Assessing the Effectiveness of the Educational Opportunity Fund Program

Edward J. Bloustein School of Planning and Public Policy

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Purpose

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Executive Summary

The Educational Opportunity Fund Program (EOF) is a postsecondary program in New Jersey that provides both state-funded financial assistance as well as state-funding for institutions to develop support services for students who are from educationally and economically disadvantaged backgrounds. The program has shown immense value to the students served and improves the equitability of college access across the State (OSHE, 2015). However, there is much to be learned from research on the implementation and outcomes of EOF programs, particularly given the differences in implementation across institutions and experiences among students.

In partnership with the Office of the Secretary of Higher Education (OSHE), graduate student researchers from the Edward J. Bloustein School of Planning and Public Policy at Rutgers University conducted a mixed-methods study to assess the extent to which program outcomes differ by student and institution-level characteristics and the support services identified as most valuable by students and staff. The study used a variety of quantitative and qualitative research methods, including structured interviews with OSHE staff, the Higher Education Student Assistance Authority (HESAA), and EOF program staff; focus groups with students; and an analysis of institutional, financial aid, enrollment, and completion data housed in the New Jersey Statewide Data System (NJSDS) (formally referred to as the New Jersey Education to Earnings Data System). Convenience sampling of study participants and limited participation from community colleges in both interviews and focus groups impacted the generalizability of this study's findings (see the **Method** section for more information).

This quantitative data analysis revealed that EOF students had slightly higher completion rates compared to non-EOF students. Public research universities had the highest rate of completers among EOF students. Researchers also found that the percentage of standard completers (those graduating within 150% of time) were higher for female EOF students than both male EOF students and all non-EOF students across sex. Additionally, this study showed the percentage of standard completers was greater for EOF students across race compared to non-EOF students. EOF students who identify as Black or Hispanic/Latino had higher percentages of standard completers compared to the same group of non-EOF students.

The interviews and focus groups revealed significant findings related to program strengths and areas for improvement. Participants highlighted the importance of transitional programming in which the summer program guides EOF students into their first year of their postsecondary experience. Researchers found that participants benefit from the academic support provided by EOF programs, especially tutoring. Additionally, EOF students highlighted the importance of funding, which allows students to focus on their education and supports programs in their facilitation of tailored services. Many participants discussed networking as an opportunity to facilitate meaningful connections between current scholars and alumni. In terms of social support, participants highlighted the significance of advising and student-peer mentorship.

Researchers found, however, three areas for improvement, including funding and program resources, academic and non-academic support, and social support and recruitment. Participants identified the inflexibility of Article IV funding as a major barrier to program and student success. Because additional costs are often not fully covered by financial aid packages, participants expressed a desire for more flexibility in Article IV approval and spending in order to better address students' non-academic needs. Relatedly, participants expressed concern with limited funding. With additional funding, EOF programs could improve staffing and facilities, grants and support services, and wrap-around support. Other participants were concerned about advising relationships with upperclassmen; barriers to providing rigorous academic support; and challenges engaging students in additional programming.

A common theme among participants was the stigma associated with the EOF program. Participants discussed how the EOF program continues to be perceived as a support program for Black and Hispanic or Latino students. This misunderstanding, coupled with low program awareness for some, means that eligible students may not receive necessary support. A related and often cited barrier to program and student success was imposter syndrome, as many EOF students discussed the increased pressure they face as first-generation students. In terms of program outcomes, participants highlighted a number of student- and institution-level characteristics that are potential barriers to student success, including academic needs, housing, identities (race, class, gender), resources and institutional support, and program staffing.

This study found that EOF students overall noted the critical importance of the EOF program in their ability to enroll in and complete their degree. EOF students repeatedly stated the value of the academic, financial, and social support services provided by the EOF program. Many participants, however, highlighted areas for improvement. Based on interviews and focus groups with stakeholders, in addition to the quantitative data analysis, researchers developed eight suggestions that can inform the future of the EOF program. The following suggestions for participating institutions and the State serve to further strengthen the EOF program to better meet the needs of students:

Institution-level

- (1) Hire additional EOF staff to support smaller caseloads. This includes hiring specialized staff like mental health counselors, grant writers to support special project requests, and/or individuals with expertise in relevant fields for students.
- (2) Provide supplemental institutional financial aid for room and board when EOF students are not covered by their financial aid package. Many EOF students cited off-campus housing and commuting as a

barrier to their educational pursuits. Providing all EOF students with funding for room and board would allow them to focus on their studies.

- (3) Provide more accessible programming and social opportunities to increase participation from EOF students. Both EOF staff and students expressed need for more time to participate in program activities. Many EOF students, in particular, indicated that they would like to attend more events, but are unable to do so because of scheduling conflicts. These events could be more casual and social in nature and be offered both in-person and virtually, which would increase community building opportunities within EOF programs, particularly for students who live off-campus.
- (4) Provide additional academic support and career development to EOF students. This includes increasing access to and quality of academic resources, especially tutoring, and enhancing college readiness and career development programming for EOF students. Participants frequently cited the differences in services within and across participating institutions and noted that these differences have a direct impact on student outcomes.
- (5) Improve recruitment efforts to ensure eligible students are successfully integrated into the program prior to freshman year. Institutions must engage in intentional recruitment efforts within their respective communities to better publicize the EOF program, including the program's eligibility requirements and services provided.

State-level

(6) Invest greater funding into EOF program to expand the number of EOF students served and services provided and reevaluate Article IV regulations to examine funding flexibility. This study identified evidence to support that economically and educationally disadvantaged students benefit from the EOF program. Additional Article III funding could allow the EOF program to reach a greater number of students across the State, including part-time students. Additionally, more participating institutions could match or supplement the funding being provided by the state. This would allow the program to grow within their institution and accommodate a larger percentage of the student population.

In addition to increasing the number of EOF students served, greater program funding may support the expansion of academic and non-academic services and programming across institutions. Participants cited the importance of building and maintaining robust tutoring services, as well as the desire to provide students with additional opportunities, such as networking, career development workshops, affinity groups, and high-impact learning experiences such as study

abroad and undergraduate research. Participants emphasized that greater investment in the program at the State-level is necessary to keep up with the changing needs of EOF students and support them as "whole" persons. Participants also identified the need for more funding to support staff hiring and office centralization.

Article IV regulations must also be reevaluated by the Board of Directors to examine the flexibility of funding. Participants identified the inflexibility of Article IV regulations as an immense barrier to providing services that fill the wraparound needs of EOF students. Greater flexibility would allow EOF staff and programs to fill in the gaps left by student financial aid packages and ensure that students remain fully engaged in the EOF program by addressing non-academic barriers such as housing, transportation, food insecurity, and more.

- (7) Increase recruitment and marketing efforts across the State. The State should offer support to assist participating institutions and EOF programs in creating greater visibility of the EOF program and improving the recruitment of prospective students. Participants frequently identified awareness as an obstacle to program success, which could be addressed with additional marketing and recruitment efforts led by the State. Researchers also propose developing a standard communication toolkit for participating institutions to reduce the variation in formation provided on EOF program websites.
- (8) Increase effective data collection around program outcomes and programmatic elements. One participant stated that it would be beneficial to have more robust data analytics to ensure that all programs are meeting standards. One suggestion could be to develop an annual report of EOF student outcomes using NJSDS. Relatedly, the State should develop an inventory of all programmatic elements (academic, financial, social support services) by EOF programs across all 41 participating institutions. This inventory should include details on which program offers which service, and how these services are implemented at each institution. Increased effective data collection, in addition to maintaining consistent performance reporting, would help OSHE and/or future studies better understand the range of services provided and further improve the typology developed. Moreover, it would provide examples to institutions looking to replicate best practices from others.

Introduction

In the years after the landmark Brown v. Board decision (1954), which declared the "separate but equal" doctrine unconstitutional, the Federal government and state agencies established policies and programs to address past harms historically experienced by underrepresented and marginalized groups. Central to these policy initiatives was educational access and equity, among which includes the establishment of TRIO programs and funding for postsecondary education. One such program is the Educational Opportunity Fund (EOF) program in New Jersey. Established in 1967, EOF is a postsecondary program that provides state-funded financial assistance and support services to students from educationally and economically disadvantaged backgrounds. The EOF program has shown immense value to the students served and has improved the equitability of college across the State (OSHE, 2015). There is much to be learned, however, from research on the implementation and outcomes of EOF programs, particularly given the differences in implementation across institutions and experiences among students.

In partnership with the Office of the Secretary of Higher Education (OSHE), graduate student researchers from the Edward J. Bloustein School of Planning and Public Policy at Rutgers University conducted a mixed-methods study to assess the effectiveness of EOF programs. The analysis involved examining the extent to which program outcomes differ by student and institutional-level characteristics, documenting how EOF programs meet students' needs, and categorizing program service delivery associated with successful outcomes. Researchers framed the study's findings through the lens of diversity, equity, and inclusion (DEI) *theory of transformation* to better understand the context of program practices that empower and motivate underserved and underresourced student populations.

This report begins with a brief discussion of the literature review and provides background context around the theory of transformation. The next section outlines the methodological approach for quantitative and qualitative data collection and analyses, with the following section highlighting the results. Researchers then discuss key findings and suggestions around the role of EOF programs in providing students with the necessary resources to navigate through and beyond college. This report concludes by connecting the findings with the transformative framework and the future direction of EOF programs in the State.

Background

Since the 1940s, policymakers have positioned access to higher education as a public good. The very first major national policy on postsecondary education, the GI Bill, was designed to provide American veterans returning home from World War II with access to funding to pursue postsecondary education and training programs. In the 1960s, at the height of the national civil rights movement, President Lyndon B. Johnson centered

his policy initiatives around a vision of a "Great Society," which entailed providing all Americans access to a series of public programs, including increased federal funding for education, healthcare, and to eliminate poverty. In 1967, as a result of the Newark Riots, Chancellor of Higher Education Ralph A. Dungan led the state's efforts to make access to higher education more equitable by proposing for the establishment of "programs of special assistance to young men and women from economically and educationally disadvantaged backgrounds" (Official Site of the State of New Jersey, 2021, np). From this proposal came the establishment of the EOF program in New Jersey—the very first of its kind at a state level—with aims to provide financial assistance and support services to students who are categorized as educationally and socio-economically disadvantaged. Subsequently, many other states, including New York and California, have established their own programs modeled after New Jersey's EOF program, called Educational Opportunity Program (EOP).

Since the turn of the twenty-first century, the U.S. has seen rising numbers of Americans pursuing postsecondary education. Nevertheless, in the general population, underserved student groups (i.e., first-generation, low-income, and BIPOC¹ communities) are still disproportionately underrepresented in post-secondary educational institutions. Educational attainment for these students is considerably lower than their white and Asian counterparts (State of New Jersey office of the Secretary of higher Education, 2019). Scholars have argued that a series of factors play a role in the lack of educational attainment for these respective groups, including the effects of de facto segregation in K-12 education, the absence of college readiness activities and programs in low-income communities, lack of access to financial aid information and support, and lack of social and cultural capital to navigate through college (Clauss-Ehlers & Wibrowski, 2007; Sader, 2013; Klay, 2019). Moreover, for those who successfully navigate these barriers and graduate college, they may face more obstacles while transitioning into their careers, thereby potentially limiting their access to well-paying and high-quality jobs that could eventually lead to upward social mobility (Thiem and Dasgupta, 2022).

A nation's higher education system is an effective channel to ensure upward socio-economic mobility for individuals and families (NJEEDS, 2023). Unfortunately, many low-income, first-generation, and BIPOC students are often excluded from higher education due to financial and/or other social barriers. To ensure that these students have access to higher education, public staff at both federal and state governments have established various initiatives that provide financial, academic, and professional development support. This report explores how some of these programs are currently aiding students to achieve their goals by supporting their academic and career pursuits. Specifically, we situate the theory of transformation in diversity, equity and inclusion to analyze the effectiveness of government-funded support-services programs like the EOF program in helping students succeed academically and professionally in college and beyond.

¹ This refers to Black, Indigenous, and people of color: https://www.merriam-webster.com/dictionary/BIPOC.

Theory of Transformation

The *theory of transformation* is an interdisciplinary framework that foregrounds intersectional practices around education and social change from leadership, teacher training, adult learning, pedagogy, curriculum and more (Mezirow, 1994; Ciarletta, 1998; Shields, 2010; Nevarez et al., 2019; Schmid & Smith, 2021; Haddad & Bergek, 2022). From an evaluative standpoint, the theory of transformation entails the relationship between program design, implementation, and outcomes. For the purpose of this study, we focus our idea on the theory of transformation using the St. Olaf College's framework, which entails a series of aspirations for diversity, equity, and inclusion, as well as action steps to achieve its goals, ranging from designing core experiences, capacity-building experiences, and systemic support. Below we summarize the concept of diversity, equity, and inclusion transformation theory and the necessary practices and investments required for its success:

<u>Diversity</u>: To truly achieve diversity it is not simply a question of recruiting diverse populations, but rather to center the experiences and needs of diverse groups of people. As such, the core experiences of individuals must be centered around *curriculum and pedagogy*. To build and strengthen program capacity, intentional practices for *recruitment*, *hiring and enrollment* is necessary for establishing a diverse program. To sustain such an environment, institutions must provide the necessary *financial support* to elevate targeted communities/populations.

Equity: The practice of equity requires that one must acknowledge that not everyone is starting on the same level playing field. As such, *co-curricular* initiatives must be implemented to accompany primary curricular and pedagogical approaches. *Orientation and onboarding* practices must center the direct needs of targeted populations. Program *staffing and organizational structure* must reflect the communities/populations being served.

