as [traditional] merit.*

To Dave, defining merit without taking students’ or the region’s context into account usually results in awarding students who are already greatly resourced, which, to that pivotal keynote speaker’s point, leads to an ROI of zero.

Dave decided that traditional indicators of scholarship merit, like high test scores and grade point average, wouldn’t lead to the right students for a social ROI in this region. Dave posited:

*Do we think [scholarships] are to recognize and award merit, whatever that is? Or is it to identify and develop talent so we can all benefit from it as a society? Which choice do you think is going to make the greatest difference to other people besides the student?*

Dave concluded: “Okay, this is the type of student we’re looking for. It’s not the typical one. It’s not GPA and test scores, it’s not the stunning resume of community service. It’s alternate stuff.”

To this day, there are no GPA requirements for McConnell Scholar applicants. Profoundly, this hasn’t had any effect on their success rate.

## Social ROI: Other-centeredness

Instead of traditional metrics of merit, Dave focuses merit for the scholarship on non-cognitive variables (Sedlacek, 1989) in students' applications, which measures potential for success in college students. Of the students who demonstrate non-cognitive variables, Dave turns the focus to what he calls "other-centeredness" – an intrinsic and demonstrable interest in "making the lives of those around you better." Dave explained: "We've got this idea of an eventual community payoff, a social payoff. [We ask]: What's the net benefit to people other than the recipient [of the scholarship]?"

Other-centeredness is about making others' lives better in addition to your own, but it's not just boiled down to "community service." In fact, community service, as many traditionally consider it on a scholarship application, doesn't carry much weight with Dave and the selection committees. In his notes to selection committee members on how to weigh applicants, he states:

*Please remember that non-traditional [scholarship recipients] represent our greatest opportunity for making a difference with our scholarship funds, and non-traditional students often do not have the opportunity or inclination for traditional community service and activities.*

*"We want to make a transformative difference to the students we select, we want to choose students that are "other-centered," the goal is to bring about the most positive change with the limited scholarships. Success is measured in many different ways; perfection isn't what we are striving for."*

-Selection committee member survey respondent

When assessing a student's other-centeredness, Dave encourages the selection committees to make their "best attempt to evaluate each activity on its own in the context of the student's family situation, socio-economic status, and culture." The committees should look for "sustained and genuine commitment rather than superficial participation that may have been aimed just at looking good on applications."

The measurement of other-centeredness is also steeped in equity, based on each student's unique context. For one student, taking care of their six younger siblings after school is an extraordinary demonstration of other-centeredness, even though the efforts are felt by only a few immediate family members. In his notes, Dave wrote:

*Having time for extracurriculars is often a luxury for non-traditional students. One of our recipients was often left in charge of six younger children, ages 5-12. She developed incredible leadership ability (taking care of one kid is challenging enough), but that type of experience doesn't usually show up on activity charts. Pay attention to the content — the actual leadership skills and competencies, not the form or the setting.*

Time for service is laden in context. Some students have plenty of time to give back, while others, who might have work commitments or long school commutes in the rural region, must make their impact in the precious time they have left over. Dave shared:

*Some of our kids in mountain areas who are coming to our local high schools are on their bus for an hour each way. When are you going to do your community service when you're sitting on the bus? How does that happen? So their amount of time might be much smaller, but you'd weigh what they are able to do more.*

*"Financially, it was just a stress reliever. I only had to take out one loan for a summer session [of courses]. I never had to worry about finance. Not like other students, especially minorities. It made me want to give back more to the community."*

-McConnell Scholars student survey respondent

In a departure from test scores, the McConnell Scholars are chosen on other-centeredness – their intrinsic desire to think of and help others. Some could say it's not a merit-based scholarship, but having a sense of other-centeredness — of caring about others beyond yourself — is not *not* merit.

## Discussion Questions

1. The McConnell Scholars measures merit on other-centeredness, not test scores. What are non-traditional measurements of merit in your context?
2. How does considering non-traditional forms of student merit help debunk myths in higher education?





## Theme 4: It's sacred that the community has this choice.

*When it comes to selecting students, who gets to decide?*

The mission of the McConnell Scholars was — and is — clear: to build better communities through philanthropy. In order to reach its mission, it was clear to Dave that building better communities with a scholarship is not only something to be done **by empowering students**, but also **by empowering communities**.

The McConnell Foundation decided from the beginning that the selection committees choosing the scholarship recipients couldn't be outsiders or even McConnell staff; they had to be community members. Dave stated: "The community knows the situations that [students] are growing up in better than we do. Especially in the more rural areas."

Community members don't just know the regional context; they know the students. Dave recounted:

*The community knows the kids better than we do. The first time I did a selection committee training, I spent hours redacting any bit of personal information off [paper applications]. I handed them out [to the selection committee], and within seconds people say, 'I know who every single one of these kids is.' And I'm like, 'What did I do that for?'*

Because of the close-knit nature of the five-county region, community members know one another well and understand where each other comes from, including the students. This intimacy gives community members an insider view of students and a stake in the ultimate selection. The scholarship is personal.

*"Knowledge of the local community helps me understand the opportunities and obstacles that students may have faced. I think a lot about structural inequality in the community, which informs my approach [to student selection]."*

-Selection committee member survey respondent

Dave assembles selection committees from the five-county region each year, often with committee members returning year after year. The selection committees, who read applications and then conduct interviews with students, are made up of community members from a wide background. They include McConnell Scholars alumni who live in the region, medical professionals, business people, lobbyists, research analysts, employees at think tanks, technical writers, a retired judge, and many educators, among others. They are from all points on the political spectrum, including from both far-right and far-left leaning poles.

From their backgrounds, they come together for a big responsibility: to improve the community. The selection committees are taught to understand that helping students through the scholarship benefits the community, not just the individual. Dave explained:

*[I tell the selection committee]: It's your community, this whole thing is for you to help your community, and this is your choice. So what do you wanna do with it? That's part of grant making now: Don't do things to people or for people without their input as part of it.*

With the power differential between a foundation and the community, it would be easy for the community selection committees to simply be a token exercise. But Dave underscores that student selection truly is the community's choice:

*I am really aware of my own level of influence in there because people will say as if we're a monolith, 'What does McConnell want?' [I respond]: 'McConnell wants you to pick them yourself. That's what McConnell wants.'*

To Dave — to McConnell — it is sacred that they have this choice.

*"We are not looking for the perfect grades student. The program is for students who are looking to be bigger than themselves. Struggle is not something students should be ashamed of, but embrace to better themselves and hopefully eventually give back into their community."*

-Selection committee member survey respondent

## Roles

In the selection process, Dave commits to his role as facilitator, not decision maker. Notably, Dave does not vote on student selections, sharing: "I am never going to override a committee's choice, like ever. That's not my role." By not overriding their decision, Dave helps to protect the trust he has built with the community.

Before the committees start making selections, he reminds them of the goal. He reiterates their value system and the mission to improve communities – the social ROI. He reminds them to search for the non-cognitive variables.

He will play devil's advocate, probing the committee to consider candidates thoroughly and fairly. Dave explained:

*I'll remind [the committee] of the goals: If you're stuck between this student and that student, [ask yourself]: Which choice do you think is going to make the greatest difference to other people besides the student?*

Other than that, it is ultimately the community's choice.

*"I am humbled and grateful to be a part of enabling students to further their education despite overwhelming obstacles. It is one of the most inspiring things I've ever participated in."*

-Selection committee member survey respondent

## Selecting Students

After sorting through student applications in an initial review and then conducting interviews, there's an important, final factor: The selection committee members must come to a complete consensus on the ultimate recipients. Dave explained: "They all have to agree. And so we sit there and we talk it out."

The community does not take consensus passively; members are committed to and passionate about students they believe in. Dave offered one example:

*There's a pretty strong Mien community in Redding, and the young women do really well, but there is evidence that the boys have a harder time culturally adjusting to the community. We had a male applicant from the Mien community who wasn't the best necessarily at the interview, but he represented somebody that other Mien boys could see. So one of our interviewers said, 'I will go to the mat for this student, I don't care if we're here till midnight, we're taking him.' If you feel that strongly, you can push.*

Community is sacred to the McConnell Scholars. What is for the community is ultimately from the community. When it comes to funding a student's potential, it's not simply a philanthropy's big bet; it's a community's collective belief. Perhaps the success felt by McConnell students isn't from being selected by a foundation but from being chosen by your home.

## Discussion Questions

1. How do you perceive the community's level of involvement in your context?
2. How might your decision processes shift from "doing to" or "doing for" the community, to "doing with" the community?
3. In what ways can community members be supported as they prepare for collective decision-making? What are the pre-conditions, if any, for community voice and involvement?





## Theme 5: Equity can be learned.

*At the heart of social ROI, of stripping away SAT scores and GPA as barriers to entry, of empowering the community to make a sacred choice, of challenging the status quo of meritocracy, of debunking myths in higher education — at the heart of the McConnell Scholars itself — is a regionally, even nationally, tricky topic: Equity.*

Perhaps against all odds, particularly taken in the context of the local, regional, and national political climate, the McConnell Scholars demonstrates that community members share a vested interest in equity at the community level. Even more, Dave demonstrates that **equity can be learned**. Equity, in all its present day, paradoxical divisiveness, can unite diverse-minded people around a common goal when the conditions are right.

Dave has a disarming way of talking about equity with the McConnell Scholars. In fact, it's a more accurate statement that Dave doesn't directly talk about equity at all. In the eleven hours of interviews, he only said the word equity once.

Make no mistake, what he is doing at McConnell is equity work, but he uses other words: Other-centeredness; non-cognitive variables; building better communities; psychological gardens of biases and prejudices; confronting white fragility; systemic racism; anti-racist and anti-classist approaches; protecting human sovereignty; honoring individuals' humanity. Over and over, the McConnell Scholars and the ideals that construct its success are, without doubt, works of equity.

In a place like far north California, even a place as broad as the United States, equity isn't an easy topic to broach. Merely saying the word invites backlash. But Dave is on a lifetime track of learning what true equity means, and he is teaching equity to the selection committees, helping them make decisions from an equity lens.

### **Dave's Equity Journey**

Before Dave could begin to teach equitable decision-making at the selection committee level, he had to learn more himself. He had an up-close view of equity at his former position in Extended Opportunities Programs and Services (EOPS). Aimed at students who are "educationally disadvantaged," a term that Dave confided now makes him cringe, he saw students from varied backgrounds who had barriers to their success.

At EOPS, he saw students who came from more challenging backgrounds than him but were exceeding his own achievements. At EOPS, Dave learned he enjoyed working with students, developing substantially more empathy than he was raised with in his middle class family. He came to understand people from different backgrounds than him, and he came to love the work.

And at EOPS, something clicked. In a moment of profound vulnerability, Dave shared:

*This is something I thought at EOPS: That other person [I was helping] over there is fully human. That was a watershed moment for me to have that realization. It's like, 'Oh, this person's fully human in a way that I'm fully human.' [I learned] how to be respectful of somebody else's sovereignty. To me, it felt like a revolutionary thought.*

Having that realization, deep in his marrow, is part of what makes Dave a compelling teacher of equity now. Teaching equity can be rife with judgment, of condemning those who don't yet think equitably, who don't have all the right words. Perhaps that is what makes it so divisive – equity can dig a trench between those who know it and champion it and those not yet there, those not yet aware there is work to be done. Dave, though, is open about his own journey in a way that invites you in and to take a risk to learn yourself, right alongside him. He stated:

*I'm still pulling up weeds in my own psychological garden in terms of biases and prejudices. You bet. Still a lot. Now, I know what to do with them. I'm like, 'Oh why did I think that?' Like, 'Oh, that's strange. There's some prejudice there.' The invisible stuff is the stuff that's persistent and that's really hard to talk about.*

## Training

Dave didn't stop his equity learning with personal experiences; he immersed himself in formal coursework. When asked if he's done any training in equity, he had a long list: Racial equity trainings, Red Sea Road Consulting DEI trainings, resources in students' first year experiences and transition to college, a case management workbook, an equity and inclusion group course, and even graduate courses in psychological counseling, where he learned reflective listening, a necessary skill in equity work. About his formal training, Dave shared:

*I've known since 2007 that addressing racism is part of [the process]. But I never used the word racism in our selection committee trainings; I was too scared to put it in. Only since [McConnell] started doing our internal DEI work did I even mention the word racism. I never felt like I had the expertise to handle that conversation like institutional racism before. Although I hinted around it a lot from the beginning, now I feel like I've got more of the tools to [call it out].*

Even still, he shared that equity is never fully learned and that he will never be done learning and growing in this mindset.

*"I like that [the scholarship] isn't just give the money and be done. This program is an investment in each recipient. The training provided to the selection committee is critical in educating (or reminding us) of what to look for."*

-Selection committee member survey respondent

## Equity and the Selection Committees

To choose scholarship recipients who would contribute to a social ROI, the selection committees couldn't choose students who might be already predisposed to succeeding in higher education. This presented a challenge. Those students predisposed to succeed – that is, those from an upper or middle class background who have a sparkling resume – are the students who typically stand out to committees in an application process.

It was clear that Dave would need to help attune the selection committees to the mission of the McConnell Scholars and the types of students the Foundation is looking for. He stated: "I got all these people who were willing to serve on selection committees and then I had to train them, right?"

As seen in Theme 4, the selection committees often know the applicants well, presenting another challenge: "We had to change the focus from anonymity [of applicants], which is just simply not possible [in this region], to 'Can you keep your own biases in check?'"

He set out to help check biases in a number of ways. First, he had to get through to the committees about looking past the norm. He shared: "We had to start differentiating on things other than social niceties or cultural niceties like eye contact and handshakes. I had to stress that it's not who's got the best interview skills."

He also put together an informal curriculum for the selection committees, from just-in-time emails, to in-person and virtual trainings, to notes to the committees as they read applications. Read through some of his curriculum on the next page:



## PROPERTIES OF EQUALITY HANDOUT WRITTEN BY DAVE TANNER

White Fragility: It seems that people who have lived under conditions of privilege, especially when that privilege comes as a result of the oppression of others, are really reluctant to have conversations about racism. But, if they are human (and they are), they are just humans who have been living for a long time under conditions that encourage terrible behavior. Yes, terrible behavior is something to be ashamed of. (You don't have to have overtly oppressed anyone to have behaved terribly – all you have to do is ignore the oppression that is done on your behalf.) But then, if you are a human – and you are – you are capable of nobility and greatness. As are the people who have been oppressed. So yeah, you're no better, in your central humanity, than anyone else (which should come as a relief), but you're no worse either. So don't take it personally, get over it, and get talking. We all need to if we're going to survive.

The “whiteness” isn't responsible for the fragile part. It's just a varietal of the same species. Nor is it responsible for the guilt in “white guilt.” Feeling guilty for happening to be born a certain varietal is just silly. Feeling guilty for something we did, especially what we chose to do, makes sense, but it doesn't make sense to feel guilty for existing.

