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The Quality, Role and Effectiveness of the Haas BETA Program: Final Evaluation

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**THE QUALITY, ROLE, AND EFFECTIVENESS  
OF THE HAAS BETA PROGRAM**

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**FINAL EVALUATION**

**INSTITUTE FOR THE STUDY OF SOCIAL CHANGE  
UNIVERSITY OF CALIFORNIA, BERKELEY**

**May 2003**

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This report documents the findings of the Institute for the Study of Social Change's evaluation of the quality, role, and effectiveness of the Business Economics Technology Achievement (BETA) program at the Haas School of Business at UC Berkeley. The document is organized in two sections. The first section is an Executive Summary of the findings from our research and evaluation activities. The second section is the more comprehensive Final Report on our evaluation of the BETA program.

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## EXECUTIVE SUMMARY

### Evaluating the quality, role, and effectiveness of the Haas BETA program

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#### ***The Intervention and Evaluation Context***

##### **Background to the Study: The growing educational need for outreach**

Over the past twenty years there has been substantial growth in the population of K-16 students. Over the same period, the demographic composition of the population of the United States has changed dramatically. Largely as a result of increasing immigration since the change in immigration policies in 1965, there has been a major increase in the population of Latino and Asian Pacific families and children in California.

The contrast between the ethnic and racial composition of the population of California public high school graduates and the UC freshman student population illuminates the gaps in representation, particularly of Blacks and Latinos, in the student population of UC. In 2000, Asian Pacific students were 14.8 percent of the California public high school graduates but more than 42 percent of the UC freshman student population. In contrast, Latinos were 32.8 percent of high school graduates but only 4 percent of the freshman students at UC, while African American students made up 7.1 per cent of the high school graduates and 3 per cent of the freshman class. American Indians represent about 1 percent of both the high school graduates and the University of California freshman student population. White students constituted 44 per cent of the high school graduates and 40 percent of the UC freshman class. This simple demographic perspective on inequalities of access to higher education points to a need to design and implement new outreach and retention strategies to increase the enrollment and matriculation of educationally disadvantaged groups.

There are two large statewide programs supported by UC, the state, and private funding which have been successful with their target missions. MESA has increased the number and proportion of historically underrepresented groups including African Americans, Latinos, and women in math, science and engineering programs at UC and other colleges. PUENTE has been successful in enhancing the student pipeline to college by improving the articulation between high schools, community colleges, and the CSU and UC systems. The UC Outreach Task Force has called for implementing innovative and effective approaches that will enhance the outreach to educationally disadvantaged students. The BETA program was developed as an innovative alternative to current programs that would also build on the approach and strengths of the MESA program.

##### **The Origin and Distinctive Mission of the BETA Outreach Program**

Originally it was conceived that there was a need for a business and economics outreach program because it would correspond and appeal to the interests of youth and would fit well with the interests of schools, government, and business in strengthening school-to-career programs, curriculum, and a more skilled labor force.

Then in 1997, the UC Outreach Task Force report suggested that an outreach program based upon a business model might be an effective outreach vehicle. Looking at the status of outreach programs and the continuing gap in enrolling educationally disadvantaged youth into four year college and university programs, the Outreach Task Force members suggested implementing new outreach approaches based upon current needs and best practices including a **Business**

## **MESA program:**

*Business MESA:* The MESA undergraduate model, which currently focuses on students' academic development within math- and science-based fields, should be extended to other fields of study. The current MESA model has helped to boost retention and academic advancement of students in science and engineering and appears to be applicable to other fields of study. The Task Force favors an initiative that would orient students toward business-oriented disciplines such as accounting and economics, which are areas of interest to many students.<sup>1</sup>

MESA program managers and selected faculty and administrators at the Haas School of Business who had been involved in community service and outreach programs communicated their shared understanding of the need for an outreach effort anchored around a business concept that would target educationally disadvantaged youth in middle and senior high schools within the Bay Area. The BETA (Business Economics Technology Achievement) program emerged out of this program and policy context. It began its first full year of implementation in the 2000-01 school year. The program was called BETA in part because it was seen as a pilot program, which, if successful as a model, could be expanded to other campus sites of the UC system, with the possibility of expansion to other campuses in the future. This report grows out of this implementation process.

Fundamentally, this report is designed to assess and evaluate whether the business based MESA BETA program is an effective outreach strategy. Further, if the program appears to be effective at its Haas School of Business site, does the program appear to be transferable to other campus sites of the University of California?

