Part I: 2010-2011 Outcomes Unit/School Report

If you need a copy of your 2009-2010 Diversity Plan Report, please contact Dr. Cookie Newsom at newsom@email.unc.edu. For a list of the University’s adopted Diversity Goals please visit: http://www.unc.edu/diversity/diversityplan/goals.html

a. Which of the 5 University Diversity Goals (UDG) did your school/unit identify as a priority for the past twelve months (2010-2011)? Please check all that apply.

✓ Goal 1 (Clearly define and publicize the University’s commitment to diversity.)

✓ Goal 2 (Achieve the critical masses of underrepresented populations necessary to ensure the educational benefits of diversity in faculty, staff and executive, administrative, and managerial positions.)

Goal 3 (Make high quality diversity education, orientation, and training available to all members of the university community.)

✓ Goal 4 (Create and sustain a climate in which respectful discussions of diversity are encouraged and take leadership in creating opportunities for interaction and cross group learning)

✓ Goal 5 (Support further research to advance the University’s commitment to diversity and to assess the ways in which diversity advances the University’s mission)

b. What school/unit-level goal(s) (UG) did you establish for 2010-2011 to address the above goals selected as a priority?

1. Continue to spread messages about the availability of need-based aid (UDG 1 & 2)
2. Continue to recruit and retain a diverse staff (UDG 1, 2 & 4)
3. Continue to encourage participation in diversity related training and initiatives (UDG 4)
4. Continue to develop and evaluate our financial aid programs and services (UDG 2, 4 & 5)

c. What actions did your school/unit undertake to achieve the above identified goal(s)?

UG1 (UDG 1&2)

i. Traveled off-campus to speak with local groups and organizations about need-based aid and the Carolina Covenant. This included presentations at churches, youth organizations, high schools, and the Durham county public library.

ii. Continued to work with the Office of Undergraduate Admissions and the Office of Diversity and Multicultural Affairs, giving presentations on financial aid to
prospective students as part of the departments' on- and off-campus recruitment programs. Some of the programs and events we participated in during the past year were Project Uplift, Decision Days, High School Honors Days, North Carolina Renaissance, Native American Scholar Day, Hispanic Scholar Day, Explore Carolina, Carolina 101, Upward Bound and Admitted Student Receptions across the state. At these events, we spoke to students and families about the importance of a college education, about our University’s commitment to access and affordability, and how our office can help make their educational dreams a reality.

iii. Continued to foster our relationship with Peck Elementary School. A staff member continues to visit the school yearly, and one of the Guilford county NCAC advisors was assigned to the school to serve as an additional resource for their students.

iv. Continued to develop training opportunities for NCAC. The National College Advising Corps (NCAC) seeks to bring talented, enthusiastic advisors to every community that wants them and to every student who needs them.

v. Continued to promote the C-Step program and provide resources for new and current C-Step students. The Office of Scholarships and Student Aid partners with C-Step to recruit and successfully transfer to Chapel Hill students who attend Wake Technical Community College, Alamance Community College, or Durham Technical Community College and who are at, or below, 300% of the federal poverty guidelines. This year, the financial aid office is conducting onsite visits and providing financial aid workshops specifically designed to help C-Step students make the transition from financing a community college education to planning and budgeting for a four-year, public university education. A previous Study Abroad Scholar also assists with the presentations to show students that there are resources, including scholarships, available to help make study abroad possible.

vi. Formed a staff committee to review our website and identify where updates, corrections, and improvements are needed. One of the committee’s recommendations to the Director is the inclusion of a link to the University’s diversity goals.

UG2 (UDG 1, 2, & 4)

i. Brought staff together on a regular basis (at least monthly) for activities which foster a sense of community and camaraderie.

ii. Staff members formed an internal Employee Forum to discuss concerns among their fellow co-workers. Members meet bi-monthly, and are in the process of developing a survey tool for evaluating office climate.

UG3 (UDG 4)

i. As much as possible given current budget constraints, invited staff members to attend workshops and conferences offered locally, regionally, and nationally.

ii. Staff members were also invited to share their involvement in diversity-related initiatives, as well as participate in the preparation of the diversity plan report.
iii. Members of the Client Services Unit invited a Human Resources trainer to the office to provide training on customer service for diverse audiences and stress management. The group also participated in a Meyer's Briggs analysis and workshop. Counselors also attended Diversity 101 and various HR workshops, on an individual basis.

iv. Two client services staff attended "Black, Brown, and College Bound: Taking it to the Next Level with African American and Latino Males", which is a program designed to discuss the challenges facing this population of students. The program featured workshops and speakers such as White House Deputy Director Jose Antonio Rico, Tim King, J.D., Robert Jackson, Dr. Luis Ponjuan, Dr. Juan E. Gilbert, Dr. Calvin O. Butts, III, Victor Antonio Gonzalez, and David Price. The counselors plan to present at this conference in 2012, highlighting our Carolina Covenant Program.