Inclusion: Inclusive programming must be at the forefront all experiences ranging from *in-classroom and outside of classroom*, as well as *workplace environment*. Necessary *training, professional development, academic scholarship, and dissemination* of educational initiatives is a must for inclusive environments. Furthermore, program leadership must always ensure to *plan* and *assess* activities in a way that is result oriented.

This study applies the theory of transformation on diversity, equity, and inclusion to the EOF program in New Jersey.

The Educational Opportunity Fund Program As A Transformative Framework

The National Center for Education Statistics (NCES) foregrounds that the percentage of college students from low-income backgrounds has increased steadily over the past two

decades. Nevertheless, student retention rates for low-income, first-generation, and racial/ethnic minority students remain low. For instance, according to the NCES (2019), for students that entered university in 2010 for a full-time four-year undergraduate degree, only 54% of Hispanic students, 40% of Black students, and 39% of Native students graduated within six years while 65% of white students and 74% of Asian students graduate within the same timeframe. Many scholars contend that various factors impact low-income and racial/ethnic minority students' college entry accessibility and subsequent graduate rates. Those include pre-college academic readiness, social transitions into university spaces, and structural barriers that make it harder for these groups to navigate university spaces (U.S. Department of Education, 2020; Rivera-Mosquera et al., 2007; Fashola & Slavin, 1998; Phung, 2011; Perna et al., 2011; Rose, 2013; Thiem & Dasgupta, 2022).

For this reason, at the federal and state level, government agencies have established several programs to support these students, including Educational Opportunity Programs (EOP) and TRIO programs, in accessing and remaining in college (Rosenberg, 2016; Perna, 2015). In the state of New Jersey, the EOF program has been a significant support for students from educationally and economically disadvantaged backgrounds enrolled at both public and private higher education institutions, including community colleges. The program provides financial assistance as well as academic and personal support services to these students (Mayers, 2022). Programming includes assessments, basic skills, supplemental instruction, learning assistance, academic monitoring, counseling, tutoring, mentoring leadership development, career exploration, and graduate school preparation (Anderson, 2022; Phillip, 2015; Turner, 2020). According to a 2015 OSHE report, the EOF program has also been successful in helping students build a sense of community. The program creates a supportive environment where students can build relationships with their peers, counselors, and faculty. This sense of community helps students feel more connected to their school and gives them the confidence to participate more actively in their education. These components give educationally and economically disadvantaged students the knowledge and support that they need to succeed in college. As part of the program, some institutions offer students access to career exploration opportunities. such as speaker series and professional development workshops (Slade, 2019; Videla, 2020).

Base Program

Graduate student researchers (referred to hereafter as "researchers") conducted a preliminary document analysis of the base programmatic model and existing administrative procedures and policies that inform the implementation of EOF programs across New Jersey participating institutions. *Figure 1* shows that there are different programmatic elements offered by EOF program staff based on the semester.

Figure 1. EOF Programmatic Model



During the academic year (AY), for example, EOF programs must provide assessment, basic skills, supplemental instruction, learning assistance, academic monitoring, counseling, tutoring, structured study, leadership, development, career exploration, graduate school preparation, and financial aid support to all students participating in the program. Though programmatic elements change during the summer program and winter sessions, there are three common requirements that exist across all sessions: (1) assessment, (2) academic enrichment, and (3) student leadership and professional development.

Regulations

The administrative procedures and policies in the New Jersey Administrative Code inform the implementation of EOF-related programming at participating institutions across the State. The purpose of each EOF program, according to regulations, is to "maximize the educational opportunities for EOF students by providing direct program services designed to promote persistence through degree completion" (Educational Opportunity Fund: Administrative Procedures and Policies, 2022, p. 7). The State tasks EOF programs with providing "innovative educational initiatives, supplemental instruction, support services, academic and educational advisement, and leadership development activities to improve the student's chance of academic success" (Educational Opportunity Fund: Administrative Procedures and Policies, 2022, p. 7). Annually, the regulations set the income eligibility scale to 200% of the Federal poverty line guidelines. Participating institutions are required to verify the eligibility of all prospective EOF students. The main criteria are family and individual income and assets.

The fiscal year appropriation determines the Article III and Article IV funds for each participating institution, and the Board of Directors, appointed by the Governor, develops an annual maximum amount for undergraduate awards for students based on

enrollment type (full-time, part-time), institution type (public research universities, state colleges and universities, community colleges, independent colleges and universities), and financial need. The minimum semester grant to EOF students through Article III funds cannot be less than \$100. Participating institutions can, however, include nonaided EOF students. EOF programs are responsible for tracking student eligibility over time, including in-state residency, full-time enrollment status, and maximum semesters. By comparison, the purpose of Article IV program support funds is to "supplement, not supplant" services provided by New Jersey participating institutions (Educational Opportunity Fund: Administrative Procedures and Policies, 2022, p. 35). There are substantial restrictions, however, on the use of Article IV program support funds. According to regulations, Article IV program support funds cannot be used to purchase equipment or hardware; transportation of students for normal commuting costs; or room and board, books, educational supplies, and childcare. Though there are restrictions on Article IV support funds, participating institutions can provide additional support through institutional funding and are, indeed, required to provide matching funds to help demonstrate the support and commitment that the institution also provides. Additionally, EOF programs must comply with program evaluation processes by reporting program outcomes. These outcomes include cohort retention rates, cohort graduation rates, student enrollment, student transfers, and the equity index for senior institutions or county college success rate (Educational Opportunity Fund: Administrative Procedures and Policies, 2022, p. 39).

Program Websites

The research team reviewed twelve EOF program websites as part of the preliminary document analysis.² The following section discusses the mission statements, eligibility criteria, requirements, support services, student engagement, and program outcomes found on the twelve websites reviewed. Though this section only includes the EOF program websites reviewed, the findings of the preliminary document analysis are indicative of the EOF program overall.

Mission Statements

The document analysis showed that most EOF program websites reviewed provided mission statements that corresponded with language outlined in the regulations. Most mission statements specified, for example, that the purpose of the program is to serve educationally and economically disadvantaged students. Consistent among many mission statements is the inclusion of academic and financial support services offered by the program. While the academic and financial support services provided by each EOF program vary, most mission statements indicate that they offer a wide range of

² Researchers reviewed EOF program websites at the following institutions: Rutgers University, The College of New Jersey (TCNJ), Ramapo College, Stockton University, New Jersey City University (NJCU), Ocean County College, Seton Hall, Monmouth University, Kean University, and the New Jersey Institute of Technology (NJIT). See the **Method** section for a more information.

programming for EOF students. Subsequent paragraphs examine which academic and financial support services are commonly offered by EOF programs.

Eligibility Criteria

Most EOF program websites reviewed in this analysis discuss eligibility. The EOF program website for Rutgers University, for example, states that they use the EOF Income Eligibility Scale to determine whether students fall within income and asset limits (Figure 2). The EOF program website for Rutgers University was one of few that provided clear information regarding the EOF Income Eligibility scale for current and prospective EOF students. The EOF Income Eligibility Scale is similar to one provided on the OSHE website.

Figure 2. EOF Income Eligibility Scale for Rutgers University

Household Size (Including Applicant)	Gross Income (Not to Exceed)	Asset Cap Calculation (Not to Exceed)
Number of people living at home that you or your parents are financially responsible for.	Money that you or your parents earn within a calendar year, before taxes. Usually from employment.	Additional items that hold value like businesses, stocks, and investment properties.
1	\$27,180	\$5,436
2	\$36,620	\$7,324
3	\$46,060	\$9,212
4	\$55,500	\$11,100
5	\$64,940	\$12,988
6	\$74,380	\$14,876
7	\$83,820	\$16,764
8	\$93,260	\$18,764
*For reach additional member of the household add:	\$9,440	\$1,888

Moreover, the Rutgers University EOF program website clearly indicates that students must meet the academic criteria set by each school attended. The academic criteria often involve an assessment of academic standing, including earned credits and GPA. Some EOF program websites distinguish eligibility between full- and part-time students.

The EOF program website for Stockton University, for example, states that only prospective EOF students who seek full-time admission receive funding.

Requirements

A number of EOF program websites provide clear expectations for EOF students by year. The EOF program website for Kean University states the focus for first-year, sophomore, junior, and senior EOF students. First-year EOF students, for example, are responsible for transition-related goals and objectives, while sophomore EOF students develop concrete academic plans based on personal and career goals.³ Moreover, junior EOF students focus on professional development, and senior EOF students work to become "employment ready and globally competitive." The EOF program website for the New Jersey Institute of Technology (NJIT) provides similar expectations for EOF students by year. Namely, the EOF program website lists the cohort (Freshman, Sophomore, Junior, Senior/Graduating Senior) and corresponding goal. The EOF program at NJIT expects sophomore EOF students to focus on "advancing strategies for success beyond the first year." Additionally, the EOF program website states the required activities for each EOF student according to year of study and lists additional requirements to maintain funding such as academic standing (e.g., GPA ≥ 2.5).

Support Services

The *financial* support services offered by EOF programs are largely scholarships and grants. As mentioned previously, financial awards depend on eligibility guidelines, academic performance, and unit progression. The document analysis revealed, however, the different ways that EOF programs use institutional funds to provide targeted supplemental financial aid support to EOF students. For example, the EOF program at The College of New Jersey (TCNJ) used additional institutional funds to create two separate grants—the Promise and Incentive awards—to motivate students to complete their degrees. The Promise Award, started in 2004, offers to fund tuition, fees. room and board, and the direct cost of books for the first two years of study. 5 On the other hand, the Incentive Award functions as an extension of the Promise Award to which students in their third and fourth years receive the same amount of funding (except for books). Another example of targeted supplemental financial support is the EOF program at Ramapo College. Namely, the EOF program website for Ramapo College states that eligible EOF students receive one grant—a four-year scholarship for up to \$5,000 per year (or \$20,000 over four years). Moreover, EOF students are also eligible to receive \$1,400 for the direct cost of books.

The *academic* support services listed on most EOF program websites are consistent with the base programmatic model and regulations. The document analysis revealed, however, that some EOF program websites list unique EOF-related programming. Most

³ https://www.kean.edu/eof/eof-program-overview

⁴ https://www.njit.edu/eop/academic-and-student-support

⁵ https://eof.tcnj.edu/

⁶ https://www.ramapo.edu/eof-program/

EOF program websites present an array of academic support services, including advisement, counseling, tutoring, and peer mentoring. The EOF program website for Seton Hall, for instance, provides specific examples of structured study, college success workshops, and professional school exam preparation. One such program is "Books and Brunch," where counselors assist EOF students with final test preparation and enjoy food. The EOF program website for Monmouth University also lists specific academic support services, including leadership opportunities, social engagements, educational workshops, and professional development opportunities. In addition to EOF-related programming, the EOF program website at Monmouth University encourages EOF students to become involved in clubs, organizations, athletics, service trips, research, and study abroad programs.

Many EOF program websites stress the importance of counseling and advisement. Notably, the EOF program website for NJIT refers to their approach as "intrusive yet compassionate counseling." There are five cohorts in the EOF program at NJIT, and each cohort has a professional, full-time assistant director. According to the website, EOF students "rotate through each director, as per earned credits, and experience varying services, events, and supplemental instruction (SI), including peer mentoring and tutoring, as per the cohort's focus and students' needs." The EOF program website also highlights the importance of tutoring as a complement to classroom instruction, as tutoring is mandatory for all first year EOF students at NJIT.

Service Delivery

The document analysis revealed that few EOF program websites provided information about service delivery. The Educational Opportunity Program (EOP) website for Seton Hall shows that staff who implement the program use the STRIVE model to deliver academic support services. According to the website, the STRIVE model refers to the following tenants:

<u>Service</u>: Advisors serve scholars by becoming a guide to them through their academic careers. Advisers in EOP operate with an open-door policy, which encourages scholars to be candid.

<u>Transformation</u>: Advisors create a transformative experience through one-on-one meetings, workshops, and programming designed to challenge and support, promote community, and build rapport.

Retention: Advisors assess the needs of scholars and identify resources needed to ensure satisfactory academic progress which leads to graduation.

<u>Inspiration</u>: Advisors inspire each scholar to function at their highest level. We accomplish this by connecting the scholars' dreams with their behavior. Advisers

⁷ https://www.shu.edu/educational-opportunity-fund/

⁸ https://www.monmouth.edu/eof/

help the scholars develop a realistic Plan of Action (POA), which is updated each semester via our Services Agreement.

<u>Visualization</u>: Each scholar and administrative member understand that the scholars' vision must align with the scholars' ability to succeed in their career choice, and their willingness to work to their potential.

Empowerment: Advisors empower scholars to take responsibility for their success by monitoring their behaviors while developing their emotional intelligence.³

Other EOF program websites provide similar models for advising. Namely, the EOF program website for TCNJ uses three key components to guide supplemental advisement: Curriculum, Pedagogy, and Student Learning Outcomes. The Curriculum component represents *what* advising deals with and Pedagogy refers to *how* advising is done. The Student Learning Component, on the other hand, focuses on the *results* of advising. It is possible that other EOF programs across the State use similar models for delivering academic support services, but researchers were limited to information available on EOF program websites.

Student Engagement

Only one EOF program website reviewed outlines the extent to which the program engages with students who fall behind in the program. Here, the EOF program website for TCNJ provides clear language around levels of student engagement. There are three levels of engagement: high-, mid-, and low-level. According to the website, high-level engagement exists for EOF students who are placed in the Student Success Program (SSP) because of poor academic standing (e.g., GPA ≥ 2.5). The minimum requirement for EOF students placed in SSP are developing an action plan and attending three individual meetings with Assistant Directors, six group meetings, and two general meetings. Mid-level engagement involves EOF students who are "off track." The minimum requirements for students categorized as mid-level engagement are to attend three individual meetings with Assistant Directors, two Guided and Personal Support (GPS) meetings, and two general meetings. The EOF program reserves low-level engagement for juniors and seniors who are "off track." The minimum requirements for EOF students categorized as low-level engagement are to attend one GPS workshop and two general meetings.