## NOTES TO THE APPLICATION REVIEWER WRITTEN BY DAVE TANNER

To paraphrase community organizer and fat activist Aubrey Gordon (<https://www.yourfatfriend.com/>), systemic racism (and bias) is our inheritance. It exists within us until we consciously identify it and root it out. People who have been subjected to certain kinds of abuse or toxic situations sometimes come away with what are known as psychological “fleas.” That is, they adopt attitudes and behaviors they subconsciously picked up from their abusers that are themselves toxic and abusive. A huge part of recovery and healing is the identification and eradication of those fleas – “How did THAT idea get in there? Why did I just think (or say or do) that thing? Is that something I want to be known for, or have as part of me, in the future? Does it serve me well, or do I need to break the habit of saying or thinking or doing it?”

And, like I was trying to say, it's the invisible things (like culture, or the collective internal experience of a group of people) that are the most powerful, last the longest, and are hardest to come to terms with. So, as a society, it seems we need to address those things, put words on them, bring them into our collective consciousness and decide if we want to keep them or not. Sometimes those things are really subtle and almost universally accepted as fact – like GPA and SAT = merit, for example.

You can see in his word choices in these excerpts how he creates a safe place for selection committee members to approach their own internal biases. He invokes the idea of humanity, something we all share, and that to inherit bias is part of our collective humanity – just as controlling for it is. He uses metaphors, like fleas, to make our most private, biased thoughts more conquerable. He provides probing questions to ask of yourself, questions that are compassionate, open-ended, and without judgment – questions that are gentle and private invitations to improve how you think. He acknowledges that bias can be invisible and admits that its invisibility is what makes it so hard to come to terms with.

He makes a tough concept like invisible bias plain in the McConnell context – like in the case above, the implicit bias of SAT scores and GPA.

Over and over, in the above examples and the many more shared within his interviews and the notes, emails, and resources he has sent out to the committees, Dave uses language to make equity work a little kinder, a little more compassionate, a little more forgiving. The way he teaches equity is not a condemnation for all the ways we are thinking wrong, for all the ways we are biased. He teaches equity as someone who himself has made mistakes, as someone who is humble enough to admit he will make mistakes still. It's gentle; it's disarming. It's a soft-spoken invitation to be better.

## Discussion Questions

1. In what ways is teaching equity integral to the success of the program?
2. When it comes to scholarships, how do you see the connection between equity work and social ROI?
3. What are the assets and challenges of approaching equity gently?



## Theme 6: Dave matters.

It's difficult to describe the McConnell Scholars and its success without shining a light on Dave Tanner. As the only leader of the McConnell Scholars since it has taken on its current form, he has been the main architect of all the pieces that make the program so special. Without question, the students are the main characters in this story, but Dave isn't too far behind.

### Becoming Dave

Dave was raised with an expectation that he would go to college. It was never a question of "if" but "where," a common theme for people who are second-generation college students. His father had a college degree, and his mother was a third-generation college graduate. There was a sense that, "This is what we do."

But his own experience of graduating college was more one of falling apart. He majored in German with an emphasis in area studies. After four years of hearing, "What are you going to do with that degree?", he internalized the narrative: "Your degree is worthless unless it's practically applicable." This narrative really impeded his job prospects after graduation.

Besides a college-going mindset, Dave shared that he inherited something else from his family: a legacy of classism. Growing up, he observed: "There is a hierarchy, and I have to be at the top of it, and that's the way the world is supposed to work, and if anything threatens that, I'm going to activate to try to put it back in place."

But after college, Dave was not at the top of the hierarchy. Experiencing what felt like failure after college, Dave shared: "It challenged me to kind of rethink like, okay, what if we switch from this [hierarchical] mindset?"

A few jobs, a happy marriage, a baby, and a lot of learning later, Dave found himself in a role at Extended Opportunities Programs and Services (EOPS), where he discovered that his talent might lie in nurturing people, or at least in being "really, really interested in how people develop" and trying to help them be successful. He recounted:

*[In that role], having all of these preconceived notions were no longer useful. [...] EOPS challenged me to rethink the idea of like, okay, instead of having a hierarchy, maybe the focus could be, 'You, [the student] are super. You have so much potential, and you have so much talent, you have so much.' This other person has so much to offer, why aren't we capitalizing on it? And then turning that into a feeling of, not competition, but missing out on this person's ability to contribute.*



## Helping Students Through the System

His personal experience in college and his time at EOPS gave him a great empathy for a more realistic college journey shared by many but less often talked about: that college isn't always a straight path. He shared:

*College isn't often like this magical experience. Everyone's telling you to go, and then all your problems will be solved. No. [We need to] normalize, discuss, and process all of that stuff [the hardships of college] and help people through it.*

Dave uses this truth to help McConnell students navigate the system.

### Mitigating – Maybe Solving – Summer Melt

The complexity of going to college begins as soon as students graduate high school. While colleges wait until students are on campus to begin services, Dave's sense of responsibility toward students starts in May. The risk of students' "summer melt" – or getting accepted to college but not attending come fall – is high, but Dave does his part in bridging the gap.

First, Dave meets with awarded students to help navigate college portals and online forms and discuss financial aid, actual costs, and out-of-pocket expenses. To help with finances, he shares a handout, "Basic Understanding of Financial Aid and Worksheet." On the worksheet, Dave writes:

*This is the essential information you need to know in order to understand financial aid and how it works. It's just basic arithmetic, but because it involves money, even people who know calculus can get stressed and shut down. Understanding financial aid is critical to your success in college, but it is actually fairly simple. Stick with it, and you'll soon know more than most of your fellow students.*

Through the form, Dave empathizes with students' fears, demystifies the finances of college, and empowers students to take control.

*"I know my experience would not have been the same without The McConnell Foundation. It was helpful to know that I always had [McConnell's] support with all kinds of things. I had [issues] with financial aid; it was frustrating, but it was good to have the support. And just knowing that I had support with trouble with classes, financial aid; I knew I could always reach out to you."*

-McConnell Scholars student survey respondent

This first meeting between Dave and the scholarship recipients is purposely transactional. Dave shared:

*It's a transaction, but it's an interaction with a purpose, a bonding experience. Like, 'Dave's not so bad, he's helping me in this situation.' Hopefully, we get to the point where, when things do fall apart, they feel comfortable giving me a call.*

*"The first year [...] I was questioning if school was even worth it. If people are struggling, I remember you [Dave] saying that it didn't matter what I wanted to do, that McConnell would be there to support me whatever I wanted to do.*

*There were stressed people all around me, and it makes you think, 'What else could I be doing besides this?', like work somewhere else, leave education behind. But having that person to say, 'You can make any decision you want and we'll back you up' – that was always in my mind. It was definitely important for people to hear. You get a lot of second thoughts. But that was in my head, Dave said he was going to support me no matter what. That was the biggest thing McConnell did for me."*

-McConnell Scholars student survey respondent

For first-generation college students, covering the basics is just the help they need: "I have had students say, 'I don't have anybody in my life who knows this stuff,' so I think it's helpful to have me there as a calming presence and as somebody who's like, 'Okay, let's not give up.'"

Dave continues his summer melt support through a summer conference with the students, where he pivots from the tangible aspects of college going, like financial aid, to the more intangible, like the emotional weight of leaving home. Dave explained: "I try to introduce some really basic mindfulness stuff, like naming emotions. I'll try to model it like, 'Oh my gosh, it's so scary going [to college],' just to make it like you don't have to pretend like everything's okay when it's not. It's a big one."

He also introduces the idea of being in a transitional state as you move from high school to college. He shares with students:

*You're not what you used to be, and you're not what you're going to be. It's a weird, disorienting time, scary, stressful, right? It's totally normal. I introduce a bunch of things to increase their chances of having a good experience [...] like forming identity. [...] We talk about, 'Did you talk to your parents or did you talk to your family [about] how things are gonna change? Bring that idea up.'*

Sometimes students don't realize they are in a transitional state until they are experiencing a big emotion, so Dave does his part to get ahead of it.

As summer ends, one of the biggest sources of heat in summer melt hits: the tuition bill. Students usually get a letter from their college's financial aid department, stating that their classes will be dropped unless they pay their fees by the 15th of the month. Of course, the students have scholarship funding to cover it, but that financial aid hasn't hit by the time the letter goes out. Dave explained the detriment of this warning letter:

*It scares the crap out of them. The letter doesn't say, 'Alright but you're getting financial aid, so don't worry about this.' [The letter should say], 'We realize that you're going to get your financial aid funded a week before school starts, which is after the due date.' I warn students about this [letter] and help make it less scary.*

Summer melt is an issue across the country, but Dave just might be solving it for the McConnell Scholars.

### You Don't Have to Pick the "Good Major"

Many students, especially first-generation college students, feel compelled to study a practical — a "good" — major. The drive to major in a discipline that leads to a big wage or a discipline a student's family can recognize is high among McConnell students. But the "practical major" isn't always the right fit for students' strengths and interests. Dave doesn't give preference to some majors over others. He shared:

*We don't give any preference for college or major. Majors change frequently — the average student will change majors four times — and a successful art or theater major can have just as much long-term positive effect on the community as a teacher, doctor, or social worker.*

To Dave, the discipline area doesn't matter so much as the degree itself: "My feeling is that any college degree opens up a wide array of careers, no matter what it is. A bachelor's degree is the minimum qualification for a whole range of jobs."

*"I switched from psychology because what I wanted to do wasn't even a job. I wanted to work with other children whose parents struggled with addiction like mine did. There weren't resources for children. But it's not really a job currently. I can volunteer with that, but I switched to accounting because I competed with that in high school and I was really good, and accountants make money. I'd like to not have to worry about my salary being over half my rent. I want to buy a house and volunteer with kids whose parents struggle with addiction."*

-McConnell Scholars student survey respondent

Dave uses his own undergraduate major as an example: "We have the, 'I was a German major' conversation a lot so that I can help them articulate the value of their degree even if it's not 'practical.'"

Using tools like CliftonStrengths by Gallup, Inc., Dave helps students identify their talents and think outside of the box when it comes to majors. When students struggle with selecting a major, Dave has them list all of the skills that they gain during the course of their undergraduate work, like their ability to think critically, to appreciate diversity of experience and thought, to work collaboratively, to communicate effectively in written and verbal format, and above all, to be a self-directed and effective learner. Of these skills, he tells students:

*These are all desirable characteristics for any position in any organization, regardless of your major. Those are things that last and increase in value over time, where specific content goes out of date. And with CliftonStrengths, I help them think about and articulate their unique talents that can be of value when they are seeking careers. I help them change their attitude from 'Please give me a job, I'm not worthy' to 'I'm here to help your organization accomplish its mission and here's how.'*

He recounted a student story:

*I had a student who wanted to do pre-med but hated chemistry, got really [bad] grades in it, didn't like biology either, but didn't know what else to do. [She shared]: 'College is a chore. This sucks; it was supposed to be something better than that.'*

*She wasn't able to articulate it. The principle behind [our conversation was], 'Okay what gives you energy? What drains your batteries and what comes naturally to you, and what are you naturally good at?' She really loves Spanish literature, and Spanish is her first language. She's super excited by it but, 'Well that's not practical.'*



To Dave, the practicality of the major means less than the practicality of students' success. He explained:

*I want them to be happy. I want them to want to go to class. I want them to be interested in what they're studying. If you're going into engineering because you think it's practical and you hate it, the kid who's next to you who actually wants to be there is going to eat your lunch. You're gonna get your butt kicked. You just are if you're making yourself go.*

In short, students who enjoy their studies are more likely to persist and succeed, with that not-so-small perk of being happy as they do it.

### **Navigating Bureaucracy**

One of the hardships of college is navigating a complex and disorienting bureaucracy. From admissions to academic advising, the system is difficult to understand, especially for first-generation college goers. Even the financial aid office can be complicated for McConnell students, despite their ample funding. Dave extends his social capital to help students navigate these privileged spaces:

*I talk [to McConnell students] about gatekeepers and deal makers. That person at the front desk [of a college office], that's a gatekeeper. You have to get past them to the person who's going to be able to make the deal. So we're going to just coach it. Hopefully, I've given people some confidence around financial stuff.*

He tries to help students learn how to deal with the bureaucracy of higher education and reminds them, over and over, "You're not powerless." To students, he asserts: "They [the university] let you into that college. It means you're smart enough to understand it. So if you're not getting it, they're not explaining it well. So let's just hang in there."

### **Deep Listening, Sincere Empathy, and Good Communication**

Students also encounter issues that get more personal than navigating bureaucracy. Homesickness, a missing sense of belonging, and even health issues spring up over the course of four years. One of the more difficult parts of the job, Dave has a vested interest in helping students navigate personal challenges.

*"I think that if I wasn't in The McConnell Foundation program, I wouldn't have come this far. Every time we talked, I could tell Dave how it was going. I think that maybe other students don't have that. It's very helpful, let me tell you that. I know we didn't talk much, but it really helped me. Without The McConnell Foundation program, and [Dave's] help, I don't think I would have made it this far. It would have been really hard."*

-McConnell Scholars student survey respondent

### **Addressing Complex Challenges**

It's no coincidence that Dave has taken graduate courses in psychological counseling; it was born from a need he was seeing with his students. His students, mostly 18-24, are at the age when mental health challenges are more likely to spring up. Seeing students come to know bipolar disorder, depression, anxiety, and other new-to-them mental health challenges, Dave wanted to help:

*Psychological counseling taught me reflective listening and that 80 percent of the benefit of therapy is a therapeutic relationship. Somebody who actually cares. So, I think that goes a long way – somebody [who says], 'Okay, I actually care. And, I actually hold you in high esteem. And I feel like that you have something valuable to contribute in your full human being as you are right now.'*

Dave does not pretend to be a therapist or pretend to understand fully where students are coming from, but he knows the value of true listening and care:

*I will say to them, 'Look, I'm a white western dude, I don't know what your experience is like. You tell me, what does it feel like?'*

*I try to be as skillful as possible and not shut people down, so I'm like, 'What do you think about...?' I'm always asking questions, so I'm trying to put myself out of it. If somebody says 'should' to me – 'You should do this' – I immediately have a contrarian reaction to that.*

He asks: "How can I help? When can I talk to you again and follow up about that?", letting students know that he hears their challenges, he takes it seriously, and his care isn't over once the conversation finishes.