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<sup>1</sup> "New Directions For Outreach," Report of the University of California Outreach Task Force. A report by the Outreach Task Force for the Board of Regents of the University of California, July 1997.

## **Program Description: The BETA program**

The BETA Program is housed at the **Young Entrepreneurs at Haas (YEAH)**<sup>2</sup> at the Haas School of Business on the UC Berkeley campus. Since 1989, the Haas School's outreach program has developed a range of innovative programs for urban youth. The BETA program is designed to serve as a vital link between the resources and expertise of the Haas School's students, faculty and facilities and the surrounding community. In partnership with UC's Office of the President and the statewide MESA program, BETA's curriculum has been designed to build business skills, and to assist youth in becoming eligible and competitive for college. BETA uses the principles and real-life lessons of business, finance and entrepreneurship to excite, educate and support underserved youth toward the achievement of higher education. The program reaches out to educationally disadvantaged youth and schools in Berkeley, Oakland, West Contra Costa county and San Francisco. The program is also distinguished by its use of undergraduate and graduate MBA business students from the Haas School of Business as mentors in delivering its program services.

BETA offers the following programs for middle and high school students:

- 1) Young Entrepreneurs Program (YEP) – BETA offers a two-year long business training program for educationally disadvantaged youth from more than 20 Bay Area high schools. Each spring, BETA accepts forty eighth graders into the first year of the program. BETA students spend two years in the program with the first year program focused around a business plan presentation where students write a business plan, learn Word and PowerPoint proficiency skills, and develop new skills as they prepare and present their business plans. In the second year, they focus on a stock market based simulation and

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<sup>2</sup> The program website is at <http://www.haas.berkeley.edu/yeah/yeah.htm>.

competition as well as the necessary steps for applying to and being accepted by a UC campus.

2) BETA also offers hands-on training using a business based curriculum as well as mentoring support at seven school and community sites in Oakland and Berkeley. The evaluation of these programs is based upon field observation, interviews, surveys, and secondary data for four case study sites where BETA programs operated for the full 2001-02 year.

### **Frame: An overview of the evaluation of the role of BETA programs**

Our evaluation effort was focused on observations of BETA programs in their field settings and upon interviews with key players and participants in the programs. We completed interviews with principals, program directors, teachers and staff at each of the BETA community field sites that have been active over the past year. In addition, we talked with the program staff, mentors, and students who participated in the summer and Saturday programs at the Haas School of Business to determine their views on program goals, activities, and effectiveness.

The evaluation employed mainly qualitative and narrative analyses because the programs are currently too new to have a track record of success at enrolling educationally disadvantaged students in four-year college and university programs. The large formative and substantive evaluation was designed to assess the quality and role of BETA program services in the three program contexts where it delivers direct services to middle and high school aged youth: 1) middle and senior high school classrooms, 2) community youth after school program settings, and 3) summer and Saturday program sessions for individual youth at the Haas School of Business. In addition, we also collected documentation on BETA workshops and conferences designed to provide resources for school and youth programs based upon business and entrepreneurship that

also support youth development and the pipeline to college.

### **Conclusion: Summary of Major Findings**

#### **Program Effectiveness**

The BETA student cohorts in the summer and Saturday program perform at a high academic level. They are drawn from a largely underrepresented student population from a mix of predominantly public and some private high schools in the Bay Area. When they have completed the second year of the program they exhibit a high degree of commitment to the importance of attending college, and they have acquired enhanced business and oral and written presentation skills with effective competencies in Word, PowerPoint, and Excel programs. They exhibit critical thinking skills, and are honed in the requirements for college applications, SAT test preparation, and in preparation of personal statements and college applications. BETA is effective at using hands-on business exercises and simulations to teach and engage its student clients. In the process it raises the skill levels of engaged students and increases their awareness of and commitment to attending college.