Program Outcomes

The document analysis showed that some EOF program websites provide indicators of success. Researchers found that EOF program websites used a combination of earned credits (i.e., academic progress) and GPA to determine academic performance. Per regulations, the EOF program websites also emphasized retention and graduation rates as outcomes of great importance. Most notably, the only EOF program to list cohort outcomes on their website is TCNJ. In addition to demographic characteristics of EOF

students during the 2016–2017 academic year, the EOF program at TCNJ provides data on the number of contacts for academic, administrative, personal, and professional services. The EOF program website also provided data on retention and graduation rates.

The document analysis ultimately helped researchers better understand the extent to which the EOF programs reviewed implement the base programmatic model and comply with regulations. Moreover, the document analysis revealed that several EOF program websites provide unique programming based on the needs of their students.

Program Impact and Success

The New Jersey EOF program provides holistic programming, which includes important individual elements, including tutoring or academic coaching, supplemental instruction, peer-mentorship opportunities, and other high impact experience opportunities. Cheung (2012) and Gordon and colleagues (2021) found that academic coaching provided to students during the summer immediately after high school graduation and prior to the start of their first semester as first-years in college (also known as pre-freshmen bridge programs) was deeply impactful for first-generation New Jersey EOF students' transition into college. Furthermore, some of the pre-college bridge initiatives are residential programs whereby students live on campus for a short period on a college/university campus while they are taking courses (Cheung, 2012). These residential pre-college opportunities enable students the opportunity to explore life on campus, build community, and as well gain exposure to different student focus/student led organizational resources to enhance social preparedness (Gordon et al., 2021). Peer mentorship was another component that Gordon and colleagues (2021) found to have had great impact on students' academic success, especially for young Black men, in terms of retention rate and as well as their social and professional development.

The overall effectiveness of the EOF program (also referred to as the Educational Opportunity Program or EOP in New York) and similar TRIO programs funded through the federal and state government such as Student Support Services programs at a national level in improving student retention rates has been well-documented through multiple studies. According to a NCES meta-analysis, the TRIO and EOF/EOP programs was associated with a 5.6-percentage-point increase in overall college graduation rates, the most significant effect size of any intervention examined (Hoyt, 2021). Additionally, a study by the California Post-secondary Education Commission found that EOP program participants earned baccalaureate degrees at a rate nearly 20% higher than the state average. Studies show that the financial support offered to students through the EOF program makes pursuing a degree much more affordable, thus reducing drop-out rates due to financial need (Bailey, 2021). These programs offer academic, personal, and financial counseling, mentoring, and tutoring services to help students reach their goals. This comprehensive support helps students stay motivated and achieve their academic goals.

Currently, the state of New Jersey supports 41 higher education institutions and community colleges as participants in this program. The EOF program has contributed to positive educational outcomes for its students, as evidenced by the number of EOF students who graduate with a bachelor's degree within six years. For example, in 2015, the six-year graduation rate for EOF students was 55% which in comparison to the national average of 44% for low-income students in public institutions (OSHE, 2015). Scholars attribute such a high six-year graduation rate to the numerous resources that EOF programs provide, including financial aid, academic advising and tutoring, career counseling, and mentorship. These resources enable EOF students to gain the skills and knowledge necessary to complete their degrees and succeed in their chosen careers (Watson and Chen, 2018; Yu, 2017; SAS EOF program at Rutgers-New Brunswick, 2021; Fried-Goodnight & Torres, 2020).

Methodology

This study used a variety of quantitative and qualitative research methods to assess the effectiveness of EOF programs at participating New Jersey institutions. Researchers conducted structured interviews with OSHE and HESAA staff and EOF program staff. Additionally, researchers held focus groups with EOF students at participating institutions across the State. With the assistance of the John J. Heldrich Center for Workforce Development ("Heldrich Center"), researchers conducted quantitative analyses of Higher Education Student Assistance Authority (HESAA) data in addition to completion and enrollment from OSHE within NJSDS. The three research questions below guided all research activities.

Research Questions

- (1) Do program outcomes differ by student and institution-level characteristics such as enrollment status, institution sector, program of study, specific EOF program support services and delivery model for the program, and student demographic characteristics? If so, how do program outcomes differ?
- (2) To what extent is the specific EOF program design successful at meeting the needs of economically and educationally disadvantaged college students in EOF programs across the state?
- (3) Can program service delivery design outside the mandated template be categorized? If so, which types of designs and services are associated with successful outcomes?

Researchers designed the assessment to capture a holistic perspective of EOF programs across the State. The following sections outline the multiple methods of data collection.

Document Analysis

The research team conducted a document analysis to better understand how participating institutions of the EOF program implement the base programmatic model and the extent to which programs incorporate additional academic and financial services. The document analysis examined the base programmatic model, regulations, and twelve EOF program websites (as detailed in the Background section). The participating institutions selected were Rutgers University, The College of New Jersey (TCNJ), Ramapo College, Stockton University, New Jersey City University (NJCU), Ocean County College, Seton Hall, Monmouth University, Kean University, and the New Jersey Institute of Technology (NJIT).9

Quantitative Methods

In partnership with the Heldrich Center, researchers used the New Jersey Statewide Data System (NJSDS), a longitudinal data system that includes data from four participating state agencies. The quantitative analysis involved financial aid data from HESAA as well as completion and enrollment data from OSHE. For the purpose of the analysis, researchers limited the scope to students who were enrolled for the first-time, full-time in an associate or bachelor's degree program in Fall 2014. Though there are non-aided EOF students across participating institutions, this analysis only includes aided EOF students. Using student financial aid data, researchers categorized students in the initial cohort into two categories: EOF students and non-EOF students. EOF students represent those who were awarded EOF funding at any point during their degree. Non-EOF students represent those who did not receive EOF funding at any point in pursuing their degree, irrespective of their funding status in any other program.

Researchers then tracked every student in each distinctive category by examining completion status through 2021. Following the review of completion status, the research team grouped EOF and non-EOF students into the categories (**Table 1**). Researchers analyzed these categories across race, gender, institution, and award level (see **Appendix C** for tables and figures). The institutions were classified based on region (north, central, south) and the institution type according to OSHE.

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¹ Researchers did not randomly select the websites to be analyzed. The document analysis included certain participating institutions, such as Rutgers University and the New Jersey Institute of Technology (NJIT), because researchers randomly selected administrative staff and students from these institutions to participate in interviews and focus groups. Other institutions (e.g., Stockton University, Seton Hall, etc.) were selected to ensure that the study had additional representation outside of interview and focus group participants.

Table 1. Categories by Completion Timeline

Completion Status	Completion Timeline	Completion Characteristics
Standard completers	100% of on-time, associate degree completers	Students completed their associate degree within 100% of the standard completion timeframe ¹⁰
	150% of on-time, associate degree completers	Students completed their associate degree between 100% and 150% of the standard completion time frame
	100% of on-time, bachelor's degree completers	Students completed their bachelor's degree within 100% of the standard completion timeframe
	150% of on-time, bachelor's degree completers	Students completed their bachelor's degree between 100% and 150% of the standard completion timeframe
Beyond 150% completers	Beyond 150% completers	Students completed their associate or bachelor's degree beyond 150% of the standard completion timeframe
Non-completers	Non-completers	Students who pursued an associate or bachelor's degree but did not receive an award as of 2021

Qualitative Methods

Researchers conducted **eleven** semi-structured interviews with OSHE, HESAA, and EOF program staff. The purpose of the interviews was to better understand how OSHE staff oversee EOF programs across the State as well as the short- and long-term objectives of the program. The research team coordinated with OSHE staff to conduct initial outreach to EOF program staff in early March 2023. The initial outreach included a Google form that potential interviewees (as well as focus group participants) could use to schedule an interview. All EOF program staff who expressed interest in participating in the study were selected for interviews. Researchers conducted 30- to 60-minute

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¹⁰ For the purpose of this study, researchers define the standard completion timeframe as four semesters (two years) for an associate degree and eight regular semesters (four years) for bachelor's degrees, both starting from Fall 2014. Similarly, 150% of the standard timeframe is six regular semesters (three years) for an associate degree and twelve regular semesters (six years) for bachelor's degrees.

interviews via Zoom between March and April 2023 (see **Appendix A** for the interview protocols).¹¹

Additionally, the research team conducted five semi-structured focus groups with sixteen EOF students. The research team originally used a stratified random sampling method to create a representative sample of EOF students at participating institutions across the State. Researchers first grouped all participating institutions by *institution* type (community colleges, independent colleges and universities, public research universities, state colleges and universities) and institution region (north, central, south). Though researchers conducted initial outreach to the fourteen institutions selected 12, few EOF students responded. The research team then used convenience sampling to recruit EOF students from any participating institution who expressed interest in participating in the focus groups through the Google form that EOF program staff distributed to EOF students. The EOF students who participated in the focus groups represented the following institutions: Rutgers University-New Brunswick (School of Arts and Sciences, School of Communication and Information, School of Nursing, Robert Wood Johnson Medical School), Rutgers University-Camden, Bloomfield College, Bergen Community College, and TCNJ. The research team conducted focus groups via Zoom between March and April 2023. The Google form provided multiple dates and times to ensure that EOF students had opportunities to participate. Focus group participants received \$20 electronic gift cards for participating in the study. Researchers triangulated data by producing a summary of the information provided during focus groups, which was sent in April 2023. Researchers used NVivo software and thematic coding to transcribe interviews and focus groups. Qualitative analysis of interview transcripts was a collaborative effort among researchers.

Limitations

This study had a number of limitations. Though the research team conducted outreach based on the sampling methodology, few EOF students from those participating institutions responded. Instead, researchers relied on EOF students who expressed interest in participating in the focus groups. The curtailed outreach limits the generalizability of the study's results. The COVID-19 pandemic presented another major factor in interpreting student perception of the EOF program. Many EOF students who participated in the focus groups started their college experience during the height of the pandemic or soon thereafter. Program operations likely differed from standard procedures as a result. These differences certainly impacted student experiences at their institutions and EOF programs in particular and as such, shaped their perceptions and opinions on certain aspects of the EOF program support services.

¹¹ One interview with an EOF staff member was conducted via email to accommodate for childcare-related issues.

² The institutions originally selected were Warren County Community College, Union College at Union County, Rowan College at Burlington County, Stevens Institute of Technology, Monmouth University, Gregorian Court University, Montclair State University, Rutgers University, William Paterson University of New Jersey, The College of New Jersey, and Stockton University.

The quantitative analysis was limited to students who are first-time, degree-seeking, full-time students who enrolled in an associate or bachelor's degree program in Fall 2014. If students had more than one completion record, we retained the completion record with the higher degree. A student may have both an associate and bachelor's degree, for example, but researchers included the record with the bachelor's degree in the quantitative analysis. The definition of non-completer students is also time-bound and limited to this study only.

The completions and enrollment data used for the analysis does not include students who transferred out of state and graduated elsewhere, including institutions that do not regularly submit to the OSHE Student Unit Record (SURE) system. Researchers categorized this type of student as a non-completer as a result. Another major limitation was that the analysis only included aided EOF students. Existing data does not capture non-aided EOF students in a clear way. Researchers also combined racial categories to comply with data confidentiality mandated by user agreements. This analysis combined Asian and American Indian students, for example, though these groups likely have different experiences.

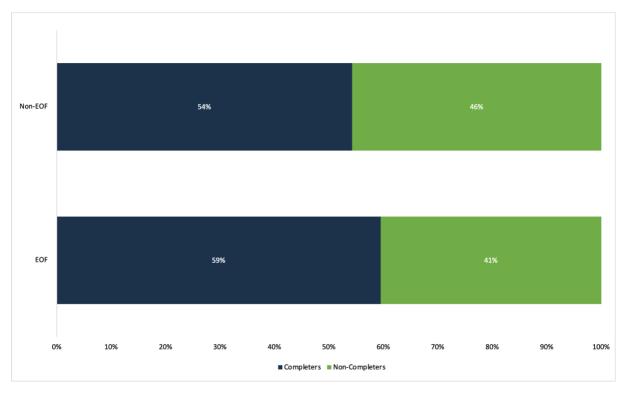
Findings

This section discusses the results of the analysis of completion and enrollment data in addition to high-level themes identified through interviews with OSHE and EOF staff and focus groups with EOF students. The following paragraphs discuss descriptive statistics, in particular, across race, sex, institution type, and region.

Quantitative Data Analysis

The results of the data analysis show variation in completion status (standard completers, beyond 150% completers, non-completers) and completion timeline (100% of on-time, associate degree completers; 150% of on-time, associate degree completers; 100% of on-time, bachelor's degree completers; 150% of on-time, bachelor's degree completers) (see **Table 1** for definitions). The completion rate for this cohort is slightly greater for EOF students than non-EOF students (**Figure 3**). Indeed, 59% of EOF students in the 2014–15 cohort were completers compared to 54% of non-EOF students.





When comparing completion outcomes by region, researchers found that institutions in central New Jersey have the highest percentage of standard completers for both EOF and non-EOF students. **Figure 4** shows that 59% of EOF students in the 2014–15 cohort at participating institutions in central New Jersey were standard completers, compared to 49% and 43% for the north and south regions, respectively. This may be the product of the types of institutions and where they are located within the State.