In tough conversations, Dave puts students in the driver's seat:

*And if I feel like there's enough rapport there, I can challenge them, like gently test it. So just like, 'Hey, is it okay if I ask you some questions about this?' [I share], 'You're in charge of how this goes, right? Tell me what you think about this.'*

Some students are less comfortable talking. To account for that, Dave sends out "thriving surveys" — student surveys adapted from *Thriving in Transitions: A Research-Based Approach to College Student Success* (Schreiner, Louis, & Nelson, 2012) — twice a year to give students an opportunity to share how they are doing and what they are experiencing:

*I send out the surveys twice a year. First, second, third, and fourth years have a different survey, depending on what the typical, developmental challenges are and tasks of that particular time.*

Perhaps more importantly, Dave reads every single survey response and follows up on them with the support, encouragement, or resources each student uniquely needs. He shared: "Well, fundamentally, [it's about] respecting this person's sovereignty and sacred humanity."

*"I'm really, genuinely grateful for this whole experience. Even the bad ones. Dave watches us grow up. I'm grateful to have had that guidance, Dave watches us fumbling around and helped me stumble through things. Dave vaguely pointed me in a good direction, because he never wanted to tell me what to do, but it gave me confidence because I figured out I could solve my own problems."*

-McConnell Scholars student survey respondent

### Sense of Belonging

A major factor for students stopping out of college is feeling like they don't belong — a valid feeling while occupying space in higher education systems that might not have been designed with them in mind. Dave has seen this repeatedly in his tenure:

*A psychological sense of community is a major factor in success. The number one reason people drop out is money. That's not a problem for [the McConnell Scholars] anymore. It shouldn't be anyway.*

*The second one is, 'I don't feel like I belong here.' Over and over I've heard this, like, 'I don't know how to make friends. I've never had to make a friend in my life. Like everyone I know I've known my whole life,' because they've grown up in a tiny community.*

Dave makes a sense of belonging less scary by talking about it explicitly. It's important to name the challenge: "Once we name it, we can discuss it, and then we can figure out what you want to do."

### The Little Things

Dave also knows the power of the little things. While small things individually don't lead to college persistence, they can add up. For instance, when students are struggling with a sense of belonging, he does something as small as buying them a college sweatshirt: "They can physically put on that new identity and get used to it."

When the pressure of school heats up and students start to feel homesick, Dave sends homemade cookies:

*That is right around the first round of either studying for or having finals. It's partially like, 'Oh hey, somebody's thinking about you.' It's dorky and homemade looking, but we'll do like a little Microsoft Publisher holiday card. We'll put pictures on there. I put pictures of everybody who made cookies and write a little something about them, just so they have pictures of people who are interested in their wellbeing.*

Sometimes the just-in-time, small gesture of support can be enough to see students through.

*"I feel like I really had Dave's support contacting me, asking how I was, who actually cared when I was going through what I went through. Dave was flexible and understanding if I needed to take a break. The phone calls, the messages, if I hadn't had that I could have dropped out. It's not about being there physically or being there all the time. I just liked how it was every once in a while, checking in, cookies during finals. The small little things are what counts."*

-McConnell Scholars student survey respondent

### Friendly Colleges

Colleges also do little things that add up. While many college procedures can be confusing and cumbersome, some colleges mitigate the burden more than others, deeming them what Dave calls "friendly colleges." To Dave, some colleges, often the most selective colleges, have an unfriendly sentiment: "If you can hack it, great, but if you can't, there's somebody waiting to take your space. So we're going to test you to see if you're worthy." At these colleges, it is often difficult to get support, including support as simple as getting personnel, like financial aid office employees, on the phone.



Friendly colleges, though, find every opportunity to support students. Places like Chico State and Humboldt State University come to Dave’s mind as friendly colleges for students. Dave shared that, of students, friendly colleges think, “You could be good at something. Let’s figure out what it is and capitalize on that.” These colleges often have not only direct phone numbers for support staff on their website but also pictures of who that support person is.

Dave explained: “[At friendly colleges], you can actually email [support staff] directly. They don’t have these walls of defense and [make] you run this gamut.”

Part of being a Dave-appointed “friendly college” is simply just...being friendly. About Humboldt, Dave recounted:

*I took a whole trip of community college students over [to Humboldt] who were planning to transfer somewhere. We just went in a van and showed up five minutes before the bookstore was going to close. And they said, ‘Oh yeah, come on in. Where are you from? Look around, and take all the time you want. We don't care.’ And they were just totally kind. And okay, these are people who work at the retail store.*

Taking small steps, from transparent contact information on websites and even simply kind employees at stores, can add up to a friendly, supportive environment for students.

It’s important to note that Dave doesn’t steer students towards or away from any particular college. However, he does point out what other students have experienced at particular institutions and brainstorms how students can be strategic in setting themselves up for success at the college of their own choice.

## DIGGING DEEPER

For more information on determining friendly colleges, freezing summer melt, and other strategies and tools used by Dave, see page 53.

Having run the McConnell Scholars for over 18 years, Dave’s belief in students – in humans – has only grown since his time at EOPS. He reflected:

*I have a deep-seated belief that everyone has natural gifts. And I think that these gifts or talents, if they are tended to and they're developed, they become functional and they help people feel good while making a contribution. Their own unique contribution. I want you [the student] to honor that, and I want you to go with it and use it for something positive.*

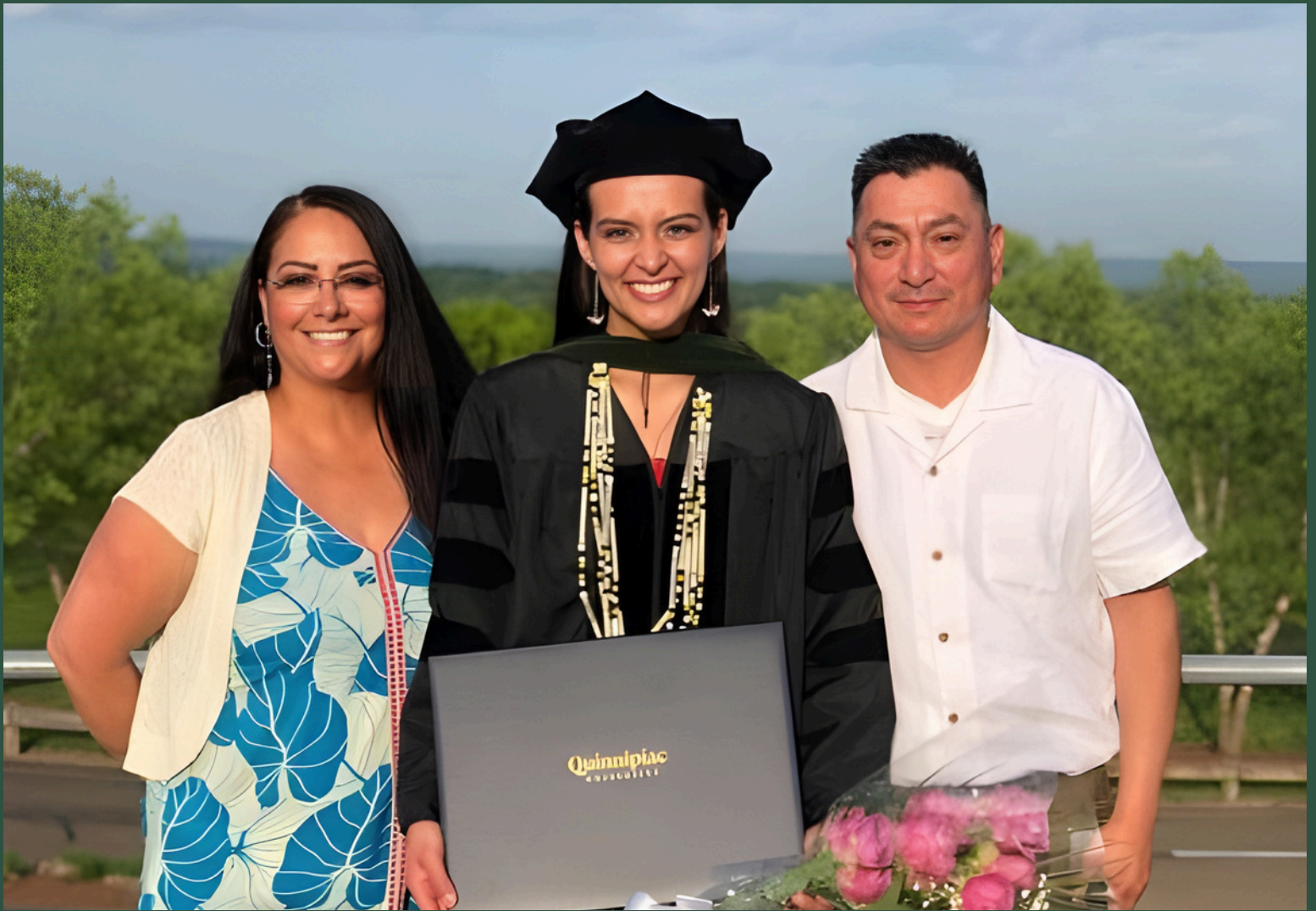
The McConnell Scholars’ leadership reminds us of an important lesson: **People matter, and given the right conditions, people grow.** Dave didn’t start out as an equity leader, but through his own experiences, deep curiosity about the success of others around him, and the culture of learning and growth at The McConnell Foundation, Dave became the leader this program needed to thrive. Simply put, the McConnell Scholars works in no small part because of the talent, care, experience, and intentionality of Dave Tanner.

*“ If I had to choose between the money or Dave, I’d choose Dave. Money comes and goes. I’ll always need it and I’ll always spend it. The biggest fight against trauma is a strong, positive connection. And that’s Dave. I am 1000000/10 satisfied with the support and resources I received. I’m incredibly lucky to still have him in my corner after graduation.”*

-McConnell Scholars student survey respondent

## Discussion Questions

1. Dave is talented in his role, but he knows that talent was learned, not inherited. In your context, what are the key skills and dispositions one must have to lead effectively? Where could one learn these skills and dispositions?
2. The McConnell Scholars doesn’t occur in a vacuum, and Dave doesn’t either. How does/can your work context, policies, and relationships contribute to the growth of staff and leaders? What are the conditions that allow people to thrive?



# ADJACENT INQUIRY

Operating because of,  
in spite of, and within.





**As our research team dug into the perspectives shared by students, selection committee members, and Dave, our minds wandered to adjacent inquiry — categories we affectionately called ‘rabbit holes.’**

We wondered: How does the McConnell Scholars program operate because of, in spite of, and within its local rural context, and how do perceptions of postsecondary education within that rural space inform its work? When students shared the systemic barriers they had to overcome on campus, we questioned: How do higher education institutions contribute to issues of inequality? When Dave shared the community’s conception of merit, we probed: What exactly is merit, and who gets to decide? In fascination, we followed these rabbit holes through relevant literature and our own debates while keeping the McConnell phenomenon front and center.

In this section, we offer you brief findings related to our adjacent inquiries, including:

- 1. Perceptions of postsecondary education in rural spaces;**
- 2. The ways in which postsecondary education can exacerbate inequality; and**
- 3. Merit.**



## Perceptions of Postsecondary Education in Rural Spaces

In Theme 1 on page 23, we discuss how the McConnell Scholars works to debunk myths in higher education. Perceptions of postsecondary education, particularly in rural spaces, can add to the continuation or dispelling of some of these myths.

Research from the USDA Economic Research Service shows that the percentage of adults ages 25 and older with a bachelor's degree or higher in rural spaces (21 percent) lags well behind the same age group in urban spaces (36 percent). As the data on the next page suggests, understanding why college “means” different things in rural (nonmetro) versus urban (metro) spaces matters. Who is going to college, who isn't, and why are critical questions in higher education. We dug into the “why,” looking at perceptions of postsecondary education in rural communities.

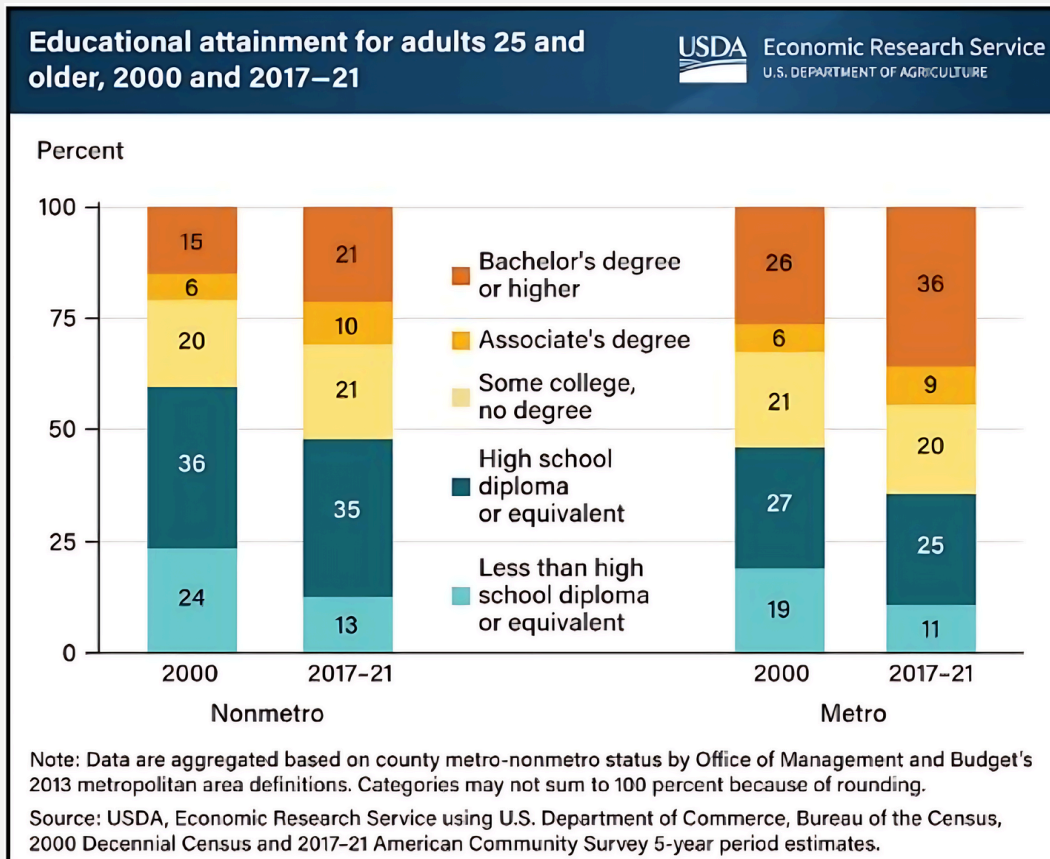


Rural communities both shape and are shaped by shifts in public discourse that sees postsecondary education as corrosive to society in general and antithetical to their personal needs and beliefs in particular. The impact of that public discourse on individuals is especially powerful when its coming from those closest to you: “If you hear [negative sentiments about college] even from within your own family context, that can have a really powerful influence on deciding whether you see college as an option for you, whether college is objectively good or bad” (Chakrabarti, 2023).