#### **Models of Collaboration: Turnkey Programs and Standards vs. Active Flexible Models of Collaboration**

The BETA program appears to be successful because of its program model of *active but flexible collaboration*. It appears to be successful because it adjusts program content and style to the unique needs of school and community settings and of individual students in the program. For school or community sites, BETA program managers and mentors work to adapt business and economics related content to be complimentary to the needs and mission of the individual sites. The BETA program, at each of the community sites, was found to be particularly useful by school or

program staff and administrators because it supported the distinctive goals, objectives, and program content that the school or program was committed to, but lacked the tools and resources to fully execute. Schools were able to benefit from BETA resources based upon program support for their distinctive needs and flexible collaboration with their existing staff and programs. For the summer and Saturday programs at the Haas School of Business, the program exhibited flexibility in terms of adjusting program content and style to the specific needs, learning style, and skills of the individual youth participants. For individual students it customized its delivery of services to support the unique needs and strengths of its summer and Saturday student participants. This pattern of flexible program delivery supported student engagement and success.

### **The Role of Business School Student Mentors**

Undergraduate and graduate business students are at the core of the BETA approach to delivering program services. A key question for the evaluation involved assessing the effectiveness of the model of using a large number of Haas students as mentors, teachers, and organizational consultants for BETA programs. Our fieldwork suggests that this model was generally well received by the teachers, program managers, and youth at each of the BETA sites. In the summer and Saturday programs at Haas, the MBA mentors played a fundamental and effective role in coaching the student participants, engaging them in the program and the work tasks. The mentors represent, along with program staff, a flexible connection with the mentees, providing the types of support and skill set development that individual students need. Both the MBA mentors and the undergraduate business student mentors serve as role models who embody for the mentees what it means to be a college student. They become a link for program participants to the meaning and advantages of a college education, increasing student interest in the process and

requirements for being admitted to a college or university. Our findings suggest that this is a strategic model for program delivery that has special efficacy for reaching and engaging youth who are not yet engaged in the college preparatory pipeline. Our research also highlights the social and emotional appeal of the program's use of Haas Business School student mentors as a link to youthful clients.

Program effectiveness requires engaging youth who are often disengaged from conventional school curriculum and teaching strategies. The power of the BETA program appears to extend beyond the quality and content of its curriculum and program structure. The mentor/youth connections increase the engagement of youth participants through the power of the relationships they create between the BETA mentors and the youth with whom they work.

### **Business Content and Project-based Learning as Pedagogy**

The BETA program content and design is representative of the increasing focus in education and organizational development on project-based learning and collaboration. However, it is relatively unique in its use of business and economics as tools for adding value to the curriculum, teaching, and youth development activities of schools, teachers, and community organizations serving youth of middle and high school age. The BETA approach of using business content to excite and engage youth appears to be effective because business content seems to be relevant to a wide range of courses and settings while having a widespread appeal to youth from divergent school and community settings. The hands-on business content of the program also appears to be an effective hook for reaching urban youth because business is experienced as connected to the real world outside school of money, jobs, and consumption, including the worlds of street and youth culture. It provides a link for connecting personal experience and intuitive intelligence to school-related information



and concepts. This process is facilitated with hands-on learning projects which work because tasks are concrete and connected to features of the world which draw out mentees' knowledge, interests, and intuitive understanding of business, economics, and public policy concepts and practices. Project-based learning functions to take youth from the practical and concrete to greater competence in using concepts and language which enhance their critical thinking and writing skills.

### **BETA is Distinctive in Terms of Public/Private Partnerships**

BETA is organizationally distinctive in relation to other outreach programs because it retains and is seeking to build upon its strong links with business and corporate sponsors and advisors through its ties to faculty, alumni, and associates of the Haas School of Business. Over the past ten years, private givers primarily supported the Young Entrepreneurs Program at Haas until it received funding for the BETA program from the UC Office of the President. However, it continues to receive approximately 40% of its funding from businesses and private givers. It is currently engaged in a development campaign targeting private givers for funding of the program over the next five years.

Through the Haas School of Business and the YEAH Advisory Committee, BETA retains strong connections with the business and corporate community. These linkages support options for future development efforts and contribute to the expansion of program content and curriculum through active partnerships with members of the business community and the business faculty.

On a routine basis, Haas faculty, alumni and people from the local business and corporate community support the program through guest lectures and contributions to developing the BETA program. The public/private partnership supports both program content and program development. This is consistent with the MESA model, where private and corporate individuals

and organizations contribute to program content and underwrite a significant portion of program costs. The public/private partnerships strengthen the content and development support for the MESA and BETA programs.