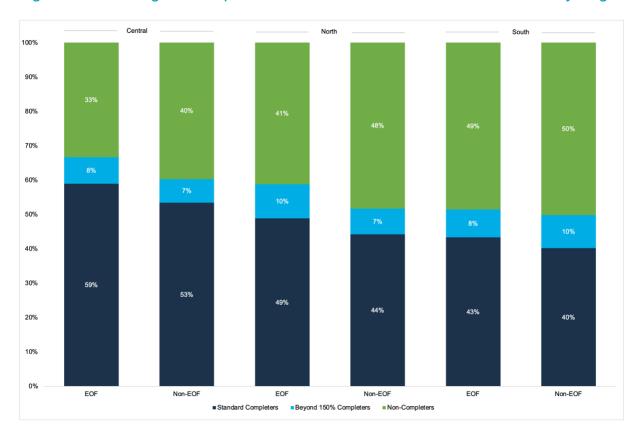


Figure 4. Percentage of Completion Status for EOF and Non-EOF Students by Region

Nearly half of EOF students at participating institutions in southern New Jersey did not complete their degree as of 2021. Researchers found, however, that the percentage of EOF students who were non-completers at participating institutions in southern New Jersey is comparable to that of non-EOF students in that region.¹³

¹³ Other factors, such as admission/acceptance rates, may impact completion rates by region. For example,TCNJ and Rutgers University have lower admission and acceptance rates, thus increasing the graduation rate for the Central region. The number of institutions may also effect completion rates. Future analyses should examine these additional factors in context to completion status by region.

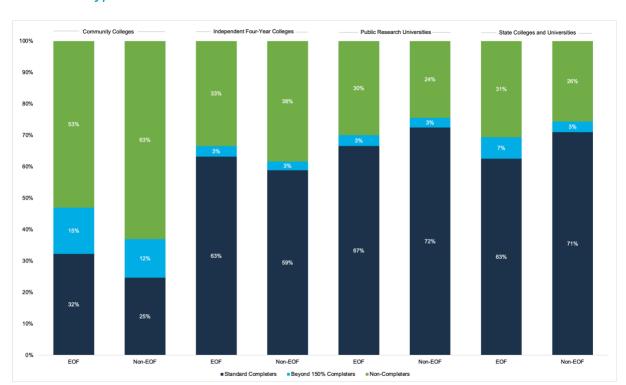


Figure 5. Percentage of Completion Status for EOF and Non-EOF Students by Institution Type

Researchers found that 67% of EOF students at public research universities were standard completers, followed by EOF students at state colleges and universities (63%) and independent four-year colleges (63%) (**Figure 5**). By comparison, 32% of EOF students at participating community colleges in the 2014–15 cohort were standard completers. Figure 5 shows that 53% of EOF students at community colleges did not complete their degree as of 2021. Most notably, EOF students at independent four-year colleges have a higher percentage of standard completers than non-EOF students, whereas the opposite exists for non-EOF students at other institution types, such as public research universities and state colleges and universities.

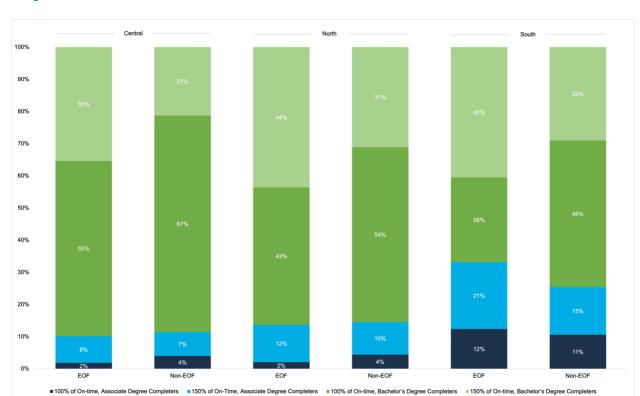


Figure 6. Percentage of Completion Timeline for EOF and Non-EOF Students by Region

Researchers found that EOF students at participating institutions in central New Jersey had the highest percentage of 100% of on-time, bachelor's degree completers (55%) compared the north (43%) and south (26%) (**Figure 6**). 44% of EOF students at participating institutions in north New Jersey were 150% of on-time, bachelor's degree completers. By comparison, 40% of EOF students at participating institutions in central New Jersey and 35% in south New Jersey were 150% of on-time, bachelor's degree completers. **Figure 6** also shows that EOF students at south New Jersey participating institutions had the highest rate of 150% of on-time, associate degree completers (21%) followed by north (12%) and central (8%) New Jersey. Participating institutions in south New Jersey also had the highest percentage of 100% of on-time, associate degree completers (12%).

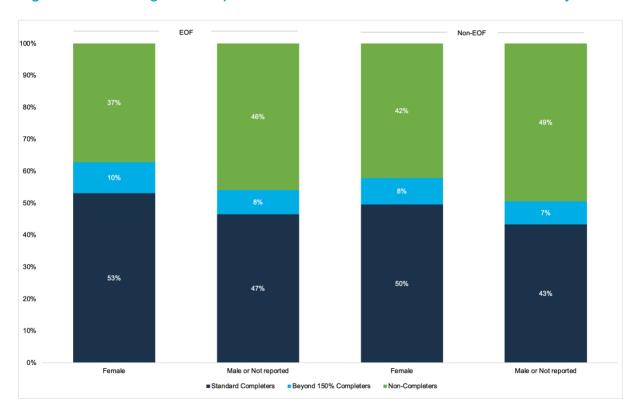


Figure 7. Percentage of Completion Status for EOF and Non-EOF Students by Sex

Researchers found that the percentage of standard completers were higher for female EOF students (53%) than both male EOF students (47%) and all non-EOF students across sex (**Figure 7**). Indeed, the percentage of standard completers for female EOF students is six percentage points higher than their male counterparts. Moreover, male EOF students had a higher percentage of standard completers (47%) compared to male non-EOF students (43%).

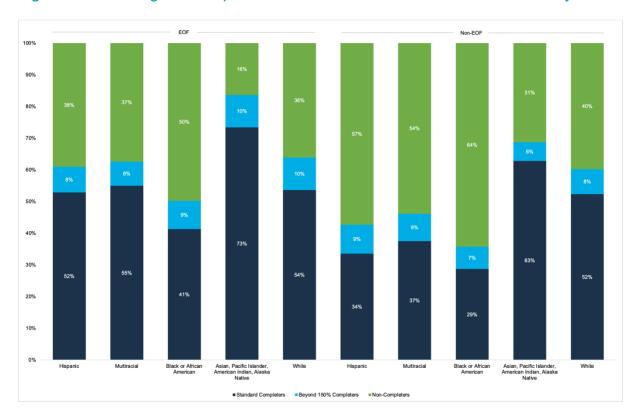


Figure 8. Percentage of Completion Status for EOF and Non-EOF Students by Race

The data analysis revealed variation in the percentage of completion statuses for EOF and non-EOF students by race. **Figure 8** shows that Asian, Pacific Islander, American Indian, and Alaska Native EOF students have the highest standard completion rate among both their peers and non-EOF students (73%). Other racial groups of EOF students with high standard completion rates include multiracial (55%), white (54%), and Hispanic (52%) students. By comparison, Black or African American EOF students have the lowest percentage of standard completers (41%).

Most notably, the percentage of standard completers for EOF students across each racial category are higher than non-EOF students. The percentage of standard completers for Black or African American EOF students, for example, was twelve percentage points higher than Black or African American non-EOF students. The gap was even larger for Hispanic students. Indeed, **Figure 8** shows that 52% of Hispanic EOF students were standard completers compared to 34% of Hispanic non-EOF students. It is important to note that the difference in the percentage of standard completers between white EOF and non-EOF students is marginal compared to the other racial groups. Additionally, **Figure 8** shows that non-EOF students across each race have higher percentages of non-completers than EOF students. The percentage of non-completers for Black or African American non-EOF students is 14 percentage points higher than the same group of EOF students. It is important to note that the percentages of late completers for both EOF and non-EOF students across race are only marginally different, fluctuating between 6% and 10%.

The analysis of completion and enrollment data revealed important findings about who participates in EOF programs as well as the graduation outcomes of EOF and non-EOF students across the State. The following section discusses interview and focus group themes that provide nuance to the quantitative analysis component of this study.

Qualitative Data Analysis

Interview and focus group participants shared their experiences and perspectives on both the strengths and areas for growth within the EOF program, as well as how these areas might be addressed. The following findings are organized into three categories: (1) what participants perceive as **program strengths**; (2) what they perceive as **areas for improvement**; and (3) student- and institutional-level characteristics that may impact **program outcomes** (see **Table 2** for categories and corresponding findings).

Table 2. Qualitative Data Analysis Findings

Category	Sub-Category	Finding
Program Strengths	Academic Support	Transitional ProgrammingTutoring and Supplemental Academic Resources
	Non-Academic Support	 Grant Funding Wrap-Around and Gap Support Services Networking and Career Development
	Social Support	 Advising and Student-Staff Relationships Community and Student-Peer Relationships
Areas for Improvement	Funding and Program Resources	Article IV RestrictionsOther Funding and Resource Limitations
	Academic and Non-Academic Support	Limited AdvisingLimited Tutoring and Academic SupportAdditional Programming
	Social Support and Recruitment	Conflicting Relationships and AttitudesLow Recruitment and Visibility
Program Outcomes	Student-Level Characteristics	 Experiential Characteristics Pre-College Preparation Class Level Academic Needs EOF vs Non-EOF Housing Non-Academic Barriers
		Social Characteristics Identities Personalities and Attitudes
	Institution-Level Characteristics	 Experiential Characteristics Resources and Institutional Support Staff Rigor and Relevance of Programming Social Characteristics EOF Identity and Community

Program Strengths

The interviews with OSHE, HESAA, and EOF staff and focus groups with students revealed important findings related to program strengths. Participants identified the following areas as strengths of the EOF program: (1) academic support, (2) non-academic support, (3) social support.

Academic Support

The benefit of EOF's transitional programming is an aspect of the program that many participants highlighted. Nine EOF staff cited this aspect of the program as an important feature for student success. Two staff members mentioned that the summer program may be a student's first opportunity to understand how college is set up and learn valuable skills, including how to manage their time effectively and/or communicate with professors. One staff member emphasized that the summer program offered "deputizes" first year EOF students. That is, it enables them to guide their peers and positions EOF as a sought-after program.

In addition to the initial summer program provided to first year students and/or transfer students, some EOF programs also offer subsequent summer and winter programs for students of differing class levels. One staff member highlighted the ways that students utilize these programs to meet financial needs during these time periods, improve their Satisfactory Academic Progress (SAP)¹⁴, and fund courses to boost their GPA. Additionally, several students in each focus group stated that transitional programing prepared them for college courses or clinical experiences without having to take on additional financial burdens. One student said,

I went through their [summer program] before entering college. It's like a bridge between high school and college to try to support students in that transition period which is super crucial. For me, it was a phenomenal opportunity to be able to have advisors and peers from similar backgrounds to have support.

Many other student participants echoed this sentiment. One EOF student highlighted how the credits offered in the summer program helped them academically.

The three credits that they give you during the [summer program] really helps to reach the 120-credit thing. Even taking those three practice classes was really helpful to get the hang of what a real college class is like. I think that was really good because you have to learn study habits, and you're in that environment where you learn to adapt.

Several staff and students discussed the academic support that the EOF program provides. Participants said that there are academic support classes and tutoring offered

¹⁴ Individual institutions set their standards for SAP.

for even the most rigorous courses like anatomy and organic biochemistry. One administrator highlighted that they hear about non-EOF students wishing they could also benefit from these additional resources. They stated,

I hear from our scholars that their peers envy the amount of support they receive from EOF. Their peers sometimes ask our department if they can participate in our support classes or programs. Unfortunately, while we would love to be able to provide our services to all students, we are state grant-funded and can only support EOF students.

Even in instances where tutoring is unavailable, participants noted that EOF staff are knowledgeable on where their students can obtain the resources and supplemental education required to be successful. Multiple student participants also noted that access to textbook and calculator rentals were valuable tools in their academic success. One student stated,

I think I engage with all of the services they offer, like the support [and] tutoring that they give for each difficult class. I really engaged in all of them, attended every single one of them. The textbooks, I also borrowed them, and I use them really well.

Non-Academic Support

Participants discussed the importance of student grant funding and the ways it has positively impacted them or, at minimum, reduced the amount that they would pay in tuition, fees, and living costs. Some students shared that there were times when they had to choose between studying or working, but grant aid gave them the opportunity to focus on school. One EOF student stated, "Since I know there's funding, I know that I have an extra hand, [and] it relieves me mentally. Like, okay, I don't have to [work] part-time." Another EOF student stated,

The grants they give are really helpful. I don't know how to put this into words, but I really just can't afford college ... even though I now currently work, the grants, the resources, and the network really helped me be able to pay for college ... So now that I don't have to focus on the money aspect, I can just focus on my education.

EOF staff also identified special project funding as an important feature of the program, indicating that special project funding enables them to go above and beyond for their EOF students. Participants stated that special project funding allows them to support students through a variety of support and programming uniquely tailored to their students' experience, such as technological support and affinity groups, ultimately filling programmatic gaps and service student wrap-around needs.