The public discourse on postsecondary education in rural spaces is often one of distrust, in part because of the “brain drain” effect of postsecondary education in rural communities. College “success” for students and their families is often predicated upon leaving the community — leaving family, friends, networks, and home. Students in higher education deserts must leave their town, county, or region to attend a four-year university — the case in the McConnell five-county region. And after graduation, students might not be able to find work in their field of study back home, so students who leave for college might not ever return (Carr & Kefalas, 2010).

Rural communities’ distrust in postsecondary education is exacerbated by real issues of access and population decline (Lumina Foundation, 2019). Even after the expansion of educational opportunities through technology afforded by COVID-19, students in remote areas continue to struggle with access to reliable internet and hardware. Writing papers on a phone in the fast food parking lot is far from an ideal learning experience. And even for those privileged enough to have reliable technology, transportation is a persistent challenge. Getting to an internship, showing up on time for a tutoring appointment, or meeting with a faculty member during office hours are almost impossible without access to effective public transportation or money in the budget for gas.

Educational Attainment for Adults 25 and Older, 2000 and 2017-2021



## Cultivating Trust: Postsecondary Education Within Rural Spaces

Despite underlying issues causing distrust, rural-serving institutions could find a path forward by harnessing arguably their biggest asset: the community itself. A recent Aspen Institute report (Barrett et al., 2023) drew from an amalgamation of rural-serving colleges and universities to create a general framework that could be used to generate trust within their contexts:

- **Create pathways to economic mobility.** Rural institutions could leverage local networks to build out and nurture clear opportunity pathways for students.
- **Convince students to enroll in and stay in college.** Rural-serving postsecondary education systems could overcome skepticism about higher education through clear and consistent communication and connection in ways that meet students where they are.
- **Build strategic partnerships to support student success.** Leaders at rural institutions could translate their social capital into meaningful opportunities for students rooted in the needs of the local community.
- **Rethink where education is offered.** High schools through dual enrollment and employer facilities could be excellent venues for delivering postsecondary courses and content if a college is not accessible.
- **Ensure that online offerings are matched with intensive support.** There are increasing online partnerships that provide higher education, but they must be wrapped in with high-touch support to maximize potential benefits.
- **Make the small size a strength.** Because of their small size and limited resources, leaders on rural campuses must wear multiple “hats” in efforts to support students. While overwhelming at times for staff, the researchers note that this multitasking “can increase coordination between different parts of the college and, in turn, strengthen the effectiveness of student success strategies” (Barrett et al., 2023).

It’s important to note that no one college in the report is doing all six of these approaches, but such an amalgamation framework could help show ways rural institutions could serve their communities and keep talent local, building trust within the community.

## The McConnell Connection

When it comes to postsecondary education, The McConnell Foundation is mindful of its rural context — and the perceptions that come with it — working to build trust within and among the community. First, McConnell focuses higher education on social ROI. It doesn’t assume that pursuing education is itself the goal. Instead, it takes up the “so that” lens: Students should get resources to attend postsecondary education *so that* they can go on to contribute to building a better community. By focusing on students who have a community-minded and/or service focus, they remain true to the mission of empowering local communities through this program.

Further, Dave talks about friendly colleges. He is — and by extension, the community is — building trust with a number of institutions by focusing on the micro-interactions between the colleges and scholars. While Dave doesn’t usher students to or away from particular colleges, he does have honest conversations about the experiences other students have had. As Dave says, “Everyone knows a McConnell Scholars student at this point,” so it’s reasonable to believe that such conversations get shared among scholars, with younger siblings, and with other community members. McConnell’s sense of trust in local, friendly colleges — and the ways that trust is communicated to students and through the community — just might be part of the phenomenon. Is it a phenomenon that some colleges in the north state are building trust within their rural context, despite pervasive negative perceptions of postsecondary education in rural spaces? At a time when public distrust of higher education is at an all-time high — irrespective of being rural — the McConnell Scholars program is generating community-wide trust through their unique, community-driven partnership process.



## How Colleges Can Exacerbate Inequality

A study conducted by Gallup and Lumina Foundation found that public confidence in higher education is decreasing (Jones, 2024). Further, cuts to higher education funding across the country are not only limiting access but also disproportionately saddling low-income students with considerable debt, setting them behind their wealthier counterparts as they begin their careers. Tuition hikes in particular have worsened racial and class inequality, since rising tuition is known to deter low-income students and students of color from college (Mitchell, 2019). The Gallup study showed that two-year institutions held higher confidence than four-year universities (2024), but it also serves as a wake up call for people seeking to ensure that postsecondary education delivers on the promise of growth and opportunity for all.



### *Four-Year Institutions & Inequality*

Widening inequality between lower-income and higher-income students is especially true at four-year public colleges and universities. While four-year institutions are designed to provide educational opportunities to all, cuts in public funding can make them increasingly out of reach for the very students they were intended to support. California's Prop 98, for example, passed in 1988, requires that a minimum share of the state budget be allocated to K-14 education, cutting into resources for the UC and CSU and forcing them to make up for the difference through tuition hikes for students (Cook, 2017).

Highly rejective institutions of higher education (those commonly thought of as elite) can do particular harm to public confidence in postsecondary education as a means of upward social mobility. As Chetty and colleagues (2023) argue, admissions policies and practices at elite and Ivy League schools essentially render these institutions as systems of "affirmative action for the wealthy." The privileging of those with resources, combined with exclusionary enrollment practices, renders these institutions not "selective" but rather "rejective" by design, thereby sustaining social inequality instead of dismantling it (Orphan, 2022).

### *Community Colleges & Inequality*

With low or no tuition fees, community college systems are designed to remove barriers to economic and social opportunities. However, access doesn't always mean opportunity. Informal "tracking" of community college students, who are disproportionately low income, into workforce-aligned programs can limit opportunities for upward social mobility. Often done based on the very real economic needs of students to "hurry up and get a job," the heavy investment in workforce-aligned programs — and subsequent divestment in transfer programs — channels students into career opportunities that, on average, have lower rates of economic ROI than other degree programs in the long term. A system truly dedicated to upward social mobility for all students should invest in all educational opportunities, including transfer programs, community college baccalaureate programs, and career and technical education (CTE), to ensure equity in career opportunity.

In recent years, community colleges have invested time and effort to address this, with a focus on guided pathways and increased resources on mental health and basic needs. Two-year institutions must continue to be reflective to ensure that they deliver on their promise of equity in access, opportunity, and positive outcomes for their students.

### **McConnell's Role in Bridging the Gap**

The McConnell Scholars takes many intentional steps to help mitigate the inequality in higher education. The selection committees focus on students often overlooked by other scholarship programs and elite schools. The scholarship award itself virtually closes the financial gap for attending college, helping lower-income students enter college on a level playing field with their higher-income counterparts. The non-financial support offered to students by Dave and McConnell — including teaching students how to manage funds and advocate for themselves on campus and in financial aid offices — builds students' agency and persistence. Dave's focus on CliftonStrengths and other reflective tools ensures that students are aware of their abilities and dispositions, and Dave helps them to understand the educational options that are available to them. If a student seeks to transfer or go on to graduate school, that student has support during the transition from one institution to the other.

These steps, considerations, and strategies, among countless others, illustrate the deep thought and care in the design of the McConnell Scholars. The program captures the inherent potential within postsecondary attainment while mitigating potential gaps that can limit success. It is working within its unique region but also has elements that can inform other reform and support initiatives (see Applications on page 67 for more discussion on broader impacts).

The premise of the program isn't that "all college is good, and it's good for everyone." Instead, the McConnell Scholars recognizes the profound opportunities higher education can afford alongside the real and inequitable harm it can perpetuate and then continuously designs itself around that contradiction. It promotes college without making it seem simple. It is honest and forthright in its critique of the many ways in which the system fails itself and students, while acknowledging that higher education is still a critical path forward for social mobility and community improvement. It doesn't make excuses for the shortcomings of higher education, helping students succeed in spite of an inequitable system.



## An Investigation of Merit

A question Dave often gets about the McConnell scholarship is: “Is it a merit-based scholarship or need-based?” Such a question is often heavy with intonation, with a subtext that merit and need are mutually exclusive, that a student with financial need is not also a student of merit.

Dave confides that he is both incensed by the implications of this question and at a loss for words in his response. Yes, McConnell seeks to empower students who have a demonstrated financial need. And yes, McConnell students have merit, but no, this is not a meritocracy. McConnell students are exceptional, but that exceptionalism is not measured by test scores or awards, metrics often implied as appropriate for merit by the inquisitor. And as seen when the Vista program and McConnell Scholars program combined, trauma does not evanesce when talent is present.

And so, to this obnoxious question, we offer an answer: Through our study, we have found that the McConnell Scholars is radically redefining merit in a way that honors local context and community-level decision-making. To be excellent is to be deviant (CivicLab, 2024), and the McConnell Scholars excels by deviating from a false dichotomy of merit and need and reclaiming a locally relevant conception of merit.

### **What is Traditional “Merit”?**

The question, “Is selection based on merit?”, begs another, broader question: “What is merit?” Traditional measurements of merit seen in education include standardized test scores, grade point average, class rank, advanced coursework, like honors and AP classes, leadership roles in extracurricular activities, letters of recommendation, often from the “right” kind of recommender, awards and recognitions, and other special achievements.

Such markers of meritocracy are often also markers of privilege. Kim and Choi (2017) describe the connections between merit and privilege: “Contemporary meritocracy has largely disregarded non-meritocratic elements such as family background and social networks, yet it is important to bear in mind that these factors can cause severe inequalities within society” (p. 118). For instance, students from higher income households have more access to financial resources for tutoring when needed, leading to higher grade point averages. Their parents might have more time and higher levels of education to help with academic work. Students with advanced coursework might be at higher resourced schools with the funding, enrollment, and teacher talent to offer such classes. Students in extracurriculars have extra time to participate — time that they do not need to spend helping with siblings, the household, or working part-time jobs.

In this way, traditional conceptions of merit and equity are inextricably linked; the way merit is defined and measured is a lagging variable that can reinforce existing social inequalities. Students exhibiting the most “merit” often have the most resources to begin with, creating a vicious cycle of haves and have nots.

### **Redefining Merit**

Traditional markers of merit, like grade point average and test scores, would falsely show that no, the McConnell Scholars is not a merit-based scholarship. Yet, selection committees are not only looking for financial need and adverse experiences when choosing awardees, markers of a need-based scholarship. Quite the contrary, their most weighted factor is applicants’ sense of other-centeredness — their history of and affinity toward taking care of others beyond themselves. While traditional measures of merit don’t include demonstrations of other-centeredness among their examples, it’s a difficult argument to make that other-centeredness is not itself a worthy example of merit.

While traditional definitions offer what merit in education *has been*, we offer here what merit *could be*. Instead of stuffing the McConnell Scholars into the literature, we show how it defies it. In particular, we argue that other-centeredness in the context of this study constitutes merit.

Further, we argue that defining merit is laden in context and, therefore, must be defined in context by those within that context. In the five-county McConnell region, merit is other-centeredness, but in another community, merit could mean something else. By using generalized definitions to be applied across space and time — by ignoring context — existing literature on merit is both insufficient and exclusionary of the very communities where conversations of merit matter most.

Through this study, we have found that merit is dependent on local need and talent and is defined based on local consensus and context. In its deviance — in its excellence — the McConnell Scholars is radically redefining merit in a way that honors local context and community-level decision-making. As such, we posit that merit itself is a phenomenon.





# INSIGHTS FOR PHILANTHROPY

The McConnell Foundation  
is uniquely poised to do  
this work.

## A Philanthropic Context

An important aspect of the McConnell Scholars phenomenon is the context in which it is situated. While we have discussed many aspects of such context, including the rural region it serves, the profile of selection committee members, and the students themselves, a key context remains: its seat within philanthropy — The McConnell Foundation.

Of course, the McConnell Scholars is a financial award, making philanthropy obviously important. However, based on our investigative journey, it is clear that the program's philanthropic context is important for reasons far beyond the scholarship dollars themselves. In particular, its focus on social ROI, local impact, distributed power, support of Dave, and reciprocal trust with higher education are critical pieces of the McConnell Scholars' success.

### The McConnell Foundation's Role

The McConnell Foundation's mission is the cornerstone of their work. It provides the "why" for the strategies chosen, and those strategies are expansive. McConnell works to improve the community through a wide portfolio, including efforts with children, youth, and education; community vitality; ecosystem resilience; major projects, including investments in the Redding School of the Arts, a public library in Tehama county, the Shasta Family YMCA, and the renowned Sundial Bridge in Redding; and of course, the McConnell Scholars.

In its effort to build better communities through philanthropy, The McConnell Foundation has three strategies: to grant, to convene, and to collaborate. But without the last two, the granting won't work. As such, program officers at McConnell see their work as judging momentum and buy-in in the community and letting that community input guide the ways in which the Foundation can make a difference.

### The Foundation Focuses on Social ROI

Communicating to the board and other internal stakeholders is a major part of grant-making work. To do so, Dave shares personal interest stories about students that showcase their significant accomplishments and how they have overcome challenges.

However, living up to the McConnell mission is central; the Foundation and its board want to see an impact with their investments. For the McConnell Scholars, social ROI becomes a persuasive tool for communicating impact.

Dave shared:

*I make the argument to the board: We have this local talent [in students] that we aren't converting. They have all this untapped potential. By awarding the scholarship to students who can have a positive social ROI, we are making an impact in the community. [Our board] has an influence regionally and state-wide. There's a belief: 'We can change the trajectory of this entire family.'*

When the board focuses on social ROI, they disrupt the status quo. Dave explained:

*Our mission at The McConnell Foundation is helping build better communities through philanthropy, not reinforcing the status quo through philanthropy. If we give a scholarship to a student who would have been able to go to college anyway, we've reinforced the status quo, and we've wasted our money.*

### Student Selection

In the case of the McConnell Scholars, the Foundation is disrupting the status quo by not following the same, often inequitable patterns of scholarship awards — that is, it is not simply giving scholarship dollars to well-resourced students who demonstrate traditional forms of merit, like high test scores or grade point average.

Instead, The McConnell Foundation is disrupting the status quo through social ROI by breaking away from the traditional model and choosing a different kind of student. It focuses on students' other-centeredness, their history of giving back to those in need, and their propensity to continue doing so in the future. The Foundation is funding students who have demonstrated that they can overcome barriers and, with the financial and non-financial support from the Foundation and its staff, can persist in college and potentially change the trajectory of their future, that of their family, and the community at large.

Part of the argumentation for the McConnell Scholars student selection is that it is not just good for the student; it's good for everyone. Whereas focusing on the students' stories alone could come across as a "bleeding heart," focusing on the collective impact shows how everyone gains when students succeed. Such a view lets the Foundation be a bit self-interested in a way that is deeply compelling — the notion of, "Why do I have to miss out on this young person's talents? Why is their potential being wasted to the point that I can't benefit?"