### **BETA Benefits the Social Capital of participating groups and individuals**

#### **A: Schools and community based organizations:**

Schools and community-based organizations often find it difficult to continue the provision, development, and delivery of services and organize for program changes and social and financial support. This is particularly true in the current political and economic environment where there are declining public and private resources available for public and social investment in schools and community services. Even in better times, schools and organizations function with limits in their organizational capacity to develop and implement new programs and initiatives. At each of the settings where BETA operated a school or community based program it added to both the symbolic and organizational capital at the sites by supporting content and curriculum development, organizational and professional development, and hands-on teaching and mentoring of the youth in the setting. It provided content and support for offering the students lessons and projects with business and economics content and mentors to support the teaching of business and business literacy. The presence of the Haas School of Business at the sites also added to the social capital and stature of these schools and organizations with educators, school boards, and private and public funders.

#### **B: The Program adds to the Social Capital of Students and their Families**

The BETA program, both in school and community settings, and particularly in its summer and Saturday Haas based program, also builds the social capital of its youth participants and their families.

The BETA programs provide a distinctive intervention approach because their program content, in conjunction with their pedagogy, offer supporting social capital through:

*Hands-on learning* based upon concrete and practical business-related tasks and activities.

*Cohort Formation* opportunities to participate in a learning and friendship community of other youth with supportive and challenging program content.

*Flexible mentoring services* which design and deliver responsive mentoring to meet the needs and strengths of particular students and their families.

The effect of the program is unusual because it allows for the knitting of new social networks and relationships that support a new culture of engagement in the learning process among the youth in the program. Particularly in the summer and Saturday programs, in those settings where the BETA program is most intensive, one observes the ability of the program to support the formation of new emotional ties with other youth in the cohort, with MBA mentors, and with program staff. This emotional “binding social capital” constitutes a form of emotion work that the program supports and nurtures. What is

important here is that the program creates routines and social supports along with the process of hands-on learning that support the active personal and emotional involvement of youth and their families in learning and changing their orientation towards school and higher education.

C: The BETA Program Builds the Social Capital of the Haas School of Business:

The active connections of the BETA program to the Haas “brand” encourage buy-ins and support, beginning with the undergraduate students who work as volunteers and the MBA students who volunteer as mentors for the summer and Saturday programs. The Haas cachet extends to interest among faculty, alumni, and the corporate community in supporting a community-based business program sponsored by Haas.

With its mix of private and public support and roots in urban communities that have been largely left behind, the BETA program is attractive and builds bridges because it makes everyone look and feel good. It builds the social capital of the Haas brand while contributing to the content and value of the BETA program and offering unique opportunities for teaching and mentoring to Haas MBA and undergraduate business students.

## **Cost Effectiveness**

BETA is a stellar example of how outreach programs housed at a UC campus can maximize campus resources and minimize per student annual costs by drawing on existing services and university resources including space, classrooms, computer labs, staff, students, and faculty. The summer and Saturday component of BETA has a cost of \$400 per student for the summer program and \$500 per student during the fall and spring semester Saturday program. For the cost, it delivers a very intensive, hands-on program with flexible mentoring, teaching, and counseling utilizing active business school student mentors.

BETA programs provide students with both individualized academic enrichment and counseling services with nearly 5,000 hours of undergraduate and MBA mentoring and ancillary services in individual and small group settings during the program year. The program also delivers academic lectures, curriculum, and support services in a predominantly classroom or small group setting at the community-based school and after-school BETA program sites with an estimated 20,000 hours of classroom and small-group instruction during the school year. It is important to stress at the conceptual level that the current Haas BETA program offers extensive high quality business related mentoring and academic services at a relatively low cost because the services are largely provided by employed undergraduate business mentors and MBA students who volunteer to work with the program in an active teaching and mentoring role.

It is problematic to compare the BETA costs and services with the cost of other programs per client, because data is not available in the public domain with annotations of the cost basis for determining the estimated cost per individual client of other programs. Instead, the available data from reviews of outreach programs (c.f. Gandara, 2001) provides a set price for the average cost per client. Costs are estimated for AVID and PUENTE, which are examples of class

cohort based programs that also include academic enrichment, tutoring or mentoring, and counseling for academic progress. These programs have a reported per-student annual cost of \$625 for AVID and \$500 for PUENTE. BETA program services include elements of these programs along with the featured services of more intensive individual and small group teaching and mentoring which distinguishes more costly programs like Neighborhood Academic Initiative that operates with an estimated cost per student of \$2,000 and Upward Bound, with estimated costs of about \$4,200 per participant. Given the services provided, and their intensive and flexible content, BETA appears to be competitively cost-effective for the high value, personalized enrichment and support services that it provides. Further assessment of the cost effectiveness would benefit from more detailed cost data from other programs and more data on BETA services and results that will come with additional years of program delivery.