The interviews and focus groups revealed that EOF staff work tirelessly to provide wraparound and gap support services to meet the needs of their students. Participants felt that EOF advisors, in particular, are in tune to aspects of students' performance that depend on creative or flexible solutions. Some of these miscellaneous accommodations include:

- Assisting with financial aid award processing errors
- Paying for car repairs or transit pass to get to and from class via third party external funding sources
- Writing letters of recommendation
- Facilitating workshops, introducing keynote speakers, hosting meditation or time management event, and a variety of other activities
- Providing access to textbook rentals
- Paying for graduate school program applications
- Providing career exploration courses
- Providing education on course navigation tools and 4-year course planning
- Offering job interview preparation, educational group trips, retreats, study abroad funding, and conferences
- Encouraging campus collaboration which involves connecting EOF students to external resources like disability services, career counseling, health services, and leadership opportunities
- Paying for uniform needed for clinicals
- Providing preparation for graduate school and professional school entry exams
- Offering snacks in the office

Non-academic services are important for the overall wellbeing of students. The EOF program's ability to navigate academic, social, emotional, financial, and professional obstacles is a strength of the program, and it is something that their students value. One EOF student stated, "I know that personally, here at my college, the counselors, even sometimes take money out of their own pockets to fund these things and that's really important to me." Many EOF staff described their commitment to the EOF program. One participant stated,

This is a program I love. This is what I have dedicated my career to. One of the things that I'm really proud of is that our students do have financial need, and there's a limit to what we could do with state funding to assist them, but what I've really poured a lot of my passion into is creating [alternative funding sources] ... to help current EOF scholars with emergency educational needs [and] life needs—their glasses break, or they need to go to the dentist, or they need a transit pass because they have an internship opportunity—so we're able to assist students.

Several EOF staff highlighted the importance of networking and stated that they host a variety of networking events. Some of these events center around identity (e.g., race, gender, etc.), while others are tailored for a specific major or profession. Participants also indicated that the EOF program facilitates networking opportunities for students interested in research by getting them involved in research symposiums and events.

Other administrators illuminated the programs' role in facilitating meaningful connections between current scholars and alumni. EOF administrators highlighted the importance of current students seeing successful alumni as a demonstration of the program's effectiveness and motivation for them to work toward their goals. One participant stated, "One kid was told, 'You'll never be a doctor' by a professor ... And now that kid is a doctor. I had him come back and tell his story." According to participants, these types of testimonies are typically disseminated in a meet-and-greet format during the summer program. However, EOF staff and students both expressed a desire to incorporate more alumni events throughout the academic year.

Social Support

Almost all participants discussed the ways in which advisors work tirelessly for students. Some EOF students even stated that there are times when their advisors "take money out of their own pockets" to support them. Based on participants' responses, advisors appear to be a central aspect of what allows the EOF program to work. The staff participants echo similar sentiments of camaraderie between students and staff. One EOF student said,

I always feel comfortable talking to [their advisor], and not even just with [them]. I also talked to the other EOF advisors and they're very welcoming even to people that are not their advisees. And they're willing to talk to you. If you need their help, they're willing to help you.

Many participants stated that EOF students are satisfied with how effectively advisors communicate. Participants indicated that EOF students are always aware of workshops taking place and they receive individualized support if they are struggling in school or other areas. EOF students said that they feel empowered due to the connection they have with their advisors. Several EOF students stated that they feel academically, socially, emotionally, and professionally supported by their advisors. One participant stated,

My advisor—we're always talking about things that I want to do ...
Personally, I'm big on a support system, so they're my support system here, and I feel as long as I have a support system, I can do anything.

All sixteen EOF students who participated in this study expressed gratitude for their advisors and the support they provide. One participant noted feeling completely supported by their advisor, that they are a good role model and keep them on track. Numerous EOF administrators and students discussed the comprehensive and supportive nature of advising in the EOF program. Participants indicated that advisors reach out to professors directly for updates on student performance, call their students to check in, help with career and life planning, and have one-on-one meetings two times a month instead of once a month if issues arise in academic performance or emotional wellbeing.

Interviews and focus groups revealed that the EOF program not only focuses on the educational well-being of their students, but also social and emotional well-being. One administrator discussed a game-show style event their program conducted to facilitate a sense of community and camaraderie among students. Not only did participants describe positive relationships between current students, but among former students, as well. One EOF student stated,

The EOF program here tries to make sure that it's a community ... by bringing back students who finished college and now are actually working in their fields or in further education. They come back to provide insights to the students and motivation as well; to let them know that it's extremely possible—that it takes a lot of work, but it's extremely possible to do whatever you want to do.

Indeed, participants indicated that the EOF community lasts long after graduation. The EOF program supports students from the associate level through doctoral studies, and regularly invites alumni. Many participants expressed the ways that the program can feel like a family. Several EOF students stated that being around people who had similar experiences and were from similar backgrounds helped them "feel at home" and fostered a sense of belonging at their institutions. Some students stated that one of their favorite things about participating in the program is the life-long friendships they have made.

Areas for Improvement

Participants identified the following areas for improvement within the EOF program: (1) funding and program resources, (2) academic and non-academic support, and (3) social support and recruitment.

Funding and Program Resources

OSHE and EOF staff expressed two major concerns related to funding and program resources. First, administrators identified the inflexibility of Article IV funding as a major barrier to program and student success. Participants noted that Article IV funding may not be used to cover costs typically covered by a student's financial aid package, though they overwhelmingly expressed a desire for flexibility in Article IV approval and spending in order to address students' non-academic needs. Participants noted that these additional costs, which include housing, transportation, and the purchase of textbooks or equipment required by academic programs, are often not covered by students' financial aid package. As one administrator summarized:

If I could say one thing we need, I would love for some of the guidelines and parameters to be relaxed a little bit on some of the funding, and just allow us to be who we are individually for our institutions ... If I had to pick out something that's lacking, give us the flexibility to see the need. Give us the money and let us meet that need without all the red tape.

Another administrator echoed this sentiment, stating: "I think having funds separate from the academic to address some of those nonacademic barriers would be great. Not having them is definitely a space where we can improve upon."

EOF staff expressed concern with limited funding and program resources, in general. Participants identified a need for greater investment in the EOF program at both the state and institutional levels. Specifically, participants identified the following areas in which funding and resource limitations hindered program and student success: staffing and facilities; grants and support services; and additional wrap-around support.

Participants discussed the need to hire more staff to support increased caseloads, as well as to better support existing staff members through improved compensation and benefits. As one administrator pointed out, increased caseload per counselor hinders the success of EOF advising: "I would love to have another staff person to help lighten the load, so that our advisors could be a little bit more intentional." Another EOF administrator shared this concern, stating, "I think we have too many students for [only a few directors]. If the funds were there, I think we could easily employ ... more ... to help us be a bit more effective." Participants also noted the need for improved program facilities, including centrally located offices for improved accessibility for students.

Participants additionally expressed concern over minimal grant support provided to students, as well as the inability to provide necessary and supplemental programming as a result of funding deficits. Participants repeatedly referred to the grant support as "nominal," meaning that the financial support provided to EOF students was often ineffective at covering total educational costs. As one participant described,

The financial support in the form of a grant is small, which is why we continue to raise monies to have discretionary funds to support our scholars. Like most college students, our scholars would be happier receiving more financial aid.

EOF staff also expressed concern with an inability to fully fund tutoring services, developmental seminars, and additional programming, ultimately impeding the EOF program's goals.

Participants also identified the inability to address the wrap-around needs of students, as discussed in the above section regarding Article IV funds. These wrap-around needs include housing costs, technology support, childcare, and other non-academic needs. EOF students specifically identified difficulties related to housing, overwhelmingly agreeing that the affordability of on-campus housing was a detriment to their EOF experiences, as well as their physical and mental health. EOF students expressed difficulties related to residing in off-campus housing and agreed that the EOF program would be greatly improved if it lessened the burden of housing costs. One student noted that their intensive academic schedule kept them on campus all day:

If I dorm, I would be able to take a break or take a nap or eat something, but instead, I have to pack food from home or buy something. So *dorming* would have helped keep myself a little healthier, like mentally better, too.

One participant put the problem succinctly: "Money is the common denominator.

More, more money. Not that it would solve all the problems, but it would definitely help."

Academic and Non-Academic Support

Participants noted some limitations related to the advising component of the EOF program. Though participants largely identified advising as a strength of the program, some administrators expressed that student success is hindered by few mandatory advising touch points throughout the academic year, resulting in minimal follow-through and consequences for student progress. Participants were specifically concerned about advising relationships with upperclassmen, noting that there are fewer advising requirements for juniors and seniors which may result in limited engagement with the EOF program and potentially poorer academic and developmental outcomes. One administrator noted, "I personally believe that there should be more touch points with our juniors and seniors. I think we lose sight of the professionals that we're trying to build."

Participants identified counselor and student relationships within advising as another challenge of the EOF program. Administrators expressed concern over students' attitudes and perspectives on advising. One administrator noted that students may feel embarrassed or disappointed about their academic performance, resulting in their disengagement from EOF advising and other support services. The administrator stated.

That's always a challenge—getting [students] to understand that you're not beholden to us in a way—that you have to protect whatever feelings you think we might have about you. That's not what this is about.

In addition, one EOF student identified concerns related to their counselor's unresponsiveness, as well as the counselor's lack of knowledge of their degree requirements.

While participants generally noted the importance of the tutoring and academic support provided by the EOF program, staff highlighted the need for greater investment in tutoring and academic support services, particularly at participating institutions which lack robust academic services provided to the general, non-EOF population. Participants noted that when EOF academic services are limited, EOF students must rely on existing institutional support services, though wide disparities exist as a result of varied institutional resources. One participant discussed the differences between two universities that they had worked at:

There are some challenges I feel like here in terms of academic support, that since I've been here has been a struggle for our students, especially the strength of our tutorial services ... But when I was at [another institution], they had a full tutoring center ... on top of the additional tutoring services from EOF, which currently we don't have.

Participants also suggested the need for an inventory of academic support services across EOF programs in order to ensure that programs received proper investment relative to available institutional resources.

Participants overwhelmingly agreed that students engage the least with the additional, non-academic programming provided by EOF programs. This programming may include kickoff meetings and town halls, career-related services, affinity group meetings, or other supplemental opportunities. EOF staff and students alike cited the scheduling of these events, as well as their relevance to students, as the biggest barriers for engagement, regardless of whether these events are mandatory or optional.

Participants collectively stressed the importance of finding time to host additional programming that does not conflict with students' schedules. Students additionally discussed how programming that is offered only in-person creates an additional barrier for engagement— particularly for those who commute—and expressed a desire for greater hybrid programming.

Social Support and Recruitment

Participants identified the relationships and attitudes of administration, staff, and students as an additional challenge related to navigating the EOF program. One EOF administrator cited difficulty in adapting services to changing student needs due to the conflicting vision and "philosophical differences" held by university administration. The participant expressed,

[The administration] has [their] vision of EOF that now I'm kind of getting forced into doing versus some of the things that I would be willing to do ... best practices that I've built up over years. So, it's facing institutional challenges as well as institutional resources.

Participants also expressed concern over stigma related to the program. Participants discussed how the EOF program continues to be perceived as a support program specific to Black and Hispanic or Latino students. One administrator discussed how students may experience varying levels of stigmatization based on their race "because people on campus won't look at a white student as being an EOF student or an Asian student as being an EOF student." This stigma extends to EOF staff as well, as one administrator noted that non-EOF campus staff "tend to pigeonhole" EOF staff members and insinuate that they are "not engaged on campus" even though "nobody here is more engaged than this office because we're connected to everybody."

Participants cited imposter syndrome as an additional barrier to program and student success, in part due to the stigma associated with the EOF program, as well as the increased pressure that students may face as first-generation students. One participant stated,

I think a lot of it has to do with that they just don't feel like they fit in at college, especially a college of this magnitude. Some of it has to do with race and things, but a lot of it is still like that fear of the unknown. And even though we do the best we can in the summer, they're still fearful because they're the one who's going to make it, right? They're the ones at home where everybody's cashed in all their chips and, "Hey, Johnny's going to make it, right?" And so, they have all this weight on their shoulders.

Participants also cited differences in students' understanding of the EOF program as an area of concern, as the non-financial supports of the program are critical to student success. One administrator noted that "sometimes, especially newer students or students who are not as familiar with EOF, kind of arrive thinking this is about money." The administrator stressed the importance of instilling in students that the real value of the program is from the non-monetary support—that "you can't really quantify what these things are worth"—in order to support greater engagement and outcomes.

Participants identified low recruitment and visibility as another limitation of the EOF program across the state. OSHE and EOF staff noted that despite the program's long history, many institutions of higher education, K–12 institutions, and students alike remain unfamiliar with the program. This may result in EOF programs being neglected in their respective institution's resource allocation process, as well as eligible students being unaware of EOF programming and failing to receive necessary support. As one participant stressed, "I don't want [the EOF program] to be the best kept secret. I want us to be the best support entity in the country, if not the world."

Program Outcomes

Based on interview and focus group findings, researchers identified both student- and institution-level characteristics that may impact program outcomes and student experiences.

Student-Level Characteristics

EOF student experiences and outcomes may differ based on whether the student identifies as first-generation or if they had previously received college preparation during their K–12 education. Participants reported that students with limited pre-college preparation tend to engage less with EOF services and programming and may experience greater academic struggle and imposter syndrome than their peers.

Student experiences may differ based on class level or academic standing.

Participants reported that juniors and seniors, or students with higher academic standing, may engage less with EOF services and programming beyond the requirements of their program. Participants noted that this largely results from minimal requirements enforced for juniors and seniors compared to their underclassmen peers.

Student experiences may differ based on academic needs, such as major, GPA, and graduation status. Participants reported that the majority of EOF programming is offered to all students regardless of their academic track, but that students tend to engage only in the services and programming that are relevant to their academic needs. This includes major-specific programming; academic services like tutoring and seminars for students who do not meet satisfactory academic progress; and career-related services.