### *Pairing Financial and Non-financial Support*

The Foundation is also committing to social ROI by pairing financial awards with non-financial support. Seen clearly in the interview data with the students and Dave, the program's success is not found in a barrel of cash. Instead, it is the substantial financial award paired with a longitudinal suite of professional and personal development opportunities, mentorship from Dave, fellow scholars, and alumni, and an insistent care that begins senior year of high school and continues well past when the caps are thrown at college graduation. Such an approach acknowledges that, to feel a social ROI in the community, students need so much more than financial freedom.

### **Local Impact Matters**

The adage goes that “national philanthropy gives to national organizations.” If that is true, it suggests that family and local foundations should, in contrast, consider local impact; we posit that they are uniquely poised to do this kind of work.

Investing locally is part of a social ROI. In smaller communities like Redding and the surrounding five-county region, The McConnell Foundation's investments go farther than they would in, say, the bay area. To get an ROI, philanthropies have to think locally.

Giving locally doesn't mean that investments won't have an effect on a national level. In the McConnell Scholars alone, graduates have gone on to work for think tanks, in federal government, and on other national stages, informing major decisions on a national level.

Such an impact doesn't have to be a person, though. Philanthropic efforts like the Sundial Bridge have impacted the entire region; having Santiago Calatrava design a breathtaking piece of art in your own backyard makes things different. The Sundial Bridge has become a town square; go there in the evening, and you'll likely run into someone you know. It changes how residents see themselves and the community; it changes “who we think we are.” It's a point of pride that has more than a regional effect; it put Redding on the map. A point of pride, the Sundial Bridge shares the message: “Take care of what's yours, and it expands out.”

When local philanthropy gives locally, it proves that big things can come from small places. Specifically, the McConnell Scholars phenomenon has shown that talent is local. It has proved that people from the rural five-county region can be successful in higher education and that they have the desire to come back and live in the community.

Investing in local talent also allows the Foundation and other employers to hire locally. When looking for new hires, the Foundation asks, “Can you live in Redding, CA?” For national applicants, the answer is often no, but applicants who live locally have no problem committing. They understand the community, they have a network there already, and they know what it means to live in the far north. Whereas national applicants see The McConnell Foundation as a stepping stone in their career, local applicants will still be at the Foundation — and in the community — five years later and beyond.

### **Community Vitality is Everyone's Responsibility**

As a well-resourced philanthropy, it would be easy for The McConnell Foundation to enforce and hold tightly to the power it could wield over the community. On the contrary, the Foundation redistributes its power to the community through selection committees and to students as agents of change within the five-county region. The McConnell Foundation attends to the power dynamics at play, intentionally and repeatedly bringing the community and students into decision-making spaces that affect the region at large, helping make the social ROI a community experience.

While the selection committees and their sacred choice in student awardees are no small part of the McConnell Scholars' success, how does a program officer get a board to agree to distributed power?

First, building the capacity and autonomy of community members goes hand-in-hand with social ROI, an argument that Dave has been able to make to the board. By training selection committee members in diversity, equity, and inclusion and giving them a stake in students' success, social ROI goes beyond the students and into the community itself. Community vitality becomes everyone's responsibility — and everyone's gain.

The McConnell Foundation also saw an example of community selection committees working at the Ford Family Foundation. By having this successful model to lean on — plus seeing how the early iterations of the McConnell scholarship failed — was persuasive in trying something new.



When it comes to distributed power, McConnell trusts the judgment of its program officers as partners in the work. While the selection committee model was a part of the new McConnell Scholars design, it wasn't always ultimately their choice. Dave's original job description stated that he could override any selection committee decision. Dave quickly changed this policy, something the Foundation was supportive of. To McConnell's board and leadership, there is a sense that program officers are the eyes and ears of the community. Dave and other program officers have autonomy and freedom to bring new ideas and approaches, in good faith that they represent the community's will.

## **Creating the Conditions for Dave to Grow**

As discussed in Theme 6 (p. 34), Dave is another central aspect of why the McConnell Scholars has been so successful. But just as the McConnell Scholars does not occur in a vacuum, neither does Dave. Dave has grown in his equity mindset, his skillset in nurturing others, and his leadership during his time at the Foundation because The McConnell Foundation has created the right conditions for Dave to grow.

### *Graduate Courses*

The Foundation funded Dave's professional development and graduate courses in psychological counseling, something Dave spoke of often in his interviews. He learned key lessons on case management, therapeutic methods and relationships, and other skills that he employs as he provides non-financial support to students.

These are skills that Dave shared he uses "every day; all the time." In more than one case, it is through using these skills that Dave has been able to get through tough moments with students suffering from personal or mental health challenges, helping them to come through to the other side and go on to graduate. Without these courses funded by The McConnell Foundation, Dave would lack the formal training and education needed to be successful in such work.

### *A Commitment to Diversity, Equity, and Inclusion*

The McConnell Foundation's commitment to creating the right conditions for Dave to grow is, in itself, equity work, and yet, the Foundation has done more. It has committed to bringing diversity, equity, and inclusion into both its internal and external work, efforts that have supported Dave in his understanding of and ability to discuss issues of equity with the selection committees.

Teaching an equity mindset to the selection committees is no small part of Dave's job in making sure the right students get funded, but learning how to talk about equity in a clear and approachable way is difficult. This is where the Foundation stepped in.

It was through the Foundation's own equity work, especially its foundation-wide DEI trainings and its assembling of an equity team, that Dave felt empowered in his conversations about equity with the selection committees. He explained:

*The Foundation did a two-and-a-half year intensive DEI process, an internal process. We [also] formed an equity team which has representatives from all the different departments. At that point, I had some more tools [and] more skills to start bringing up [topics of] race, racism, and systemic racism in our selection committee trainings.*

Considering how critical the selection committees are in the McConnell Scholars' ability to live out its mission, Dave's ability to teach equity, as provided through the Foundation, is imperative.

## **Reciprocal Trust Between the Foundation and Higher Education**


Seen in the perception of "friendly colleges," trust in higher education institutions is important for The McConnell Foundation, but that trust must work both ways. Just as Dave knows the colleges that are good for students to work with, he makes sure that The McConnell Foundation is seen as the same among colleges.

Dave is on a first name basis with several college presidents from across the region and state, and some of those presidents have visited The McConnell Foundation office. He has personal contact with staff at most colleges and can get a hold of them directly. He strives to be a reliable partner to College of the Siskiyous and Shasta College, stressing both internally and externally that these local community colleges are great options for students and worthy of investment. In doing so, he builds reciprocal trust with colleges in the region and state, which goes a long way in improving perceptions of higher education — and philanthropy — locally.



# STRATEGIES AND TOOLS

Providing students with the  
resources they need to succeed in  
college and in life.



**Over the past 18 years, the McConnell Scholars program officer Dave Tanner, along with McConnell staff, have created and assembled strategies and tools to provide students with the resources, both financial and non-financial, they need to succeed in college and in life.**

While over the course of this study we surfaced many such tools, three in particular seemed to play a significant role in Dave's implementation: (1) strategies and approaches for assembling and training selection committees; (2) a timeline for providing consistent and scheduled non-financial support to students; and (3) a framework for determining colleges that are student-friendly. These strategies and tools are provided in this chapter, organized by (a) background information, including observations and underlying principles; (b) tools, resources, and materials; (c) action steps to take; and (d) real-life feedback.



# SELECTING AND TRAINING SELECTION COMMITTEES

## BACKGROUND

The selection committees are an integral component of how the McConnell Scholars engages the community in its mission. To Dave and the Foundation, building better communities through a scholarship is not only something done by **empowering students** but also by **empowering communities**. Dave decided from the beginning that the selection committees choosing the scholarship recipients couldn't be outsiders or even McConnell staff; they had to be community members.

As shown in Theme 4 (p. 29), community members have deep knowledge about the region, its residents, and the students, along with an understanding of the challenges those within the community might face. They also have a vested interest in helping their communities thrive, which can often make it easier to cultivate a culture of belief when it comes to focusing selection on social ROI.

That said, selection committees don't just happen; Dave puts forth a concerted effort each year to not only assemble the selection committees but to help instill an equity mindset within them. It's not enough to pick community members; the committees must ultimately be composed of those committed to selecting students through an equity lens.

While Dave has an intangibly gentle approach when it comes to teaching equity, as we saw in Theme 5 (p. 31), he uses many tangible resources to help in his understanding of equity and how to approach it in selection committee trainings. We include some of these resources below, along with some steps to take in the selection and training of committee members.

## TOOLS, RESOURCES, AND MATERIALS

- William Sedlacek's (1989) work on non-cognitive variables
  - *Sedlacek, W. E. (1989). Noncognitive indicators of student success. Journal of College Admissions, 1 (Fall) (125), 2-9.*
- Racial Equity Training
  - This 21-Day Racial Equity Habit Building Challenge helps to deepen "your understanding of, and willingness to confront, racism for twenty-one consecutive days."
- Red Sea Road Consulting DEI training
  - This is a consultant The McConnell Foundation partnered with for DEI training.

*“This scholarship has been life-changing for our community and our students. The meaning of life to me is having an impact on someone else’s life, and that’s what I get to do here. I feel lucky to be a part of it. It brings me great pride to be able to give back to my community in such a meaningful and impactful way.”*  
-Selection committee member survey respondent

## ACTION STEPS

### Creating a community-based selection committee:

- **Be able to articulate** the type of equity mindset, dispositions, or characteristics you are looking for in a potential selection committee member. Remember that people can grow in their equity mindset and sense of diversity, equity, and inclusion, but there are likely base-level dispositions that they will need from the onset. Aspects to consider might include their ability to hear multiple sides of an argument, their ability to work collaboratively with others, their open mindedness, and/or their listening skills. You might also attend to the diversity of the members you seek, including diversity in racial, ethnic, or economic background and diversity in occupations.
- **Reach out to local schools and other allies** in the community who already have an equity mindset or portray some of the dispositions and characteristics you are looking for. These critical friends will likely have connections to a network of others within the community who have some of the dispositions you seek. Work within these trusted networks to reach out to potential members. In the process, don’t just look for the “usual leaders” within the community. Consider selection committees as a way of increasing community capacity by looking for leaders in unexpected places and roles.
- When assembling a committee, **be steadfast in the qualities you are looking for in a member.** Remember your list from the first step above, and be willing to turn away community members who do not possess or demonstrate the requisite dispositions.

### Teaching equity to selection committees:

- **Commit to training the selection committee.** Dave holds multiple trainings each year to help acclimate the committee members to the application and interview process and to reinforce the goals of the program. However, the most important work he does during this time is DEI training, helping cultivate an equity mindset in committee members. Use some of the resources listed on the previous page, along with your own student stories, to help plan your trainings.
- **Be prepared to repeat yourself** when it comes to teaching equity. Dave shared in interviews that when it comes to reinforcing the types of students the program is looking for, he has “to say it over and over and over again.” Remember that breaking the cycle of looking only for traditional merit in applicants means rewiring the way committees think about merit, worthiness, and ROI. Teaching committee members to consider a students’ capacity, their other-centeredness, and their propensity to give back to the community will take time and repetition. Be prepared to teach this approach multiple times and in multiple ways, and commit to running trainings each year, even if the selection committee is composed of the same people.

### Leaving the choice to the committee:

- If you want to build better communities, you must **be willing and ready to let the community members make the ultimate decision.** During selection, maintain your role as facilitator, encouraging the committee to consider all students and reminding them of the core mission of the selection. However, be prepared to let them ultimately decide, even if you don’t agree, thereby protecting their sacred choice and agency in the pursuit of building better communities, and be ready to support all students just the same.

# A TIMELINE FOR PROVIDING NON-FINANCIAL SUPPORT TO STUDENTS

## BACKGROUND

Non-financial support is an important aspect of the McConnell Scholars. Students aren't on a conveyor belt, moving steadily forward from high school to college. They are human beings and, during such a tough transitional time in life, endure hardships quintessential to their age.

While the scholarship award virtually dissolves financial barriers to college, it doesn't help students navigate the very real personal challenges that come with transitioning from high school student to college graduate. Keeping up with college-level rigor in coursework, struggling with a sense of belonging, dealing with homesickness, suffering with mental or physical health challenges, navigating challenging family or personal relationships, and learning to become an adult are all obstacles that Dave has seen McConnell students deal with. These aren't challenges that the scholarship dollars will fix; these are issues that require care, support, and nurture.

When the Foundation's Board of Directors approved Dave Tanner as the new program officer for the scholarship program in 2007, they selected someone with deep experience in nurturing young talent and making personal connections with students. Through his background in EOPS and even as a father, Dave was — and is — oriented to help students succeed. He helps to validate the big, real feelings that come with transitioning to and through college, and he helps make institutions seem smaller and less scary. He attends to students' developmental needs and puts in the effort to become someone students trust. And just as he teaches social ROI to the selection committees, he teaches it to students. He reminds them that their worthiness of the scholarship isn't tied to their college major, their GPA, or their wage after graduation. Just as it was with their selection, the most important aspect for students to pursue is their wellbeing and, in ways big and small, their commitment to caring about people other than themselves.

The non-financial support Dave provides is vast, if not incalculable. It spans from the awarding of the scholarship during senior year of high school through college completion and beyond. While we did not capture each microstep of support Dave provides, we have captured some of it in this section. We provide it chronologically, showcasing the types of non-financial support Dave provides each semester of the students' experience.

## TOOLS, RESOURCES, AND MATERIALS

- National Resource Center for the First Year Experience and Students in Transition, University of North Carolina
  - Cutting-edge resource on student success and the student success movement, which was a response to student protests during the Vietnam War.
- Pre-college, freshman, sophomore, junior, and senior thriving surveys (see Appendix)
- Kelly Rizzi's Trauma Informed Practices
  - A series of workshops to learn how to help students regulate emotions so learning can take place. Dave includes practices from Rizzi at every summer conference to ground recipients in their bodies, such as providing hammocks (rocking motion) and arm slinkies (touch stimulation without contact with other people).
- CliftonStrengths Assessment
  - An assessment of natural talent, which Dave uses to help students start to articulate their own assets and what they might actually want to study or what kind of work they want to do.



*“[Dave has] been extremely helpful. Dave is like The McConnell Foundation Uncle. My parents didn’t go [to college]; they don’t know what it’s like. Dave’s been there, done that. It’s been nice having his input. The surveys were actually really helpful even though they felt a little like a chore. I’m not going to ask myself those questions; having the forced reflections was helpful.”*

-McConnell Scholars student survey respondent

## ACTION STEPS

Below is an exhaustive list of steps, actions, support, and other interventions Dave implements over the course of the students’ McConnell experience from senior year, pre-college to post-college graduation. As Dave is just one person, he does not complete each of these items every year or with every student; action steps vary across terms and years. Still, we offer this list to demonstrate a wide array of the non-financial support Dave has offered in any given year.