## ***Transferability***

### **Exploring the transferability of the BETA Model to Other Sites**

An important feature of our evaluation of the BETA program involved looking at the likely effectiveness of the program model as an approach that could be transferred to other sites and settings. Based upon our field work at each of the BETA sites, including the programs based at the Haas School of Business, our research documents the strengths of the program relative to its model of active but flexible collaboration and use of business school students as mentors for a curriculum based upon active-hands on learning of business and economics. The evaluation employed a preliminary case study of a potential expansion site, the Riordan Program of the Anderson School of Business at UCLA. This case study provides preliminary support for the transferability of the business school based component of the BETA program to other UC

business school sites. The success of the Riordan Program, and the similarity of substantial elements of the Riordan Scholars Program and the BETA program, suggests potential for creating a transferable but flexible model of a business-based MESA program at multiple UC campus sites with business schools. However, it should be clear that adoption of a BETA type program at UCLA or other UC campuses would be dependent on the availability of private and public resources to support the program expansion.

## ***Recommendations***

### **Medium to Long Term Enhancements of BETA Programs**

We are currently operating in a state and private funding environment where there are significant constraints on funding for new programs or operations. However, based upon our evaluation to date, the core features of BETA, as a business-based outreach program targeting educationally disadvantaged middle and high school students, appears to be an attractive platform that could be moved to other settings and/or sites.

We recommend expanding the current BETA program at UC Berkeley to include:

1) A UC Berkeley BETA pilot program targeting community college students. BETA had developed plans and proposals for a community college component in 2001-02 that remain unfunded. The appeal of this approach would be the application of BETA's tested tools of hands-on learning of business and economics to a cohort that is ready for competitive eligibility through the Community College Transfer Program to UC campuses. State higher education plans mandate a 6 percent yearly growth in the number of community college transfers to UC. The community college population offers access to a sub-population of historically educationally disadvantaged students who are in a structural position to be on-track for UC eligibility.

2) A BETA program component at UCLA or other UC campuses with business schools targeting middle and high school students. The Riordan Program at the Anderson School of Business at UCLA shares common program components and services with the BETA program. It seems a natural location for creating another BETA program at an additional UC campus. If BETA retains its characteristic of being a program with active but flexible collaboration, it would appear to fit well with the history, mission, and program approach of The Riordan Scholars Program, the high school component of the Riordan Program.

# EVALUATING THE QUALITY, ROLE, AND EFFECTIVENESS OF THE HAAS BETA PROGRAM

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## The Intervention and Evaluation Context

### ***Background to the Study: The Growing Educational Need for Outreach***

Over the past twenty years there has been substantial growth in the population of K-16 students. There has been an increase in the past decade in the number and proportion of students enrolled in post-secondary institutions. Over the same period, the demographic composition of the population of the United States has changed dramatically. Largely as a result of increasing immigration since the 1965 change in immigration policies, there has been a major increase in the population of Latino and Asian Pacific families and children in California and within the United States as a whole. While in 1970, 87.5 percent of the US population was classified as non-Hispanic white, in 1998, 72 percent of the US population fell into this category.<sup>3</sup>

The process of change in California's ethnic and racial composition of the K-12 school population is even more striking. In 1986-87 the Latino high school population was about 30 percent of the total student population. By 2000-01 it had increased by more than thirty-five percent to 43 percent of the public high school population. In the same period, the Asian-Pacific population went from 9 percent to 10.5 percent, while the

African-American student population went from just over 9.2 percent to 8.4 percent. At the same time, the percentage of white students declined by a third from 51 percent to 36 percent.<sup>4</sup>