Participants agreed that student experiences differed vastly among EOF students compared to non-EOF students. Participants noted that, despite potential stigma associated with the program, EOF students are often better resourced and serviced by their institutions than their non-EOF peers. EOF students overwhelmingly agreed that the program provides the foundation for a successful transition into higher education. Both administrators and students noted that non-EOF students may be envious of the opportunities and benefits provided by the EOF program.

Student experiences and outcomes may additionally differ based on factors related to housing. Students overwhelmingly agreed that living off-campus hinders their ability to engage with EOF services and creates stressors that impact their academic and health-related outcomes. Administrators and students alike emphasized the importance of living on-campus to reduce these burdens, as well as to strengthen the program's sense of community. However, participants cited high housing costs as a barrier to on-campus residence and a primary concern related to poor engagement and student outcomes.

In addition to housing, other non-academic barriers, such as transportation, childcare, and food insecurity, may additionally impact student experiences and outcomes. Participants noted that, due to the nature of the population that EOF programs serve, EOF students often face immense non-academic challenges that limit their ability to engage in the program and present obstacles for academic success. Though an institution's student population may share commonalities, participants stressed that each EOF student is distinct in their needs and experiences and thus require individualized wrap-around services to ensure they thrive on campus and graduate in a timely manner.

A student's identity, including their race, gender, and sexuality, may impact their experiences within the EOF program. Though participants largely agreed that student outcomes did not differ along these demographic lines, some participants noted that students may experience varying levels of stigma and imposter syndrome as a result of

their intersecting identities. However, participants also expressed that students engage with and appreciate programming centered around their identities (i.e., affinity groups) as it encourages community building and establishes connection between students and potential role models.

Participants reported that student personalities and attitudes impact their EOF experiences and outcomes. As previously mentioned, participants noted that students who possess a greater understanding of the support provided by EOF in addition to potential grant funding better engage with the program throughout their academic careers. Additionally, participants reported that students who are more reserved or fear disappointing their advisors may fail to take full advantage of advising and other program resources. In contrast, students with less imposter syndrome and greater levels of self-efficacy feel more comfortable navigating both the EOF program and higher education in general, which may result in increased levels of engagement and greater academic outcomes. Ultimately, participants stress the importance of intentional outreach and tailored advising in order to close the perceived experience and outcome gaps created by differing student personalities and attitudes.

Institution-Level Characteristics

Student experiences and outcomes may differ based on the amount of funding and resources made available to them, as well as the level of institutional support they receive. Participants reported that programs differ vastly in terms of the services they can provide based on the resources that already exist within an institution, as well as the amount of funding each EOF program receives. These differences materialize through varied student grant amounts, intensiveness of tutoring and academic services, and the extent to which additional programming may be provided. Additionally, participants cited institutional support and matching as a key factor for program and student success. Participants agreed that when institutions prioritize and invest in EOF programs through financial support and matching, this translates into greater student experiences and outcomes.

Student experiences and outcomes may additionally differ based on the number of EOF staff and their specialization at a given institution. Participants agreed that limited staff and increased caseloads hinder their program's ability to be intentional and intrusive in advising. Moreover, participants noted that EOF staff are over-burdened with program and campus responsibilities, risking the possibility of providing weakened advising and services to students. EOF students also noted that their academic experiences differ based on their counselor's specialization, noting that they experienced greater satisfaction and confidence in navigating higher education when their counselor shared a similar academic background as the one they are pursuing.

Participants identified the rigor and relevance of EOF programming, specifically the summer program, as an additional factor that may impact student experiences and outcomes. Participants noted that the intensiveness, length, and number of credit hours provided in the summer program contribute to a foundation for

student success. Participants agreed that a rigorous summer program, as well as intensive academic year programming, ease the transition into higher education and provide a cushion to fall back on if students are not meeting satisfactory academic progress.

Participants agreed that a strong EOF identity and sense of community contribute to greater student experiences and outcomes. Administrators and students alike noted that when students are proud to be in EOF, they are more likely to be engaged and active within the program. Participants reported that a sense of pride and knowing that they have a community to support them is one of the greatest strengths of the program, and that fostering these feelings is integral to positive student outcomes.

Summary of Findings and Implications for Practice

This section presents an overview of findings from analyzing completion and enrollment data and the interviews and focus groups with EOF program stakeholders. Based on these findings, the research team developed a typology based on service type categorizes. This section concludes by discussing suggestions for the EOF program.

Overview

This study found that EOF students had slightly higher proportion of completers compared to non-EOF students. On an institutional level, public research universities had the highest rate of completers among EOF students. Researchers also found that the percentage of standard completers were higher for female EOF students than both male EOF students and all non-EOF students across sex. Additionally, this study showed the percentage of standard completers was greater for EOF students across race compared to non-EOF students. EOF students who identify as Black or Hispanic/Latino had much higher percentages of standard completers compared to the same group of non-EOF students.

The interviews and focus groups revealed findings related to program strengths and areas for improvement. Participants highlighted the importance of transitional programming in which the summer program guides EOF students into their first year of their postsecondary program. Researchers found that participants benefit from the academic support provided by EOF programs, especially tutoring. Additionally, EOF students discussed the importance of funding, which allow students to focus on their education and supports programs in their facilitation of tailored services. Many participants discussed networking as an opportunity to facilitate meaningful connections between current scholars and alumni. Many participants mentioned networking and career development as opportunities to facilitate meaningful connections between current scholars and alumni. In terms of social support, participants highlighted the significance of advising and student-peer mentorship.

Researchers found, however, three areas for improvement funding and program resources, academic and non-academic support, and social support and recruitment. Participants identified that the inflexibility of Article IV funding as a major barrier to program and student success. Because additional costs are often not fully covered by financial aid packages, participants expressed a desire for better flexibility in Article IV approval and spending in order to better address students' non-academic needs. Relatedly, participants expressed concern with limited funding. With additional funding, EOF programs could improve staffing and facilities, grants and support services, and wrap-around support. Other participants were concerned about advising relationships with upperclassmen; barriers to providing rigorous academic support; and challenges engaging students in additional programming.

In terms of program outcomes, participants highlighted a number of student- and institution-level characteristics that may impact student experiences and program outcomes, including academic needs, housing, identities (race, class, gender), resources and institutional support, staffing, and more. Related to identities and student experience, a common theme among participants was the stigma associated with the EOF program. Participants discussed how the EOF program continues to be perceived as a support program for Black and Hispanic or Latino students. This misunderstanding, coupled with poor program visibility, means that eligible students may not receive necessary support. A related and often cited barrier to program and student success was imposter syndrome, as many EOF students discussed the increased pressure they face as first-generation students.

Typology

Speaking with OSHE and EOF staff as well as EOF students, in addition the findings from preliminary document analysis, allowed researchers to categorize EOF program features and develop a typology of programmatic elements across New Jersey participating institutions. Researchers used three categories for support services—academic, social, financial—to inform the typology. **Table 3** describes each type of support service and provides examples and the barriers addressed.

Table 3. Program Features in the Educational Opportunity Fund Program

Service Type	Description	Examples	Addressed Barriers
Academic Support	Services that assist students in achieving academic success, such as tutoring, study groups, and academic advising	Tutoring services, supplemental instruction programs, academic advising	Academic challenges, learning disabilities
Social Support	Services that help students build community and connections, such as mentoring, peer support, and social events	Peer mentoring programs, social support programs, diversity and inclusion programs	Social isolation, culture shock, lack of belonging
Financial Support	Services that assist students with financial needs, such as scholarships, emergency funds, and financial literacy programs	Scholarship programs, emergency aid programs, financial literacy programs	Financial constraints, food/housing insecurity

Using interview and focus group findings and support service categories, researchers developed a typology of EOF programmatic elements. **Table 4** provides program element type based on levels of academic, financial, and social support, corresponding descriptions, and examples of EOF programmatic elements. The **summer and winter programs** offered by most EOF programs, for example, are highly academic with substantial financial support, with fewer social opportunities. Several focus group participants indicated that the intense class schedules and additional required programming during the summer programs resulted in limited social time. At the same time, however, focus group participants acknowledged that they were better prepared to

start the Fall semester because they participated in the summer program. Both the summer and winter programs offered by EOF programs demonstrate increased academic and financial support.

Another programmatic element included in the typology are professional and career development programs and workshops. This programming allows students to come together to build resumes, network with their peers and alumni, learn how to dress professionally, conduct mock interviews, and other events. One example is **Books and Brunch** offered at Seton Hall University. By reviewing the program website, researchers found that the Books and Brunch program allowed EOF students to gather with each other to study and provides them with brunch food. Books and Brunch, in addition to other professional and career development programs, represents supplemental programming that increases an EOF program's academic and social support for students.

Supplemental institutional financial aid was a programmatic element frequently cited in the interviews and focus groups. These additional grants represent targeted supplemental financial support for motivated EOF students. Though this programmatic element is largely financial in nature, supplemental institutional financial aid represents an additional commitment made by the participating institution to support EOF students' academic pursuits.

Table 4. Typology of Educational Opportunity Fund Programmatic Elements¹⁵

Program Type	Description	Examples
High-academic, high- financial, low-social	Comprehensive support services to help low-income students succeed in college, including those who face multiple barriers	Summer and Winter programs
High-academic, low- financial, low-social	Comprehensive support services, but with limited resources, prioritizing support for students facing significant barriers	Professional development workshops
Moderate-academic, moderate-financial, low- social	Targeted support in specific areas, focusing on addressing specific barriers	Supplemental instruction programs, financial literacy programs
Moderate-academic, moderate-financial, high- social	Targeted support in specific areas, with an additional community building component	Professional and career development programs and workshops
Moderate-academic, low- financial, high-social	Opportunities for low- income students to socialize and build community on campus, addressing isolation and lack of community	Alumni networking, Socials
Low-academic, high- financial, low-social	Targeted supplemental financial aid offered to provide additional support for motivated EOF students	Supplemental institutional financial aid

¹⁵ The typology provides a snapshot of the different programmatic elements offered to EOF students at participating institutions. Future research should continue to build on the typology in which participating institutions could use to examine their own program and support services through the lens that the typology provides.

Suggestions

Based on findings from the quantitative analysis of completion and enrollment data and the interviews and focus groups with stakeholders, researchers developed **institution**-and **state-level** suggestions around improving support services and service delivery to better meet the needs of EOF students. The following suggestions can inform the future of the EOF program:

Institution-level

- (1) Hire additional EOF staff to support smaller caseloads. This includes hiring specialized staff like mental health counselors, grant writers to support special project requests, and/or individuals with expertise in relevant fields for students.
- (2) Provide supplemental institutional financial aid for room and board when EOF students are not covered by their financial aid package. Many EOF students cited off-campus housing and commuting as a barrier to their educational pursuits. Providing all EOF students with funding for room and board would allow them to focus on their studies.
- (3) Provide more accessible programming and social opportunities to increase participation from EOF students. Both EOF staff and students expressed need for more time to participate in program activities. Many EOF students, in particular, indicated that they would like to attend more events, but are unable to do so because of scheduling conflicts. These events could be more casual and social in nature and be offered both in-person and virtually, which would increase community building opportunities within EOF programs, particularly for students who live off-campus.
- (4) Provide additional academic support and career development to EOF students. This includes increasing access to and quality of academic resources, especially tutoring, and enhancing college readiness and career development programming for EOF students. Participants frequently cited the differences in services within and across participating institutions and noted that these differences have a direct impact on student outcomes.
- (5) Improve recruitment efforts to ensure eligible students are successfully integrated into the program prior to freshman year. Institutions must engage in intentional recruitment efforts within their respective communities to better publicize the EOF program, including the program's eligibility requirements and services provided.

State-level

(6) Invest greater funding into EOF program to expand the number of EOF students served and services provided and reevaluate Article IV regulations to examine funding flexibility. This study identified evidence to support that economically and educationally disadvantaged students benefit from the EOF program. Additional Article III funding could allow the EOF program to reach a greater number of these students across the State, including part-time students. Additionally, more participating institutions could match or supplement the funding being provided by the state. This would allow the program to grow within their institution and accommodate a larger percentage of the student population.

In addition to increasing the number of EOF students served, greater program funding may support the expansion of academic and non-academic services and programming across institutions. Participants cited the importance of building and maintaining robust tutoring services, as well as the desire to provide students with additional opportunities, such as networking, career development workshops, study abroad, and affinity groups. Participants emphasized that greater investment in the program at the State-level is necessary to keep up with the changing needs of EOF students and support them as "whole" persons. Participants also identified the need for greater funding to support staff hiring and office centralization.

Article IV regulations must also be reevaluated by the Board of Directors to examine the flexibility of funding. Participants identified the inflexibility of Article IV regulations as an immense barrier to providing services that fill the wraparound needs of EOF students. Greater flexibility would allow EOF staff and programs to fill in the gaps left by student financial aid packages and ensure that students remain fully engaged in the EOF program by addressing non-academic barriers such as housing, transportation, food insecurity, and more.

- (7) Increase recruitment and marketing efforts across the State. The State should offer support to assist participating institutions and EOF programs in creating greater visibility of the EOF program and improving the recruitment of prospective students. Participants frequently identified awareness as an obstacle to program success, which could be addressed with additional marketing and recruitment efforts led by the State. Researchers also propose developing a standard communication toolkit for participating institutions to reduce the variation in formation provided on EOF program websites.
- (8) Increase effective data collection around program outcomes and programmatic elements. One participant stated that it would be beneficial to have more robust data analytics to ensure that all programs are meeting

standards. One suggestion could be to develop an annual report of EOF student outcomes using NJSDS. Relatedly, the State should develop an inventory of all programmatic elements (academic, financial, social support services) by EOF programs across all 41 participating institutions. This inventory should include details on which program offers which service, and how these services are implemented at each institution. Increased effective data collection, in addition to maintaining consistent performance reporting, would help OSHE and/or future studies better understand the range of services provided and further improve the typology developed. Moreover, it would provide examples to institutions looking to replicate best practices from others.