### • Spring of senior year, pre-college:

- Dave **shares with students that they have won the scholarship** through email. This allows students to react to the news in private or with those they trust, instead of live on the phone with Dave. Dave will also reach out to their high school counselor so that they can work together as the student transitions from high school to college.
- Dave begins his engagement with students slowly. They are naturally wary of a new person and sometimes fearful of working with a foundation. Dave works to mitigate that by being helpful in practical ways. For instance, he goes over the scholarship acceptance agreement together, and **he helps them understand their financial aid offer and basic skills in finance**. He discusses if the student has a bank account with their name on it and if they know how to pay for bills. He also helps them navigate online college portals and register for classes.
- These conversations are **shoulder-to-shoulder instead of face-to-face**, helping put students at ease and building their agency in financial conversations. He also keeps his voice low, slow, and encouraging to help students feel more at ease. Dave sees these actions as **making deposits in an emotional bank account** with students in an effort to be seen as a trusted mentor. This is not something that happens over night, and Dave approaches it with the long haul in mind.
- Students are invited to an **orientation session**. These are held in a hybrid environment, with students attending in-person at the Foundation office when they can. Students who attend in person are offered gas cards for the drive. During the orientation, Dave covers the Basic Understanding of Financial Aid document and their financial agreement. He reiterates that the only real requirement to stay in the Scholars program is to continue to communicate with Dave, including calling back when he reaches out and answering emails. In the orientation, he strives to set the tone of their relationship — that he is there to support students’ goals, not to wag a finger.
- Students take the **pre-college thriving survey**. These surveys, distributed each semester of the students’ college experience, help give Dave a sense of how they are doing scholastically and personally and help him understand which students he should provide additional support. Dave reads the thriving survey responses very carefully. While it is time consuming, simply reading them and providing feedback or questions helps build trust with students and a sense of, “He really reads these!” He follows up via phone or email on every thriving survey returned. He keeps every survey in the student’s folder, and for those who want them, he returns all of their thriving surveys to them upon college graduation.
- Dave invites students to the **McConnell Scholars summer conference**. Because they are new to McConnell, they are often afraid to attend. Dave works to mitigate this fear by sharing that they are invited to come and be their authentic selves. There is no performative nature at the summer conference.

### • Summer, pre-college:

- To help build a sense of belonging, Dave buys students “college swag,” including college-branded sweatshirts and tshirts.

- In the fall, many colleges send out financial delinquency letters, stating that students will be dropped from courses if they do not pay their outstanding bill. These letters are sent out before financial aid is paid out, thereby causing undue panic in students. Dave warns students over the summer about this letter, helping to get ahead of a scary situation.
- **Hold the summer conference.**
  - Each year, Dave and The McConnell Foundation hold a Scholars summer conference. The conference is a “soft mandatory,” with rising freshmen having the best attendance. Students are invited via email, during their orientation, and through the McConnell Scholars Instagram account. Students are asked to RSVP and submit a release, and carpooling students are given gas cards. The experience is held for two days at a local camp. Dave strives to talk as little as possible at camp so that **the conference is peer-led.**
  - On the first day, Dave sets the tone for the experience by asking students to journal: What are you excited about in the coming year? Scared of? What expertise do you have? Students share their journal responses with peers. Through journaling and subsequent conversations, **students brainstorm any possible topic they want to learn more about** during the conference. This could include aspects of college, like learning more about study abroad, having a roommate, and first year experiences, or more general curiosities, like fitness, nutrition, having healthy relationships, and even beekeeping.
  - After the brainstorm, conference volunteers (in this case, Dave’s partner, Buffy), select topics that have the most interest and arrange the conference schedule, with students serving as session leaders. Topic sessions take place the next day, with five concurrent sessions running at once across four time slots over the course of the day. Students are free to attend the sessions that most interest them.
  - After the sessions conclude, students hear from the **keynote speaker, who is always a current or former McConnell Scholar.** Dave selects a keynote speaker who is willing to be authentic about their experience, including their challenges and struggles. He relies on strong relationships with students to select the speaker.
  - Along with the sessions, students also take part in other activities, like morning yoga, walks, campfires, smores, or line dancing.
  - On the last day of camp, students reflect on and share back key lessons from the conference, including: (1) three important things to know, (1) three strategies for success, and (3) three resources they learned about. They also engage in journaling, including documenting someone from the conference who they’d like to stay in contact with, one thing they’ll change about the upcoming year based on things they learned, and one overall reaction.
  - They conclude the conference with **a graduation ritual.** In the ritual, first year students stand in a line on one side, with the graduating students in a line across from them. In between these two lines are “middle” students — rising sophomores, juniors, and seniors. Dave asks students to look across to each other, either seeing where they are headed or looking back on where they have come from, culminating in an optional group hug.
- **Fall term, year 1:**
  - Freshman year, Dave focuses on helping students **develop a friend network and social network.** In his conversations with students, he discusses developing a psychological sense of community and a feeling of “this place feels like home.”
  - Dave also helps students **adapt to the academic rigor of college,** encouraging them to find academic support if they feel like coursework is challenging.

*“Regular check-ins from Dave Tanner helped me remain focused and reminded me what I was doing was bigger than myself. It was the motivation needed to keep moving forward.”*  
-McConnell Scholars student survey respondent

- Dave checks in with students around the second week of October when the adrenaline of a new experience wears off and homesickness sets in. **He validates students’ feelings**, letting them know it is okay to feel that way. He also discourages students from making any life-changing choices when they are in an altered emotional state.
  - Students take the freshman thriving survey, term 1.
  - If students are experiencing any issues, Dave steps in with a general intervention. **He helps students define the problem** and asks if they want to hear some suggestions of how they might move forward. They **make a plan together and set up a time for Dave to check in again** to see how they are progressing. Some students want to connect with Dave weekly, which he does if asked. If things aren’t better when Dave checks back in, they set a plan to try something new.
  - Dave requests students **send their transcripts** at the end of every term. He uses this as a diagnostic tool to see if students are happy in their courses and major. He assures students that they will not be “in trouble” if their grades aren’t perfect; it’s just another way for him to help.
  - In both the fall and spring term, Dave **makes campus visits** to self-selected students. During visits, Dave asks students to show him their favorite parts of campus so that he can see it through their eyes. He often brings his partner Buffy to help model healthy relationships to students.
  - Each year at winter finals, Dave sends a **care package of cookies**.
    - Earlier in the fall, students can sign up to receive cookies during finals and share any allergies they have.
    - Around December, The McConnell Foundation staff bakes homemade cookies to send to students. They create a newsletter and write cards, and they send the cookies to students in time for finals.
- **Spring term, year 1:**
    - Dave sends a **Valentine’s Day care package**, complete with small school supplies and a handwritten note.
    - Dave conducts campus visits.
    - Toward the end of the semester, Dave works with students to understand their next financial aid offer, including determining the incoming funding from the McConnell Scholars.
    - Students complete the freshmen thriving survey, term 2.
    - Students submit their spring transcript.
    - Dave invites students to the summer conference, where they will be able to take on more of a leadership role.
  - **Summer, year 1:**
    - Students attend the summer conference. By this second summer, students are more relaxed and ready to take on more of a leadership role in selecting content and leading sessions.
  - **Fall term, year 2:**
    - In sophomore year, Dave focuses on helping students emotionally commit to a college major. If students are having difficulty regarding their major, he asks students to go through the college catalog and pick out any major that sounds fun and interesting. He reminds them that they are not selecting their future career, just their major area of focus. He helps students let go of majors that might not be best for them but celebrate that that major got them to this point.
    - Students complete the CliftonStrengths assessment to help them see what their underlying strengths may be and how said strengths might apply to their college major.



- Students take the sophomore thriving survey, term 1.
  - Dave conducts campus visits.
  - Dave sends cookies during finals.
  - Students submit fall transcripts.
- **Spring term, year 2:**
    - Dave sends a Valentine’s Day care package.
    - Dave conducts campus visits.
    - Toward the end of the semester, Dave works with students to understand their next financial aid offer, including determining the incoming funding from the McConnell Scholars.
    - Students complete the sophomore thriving survey, term 2.
    - Students submit their spring transcript.
    - Dave invites students to the summer conference.
- **Summer, year 2:**
    - Students attend the summer conference and take on more of a leadership role in selecting content and leading sessions.
- **Fall term, year 3:**
    - As junior year starts, Dave pushes students not to “coast,” **encouraging them to take part in high-impact experiences** like study abroad or internships. Such experiences propel students forward.
    - Dave conducts campus visits.
    - Students complete the junior thriving survey, term 1. Students who transferred from community college to a four-year institution receive both the thriving survey from year 1 and 3.
    - For transferring students, Dave encourages **students to attend transfer orientations** and reminds them that they will experience similar adjustments as they felt during freshman year. While they will adjust faster than before, it is still necessary to go through that transition.
    - Dave conducts campus visits.
    - Dave sends cookies during finals.
    - Students submit fall transcripts.
- **Spring term, year 3:**
    - Dave sends a Valentine’s Day care package.
    - Dave conducts campus visits.
    - Toward the end of the semester, Dave works with students to understand their next financial aid offer, including determining the incoming funding from the McConnell Scholars.
    - Students complete the junior survey, term 2.
    - Students submit their spring transcript.
    - Dave invites students to the summer conference.

*“I loved getting the cookies in the mail. That really cheered me up, anticipating those. The heartwarming events kind of give you relief from homesickness.”*

-McConnell Scholars student survey respondent

- **Summer, year 3:**

- Students attend the summer conference.

- **Fall term, year 4:**

- Dave works with students as they prepare for post-college life. He encourages students to address this transitional state directly instead of engaging in avoidance coping mechanisms. He reminds students that **action displaces fear, encouraging them to write a plan** for their career search and life after college. He also encourages them to take part in critical rituals like the college graduation ceremony, as this can help students celebrate and process the end of a journey. Just as they did when they were leaving high school, Dave encourages students to talk to friends and family about what this transition will mean. He shares that students should allow themselves time to grieve the closing of this chapter, acknowledging that moving from undergraduate to whatever comes next can cause a crisis similar to that of midlife and that it is normal to feel such a way.
- Dave conducts campus visits.
- Dave sends cookies during finals.
- Students submit fall transcripts.
- Students complete the senior thriving survey, term 1.

- **Spring term, year 4:**

- Dave conducts campus visits.
- Dave engages graduating **seniors in an exit interview and reflective discussion**. Learning is socially constructed, not absorbed, and so this interview gives students crucial time to look back on their experience and discuss their learning and growth with a trusted mentor. The exit interview is conducted over the phone and consists of two basic questions: (1) What was your undergraduate experience like and (2) What was your experience with the McConnell Scholars program like? If students are having trouble answering these broad questions, Dave follows up, asking about high points or low points of the students' college experience, any changes they saw in themselves, and anything else that comes to mind about their undergraduate that they'd like to share. He acknowledges the power differential, sharing that, now that the money's gone, they should feel free to say whatever they want without worrying about his feelings or that of The McConnell Foundation.
- During the exit interview, Dave records their personal email, instead of their college email, so that he can stay in touch.
- For those who want them, Dave returns all of the students' thriving surveys to them upon graduation.

- **Post-graduation and beyond:**

- Students complete the **CliftonStrengths assessment** again to help them as they transition into careers.
- Dave **celebrates graduating seniors**, providing them a pin at the summer conference. There, they stand on the other side of the line in the culminating graduation ritual, looking back on the incoming students who are about to start their journey.
- Dave reminds students that **they are welcomed and encouraged to stay in touch**. He invites alumni to the summer conference, even after they have graduated, and he adds them as connections on social media. Some students stay in touch continually, while other students connect with Dave years later after they have established themselves. Dave shared that one student reached out five years later, sharing: “I didn't know how important the McConnell Scholars was to me until now.”

# FRIENDLY COLLEGES

## BACKGROUND

Friendly colleges, described on page 38, are institutions that find every opportunity to support students. Dave doesn't steer students towards or away from any particular college. However, he does point out what other students have experienced at particular institutions and brainstorms how students can be strategic in setting themselves up for success at their college of choice.

If he had to sum up the difference between a friendly institution or department and an unfriendly one, it would be something like this: the attitudinal difference between, "We're going to do our best to help you succeed," versus, "We're going to make you prove that you belong here."

Unfriendly colleges are often unforgiving, using "weeding out" practices in courses and assessments intentionally designed to fail some students. Such colleges might also have complicated bureaucratic processes for students to navigate, often without support. They might have more selective admission processes, and as such, there is a sense that if one student can't keep up in coursework, there is another student close behind to take their place. To Dave, these characteristics of unfriendly colleges work to keep power and wealth in the hands of the powerful and wealthy.

Conversely, friendly colleges are more forthcoming with support. Simpler enrollment processes, kinder faculty, and more support services communicate to students: "You can be good at something. Let's figure out what it is and capitalize on that." Friendly colleges have personnel, from the financial aid front office all the way to course instructors, who are student-ready and student-centered. To Dave, friendly colleges are more interested in helping students grow than weeding them out.

In this section, we offer Dave's framework to follow in determining friendly colleges.

## TOOLS, RESOURCES, AND MATERIALS

- List of all potential colleges a student wants to attend
- College websites



## ACTION STEPS

- **Contact information availability:**
  - **Make a list of important offices** that a student might need to contact along their college journey. This could include the financial aid office, university housing, advising departments, the student health center, or the university registrar.
  - For each college a student is considering, **find the webpages** for each of the departments you listed above as important. Make note of departments that do not have webpages at all.
  - **Consider the contact information available** for each of the departments. Give priority to webpages with contact information that list specific people, along with that person's photo, email, and phone number. When a student has a question, knowing the exact person to contact will make a sizable difference for the student. Make note of the departments that only list general contact information, such as a department-wide email address or a general phone number, as well as departments that do not include specific staff members.
  - Make note of the **college(s) that has the most specific contact information** across important departments. These colleges are likely more student-friendly.
- **A welcoming spirit:**
  - **Visit college campuses**, preferably at times when personnel might not be expecting prospective students (i.e., outside of recruitment events).
  - **Make note of their welcoming nature.** Consider if the student is greeted in the spaces they tour, if staff and faculty engage the student in conversation, and/or if the student is readily welcomed into offices and classrooms. Make note if you feel like a part of the campus, if you feel like an interloper, or if you feel unnoticed. Friendlier colleges will make you feel welcomed.
- **Consider colleges that have more open acceptance policies:**
  - **Keep an open mind about college choices.** Some colleges, especially close to home, like Chico State in northern California, give priority to people who live in their service area. Colleges like these have less stringent acceptance policies for local students, thereby making it easier to be accepted and to enroll. These schools are often seen as less desirable because of their more open enrollment practices, but such schools are often the friendlier choices.

