



COUNCIL *for* OPPORTUNITY *in* EDUCATION

2023: A Year in Review

The Council for Opportunity in Education (COE) is a nonprofit organization established in 1981, dedicated to expanding college opportunities for low-income, first-generation students, and students with disabilities. Through its myriad membership services, the Council works with colleges, universities, and agencies that host Federal TRIO Programs that help more than 880,000 low-income students and students with disabilities each year receive college access and retention services.



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Advocacy

This year was filled with leadership transitions and impactful public policy events at COE. From Capitol Hill receptions for the Congressional TRIO Caucus to the 41st annual Policy Seminar, COE worked tirelessly to garner bipartisan support for the Federal TRIO Programs in 2023.



Kimberly Jones took over the helm of COE, becoming its third president.

President Jones assumed this role after sixteen years of service to the organization, fulfilling various leadership positions. As president, she serves as the chief executive officer of the Council, which represents the interests of its nearly 1,000 member colleges, universities, and community-based agencies.

In January, COE named Diane Shust its vice president of public policy.

Ms. Shust most recently served as chief of staff in the Office of **Congressman Tom Suozzi (D-NY)**, acting as Representative Suozzi's principal liaison with the House Democratic Leadership and the Committee on Ways and Means.



In February, COE hosted a "Welcome to the 118th Congress" reception on Capitol Hill for the 118 Members of Congress of the bipartisan, bicameral Congressional TRIO Caucus. Guests included Senate Caucus Co-Chair **Sen. Jon Tester (D-MT)** and long-time TRIO champion **Rep. Bobby Scott (D-VA)**.

COE hosted its 41st annual Policy Seminar and welcomed almost 600 TRIO professionals back to Washington, D.C., to meet with their Congressional representatives in March. As a result of these meetings, a bipartisan group of 49 Senators and 186 Members of Congress signed the FY24 TRIO Appropriation Request letters. In these meetings, COE members asked their Members of Congress to support the Biden-Harris Administration's FY24 funding increase of \$107 million. Participants also heard from U.S. Department of Education Under Secretary James Kvaal, TRIO alumnus and Chair of the Congressional Black Caucus **Rep. Steven Horsford (D-NV-04)**, TRIO alumnus and former House Representative **Henry Bonilla**, and military veteran and House appropriator **Rep. Tony Gonzales (R-TX-23)**.

Professional Development

COE catalyzed transformative program and professional development initiatives in 2023, from aiding TRIO programs in enhancing digital capabilities to leading forums and webinars that position institutions and TRIO practitioners for success. COE's impactful efforts, including hosting a dynamic annual conference and equipping emerging leaders with essential skills, underscore its commitment to innovation and excellence in the pursuit of educational opportunities.

More than 40 TRIO programs serving over 16,025 students (and GEARUP) attended a technical strategies seminar on increasing program reach, compliance, and outcomes. COE launched its digital technical assistance to provide support in response to requests from the TRIO community. TRIO programs can now work with experienced consultants to go paperless, enhance their digital capabilities, and integrate with their institutional platforms.



COE hosted its inaugural TRIO Student Support Services Innovation Forum and Proposal Writing Workshop in San Diego in July. With an eye on the upcoming FY25 grant competition, COE guided institutions through promising practices, ensuring they are prepared and poised for success. As the anticipation builds for the U.S. Department of Education's competition, COE collaborates with institutions, unraveling the intricacies of the request for TRIO Student Support Services proposals, regulations, and the profound nuances of the program. The event was not just about readiness; it was about crafting winning proposals that redefine the landscape of student support.

COE held its 2023 Annual Conference in Washington, D.C., drawing 1,700 in-person and virtual participants. Pulitzer Prize-winning author, Isabel Wilkerson, delivered a powerful opening address, discussing the deep-rooted issues of caste and discrimination in America. Wilkerson's discussion draws parallel with historical events, emphasizes the collective responsibility to address and rectify these systemic challenges. This conference also



celebrated the retirement of COE's immediate past president, **Maureen Hoyler**. From her early days as a work-study student to her role as president of COE, Ms. Hoyler has been a tireless advocate for TRIO students, touching the lives of millions.