v. The Senior Assistant Director for Client Services was chosen to participate on the Provost's Council for Diversity Pipeline programs. The council has been charged with compiling data on the University's diversity programs. This data will be reported to the Provost.

vi. The Manager for External Scholarships and Grants was invited again this year to sit on the Award Selection Committee of the Scholars Latino Initiative (SLI) and on the Dell Scholars Selection Panel of the Michael and Susan Dell Foundation (MSDF). SLI works to promote equity and access in North Carolina's educational system for Latino students, and the MSDF provides need-based scholarships for low-income, predominantly minority, urban high school students.

vii. This staff member also helped coordinate aid counseling and support for the 50+ Gates Millennium Scholars in attendance at the University. The Gates Millennium Scholars Program (GMSP) was established with a grant from the Bill and Melinda Gates Foundation to reduce financial barriers for African American, American Indian/Alaska Native, Asian Pacific Islander American and Hispanic American students with high academic and leadership promise. She was recently asked to serve as the official Staff Advisor for a newly-formed GMSP student organization on campus.

viii. The External Scholarships and Grants Manager spoke at the 2010 annual conference of the National Scholarship Providers Association about The University of North Carolina at Chapel Hill's efforts to: a) assist students in maximizing their financial aid awards, b) minimize student loan indebtedness, c) improve communication among the many diverse scholarship providers working with students from underrepresented populations, and d) increase college access, persistence and graduation rates.

ix. Work-Study students from the External Scholarships and Grants Unit assisted with the Diversity Report by helping make the pie graphs

**UG4 (UDG 2, 4 & 5)**

i. Compiled data on aid recipient characteristics that include diversity indicators.
ii. Continued to enhance services and support for Carolina Covenant and C-Step students.

iii. Completed an assessment (in conjunction with the Office of Institutional Research and Assessment) of the 2005 cohort of Carolina Covenant Scholars’ retention and graduation rates.

iv. Worked closely with Academic Support Services to ensure scholarship funds targeted for students with disabilities were used effectively.

v. Continued to assess and develop our merit scholarship programs, which we anticipate will continue to play a critical role in the University’s ability to recruit and retain talented students from diverse backgrounds. This included providing quality programming to UNC scholars with ample opportunities to enrich their academic, leadership, and civic development.

vi. The Scholarship Programs Coordinator implemented an early-intervention initiative to identify and work closely with scholars struggling to maintain scholarship GPA requirements.

vii. Coordinated with Undergraduate Admissions and various faculty members to choose merit scholarship recipients, including new James M. Johnston scholars. The Johnston Scholarship Program is for high-achieving students from low socio-economic backgrounds who would not be able to attend UNC without financial assistance.

viii. Worked closely with the Office of Diversity and Multicultural Affairs to select Pogue scholars. The Pogue Scholarship Program places special emphasis on minority applicants who, in addition to solid academic performance and strong leadership potential, demonstrate an abiding commitment to their local communities and embrace diversity as a value.

d. **What metrics did you establish/use to assess your school/unit’s outcome of your actions?**

**UG1 (UDG 1 & 2)**

We assessed the outcome of unit goal 1 by ensuring all of the planned presentations were completed successfully and all committee involvement was productive.

**UG2 (UDG 1, 2, & 4)**

We assessed the outcome of unit goal 2 by reviewing the demographic diversity among current staff members with respect to age, gender, and race/ethnicity. Our source data was generated as a report from the Human Resources Data Warehouse system/HRIS, and we used it to evaluate our department as a whole as well as look more specifically at those employees who occupy senior-level positions (i.e., Assistant Director or above). *(See Human Resources Detail Report – Diversity Among OSSA Staff at end of document)*

**UG3 (UDG 4)**

All staff members were invited to attend workshops and conferences offered locally, regionally, and nationally by their direct supervisor, however limited resources impacted our participation. Priority consideration was given to staff members who would be playing an active role (i.e., presenting) in the workshop or conference.
Staff and work-study students were asked to share their involvement in diversity-related initiatives for the Office as well as participate in the preparation of the diversity plan report. We assessed the outcome based on staff and student feedback and participation.

We continue to assess the quality of diversity programming for the Distinguished Scholars Program by soliciting feedback from participants.

**UG4 (UDG 2, 4 & 5)**

The OSSA annually reports comprehensive student aid distribution data to General Administration in the form of the Unit Record Report. The Office of Scholarships and Student Aid, working with Institutional Research and with the oversight of the faculty Committee on Scholarships, Awards and Student Aid, produced several other reports from the Unit Record data, so that we can better understand the effect of student aid policies on various cohorts of students. This information enables us to further (1) assist in the recruitment, retention, and graduation of a diverse student body; (2) continually improve service to students; and (3) support long-range enrollment and planning goals in support of the instructional mission of the University.