One student, who is academically successful, started out as a STEM major at a UC school. Her grades were excellent, and yet she was unhappy with the “weed out” teaching and grading practices in her STEM classes. Despite showing a lot of evidence for scientific talent, she switched her major to sociology in order to be in a more supportive environment. She shared:

*At the beginning of this academic year, I worried about taking organic chemistry and physics to the point that it significantly harmed my mental and physical health. Instead of giving up, I redirected my energy to taking fewer courses and investigating other alternatives.*

*Once I decided to switch my major to sociology, I was nervous about dropping my STEM courses and following a new pursuit. From my first class, once I took the leap, I was energized and, for the first time in over a year, genuinely excited to go to class and learn the material taught. The change was practically night and day.*

*The difference came from the professors. I was amazed as I heard my professors talk about their interest in the material and their sincere desire for the students in the class to learn. The STEM professors seemed to go out of their way to create assignments and exams not covered in any instruction or material offered. The STEM professors let it be known that they were aware of what they were doing, and the courses were designed to fail students regardless of their capability. My sociology professors' attitude toward their students was amazing to me and an invigorating breath of fresh air. While I am still working on reducing my levels of anxiety and depression, switching my major reduced the amount of pressure I feel.*

*While I am still figuring out how to balance my school work with time for myself and breaks, I feel a change in how I think about my future at this school. Since starting here, I felt myself slipping into an emotional hole that kept getting worse. For the first time since the beginning of freshman year, I feel as if I am finally starting to pull myself out.*





# A PHENOMENON SHARED

How might we too create  
the conditions for a  
phenomenon to occur?



*The McConnell Scholars phenomenon shows no indication of slowing down, and yet this book must. In this final chapter, we provide applications for others who might engage in similar work, suggestions for the dissemination of the book, opportunities for future studies, and our concluding thoughts.*

## **Applications**

A key tenet in phenomenology is that the phenomenon is situated in place, time, and context. Because it is occurring at a unique point in time, in a particular place, and under specific conditions, it is difficult to apply or replicate elsewhere. As such, implications for our study are limited by the knowledge that this phenomenon is special to its place and players — it is specific to the unique five-county region, to Dave, to the community members, and, of course, to the region's students.

That said, as a group of writers and researchers deeply rooted in place, we know phenomena are happening everywhere. Every community has something unique underway that warrants study and celebration. One might consider how their own community, program, or context can become even more uniquely itself. How might we too create the conditions for a phenomenon to occur?

We believe there are elements of the phenomenon that can help others reach this lofty aspiration. Such applications include: (a) using elements of this book to inform policies and practices at other philanthropies doing scholarship work and higher education institutions, including approaches to case management, summer melt, and financial aid; (b) seeking contextual solutions to complex problems; and (c) reclaiming the meaning and measure of merit within communities' unique contexts.

### *Application #1) Informing Policies at Foundations and Higher Education Institutions*

#### **Case Management Approaches**

One of the defining factors impacting the program's success is the tailored non-financial support provided to students. Students spoke positively about the interventions they received at key junctures in their academic journey, specifically when non-academic barriers threatened to derail them. Dave takes a case management approach (Summers, 2012), providing students a continuum of care and assistance, from minimum to extensive, allowing more intensive support when needed. Dave also helps students identify campus advocates who will aid in their success. In essence, he has created a holistic model of support for each student that follows a student success team model (Lyon, 2022).

Dave's tools and strategies, including his case management approach and student success team model, are important takeaways for other foundations that are awarding scholarships. As The McConnell Foundation learned, providing financial assistance alone likely will not change outcomes for its awardees. The real change happens when financial assistance is paired with a suite of non-financial services. Other foundations should consider what non-financial support is needed in their context and how they could be uniquely positioned to offer it.

The case management approach and student success team model could also be used by higher education institutions that are seeking to invest in expanded support systems for students. This is especially true for the many higher education institutions that have moved towards some model of student outcomes-based funding. Taking a case management approach, such as that used by Dave, might actually be cost effective based on improved results for students.

#### **Summer Melt and Financial Aid**

Shown in summer melt research (Daugherty, 2012), the time between high school graduation and starting college in the fall can be daunting for students. They are not connected to their high school anymore, and they have yet to meet their college advisors. As such, students experience a gap in support, making it easier for school-related issues that arise during that first summer to derail them from stepping on campus come August.

The McConnell Scholars program fills this support gap, providing an exemplary model of what it takes to freeze summer melt. Meeting with graduating high school seniors right away to discuss their financial aid package, warning students about the scary unpaid fees letter they'll receive from their institutions, assembling students for a summer conference where students build their networks and sense of self, and preparing students to enter a transitional state are all critical actions Dave and The McConnell Foundation take to make sure students who intend to go to college step onto campus come fall.

Other philanthropies doing scholarship work would do well to understand what it takes to freeze summer melt and the significant role they could take up in such efforts. When awarding a scholarship, it's not just about giving money and saying "good luck." Hope is not a strategy. Foundations must be active in their role to make sure students who receive their funds make it through that first summer.

To further mitigate summer melt, colleges can be more mindful of their financial aid notices. Higher education institutions that require payment for dormitories and other fees before financial aid is distributed potentially cause barriers for lower income, first-generation students. Even new student orientations and welcome days that are designed with the best intentions are often difficult for students to access before their funding is available, which could signal to incoming students that college is beyond their reach. Improving systems like this would go a long way in freezing summer melt.

### *Application #2) Contextual Solutions to Complex Problems*

This study has highlighted the importance of context, including the rural region McConnell serves, the profile of selection committee members, the students themselves, and the philanthropy in which it is situated. This context is central to determining why and how the McConnell Scholars is successful, and it is by using contextual solutions that The McConnell Foundation is able to help solve complex problems.

Embracing context, instead of controlling for it, is a key takeaway for other philanthropies and communities. CivicLab, a national leader on systems change and collaboration, offers guiding principles for how regions can work together, using their unique context, to improve the place they call home:

- Broad social change is a **systems thing, not a single thing**. Success lies in a combination of relationships and interactions among multiple people and organizations. In the case of the McConnell Scholars, Dave considers the broader higher education system and the students' unique context and then builds relational, financial, and non-financial support around it.
- Systems change starts when you can **solve for one and then extend to many**. In this case, Dave has learned valuable lessons by treating each student as unique. He provides support tailored specifically for one student and, in doing so, learns approaches and lessons that he can extend to others. What he has learned from each interaction and relationship helps him understand how to serve more students.
- **The people closest to the issue should be the ones to solve** that issue. This principle is seen through the selection committees. Made up of community members, the selection committees know their communities and students. They make the selections, and they champion those choices.

- Finally, we know that for **a human system to thrive, it must be led**. CivicLab notes that there are two distinct and important types of leadership required: organizational leadership and collective leadership. When it comes to effective organizational leadership, The McConnell Foundation, and its relentless commitment to enhance community vitality, is key to the success of this program. This leadership plays out in multiple ways, including a constant willingness to grow, learn, and change in response to the feedback of the partners, families, staff, and, especially, the students connected to the program. Collective leadership is built and sustained through the democratized process of scholar selection, ensuring that improving the human system is everyone's responsibility, not just a single philanthropy.

By using these principles, other foundations, programs, communities, and organizations can design systems that work within their unique context instead of controlling for it.

### *Application #3) Redefining Merit*

The way in which the McConnell Scholars has reimagined merit is a key takeaway that other communities could consider (read more on p. 47). Outdated measures of merit, like standardized test scores, grade point average, class rank, or advanced coursework, have a very narrow view of worthiness and are often, and sometimes only, indicators of wealth or privilege.

Within local contexts, communities and decision makers can co-construct what merit uniquely looks like for them. In McConnell's five-county region, Dave and the selection committees seek to use the scholarship to overcome local challenges — in this case, contending with poverty, rural "brain drain" (Carr & Kefalas, 2010), and under-education in an education desert. In such a context, awarding "merit" means awarding students who demonstrate the capacity to succeed in college, who have the propensity to think about someone other than themselves, and who are committed to improving their communities after graduation.

To do something different, we must think differently. In each local context, the community improvement sought after might not be found in the student with the shiniest track record. Whether it's merit or another term, local decision makers would do well to understand local context, decipher its unique assets and needs, and calibrate the meaning of "merit" within that context.

## Dissemination

Our research team hopes to disseminate this book widely to see if what has been uncovered might be helpful to others. We believe this work would be beneficial to colleges, student support programs, foundations, high school partners, and other entities seeking to expand access and opportunity in higher education. Professional associations, like the National Scholarship Providers Association and the National Resource Center on the First Year Experience and Students in Transition, might also find this work insightful. We hope that this book invites feedback and examples from other champions doing this work so that together we can continue to make a difference for the students and communities that we collectively serve. Last, we hope this book can assist future stewards of the McConnell Scholars program, serving as both a historical account of the McConnell Scholars for their edification as well as a playbook to use as they carry on its legacy.

## Future Research

While our research team has explored how and why the McConnell Scholars “works,” including surfacing themes, strategies, and tools within the program, some areas of further research remain.

### *Measuring Social ROI*

Social return on investment (ROI) is a key tenet of the McConnell Scholars program. While the selection committees choose students based on their perceptions of potential social ROI, the actual measurement of social ROI as an outcome remains unexplored. Future research should focus on social ROI not just as input for awarding the scholarship but as an outcome of participation. Such efforts would include determining measurements of social ROI, like recipients’ place of residence, occupations, and community involvement and service after college completion, and collecting longitudinal data on these measurements. Defining and measuring social ROI as an output and outcome would be a challenging but worthwhile endeavor in measuring the social impact of the McConnell Scholars.

### *Further Inquiry into Merit*

Traditional definitions of student merit that inappropriately rely on incomplete metrics like grade point average and test scores are grossly insufficient in measuring merit at a local level. Through this study, we have found that merit is dependent on local need and talent and is defined based on local consensus and context. The McConnell Scholars is radically redefining merit in a way that honors local context and community-level decision-making. As such, we posit that merit itself is a phenomenon.

We call on researchers to revisit outdated and out-of-context definitions of merit and research how measures of merit are by necessity context laden. Such research could help other communities, philanthropy, and higher education institutions reclaim the meaning and measure of merit within their unique context, helping to answer the question: How might we too create the conditions for a phenomenon to occur?

## Conclusion

At the foot of Mount Shasta — well beyond the glistening bay, state capital, and olive fields — there is occurring a phenomenon. There is a place where students are not fit into the traditional mold of merit and instead are supported because of who they are in relation to their home. There is a place where community leaders distribute often safely guarded power and financial resources to make community vitality everyone’s responsibility. There is a place that sends a clear message to every student, irrespective of background, that they deserve college, that they are college material, and that their identity cannot be measured by a score.

In this place are people who have cultivated such a vision into meaningful action. They’ve created tools and processes to make a poorly designed higher education system work for those they serve. They’ve worked closely together to build lasting relationships and then freely gave those relationships to their students. They’ve shifted their focus of other-centeredness by starting with themselves, before asking students to do the same.

And among these people, a program was made. It’s a program that solidified the community’s definition of merit, that sustained a focus on social ROI, that allowed many more students and community members to have agency over their collective future. It’s a program that provides a structure for continuous improvement, for growth, and for study.

It’s not down on any map; the truest places never are.<sup>4</sup> Instead, the phenomenon is written on the face of Dave Tanner, rich with 18 years of care, attention, and worry over each and every scholar. The phenomenon is seen by community members, going about their daily lives, interacting with the many scholars who have graduated as doctors, engineers, teachers, and parents and chosen to make this community their home. The phenomenon is felt by the collective hope of a rural community that knows real transformation comes only when they work together in a way that is unique to them.

Through its commitment to disrupting the status quo, the McConnell Scholars program lives out the mission it shares with the Foundation: to help build better communities through philanthropy — by empowering students.

<sup>4</sup> Melville, H. (2015). *Moby Dick*. Createspace.





# ABOUT THE AUTHORS

It is our history  
that informs our  
insight.

In this book, we honor the context, nuance, and rich history that makes the McConnell Scholars what it is. In turn, we honor the context, nuance, and rich history of our research team. While we the authors bear college degrees and awards, leadership experiences and fancy titles, it is not these simple accolades that lend to our credibility. It is our history that informs our insight, and it is our unique voice that brings McConnell’s story to you. And so, in lieu of a formal bio section, we share our history and voice with you.

## Colleen Pawlicki



I was Colleen Rai, familiarly called Countdown.

I was from the heartland of America, in a 1,000-person town whose mayor’s office bore my grandpa’s name.

I was from the Route 66 station cash register, lightning bugs for batting practice, and 9 Accelerated Reader books a quarter.

I was Colleen Burger, affectionately called Ms. B.

I was from ELA Room 403, surrounded by Back of the Yard’s — and Chicago’s — finest.

I was from autumns of homecoming, summers on the Pritzker lawn, and a winter engagement ring in Garfield Park.

I am Colleen Pawlicki, reluctantly called Dr. P.

I am from Troy Street, a place where work can be gentle and feedback can be kind.

I am from vintage dresses, chaos gardening, and a lifetime pursuit to be restless, bold, and optimistic.

A qualitative researcher, an editor, a partner to Dakota, and a quilt of all my lives past lived, I am Colleen.

## Kate Mahar



I was named Kathleen, but quickly called “Kate,” because “Kathleens” don’t get that dirty, catch frogs, and yell at cats for scaring mice.

I was the third child of three children in three years, from Irish Catholic parents who were quick to love and laugh.

I was from community — at our kitchen table, in the neighborhood, and in our basement which became a school.

I was Dr. Kate, challenging systems without knowing it.

I was intense while trying to appear laid back, driven, and committed to making the world a better place.

I was sure that I was never doing enough.

I am Kate.

I am loved by amazing friends and families with incredibly different backgrounds, languages, and perspectives.

I am striving to be more like the little girl in the mud.

I am a leader, who is proud of what has been done, and who can’t wait to do more.

A continuous work in progress, an advocate, my parent’s child, and a quilt of all my lives past lived, I am Kate.



## Dave Tanner



I was David Benjamin Tanner, Benjamin after my mother’s father Ben Ela, affectionately dubbed by that clan as Bongo, Bongo Benj, and Durango Dave.

I was from a Southern California town in a time where an 8-year-old boy could ride his Schwinn Sting-Ray for miles as long as he was home for dinner.

I was from Mike, Pat, and Danny, who showed me how to be an uncle, from Grandma Jeanette who came out to meet us on the porch, beaming, as we pulled into their driveway, and from an army of women teachers who could have been CEOs in a different era.

I was Dave Tanner, called “Hey, it’s my counselor!” even though technically I was a technician.