Analyzing population changes and post-secondary enrollments over the past three decades demonstrates that college-going rates for most minority groups are low. Since the mid-1970s, modest improvements have occurred for some underrepresented groups, although rates have not improved for others. For example, while 33.5 percent of African-American high school graduates between ages 18 and 24 were enrolled in post-secondary institutions in the United States (both 2-year and 4-year) in 1976, it was not until 1992 that African-American college student enrollment rates reached the level achieved in 1976. By 1997, almost 40 percent of African-Americans in the traditional college-age group were enrolled in college. On the other hand, in 1997, Latinos had only finally returned to a level of enrollment that was equivalent to 1976 (35.8 versus 36.0 percent in 1997), but the Latino population had increased by more than 200 percent during that time period.<sup>5</sup> By contrast, white enrollment in college increased from just 33 percent in 1976 to 45 percent of those in the college-age group who were enrolled in college by 1997.<sup>6</sup> Since the mid-1970s, the college-going rates for non-Hispanic white students have increased by more than 30 percent. In contrast, despite progress in the 1990s, students from

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<sup>3</sup> Patricia Gandara, "Paving the Way to Postsecondary Education: K-12 Intervention Programs for Underrepresented Youth" Report of the Postsecondary Education Cooperative Working Group on Access to Postsecondary Education, NPEC-National Postsecondary Education Cooperative, US Department of Education, Office of Educational Research and Educational Improvement, Washington DC, 2001, 177p.

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<sup>4</sup> California Department of Finance, *California Basic Educational Data System*, Department of Finance Demographic Research Unit, 2001 Series.

<sup>5</sup> Gandara, Patricia, *op. cit.*

<sup>6</sup> *Ibid.*

historically underrepresented minority groups have not experienced substantial increases in college-going rates. Improving their college-going rates is an issue of growing urgency for colleges, universities, and states.

The chart that follows on the demographic composition of the California Public School K-12 population for the 1999-2000 year and the University of California freshman student population for the 2000-year helps to illuminate the mismatch between the public school population and the college population at UC.<sup>7</sup>

In 2000, Asian-Pacific students represented 14.8 percent of the California public high school graduates but more than 42 percent of the UC freshman student population. In contrast, Latinos comprised 32.8 percent of high school graduates but only 4 percent of the freshman students at UC, while African-American students made up 7.1 percent of the high school graduates and 3 percent of the freshman class. Native Americans represented about 1 percent of both the population of high school graduates and the University of California freshman student population. White students comprised 44 percent of the high school graduates and 40 percent of the UC freshman

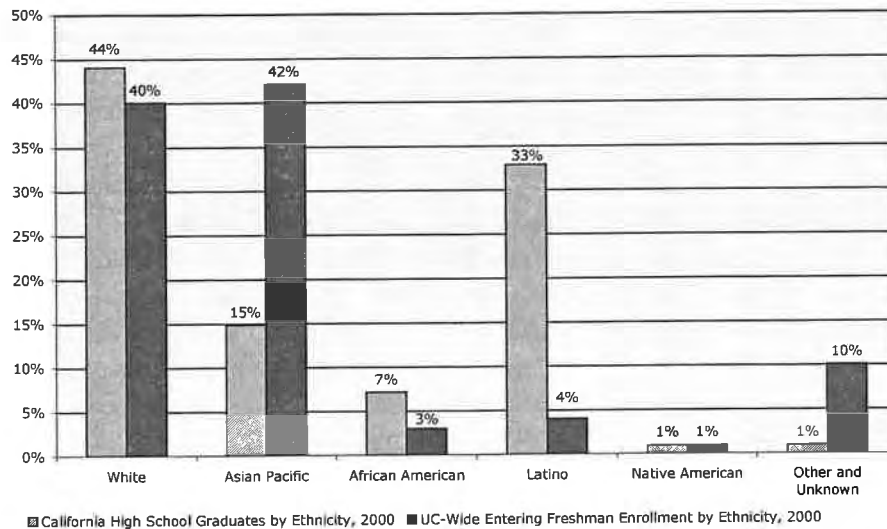
class. The contrast between the ethnic and racial composition of the population of high school graduates and the UC freshman student population illuminates the gap in representation of particularly African-Americans and Latinos in public higher education.

This simple perspective on inequalities of access to higher education points to a need to figure out new outreach and retention strategies that increase the enrollment and matriculation rates of underrepresented groups. Only white and Native American students are similarly represented in the high school graduate and college freshman student cohorts. With the exception of white and Native American students, all other groups were either extremely underrepresented (African-Americans and Latinos) or over-represented (Asians) among the UC freshman class.