We collected demographic data on our 2010-11 Carolina Covenant scholars to assess scholar diversity and are in the process of compiling data for all in-house programs, including our Johnston and merit scholarship programs.

The Carolina Covenant assessment compared scholars’ academic performance with that of similarly situated pre-Covenant students, part of an established 2003 control group.

We analyzed spending of Corbitt scholarship funds with the Academic Success office to ensure the funds were being spent to support students who later utilized the University’s support services.

We encouraged and received feedback from other units—both on- and off-campus—with whom we have interacted. All feedback indicated our staff provided consistently sound service to the diverse populations we serve.

We continue to review the statistics related to on-time application submissions.

An online survey allows scholars to evaluate their experiences as members of the Distinguished Scholars Program.

**e. What were your results? Please explain in detail.**

**UG1 (UDG 1 & 2)**

The Carolina Covenant program has grown to represent one fourth of all students funded with need-based aid. Students are evaluated for the Carolina Covenant only following their admissions to the University. This increase in Carolina Covenant eligible students appears to indicate an increase in students from households with income at 200% of the Federal poverty level who consider an education at The University of North Carolina at Chapel Hill an affordable option. This speaks to the efforts by our office and others across campus to encourage students from diverse backgrounds to attend college.

We continue to work with an increasing number of University and community-based groups on the topic of need-based financial aid. Event participants are encouraged to contact us personally regarding their or their child’s financial aid applications. As our efforts to educate the public about the aid application process increase, we have seen an
increase in the public’s awareness and understanding of the process, as evidenced by the types of questions we receive.

We have continued to advertise the March 1 financial aid priority deadline on Facebook and in the Daily Tarheel, in addition to the emails we send to all students. There have been steady increases in on-time applicants, and we feel these increases can be attributed in all or part to the use of multiple technologies.

The National College Adviser Corps recently received a $1.5 million grant that will allow the program to expand by hiring an additional 50 advisers and carry the program to New York and Connecticut. The National College Advising Corps is an innovative program that works to increase the number of low-income, first-generation-college, underrepresented students who enter and complete higher education. The Advising Corps serves communities across the country to provide the guidance and encouragement that many students need to navigate the complex web of college admissions and secure financial aid. In addition, advisers work to raise the college-going rates within those schools through creative and innovative solutions. Our office has the privilege of having provided training to advisers since the program’s onset. We also have had two student-workers accept adviser positions.

UG2 (UDG 1, 2, & 4)
Due to budget constraints we have not experienced increases in staffing levels. We have lost staff to competing institutions and are currently in the process of reviewing applicants to replace them. Our current office diversity can be seen in the report provided by Human Resources. (See Human Resources Detail Report-OSSA Staff Profile)

UG3 (UDG 1, 2, 3, & 4)
On a limited basis, staff members have been able to attend conferences locally, regionally, and nationally, which has allowed staff to stay abreast of the key issues currently facing the financial aid profession. The information they bring back to the department plays an important role in guiding our policies and procedures and will continue to allow us to better serve our diverse populations.

UG4 (UDG 2, 4 & 5)
By the close of this fiscal year, we expect to disburse approximately $265 million in aid to nearly 17,300 undergraduate, graduate and professional students. These funds ensure that qualified and economically diverse students have the opportunity to attend the University.

Our packaging policies continue to show a long history of providing aid to cover 100% of a family’s documented financial need. Approximately 65% of the family’s documented need is covered by grants and/or scholarships and 35% is covered with work-study and/or loans. This commitment has further supports Carolina’s goals recruiting and retaining a diverse student body.

The results of the Carolina Covenant assessment were extraordinary. (See the Covenant Performance Report Card at end of document or view the Flash version online at http://www.unc.edu/carolinacovenant/files/2010/reportcard.swf)

Carolina Covenant students performed 9.6 percentage points better in four-year graduation rates (66.3 percent) than the comparison group. Graduation rates for all students gained 2.5 percentage points and, overall, were slightly higher. The retention rate for 2005 Covenant Scholars in their third year was 4 percentage points higher (90.2
percent) than for the 2003 group and very close to the mark for all students (93.5 percent).

Most noteworthy of all: the graduation rate among male Covenant Scholars increased by 27 percent over the 2003 male comparison group, significantly narrowing the achievement gap between Covenant men and women, and between Covenant men and all male students at Carolina. We are now engaging higher education research faculty at the University of Michigan to further study and better understand the referent for such extraordinary improvement.

Part II: 2011-2012 Plan Unit/School Report

Please respond to the following questions in reference to your unit/school’s diversity priorities for the next twelve months (2011-2012).

a. Which of the 5 University Diversity Goals will be a priority for your school/unit to address in 2011-2012? Please check all that apply.