I was from Shasta College EOPS and a learning curve so steep my eye twitched for months.

I was from a tiny freezing office where I learned my own value, that differences that seem major don’t make us all that different, and that people usually like you if you like them first.

I am Dave, respectfully called Mr. Tanner until the Scholars relax.

I am from a new 30,000 square-mile home where my transplant roots grow deep.

I am from everyone who taught me along the way how to build a self of my own choosing.

A Senior Program Officer, a scholarship guy, a mentor, a Dad and Hubby, and a quilt of all my lives past lived, I am Dave.

## Heather Wylie



I was Heather, the quiet one, “Miss Peach” when mom needed to hug on me.

I was from the radical feminism, fierce libertarianism, and community-always corner of far northern California.

I was from the red clay, the heat, the ripe summer blackberries of Jones Valley.

I was Heather, the first generation student with college loans in a dorm filled with privilege and connections.

I was from AmeriCorps team building weekends, humble meals with families that shared all they had, GRE prep books stacked on cinder block bookshelves in my trailer.

I was from mentors, experiences, failures, and the shoulders of lifelong friends.

I am the sociologist, the fierce one. I am Professor Wylie.

I am from advocacy, humility, curiosity, and community.

I am from the passion of others for change. I am grounded in a place that allows me to roam free, to explore, and learn more.

The sociologist, the friend, the champion, the mother, and a quilt of all my lives past lived, I am Heather.



## Sara Phillips



I was Sara Michelle Phillips, SARA MICHELLE, especially when I was in trouble.  
I was from almost Nevada, almost Oregon, a little town with more sagebrush than people.  
I was from the hooky-bobbin', no stop-light-havin', huntin', fishin', and cattle brandin' wonderland that is Modoc County.

I was still Sara Michelle, but in different kinds of trouble.  
I was from Sonoma County, surrounded by Lagunitas.  
I was from lazy, foggy mornings, farmers' markets, and a parking pass at SFO.

I am still Sara Michelle, especially when I'm in trouble with my husband.  
I am from data-informed decisions, curiosity, and passion for vibrant rural communities.  
I am from honoring and exploring wilderness, a cuisine connoisseur, and all my kids must be on a leash.

A quantitative researcher, a collaborator, a partner to AK, and a quilt of all my lives past lived, I am Sara.



# APPENDICES

# APPENDIX A:

# METHODOLOGY

## **Qualitative Data: Interviews with Dave Tanner**

The McConnell Foundation program officer Dave Tanner has been leading the McConnell Scholars for 18 years and was responsible for shaping it into the program we know today. As such, it was clear that we needed to focus a substantial portion of our interviews on capturing his perspective. We anticipated he would be able to share the origins of the McConnell Scholars, insights on how he came to shape it, including the application and selection process, and background on the elements that make the program successful, including his interactions with students and his own thought processes.

### *Interviews*

Considering his long tenure in the position and wealth of knowledge, Dave met with researcher Colleen Pawlicki for seven (7), 90-minute interviews, held virtually over Zoom.

Colleen broke the seven interviews down to topic areas: (1) the beginning of the McConnell Scholars; (2) the student application and selection process; (3) shifts in mindset; (4) the path to creating the McConnell Scholars as we know it; (5) students; (6) the big picture; and (7) The McConnell Foundation's role. Before each interview, Colleen created interview questions related to that theme and shared them ahead of time with Dave.

The interviews were semi-structured, using the interview questions as a guide for conversation while allowing space for new topics or lines of thinking to emerge. The interviews were recorded on Zoom and then transcribed using a manual transcription service, Scribie. After the transcriptions were completed, Colleen read the transcripts while listening to the recording to verify their accuracy, fixing errors or omissions in the transcript as needed.

### *Artifacts*

As interviews emerged, Dave mentioned resources, emails, and other artifacts that he has authored, such as reminders to application reviewers and documents sent to the selection committees. Colleen and Dave also shared emails after interviews that expanded on ideas discussed during the interview process. Considering all of these were authored by Dave and, thus, shared his perspective, Colleen collected them as artifacts to include in this data set.

### *Thematic Coding*

Colleen then began a process of reading and rereading the dataset, including interview transcripts and the artifacts, to gain familiarity. She took a thematic analysis approach, looking for themes within her notes and the datasets. Using MAXQDA, a software that offers tools for the organization and analysis of qualitative data, she applied high level codes during the process, highlighting and labeling sections using descriptive codes. It's important to note that MAXQDA allows for both the transcripts and video files to be uploaded, so as Colleen coded, she could easily see the written transcript while watching the video, helping her stay close to the data. It's also important to note that MAXQDA is a tool, not AI, allowing the coding process to be done manually.



As codes emerged, the primary goal was to stay close to the data at hand, working to minimize research bias. This works towards phenomenological research, which “strive[s] to be as faithful as possible to the lived experiences, especially as might be described by the participants’ own words” (Yin, 2016).

After coding, she reviewed the lists of codes, looking for redundancy, duplication, and connections, culminating in a final code book. The entire research team then met for a two-day retreat to review the coded data and discuss, affirm, or challenge the findings. This team included Dave Tanner, who was able to member check (Yin, 2016) the data at this time.

From here, she generated six themes from the codes that connect to our overall research focus. These six themes are presented in the chapter, *Equity, Deep Listening, and Merit Reimagined: Insights from Dave Tanner* (p. 21).

While we present this process here in a linear fashion, it’s important to note that this data analysis process was iterative, cyclically gathering, coding, and categorizing data.

## **Quantitative Data: Student Surveys**

The objective of the student survey process was to gather recipients’ demographic information, document their lived experiences, and determine potential impacts of the program on participating students and potential impacts on secondary stakeholders, family members, and the greater community.

The survey instrument consisted of 19 questions and included multiple-choice, Likert scale, and open-ended questions. Personalized emails with information about this study and a link to the survey collector were sent to 515 current and former scholarship recipients, and the link was made available to 202 followers of the McConnell Scholars Instagram account. Follow-up reminders were sent via social media one week before the collector was closed. The survey was designed and distributed via Google Forms. Responses were collected over the four-week period between July 2 and July 26, 2024.

The results of the voluntary student survey were overwhelmingly positive. Forty-nine percent of student respondents indicated they were still enrolled in a postsecondary program, and 51 percent indicated that they had graduated. Fourteen percent of respondents are currently in graduate school.

Nearly half (49 percent) of graduates are working in a field associated with their area of study. Nearly three-quarters of respondents indicated that they heard about the McConnell Scholars from a high school counselor or teacher.

Ninety-seven percent of respondents agreed or strongly agreed that participation in the McConnell Scholars program directly impacted academic performance.

Ninety-three percent indicated strong or extremely strong satisfaction with resources provided, with a desire for more peer mentorship as feedback from those not extremely satisfied.

Ninety percent of scholars expressed that the McConnell Scholars program has had a positive impact on their community.

Responses to open-ended questions reinforced scholars’ positive feedback on the program and can be found throughout this document.

## **Quantitative Data: Selection Committee Surveys**

The objective of the selection committee member survey process was to gather information about the committees' composition and to gauge members' impressions of the impact of the McConnell Scholars program on its recipients and the larger community.

The survey instrument consisted of 25 questions and included multiple-choice, Likert scale, ranking, and open-ended questions. Personalized emails with information about this study and a link to the survey collector were sent to 56 current and former selection committee members. The survey was designed and distributed via Google Forms. Responses were collected over the five-week period between January 11 and February 16, 2024.

The selection committee survey results indicate high satisfaction with the McConnell Scholars program, including the training provided by Dave Tanner. Of the 29 respondents, 18 were female, 11 were male, and 17 identified as white. Just over half (15) have participated on a selection committee five years or fewer, with six having served for 10 years or more. One respondent has served every year of the program's operation. Twelve respondents were McConnell Scholar alumni.

Selection committee respondents had all earned at least an associate degree, with 15 of 29 having earned a master's degree. All five counties in the service area were represented. Twenty-five participants indicated that they volunteer for other community projects. One hundred percent of respondents had a positive review of the program.

Like the student surveys, the open-ended questions in the survey indicated extremely positive experiences with the McConnell Scholars program, with unique insights on impact and areas for growth. Selection committee survey responses are included throughout the document.

# APPENDIX B:

# THRIVING SURVEYS

## First-Year Thriving Survey

1. Please inform us of any changes to your enrollment status, major, or contact information.
  - a. To answer this survey the easy way, you can hit “reply” to this email, scroll down to these questions, and write your answers in a different color or different font just like this, and hit “send.”
2. How confident are you in your ability to succeed academically?
3. How committed are you to stay at/graduate from your college or university?
4. Are your academic, extra-curricular, and social commitments under control? Describe your system for time management, if you have one.
5. Do you participate in any campus jobs, activities, clubs, or organizations? If so, what are they, how often do you meet, and what is your role?
6. How many hours a week do you typically study outside of class?
7. In general, how satisfied are you with the quality of your academic work and your level of effort?
8. Have you met with faculty outside of class? If so, how often and under what circumstances?
9. As a rule, are you excited about what you are learning? Please explain.
10. How strong is your social network? Do you have close friends at school?
11. Are you proud of your college, and are you happy to be there?
12. Please give us a qualitative assessment of your college experience so far. How have you changed as a result?
13. Is there anything else you’d like us to know?

## Second-Year Thriving Survey

1. Please inform us of any changes to your enrollment status, major, or contact information.
  - a. To answer this survey the easy way, you can hit “reply” to this email, scroll down to these questions, and write your answers in a different color or different font just like this, and hit “send.”
2. How certain are you about your choice of major?
3. How often have you met with your academic advisor so far this year?
4. Have you visited the career center this year?
5. Have you talked with a professor about your academic and career goals?
6. Would someone who knows you very well say you had a good chance for success in your chosen field?
7. Are you happy or unhappy when people ask you about your goals? Why?
8. Do you belong to any clubs or organizations related to your career or major goal? If so, which ones and what is your role?
9. What research have you done on possible future careers? Have you done any job-shadowing, worked with faculty on an undergraduate research project, or similar?
10. What are your top five strengths? How do you use your strengths to be successful at academics, work, self-development, or relating to others?
11. How do you feel about the future?
12. Please give us a qualitative assessment of your college experience so far. How have you changed as a result?
13. Is there anything else you’d like us to know?



### **Third-Year Thriving Survey**

1. Please inform us of any changes to your enrollment status, major, or contact information.
  - a. To answer this survey the easy way, you can hit “reply” to this email, scroll down to these questions, and write your answers in a different color or different font just like this, and hit “send.”
2. How often do you meet with faculty outside of the classroom? Under what circumstances?
3. How energized/excited are you by what you’re learning in class?
4. How often do you discuss classroom learning outside of class, or apply what you’ve learned to real-life situations?
5. Do you engage in learning related to a subject in class beyond what is required for a grade? How often?
6. Do you feel more or less emotionally committed to your major than before?
7. Do you participate in a club or association related to your major or career goal?
8. Do you have friends with the same or similar interests, values, and goals as you?
9. Will you participate in an internship, service-learning project, study abroad, undergraduate research, job shadowing, or other co-curricular activity this year?
10. Please give us a qualitative assessment of your college experience so far. How have you changed as a result?
11. Is there anything else you’d like us to know?

### **Fourth-Year Thriving Survey**

1. Please inform us of any changes to your enrollment status, major, or contact information.
  - a. To answer this survey the easy way, you can hit “reply” to this email, scroll down to these questions, and write your answers in a different color or different font just like this, and hit “send.”
2. Do you have a personal mission?
3. What’s your philosophy about failure?
4. What are you passionate about?
5. How do you make a difference now, and how do you plan to make a difference in the future?
6. Are you optimistic or fearful about the future? If “both,” how much of one, how much of the other, and why? You can address how you feel about your own internal self-confidence, how you feel about external circumstances, or any combination of the two.
7. What are you doing to get ready for post-college life? For example, how much time and effort do you put into career-search activities? Are you taking a senior seminar, capstone class, working on a senior thesis, or similar?
8. Please give us a qualitative assessment of your college experience so far. How have you changed as a result?
9. Is there anything else you’d like us to know?

## Pre-College Survey: Having a Worthwhile College Experience

### *Surviving, Thriving, and Languishing*

At college or in your university, “thriving” is going beyond the basic requirements to have a meaningful, valuable college experience. “Surviving” is doing the bare minimum to pass your classes, get your degree, and get out. “Languishing” is the process of dropping out, which always starts with feelings of “I don’t belong here.” Successful, thriving students tend to have certain attitudes and share specific behaviors that help them have a better and more meaningful undergraduate experience than the survivors and languishers. With effort and intention, we can have a positive influence on our attitudes and behaviors. Therefore, what kind of undergraduate experience we have is largely under our control.

### *Transitional Challenges*

You are in a transition right now. You are in the process of changing from a high school student into a college or university student, or from a community college student into a university student. That comes with its own challenges, tasks, and demands. How you approach these challenges (your attitudes and behaviors) will ultimately determine the quality of your undergraduate experience.

One of the biggest challenges is starting to think of ourselves as a college or university student and making that part of our identity. Wearing clothing and having bumper stickers and other items with our college’s logo can actually help us “put on” that identity and prepare us to feel like we belong at our new campus from the very first day.

Another challenge is re-defining our relationships with our friends and family. Thriving students talk about how things will change and discuss expectations such as how often you’ll call home or come back to visit. This is especially important if your family has depended on you to care for younger siblings or help run the house.

The challenges don’t stop once you’re on campus. The main tasks of the first year are: learning to navigate the new system, forming a new social network, and adapting to increased academic rigor. Thriving students are proactive and strategic about these tasks. They attend summer orientations to learn about their campus resources and how to get their needs met. If at all possible, they live in on-campus housing where they can meet new people, make friends, and be close to advising and help. To adapt to more difficult classes, they create systems for managing their time and keeping track of assignments and commitments. They commit to studying more than they did before.

Answering the following questions will help give you an idea of your state of thriving, and imply suggestions for improving your transition to your university. We’ll talk about your answers during our orientation meeting.

### *Survey*

1. Will you live in campus housing your first year? If not, where?
2. Will you attend a pre-college orientation?
  - a. Will it be a summer bridge or extended orientation program?
3. Do you already have an academic advising appointment scheduled?
4. Will you participate in any of the following: a freshman seminar; honors program; learning community; college success course; EOP or EOPS; TRiO program; First-Year Experience program or similar? If so, what?
5. Do you know where to go on campus to get help if you feel sick, feel homesick, have academic difficulty, roommate problems, or financial difficulty?
6. Have you spoken with your family and friends about how your relationships might change and expectations for communicating, visits home, and money?
7. Do you have a specific, detailed plan for managing your time? Please describe:
8. Do you have any clothing or other items with your University’s name and logo?
9. Are you planning to join any clubs, teams, groups, or organizations? What are they?

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