To help TRIO professionals navigate the intricate landscape of the upcoming "Better FAFSA," COE spearheaded a dynamic four-part webinar series in October. This exclusive, members-only series witnessed overwhelming demand from eager registrants seeking insights into the new process. Participants actively shaped the webinar sessions through engaging polls and thought-provoking questions, which transformed this series into an interactive powerhouse. The "Better FAFSA" webinar series seamlessly delivered TRIO-focused resources, FAQs, and personalized support, fortifying the foundation for a triumphant college pursuit.



Professional Development (cont.)



With generous support from Johns Hopkins University, COE convened 45 rising leaders from 39 states and U.S. territories in Baltimore to participate in its sixth Executive Leadership Institute for College Opportunity Professionals. Four days of intensive workshops and group development experiences in October empowered participants to delve deeper into their leadership journeys while exploring opportunities for low-income and first-generation students to gain admission and succeed at highly selective institutions.

In November, COE launched the second year of its Priority 6 Management Institute for New TRIO Directors, funded by the U.S. Department of Education. Throughout a dynamic grant period from October 1, 2022, to December 31,

2023, COE has equipped more than 400 emerging leaders with essential skills. These trainings delved into the intricacies of federal legislation, adept budget management, and the art of attracting and retaining program participants, empowering TRIO directors to navigate their roles with confidence and impact.



Student Opportunities

COE's student opportunities and alumni engagement in 2023 showcased a whirlwind of transformative initiatives and award ceremonies. From the immersive National Student Leadership Congress in D.C., the groundbreaking Virtual National Student Leadership Conference, and the awe-inspiring Jurassic Park 30th Anniversary Symposium, a vivid picture of commitment to education and opportunity emerges. COE's innovative programs, from TRIO Gets Connected to the Career Opportunities Initiative, reflected a dynamic pursuit of excellence, impacting hundreds of students and institutions nationwide.

COE continued its national Opportunity Matters Book Club for a third year.

For 2023, COE selected "Finding Me: A Memoir" by TRIO Upward Bound alumna and award-winning actress Viola Davis. The 2023 book club convened 43 TRIO programs and 672 students at its conclusion in August. Additionally, more than 200 TRIO alumni and TRIO professionals took part in virtual book club meetings across the U.S. and U.S. Territories. COE hosted a national speaker series in conjunction with the book clubs, including 2020 National TRIO Achiever Award recipient **Ashley Doukas**, 2022-2023 Chair of COE's Board of Directors and TRIO alumnus **Joe Givens**, and Viola Davis's sisters **Dr. Deloris Davis Grant** and **Dianne Davis Wright**.



In April, COE received a \$750,000 grant from the Federal Communications Commission to launch TRIO Gets Connected.

Through this two-year effort, COE works with state outreach coordinators in the 24 least connected states to ensure that every adult-serving TRIO program has the resources to raise awareness and expand enrollment into the nation's Affordable Connectivity Program.



Student Opportunities (cont.)

COE piloted its Career Opportunities Initiative to increase equitable employment outcomes for first-generation, low-income college graduates. The Career Opportunities Initiative supported 115 students and collaborated with more than 20 TRIO partner institutions serving TRIO Student Support Services and Ronald E. McNair Postbaccalaureate Achievement Programs. Students completed six modules (in partnership with the **Center for Evidence-Based Mentoring**), which enabled them to gain invaluable insights into their professional interests, enhance their cultural competencies, and acquire the knowledge and skills to initiate and maintain a rewarding career path effectively, ultimately positioning themselves for competitive roles post-graduation.

In partnership with its Dutch partners, ECHO, and The Hague University of Applied Sciences, COE hosted the Keith Sherin Global Leaders Study Abroad Program in The Hague, Netherlands. Eighteen TRIO McNair and Student Support Services students and two group leaders from across the country immersed themselves socially and culturally in the Netherlands, met student leaders representing immigrant communities, and studied at The Hague Summer School. Classes focus on solving global issues and connecting the public and private sectors.





COE welcomed 139 pre-college TRIO youth from across the United States and U.S. territories for its 34th annual National Student Leadership Congress at American University in Washington, D.C., in June. Students met with their Senators and Representatives on Capitol Hill during this event. They also engaged in community service, conflict resolution workshops, and an intense Mock Congress. The Mock Congress required students to research critical policy issues, draft legislation, and debate the legislative proposals with their peers in assigned teams.