✓ Goal 1
✓ Goal 2
✓ Goal 3
✓ Goal 4
✓ Goal 5

b. What goals will your school/unit establish to support the University Diversity Goal(s) (UDG) selected as a priority?

1. Continue to spread messages about the availability of need-based aid (UDG 1 & 2)
2. Continue to (recruit and) retain a diverse staff (UDG 1, 2, & 4)
3. Continue to encourage diversity related training and initiatives (UDG 4)
4. Continue to assess and develop our financial aid programs and services (UDG 2, 4, & 5)

c. What actions will your school/unit undertake to achieve this goal(s)

i. Remain active in committees and continue to give presentations on need-based financial aid.

ii. Continue to update the office website, including a link to the Diversity goals.

iii. Follow-up with employee committee and deploy office survey.

iv. Work with Diversity and Multicultural Affairs and Institutional Research to review staff level data from the University’s diversity survey.

v. Continue to review and study financial aid trends and programs.

d. How will your school/unit’s results be assessed?

i. The successful participation in committees and involvement in presentations on the topic of need-based financial aid.

ii. The inclusion of a link to the University’s Diversity goals.

iii. The office survey will be deployed.
iv. The office will acquire data from Institutional Research from the University’s diversity survey.

v. The continuation of internal and external aid program and services reviews.

**Part III: Impact of Budget Cuts on Diversity in Staff and/or Programs**

**e.** *If you have eliminated filled positions in your unit due to budget cuts within the past year, please describe the impact on the racial, ethnic and gender diversity of your faculty and staff in your unit.*

Fortunately, we have not had to eliminate filled positions.

**f.** *Has your unit reduced, or eliminated funding support for diversity programs/initiatives in the past year? If so, please provide narrative to describe the likely impact on the program/initiative and/or your unit’s overall diversity goals.*

Due to budget constraints and the concurrent demands on staff to contribute to the successful configuration, testing, training, and implementation of PeopleSoft, we continue to be unable to devote the time and funding necessary to make the desired revisions to our internet homepage. Instead, an internal web committee was formed to propose updates to our existing site. The completion of these updates is part of an existing staff member’s duties. One of our unit goals for 2011 is to include a link to the Diversity goals.

Although we did not suffer a loss of diversity programs and initiatives, we have experienced setbacks with regard to compiling and assessing data on diversity indicators. Staff members have also had less time available for internal committee meetings and discussion.

We have had limited conference attendance.

**Authored by Jackie Copeland (Senior Assistant Director) and Lauren Hirsh (External Scholarships and Grants Manager); Submitted on behalf of Shirley Ort (Associate Provost and Director) of the Office of Scholarships and Student Aid.**

*If you have additional questions, please contact. Dr. Cookie Newsom at (919) 962-6962 or newsom@email.unc.edu.*
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Covenant Scholars Outpace ‘Pre-Covenant’ Benchmarks

Entering its 7th year, the Carolina Covenant is doing more than removing socio-economic barriers according to a study from the Office of Institutional Research and Assessment. The study’s findings prove the Covenant program is fulfilling the mission of the program.

The Covenant program funds high-ability students from low-income families who earn admission to Carolina. With grants, scholarships, and work-study jobs (versus loans), the Scholars can graduate debt-free.

An assigned faculty/staff mentor, and array of personal and academic support services support their transition and progress.
**PREPAREDNESS**

**EXCELLENT STUDENTS HIGHLY MOTIVATED**

**COLLEGE GRADES**
- The average GPA for Covenant Scholars at graduation is 3.11.
- The average GPA for all students at graduation is 3.20.

**RETENTION RATES**
- The retention rate for Covenant Scholars in fall year 3 (96.2%) is close to that of all students (96.8%). Compared to 2002 pre-Covenant benchmarks, this is an improvement of 4 percentage points.
- The retention rate for all students increased 2.8% during the same time period.

**PARTICIPATION**
- Leaders in campus organizations and residential life
- Actively involved in Student Government and Student Congress
- Members of the Chalmers' Dustforce
- Writers and staff for the Daily Tar Heel (DTH)
- Created "The Covenant Gives Back," a service organization.

**4 YEAR GRADUATION RATES**
- The 4-year graduation rate for Covenant Scholars improved 8 percentage points, compared with the graduation rate of similar students entering in 2003 – the year before the Covenant began.
- The graduation rate for all students gained 2.5 percentage points during that same time but were, overall, somewhat higher.

**COVENANT SCHOLARS ENTERING IN 05, Graduating in 09**
- 1000
- 18.18
- Average SAT
- Average SSAT

**ALL STUDENTS ENTERING IN 05, Graduating in 09**
- 1099
- 6.58
- Average SSAT
- Average SSAT GPA