### ***The Origin and Distinctive Mission of the BETA Outreach Program***

Originally it was conceived that there was a need for a business and economics outreach program because it would both link up with and

**California Student Demographic Composition, 2000**



<sup>7</sup> Demographic Research Unit, Department of Education, [www.cde.ca.gov/demographics/reports/statewide/ethgrate.htm](http://www.cde.ca.gov/demographics/reports/statewide/ethgrate.htm)

appeal to the interests of youth and would fit well with the interests of schools, government, and business in strengthening school-to-career programs, curriculum, and practices.

The business community is also interested in engaging currently educationally disadvantaged populations as a constituency. When Dick Clark, ex-CEO of PG&E, was on the UC Outreach Task Force he was an advocate for the need for a business focused outreach program, which in part would address the need (from the perspective of business) to increase the size and representativeness of the pool of workers with business training. In a recent meeting last year Lee Merritts, Director of Diversity for Human Resources at Proctor & Gamble, indicated that P&G had made a commitment to seek to create parity between the ethnic and racial composition of its work force (in all job categories) and the composition of the population. This consumer products company sees diversity as an advantage in marketing, product development, and long-term loyalty among consumers and communities where they engage in manufacturing, research, or sales activities. Given these priorities, he lamented that there is a shortage of candidates among educationally underrepresented populations for positions in research, sales, and middle and upper management. Haas School of Business staff also report a decline in the pool of MBA applicants from underrepresented ethnic and racial minority groups.

The 1997 UC Outreach Task Force report suggested that an outreach program based upon a business model might be an effective outreach vehicle. Looking at the status of outreach programs and the continuing gap in enrolling educationally disadvantaged youth into four-year college and university programs, the Outreach Task Force members suggested implementing new outreach approaches based upon current needs and best practices including a Business MESA program:

Business MESA: The MESA undergraduate model, which currently focuses on students'

academic development within math- and science-based fields, should be extended to other fields of study. The current MESA model has helped to boost retention and academic advancement of students in science and engineering and appears to be applicable to other fields of study. The Task Force favors an initiative that would orient students toward business-oriented disciplines such as accounting and economics, which are areas of interest to many students.<sup>8</sup>

MESA program managers and selected faculty and administrators at the Haas School of Business who had been involved in community service and outreach programs communicated their shared understanding of the need for an outreach effort anchored around a business concept that would target "educationally disadvantaged" youth in middle and high schools within the Bay Area. The UC Office of the President and MESA partnered with the Haas School of Business in implementing this pilot business outreach program; Haas had a more than ten year history of using a hands-on approach to business as the platform for outreach efforts with educationally disadvantaged youth in Bay Area schools. The precursors to BETA already had a reputation and anecdotal and indicator data which suggested that their approach was promising as a bridge between educationally disadvantaged youth and the pipeline to UC eligibility.<sup>9</sup>

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<sup>8</sup> University of California Outreach Task Force, "New Directions For Outreach." Report of the University of California Outreach Task Force for the Board of Regents of the University of California, July 1997.

<sup>9</sup> The Young Entrepreneur's Program at Haas (YEAH) which preceded BETA had indications of the effectiveness of their model in the ability of the program to engage youth and in experience with program alumni who successfully entered four year college and university programs. In a telephone poll of YEP graduates from the 1999-2000 school year, all of the students whom BETA program staff were able to locate had enrolled in some type of post-secondary school program. Of the 15 students successfully contacted, 40% were attending (or recently completed) community college, 27% were enrolled at UC campuses, 13% were enrolled at other 4 year colleges (USF, USC, and Hampton College), 13% were enrolled at a CSU campus, and one

The BETA (Business Economics Technology Achievement) program emerged out of this program and policy context. It began its first full year of implementation in the 2000-01 school year. In part the program was called BETA because it was seen as a pilot program that, if successful as a model, could be expanded to other UC campus sites, with the possibility of expansion to other campuses in the future. This report grows out of the identified implementation process.

Fundamentally, this report is designed to assess and evaluate whether the business-based MESA BETA program is an effective outreach strategy. Further, if the program appears to be practical at the Haas School of Business site, does it appear to be transferable to other campus sites of the University of California?

There is a need for outreach and retention programs to increase the inclusiveness of the college educated population in California. Failure to increase the educational level of the Latino and African-American youth population limits the access of these groups and their communities to positions and careers in the business, cultural, professional, and academic intelligentsia. In order for these diverse populations and the social and cultural worlds that they represent to be incorporated in the world of teachers and professors, in public policy and business and public life, they must be better integrated into the post-secondary institutions of the state, including the University of California.