Discussion

This study used a combination of quantitative and qualitative methods to better understand the EOF program—how outcomes differ by student and institutional level characteristics and to identify programmatic elements associated with successful outcomes. The mixed-methods approach allowed researchers to collect critical feedback from multiple stakeholders, including OSHE staff, EOF program administrators and counselors, and EOF students. The in-depth interviews with OSHE staff, HESAA staff, and EOF staff and focus groups with EOF students revealed significant findings related to program strengths, limitations, and outcomes. An important aspect of our findings shows that the EOF program structure prioritizes transformational framework practices to achieve diversity, equity, and inclusion. The academic, financial, and social support provided by the EOF program, as described in the Findings section, are focused on giving students the resources and tools needed to succeed academically, whether that comes in the form of tutoring support, supplemental institutional financial aid, or peer mentoring. Based on these findings, researchers developed eight suggestions for participating institutions and the State to implement. All eight suggestions are intended to increase academic, financial, and social support services provided by the EOF program and to better support EOF students in the future.

There are several areas of future research that would further inform the progress of the EOF program. This study did not include the county of residence for EOF students due to disclosure risks. Future research should therefore analyze completion rates and completion timeline by county of residence, as data shows substantial disparities in household income and educational attainment across the twenty-one counties in New Jersey. Additionally, future research should consider including non-funded EOF students as well as indicators related to wellbeing, including socioeconomic status (SES). With the recommended expansion of data collected, future research could better understand the relationship between certain program features (e.g., summer and winter programs, tutoring and supplemental advising, etc.), student- and institution-level characteristics (e.g., housing, community, etc.), and student outcomes.

This study overall noted the importance of the EOF program in improving education outcomes for economically and educationally disadvantaged students. A majority of

participants highlighted the importance of the academic, financial, and support services provided in helping EOF students graduate with their degree. The suggestions presented in this report serve to further strengthen the EOF program to better meet the needs of students and to help reach more economically and educationally disadvantaged students in New Jersey.

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Appendices

Appendix A. Interview Protocol

EOF Program Staff March 2023

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Introduction

[· · · · · · · · · · · · · · · · · · ·	, ····]
Hello. My name is	and I am with the Edward J. Bloustein School of Planning and
Public Policy at Rutger	s University. Thank you for speaking with me today. In
partnership with the Ne	ew Jersey Office of the Secretary of Higher Education, we are
working on a study title	ed: Assessing the Effectiveness of the Educational Opportunity
Fund Program.	

The goal of this research is to explore the ways that the Educational Opportunity Fund program supports eligible students and improves the equitability of higher education across the state. It is designed to yield actionable insights on differences in program outcomes by student and institutional-level characteristics, the extent to which the program meets student needs, and the categorization of program service delivery.

Because of your expertise with this topic, we are seeking your input on the functioning of the EOF program at _____ and your recommendations for how it could better meet the needs of New Jersey students. Thank you for agreeing to assist us in this effort.

[Note: The following Anonymity Statement must be read verbatim.]

Your participation in this session is voluntary and confidential. Nothing you say today will be connected with you personally. This interview should take no longer than one hour. You previously received a copy of the informed consent form. By voicing your consent and continuing with this interview, you give the study team permission to use what you tell us, but not your name, in our final report. You can choose to skip a question that you are not comfortable answering or stop the call at any time.

Allow time for interviewee to read the electronic version of the consent form.

Can I answer any questions?

Do you consent to the interview?

Do you consent to a recording of this interview? The recording makes it easier for me to focus on our conversation rather than taking notes. The recording **will not** be shared with anyone outside of our research team.

Interview Questions

Background (RQ2)

- 1. To begin, please tell me a bit about your role at < university >.
 - a. How many years have you worked in this capacity?
 - b. Can you describe your roles and responsibilities at work?
 - c. What is your position's relation to the EOF program?

Program Implementation (RQ3)

- 2. Can you describe the characteristics of <university>'s EOF program?
 - a. Probe: What kind of support and services are offered to students?
 - b. How does <university>'s program differ from others in the state?
- 3. Approximately how many EOF students does <university> serve each year?

Administrative Experiences (RQ1, RQ3)

- 4. Which services and support do students tend to engage with the most? What about the least?
 - a. Why do you think that is?
- 5. When do students typically engage in EOF services <or specific service based on prior response> most?
- 6. Are services tailored specifically to students or do all students receive the same support at <<u>university</u>>?
- 7. How are students placed in support services? <u>Probe</u>: Who decides what type of support services that the student receives?
- 8. From your perspective, what components of the EOF program do students typically express greater satisfaction with (i.e., financial support, professional and academic development activities, etc.)?
 - a. Why do you think that is?
- 9. From your perspective, what components of the EOF program do students seem less satisfied with (i.e., see above)?
 - a. Why do you think that is?
- 10. In your opinion, how much does someone's experience with the EOF program differ based on individual characteristics?

How much does someone's experience differ based on their living situation (in oncampus owned housing, off-campus (with family), off-campus (without family)?

Program Outcomes (RQ2)

- 11. How does < university > measure student participation and progress?
- 12. In your opinion, how does the EOF student experience compare to non-EOF students?
 - a. To what extent do you think the EOF program impacts student performance? What about graduation outcomes?
- 13. In your opinion, what makes a student more or less likely to be engaged and successful with this program?

Are there any reasons why a student may not fully participate?

- 14. From your perspective, what are the strengths of the EOF program at <university>? That is, what works well?
- 15. From your perspective, what are opportunities for improvement in the EOF program?
- 16. From your perspective, what are the needs—either economic or educational—that the EOF program, in general, is good at meeting?
- 17. What could the EOF program do differently to better meet the needs of students?
- 18. Are there any particular components of your EOF program that stand out in terms of student success and outcomes?

Wrapping Up

- 19. If you could change one thing about the EOF program at <university> based on your experience, what would it be? [If they list multiple things], which of those would be the most important?
- 20. Are there any questions I should have asked about the EOF program but did not?
- 21. Do you have any additional comments you would like to make?
- 22. Is there anyone else you think it would be helpful for us to contact for this research?

Office of the Secretary of Higher Education (OSHE)
March 2023

Introduction

Hello. My name is _____ and I am with the Edward J. Bloustein School of Planning and Public Policy at Rutgers University. Thank you for speaking with me today. In partnership with the New Jersey Office of the Secretary of Higher Education, we are working on a study titled: Assessing the Effectiveness of the Educational Opportunity Fund Program.

The goal of this research is to explore the ways that the Educational Opportunity Fund program supports eligible students and improves the equitability of higher education across the state. It is designed to yield actionable insights on differences in program outcomes by student and institutional-level characteristics, the extent to which the program meets student needs, and the categorization of program service delivery.

Because of your expertise with this topic, we are seeking your input on the functioning of the EOF program at _____ and your recommendations for how it could better meet the needs of New Jersey students. Thank you for agreeing to assist us in this effort.

[Note: The following Anonymity Statement must be read verbatim.]

Your participation in this session is voluntary and confidential. Nothing you say today will be connected with you personally. This interview should take no longer than one hour. You previously received a copy of the informed consent form. By voicing your consent and continuing with this interview, you give the study team permission to use what you tell us, but not your name, in our final report. You can choose to skip a question that you are not comfortable answering or stop the call at any time.

Allow time for interviewee to read the electronic version of the consent form.

Can I answer any questions?

Do you consent to the interview?

Do you consent to a recording of this interview? The recording makes it easier for me to focus on our conversation rather than taking notes. The recording **will not** be shared with anyone outside of our research team.

Interview Questions

Background (RQ2)

1. To begin, please tell me a bit about yourself and your role at OSHE.

- a. How many years have you worked in this capacity?
- b. Can you describe your responsibilities in this capacity?
- c. To what extent are you involved with overseeing the EOF program?

Program Implementation (RQ2, RQ3)

- 2. What are your short- and long-term goals for the EOF program? <u>Probe</u>: How do you envision the EOF program serving students, especially those who are economically and educationally disadvantaged, in New Jersey?
- 3. To what extent does OSHE support participating institutions in implementing the EOF program?
- 4. From your perspective, what are some of the ways that the implementation of the EOF program varies across the State?
- 5. Are there established and/or documented models at OSHE for service delivery? Probe(s):
- 6. Can you provide a specific example of the model(s)? Which institutions engage with the model(s)?

Program Experiences (RQ2)

- 7. How does OSHE measure students' experiences of the EOF program?
- 8. To what extent does OSHE assess the satisfaction or dissatisfaction with the EOF program among students?

Program Outcomes (RQ1, RQ2, RQ3)

- 9. How does OSHE measure student participation and academic progress? 10. From your perspective, what are the reasons for variation in student outcomes across the State?
- 11. In your opinion, what makes a student more or less likely to be engaged and successful with this program?
- 12. What are the strengths of the EOF program? Put differently, what works well?
- 13. What are the limitations or constraints of the EOF program? Probe: Are there certain aspects of the EOF program that you would like to improve?
- 14. From your perspective, what are the needs—either economic or educational—that the EOF program, in general, is good at meeting?
- 15. Are there any unmet needs of students in the EOF program? <u>Probe</u>: What could the EOF program do differently to better meet the needs of students, especially those who are economically and educationally disadvantaged, in New Jersey?
- 16. Are there any particular models or program design elements that stand out in terms of student success and outcomes?

Wrapping Up

- 17. Reflecting on your experience at OSHE and your knowledge of the EOF program, what lessons have been learned from the program over time?
 - a. How would you like to see the program adapt moving forward?
 - b. Are there policies that could be implemented to better support the program?
- 18. Reflecting on the short- and long-term goals of the program, how do you foresee the EOF program executing the State's vision given recent funding increases? How have those increases responded to changing needs of the EOF program?
- 19. Are there any questions that I should have asked about the EOF program but did not?
- 20. Do you have any additional comments you would like to make?
- 21. Is there anyone else you think it would be helpful for us to contact for this research?

Higher Education Student Assistance Authority (HESAA) March 2023

Introduction

Hello. My name is _____ and I am with the Edward J. Bloustein School of Planning and Public Policy at Rutgers University. Thank you for speaking with me today. In partnership with the New Jersey Office of the Secretary of Higher Education, we are working on a study titled: Assessing the Effectiveness of the Educational Opportunity Fund Program.

The goal of this research is to explore the ways that the Educational Opportunity Fund program supports eligible students and improves the equitability of higher education across the state. It is designed to yield actionable insights on differences in program outcomes by student and institutional-level characteristics, the extent to which the program meets student needs, and the categorization of program service delivery.

Because of your expertise with this topic, we are seeking your input on the functioning of the EOF program at _____ and your recommendations for how it could better meet the needs of New Jersey students. Thank you for agreeing to assist us in this effort.

[Note: The following Anonymity Statement must be read verbatim.]

Your participation in this session is voluntary and confidential. Nothing you say today will be connected with you personally. This interview should take no longer than one hour. You previously received a copy of the informed consent form. By voicing your consent and continuing with this interview, you give the study team permission to use what you tell us, but not your name, in our final report. You can choose to skip a question that you are not comfortable answering or stop the call at any time.

Allow time for interviewee to read the electronic version of the consent form.

Can I answer any questions?

Do you consent to the interview?

Do you consent to a recording of this interview? The recording makes it easier for me to focus on our conversation rather than taking notes. The recording **will not** be shared with anyone outside of our research team.

Interview Questions

Background (RQ2)

- 1. To begin, please tell me a bit about yourself and your role at HESAA.
 - a. How many years have you worked in this capacity?
 - b. Can you describe your responsibilities in this capacity?
 - c. To what extent are you involved with the EOF programs?

Program Implementation (RQ2, RQ3)

- 2. How would you describe the State's current approach to financial assistance for students?
- 3. What are your short- and long-term goals for financial support within New Jersey?
 - a. <u>Probe</u>: How do you envision financially supporting students, especially those who are economically and educationally disadvantaged, in New Jersey?
- 4. How do you see the EOF program fitting into those goals?
- 5. To what extent does HESAA support participating institutions in implementing the EOF program?
- 6. From your perspective, what are some of the ways that the implementation of the EOF program varies across the State?
- 7. Are there established and/or documented models of financial aid service delivery at HESAA? Probe(s):
 - a. Can you provide a specific example of the model(s)?
 - b. Which institutions engage with the model(s)?

Wrapping Up

- 8. Reflecting on your experience at HESAA and supporting New Jersey students, what lessons have been learned about the provision of financial support over time?
 - a. How would you like to see the state adapt moving forward?
 - b. Are there policies that could be implemented to better support students?
- 9. Reflecting on the short- and long-term goals of the program, how do you foresee the EOF program executing the State's vision given recent funding increases? How have those increases responded to changing needs of the EOF program?
- 10. Are there any questions that I should have asked about the EOF program but did not? How about financial assistance more broadly?
- 11. Do you have any additional comments you would like to make?
- 12. Is there anyone else you think it would be helpful for us to contact for this research?

Appendix B. Focus Group Protocol

Introduction

Hello. My name is _____ and I am with the Edward J. Bloustein School of Planning and Public Policy at Rutgers University. Thank you for speaking with me today. In partnership with the New Jersey Office of the Secretary of Higher Education, we are working on a study titled: Assessing the Effectiveness of the Educational Opportunity Fund Program.

The goal of this research is to explore the ways that the Educational Opportunity Fund program supports eligible students and improves the equitability of higher education across the state. It is designed to yield actionable insights on differences in program outcomes by student and institutional-level characteristics, the extent to which the program meets student needs, and the categorization of program service delivery.