Also in June, COE hosted a virtual National Student Leadership Congress, which served as a “digital bootcamp” to support the journeys of recent TRIO high school graduates who would be attending college in the fall. This experience immersed participants in dynamic workshops covering pivotal aspects of college and career planning. The conference provided a holistic roadmap to success, from demystifying the financial aid process to mastering the transition to college classes and accessing vital social and emotional health resources. The grand finale featured an inspiring TRIO alumni panel, where personal stories and invaluable advice illuminated the path to triumph in the college environment for these students.

Student Opportunities (cont.)

In partnership with NASPA's Center for First-generation Student Success, COE focused its 2023 First-Generation College Celebration (FGCC) around first-generation college students' career trajectories by featuring a panel



of first-generation graduates who have ascended into senior leader roles in some of the world's most recognizable companies. COE and NASPA also awarded 50 colleges and institutions grants to support their local celebrations and hosted a reception for lawmakers and their congressional staff on Capitol Hill. TRIO Upward Bound alumnus **Senator Raphael Warnock (D-GA)**, first-

generation college graduate **Senator Roger Marshall (R-KS)**, TRIO alumna and House TRIO Caucus Co-Chair **Congresswoman Gwen Moore (D-WI-4)** and first-generation college graduate **Congressman Tony Gonzales (R-TX-23)** introduced a bipartisan, bicameral resolution designating November 8, 2023 as "National First-Generation Celebration Day" in each chamber. Twenty senators and eleven Members of Congress co-sponsored this resolution.

Also in November, COE co-hosted the Jurassic World STEAM Symposium at Universal Studios Florida with Comcast NBCUniversal.

Attended by over 300 TRIO pre-college students, the Symposium provided laptops to attendees, symbolizing a commitment to bridging the digital divide and fostering educational opportunities. The Symposium merged education with excitement, featuring a college and career fair, dessert reception at Jurassic Park Islands of Adventure, and STEAM programming, including the engineering technology behind the award-winning Jurassic World VelociCoaster.



Alumni Engagement

By providing academic, financial, social, and cultural support, TRIO programs have allowed over 6 million low-income, first-generation students and students with disabilities to enter and graduate from college. COE's National TRIO Alumni Association helps connect these alumni with their state and regional associations. Celebrating the success of TRIO students and the TRIO programs, COE and members of the college access and success community are proud to honor the National TRIO Achievers annually.



In September, five outstanding TRIO alumni were honored with the 2023 National TRIO Achiever Award at COE's 2023 Annual Conference. Cheryl L. Johnson, James T. Brett, Fernando Cárdenas, Lesia Crumpton-Young, and Ruben Canedo shared inspiring stories of how TRIO programs like Upward Bound played a pivotal role in their success, emphasizing the importance of investing in education and advocating for programs like TRIO to provide significant returns on the federal government's investment of tax dollars. COE also honored **President Surangel S. Whipps Jr.** and First Lady Valerie **Ngereblung Remengesau Whipps** of the Republic of Palau, who both participated in the Upward Bound program at Palau Community College, with its TRIO Family Achievement Award.



Alumni Engagement (cont.)



COE's director of alumni relations and career opportunities convened TRIO alumni to form a state association in D.C. in October. In a powerful collaboration between the National TRIO Alumni Association and TRIO alumni at the local level, fifteen TRIO alumni living in D.C. elected their executive committee members and strategically outlined engagement priorities for 2024. State-level alumni associations enhance federal advocacy efforts and can provide pathways for civic engagement in local communities. Organized alumni chapters can host professional development events and mentor shadowing programs that meet the unique needs of TRIO students in a state. From shared academic journeys, an atmosphere of excitement and commitment emerges as TRIO alumni pledge their time, skills, and resources to empower the next generation of leaders and advocate for TRIO.

Securing nearly \$1 million in grant funding, The Pell Institute spearheaded research projects to understand the needs of low-income and first-generation college students and enhance pathways to college and careers in 2023. Grants from Ascendium and the Lumina Foundation supported studies on equitable career pathways and perceptions of postsecondary credentials among Black, Latinx, and Indigenous learners, showcasing The Pell Institute's commitment to impactful research and initiatives in the educational landscape.



The Pell Institute secured nearly \$1 million in grant funding for new research projects that will help us better understand the needs of students served by TRIO and how we can create better pathways to college and into careers. Ascendium awarded The Pell Institute a \$748,000 grant to support a two-year study exploring equitable career pathways. As part of the grant, The Pell Institute will work alongside select TRIO programs to understand needs, best practices, and opportunities related to career preparation. In addition, the Pell Institute received a \$250,000 grant from the Lumina Foundation to explore how Black, Latinx, and Indigenous learners perceive the value of postsecondary credentials.

The Pell Institute launched several new evaluation projects in 2023.

Pell staff served as evaluators on the Community Gun Violence Reduction Blueprint Project for the City of Champaign, IL. The Pell Institute significantly updated its Evaluation Toolkit and embedded an equity framework aimed at helping TRIO and student support programs use evaluation data for improvement and advocacy.

The Pell Institute offered two Equitable Evaluation Workshops for TRIO programs to help TRIO professionals develop evaluation confidence and create actionable evaluation plans. Over 100 TRIO professionals attended the workshops, and each received an advanced copy of the Equitable Evaluation Toolkit.



In May, The Pell Institute hosted “Reducing Equity Gaps in Educational Attainment in and among the States: A Stakeholder Panel Discussion Featuring Black and Hispanic State Legislators,” featuring TRIO alumni.



This discussion, stemming from the *Indicators of Higher Education Equity in the United States 2022* trend report, helped stakeholders and COE’s Board of Directors unpack critical questions addressing achievement gaps, boosting economic growth, fostering a more inclusive society, and improving the quality of life in their state. **New York Assemblymember Chantel Jackson (D-District 79)** and **South Carolina State Representative Marvin Pendarvis (D-District 113)** joined COE Senior Research Fellow **Margaret Cahalan** and COE Vice President of Research **Terry Vaughan** in a presentation that reviewed compelling data from the most recent report.

The Pell Institute hosted its 40th annual Student Financial Aid Research Network (SFARN) conference in New Brunswick, NJ, attracting nearly fifty TRIO professionals in July.

SFARN 2023, a premier space for researchers, practitioners, and policymakers to discuss pressing financial aid issues in higher education, reinforced the partnership with the Heldrich Center for Workforce Development at **Rutgers University**. The Pell Institute received sponsorship from Rutgers University and the Higher Education Student Assistance Authority (HESSA) to execute the transformative conference.



In the fall, The Pell Institute launched its first student-centered research project, generously funded by the Lumina Foundation.

At the project’s onset, The Pell Institute established a student advisory board that provided invaluable feedback on various aspects of the research process. The Pell Institute extended 18 seats to students from diverse backgrounds in TRIO college-level programs from an impressive pool of 250 applicants. Initial dissemination of the student survey within the TRIO community resulted in a remarkable 2,688 responses in just one week.

Membership Services

In August, COE appointed Aaron Brown, a TRIO Student Support Services alumnus with over two decades of experience in higher education, as its executive vice president. Additionally, COE successfully exceeded its FY23 membership and fundraising goal by 16%, raising \$4.4 million through its Fair Share campaign.



In August, COE named Aaron Brown its executive vice president. A TRIO Student Support Services alumnus, Dr. Brown has extensive experience in higher education that spans more than two decades, during which he served in various roles, including associate dean for student development and achievement, first-year experience instructor, director of the Academic Success Center and TRIO Student Support Services, and chair of retention and completion committees.

COE revolutionized the way college access and success professionals engage, unveiling the COE Works mobile app during its Policy Seminar in March. Available on both the Google Play and Apple Stores, the app provides TRIO professionals a gateway to seamless access to events, news, member services, advocacy resources, and so much more, all right at their fingertips.

COE concluded its fiscal year by exceeding its FY23 membership and personal contributions fundraising goal by 16%, raising \$4.4 million through its annual Fair Share campaign. In FY23, nine regions, 47 states, and four federal territories (Guam, Marshall Islands, Palau, and Puerto Rico) exceeded their fundraising goals. COE collected personal contributions from 1,023 supporters.





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About the Federal TRIO Programs

TRIO programs (Talent Search, Upward Bound, Upward Bound Math-Science, Veterans Upward Bound, Student Support Services, Educational Opportunity Centers, and the Ronald E. McNair Postbaccalaureate Achievement Program) help students overcome economic, social, academic, and cultural barriers to higher education. TRIO services include assistance in choosing a college and tutoring; personal, financial, and career counseling; assistance in applying to college; workplace and college visits; special instruction in reading, writing, study skills, and mathematics; assistance in applying for financial aid; and academic assistance in high school or assistance to reenter high school or college.

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