Because of your expertise with this topic, we are seeking your input on the functioning of the EOF program at [college/university] and your recommendations for how it could better meet your needs. Thank you for agreeing to assist us in this effort.

[Note: The following Anonymity Statement must be read verbatim.]

Your participation in this session is voluntary and confidential. Nothing you say today will be connected with you personally. This interview should take no longer than one hour. You previously received a copy of the informed consent form. By voicing your consent and continuing with this interview, you give the study team permission to use what you tell us, but not your name, in our final report. You can choose to skip a question that you are not comfortable answering or stop the call at any time.

Allow time for interviewee to read the electronic version of the consent form.

Can I answer any questions?

Do you consent to participating in this focus group?

Do you consent to a recording of this focus group? The recording makes it easier for me to focus on our conversation rather than taking notes. The recording **will not** be shared with anyone outside of our research team.

Focus Group Questions

Background — RQ1, RQ2

1. To begin, can you each tell me a bit about yourself, including your class level, major, and whether you are part-time or full-time?

Program Experiences — RQ1, RQ3

- 2. How would you describe your experience in the EOF program? What types of support services do they provide?
- 3. How has the EOF funding helped you?
- 4. Which support services do you personally engage with the most? What support services do you engage with the least?
 - a. Why do you think that is?
- 5. How has the support you received met your needs?

Program Outcomes — RQ1, RQ2

- 6. How has the EOF program impacted your academic performance?
- 7. What about your GPA?
- 8. What about your experience at your institution in general?
- 9. To what extent has the EOF program impacted your plans following graduation?
- 10. Do you feel more or less likely to graduate and/or gain employment as a result of receiving support services? Why or why not?
- 11. From your perspective, what works well in the EOF program at <<u>college/university</u>>?
- 12. From your perspective, what needs improvement in the EOF program at <<u>college/university></u>?
- 13. To what extent do you feel you have any unmet needs as a student in the EOF program?

Wrapping Up — RQ2

- 14. If you could change one thing about your EOF experience at <college/university>, what would it be?
- 15. Are there any questions I should have asked about your experience but didn't?

Do you have any additional comments you would like to make?

Appendix C. Tables and Graphs

Table 1. Categories by Completion Timeline

Completion Status	Completion Timeline	Completion Characteristics
	100% of on-time, associate degree completers	Students completed their associate degree within 100% of the standard completion timeframe ¹⁶
Standard completers	150% of on-time, associate degree completers	Students completed their associate degree between 100% and 150% of the standard completion time frame
Standard completers	100% of on-time, bachelor's degree completers	Students completed their bachelor's degree within 100% of the standard completion timeframe
	150% of on-time, bachelor's degree completers	Students completed their bachelor's degree between 100% and 150% of the standard completion timeframe
Beyond 150% completers	Beyond 150% completers	Students completed their associate or bachelor's degree beyond 150% of the standard completion timeframe
Non-completers	Non-completers	Students who pursued an associate or bachelor's degree but did not receive an award as of 2021

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¹⁶ For the purpose of this study, researchers define the standard completion timeframe as four semesters (two years) for an associate degree and eight regular semesters (four years) for bachelor's degrees, both starting from Fall 2014. Similarly, 150% of the standard timeframe is six regular semesters (three years) for an associate degree and twelve regular semesters (six years) for bachelor's degrees.

Table 2. Qualitative Data Analysis Findings

Category	Sub-Category	Finding
	Academic Support	 Transitional Programming Tutoring and Supplemental Academic Resources
Program Strengths	Non-Academic Support	 Grant Funding Wrap-Around and Gap Support Services Networking and Career Development
	Social Support	 Advising and Student-Staff Relationships Community and Student-Peer Relationships
	Funding and Program Resources	 Article IV Restrictions Other Funding and Resource Limitations
Areas for Improvement	Academic and Non-Academic Support	 Limited Advising Limited Tutoring and Academic Support Additional Programming
	Social Support and Recruitment	 Conflicting Relationships and Attitudes Low Recruitment and Visibility
	Student-Level Characteristics	 Experiential Characteristics Pre-College Preparation Class Level Academic Needs EOF vs Non-EOF Housing Non-Academic Barriers
Program Outcomes		Social Characteristics Identities Personalities and Attitudes
	Institution-Level	 Experiential Characteristics Resources and Institutional Support Staff Rigor and Relevance of Programming
	Characteristics	Social Characteristics (a) EOF Identity and Community

Table 3. Program Features in the Educational Opportunity Fund Program

Service Type	Description	Examples	Addressed Barriers
Academic Support	Services that assist students in achieving academic success, such as tutoring, study groups, and academic advising	Tutoring services, supplemental instruction programs, academic advising	Academic challenges, learning disabilities
Social Support	Services that help students build community and connections, such as mentoring, peer support, and social events	Peer mentoring programs, social support programs, diversity and inclusion programs	Social isolation, culture shock, lack of belonging
Financial Support	Services that assist students with financial needs, such as scholarships, emergency funds, and financial literacy programs	Scholarship programs, emergency aid programs, financial literacy programs	Financial constraints, food/housing insecurity

Table 4. Typology of Educational Opportunity Fund Programmatic Elements

Program Type	Description	Examples
High-academic, high- financial, low-social	Comprehensive support services to help low-income students succeed in college, including those who face multiple barriers	Summer and Winter programs
High-academic, low- financial, low-social	Comprehensive support services, but with limited resources, prioritizing support for students facing significant barriers	Professional development workshops
Moderate-academic, moderate-financial, low- social	Targeted support in specific areas, focusing on addressing specific barriers	Supplemental instruction programs, financial literacy programs
Moderate-academic, moderate-financial, high- social	Targeted support in specific areas, with an additional community building component	Professional and career development programs and workshops
Moderate-academic, low- financial, high-social	Opportunities for low- income students to socialize and build community on campus, addressing isolation and lack of community	Alumni networking, Socials
Low-academic, high- financial, low-social	Targeted supplemental financial aid offered to provide additional support for motivated EOF students	Supplemental institutional financial aid

Table 5. Number of Completers and Non-Completers for EOF and Non-EOF Students

Student Status	Completers	Non-Completers	Total
EOF	1,842	1,254	3,096
Non-EOF	26,465	22,315	48,780

Table 4. Completion Status for EOF and Non-EOF Students by Institution Region

Institution Region	Student Status	Standard Completers	Beyond 150% Completers	Non- Completers
Control	EOF	543	71	307
Central	Non-EOF	9,241	1,189	6,870
Nouth	EOF	725	148	612
North	Non-EOF	8,654	1,466	9,474
Courth	EOF	299	56	335
South	Non-EOF	4,776	1,139	5,971

Table 6. Completion Timeline for EOF and Non-EOF Students by Region

Region	Student Status	100% of On-time, Associate Degree Completers	150% of On-time, Associate Degree Completers	100% of On-time, Bachelor's Degree Completers	150% of On-time, Bachelor's Degree Completers
Central	EOF	10	45	296	192
Central	Non-EOF	408	753	6,907	2,173
North	EOF	15	84	310	316
North	Non-EOF	381	874	4,712	2,687
Courtle	EOF	37	62	79	121
South	Non-EOF	505	707	2,178	1,386

Table 7. Completion Status for EOF and Non-EOF Students by Institution Type

Institution Type	Student Status	Standard Completers	Beyond 150% Completers	Non- Completers
Community	EOF	436	199	717
Colleges	Non-EOF	6,125	3,051	15,657
Independent Four-Year	EOF	206	11	109
College	Non-EOF	2,814	135	1,834
Proprietary Institutions with Degree- Granting Authority	Non-EOF	60	11	132
Public Research	EOF	635	33	286
Universities	Non-EOF	10,193	432	3,436
State Colleges and	EOF	290	32	142
and Universities	Non-EOF	3,479	165	1,256

Table 8. Completion Status for EOF and Non-EOF Students by Sex

Student Status	Sex	Standard Completers	Beyond 150% Completers	Non- Completers
	Female	1,021	186	715
EOF	Male or not reported	546	89	539
	Female	12,344	2,066	10,513
Non-EOF	Male or not reported	10,327	1,728	11,802

Table 9. Completion Status for EOF and Non-EOF Students by Race

Student Status	Race	Standard Completers	Beyond 150% Completers	Non- Completers
	Hispanic	438	67	339
	Multiracial	194	27	132
EOF	Black or African American	429	93	517
	Asian, Pacific Islander, American Indian or Alaska Native	166	23	37
	White	340	65	229
	Hispanic	2,213	604	3,781
	Multiracial	1,809	419	2,599
Non-EOF	Black or African American	1,814	444	4,062
	Asian, Pacific Islander, American Indian or Alaska Native	3,514	330	1,749
	White	13,321	1,997	10,124

Figure 1. EOF Programmatic Model



Asset Cap

Calculation

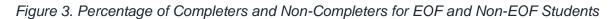
Figure 2. EOF Income Eligibility Scale for Rutgers University

Household

Size

(Including Applicant)	(Not to Exceed)	(Not to Exceed)
Number of people living at home that you or your parents are financially responsible for.	Money that you or your parents earn within a calendar year, before taxes. Usually from employment.	Additional items that hold value like businesses, stocks, and investment properties.
1	\$27,180	\$5,436
2	\$36,620	\$7,324
3	\$46,060	\$9,212
4	\$55,500	\$11,100
5	\$64,940	\$12,988
6	\$74,380	\$14,876
7	\$83,820	\$16,764
8	\$93,260	\$18,764
*For reach additional member of the household add:	\$9,440	\$1,888

Gross Income



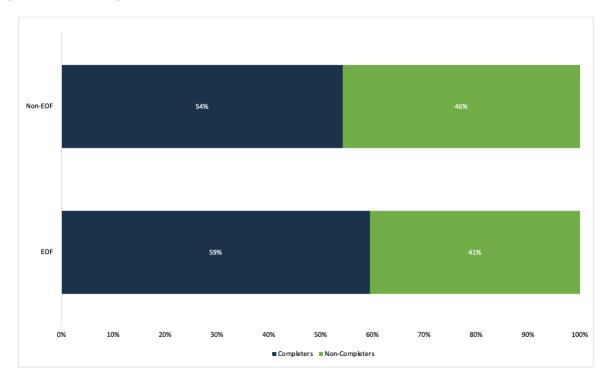
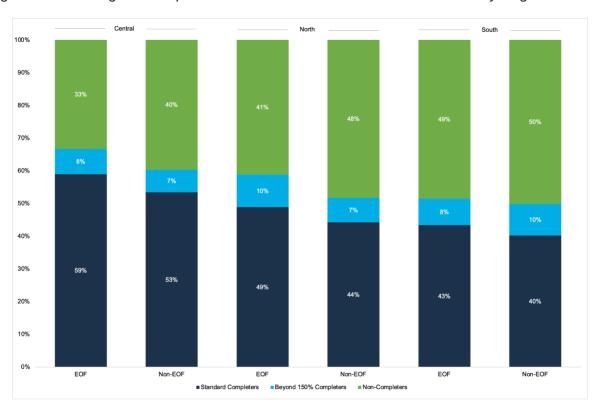


Figure 4. Percentage of Completion Status for EOF and Non-EOF Students by Region





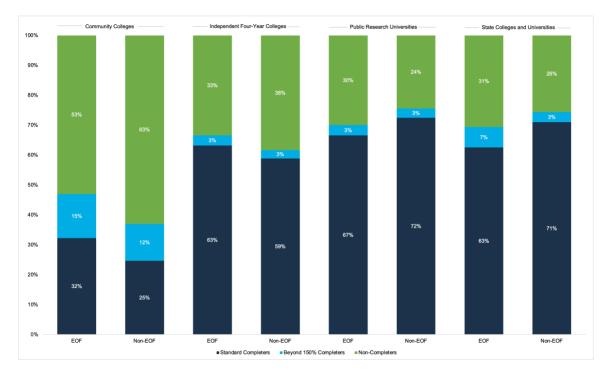
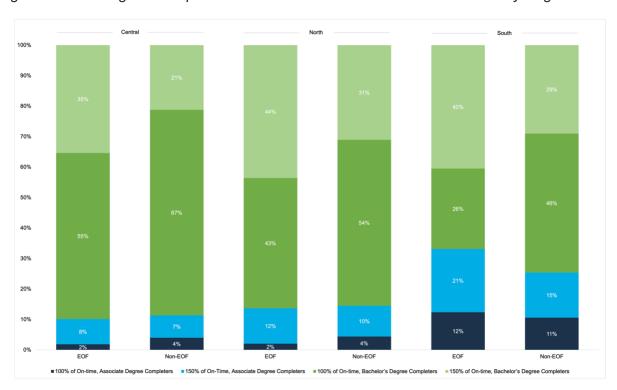


Figure 6. Percentage of Completion Timeline for EOF and Non-EOF Students by Region





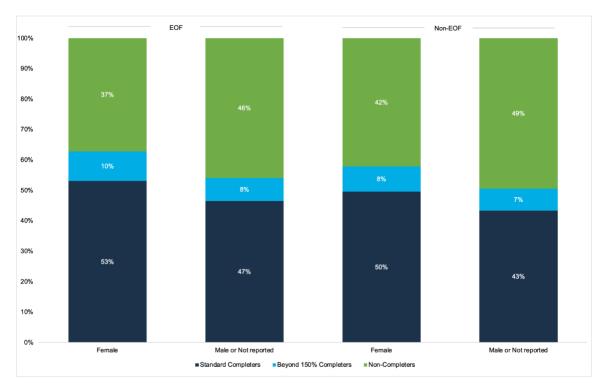


Figure 8. Percentage of Completion Status for EOF and Non-EOF Students by Race