It is this landscape that frames the effort to build and execute new and effective approaches to outreach programs, along with the expressed concern of businesses, business people and educators to create a more diverse population of people trained in business and technology skills.

BETA aims to bridge a gap between youth in the urban core and college and business related knowledge, while using hands-on business related

activities to increase student enrollment and retention in A-G courses and in post-secondary educational institutions, while encouraging youth to enter careers in business, economics, and technology.

Many youth are aware of street business and they relate to popular culture (in music, television, and movies) that portrays accumulation as heroic while educational culture is at the margins of many students' social worlds. BETA seeks to intervene in spaces where the existing education structures and tools are generally not working to engage youth. The program seeks to raise awareness and engagement into the trajectories which lead towards enrollment in A-G courses, going to college, consideration of jobs and careers in business and technology, and recognition of the requirements for building one's own business or participating in business enterprises. In the current political economy in which Fortune 500 companies provide a declining share of employment options and opportunities, small and medium sized businesses represent areas of economic growth in employment and self-employment options. BETA seeks to create a bridge between youth and awareness of education for careers in business, economics, and technology.

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student was awaiting admission at UCB, Stanford, or West Point. (Source: BETA Telephone Survey, October 2002).



## **FRAME: AN OVERVIEW OF THE EVALUATION OF THE ROLE OF BETA PROGRAMS**

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Fieldwork involves observing the situation and the actors, looking for key patterns or underlying “stories,” narratives that explain what is going on. Then it involves relating these various types of observational and narrative information to data from other sources. Toward this end our evaluation effort focuses on observations of BETA programs in their field settings and upon interviews with key players and participants in the programs. We have completed interviews with principals, program directors, teachers and staff and conducted field observations at each of the BETA community field sites that have been active over the past year. In addition, we have talked with the program staff, mentors, and students who participated in the summer and Saturday programs at the Haas School of Business to get their views on program goals, activities, and effectiveness.

The evaluation is designed to assess the quality and role of BETA program services in three contexts: 1) middle and senior high school classrooms, 2) community youth after-school program settings, and 3) summer and Saturday program sessions for individual youth at the Haas School of Business. In addition, we collected documentation on BETA workshops and conferences designed to provide resources for school and youth programs based upon business and entrepreneurship, which also support youth development and the pipeline to college.

This assessment is based on field observations in each of the three contexts, interviews with principals, program directors, and teachers/program staff specific to each setting, and a review of available student information including course taking patterns, tests scores, family income and educational achievement. To provide a framework for assessing BETA programs we looked at secondary research on existing outreach programs that are comparable or similar to those provided by BETA. We employ a

meta-analysis of findings on other outreach programs like MESA, AVID, and PUENTE, and others that have played a leading role in outreach initiatives, to support our assessment of the viability of BETA program components. Using the findings from research on comparable outreach programs to complement our own primary research efforts supports the evaluation of BETA, a program that was launched over the past three years. The case studies included in this report illuminate the role played by the BETA program in each of their program settings and their approach to engaging educationally disadvantaged youth in business, economics, and technology learning through hands-on activities that seek to stimulate the creative agency and interests of these youth.

We began our research with field interviews and observation of the classroom-based and after-school programs in community settings. This program component serves the largest number of BETA students, many of a younger age, as well as supporting the educational and youth development missions of the sites where the program operates. These community-based BETA programs target educationally disadvantaged youth attending mainly low-performing middle and high schools. At each of the BETA school and community sites we engaged in field observation and sought out the voluntary accounts of participants on the role that BETA plays at their site, in terms of its business-based curriculum. We went to each of the sites and talked with participants and observed the classroom and after-school mentoring activities to find out the experiential views of participants and to observe the program activities of youth working with the BETA program.

Our approach in this document is to focus on findings from open-ended interviews with administrators and staff at each of these settings and from field observations and targeted contact

interviews. In turn we want to address and contextualize these findings in terms of models, theories and data on best practices in school and community-based outreach programs. Relevant questions include:

- What did the program bring in added value, if any, to their sites? How did it fill needs that weren't being addressed and enhance resources at the sites?
- How did it relate to the setting's own program and curricular goals?
- What features of the program do program sites find to be valuable in adding to their capacity and effectiveness in engaging their students/youth and enhancing their approach to learning and youth development?
- Has it impacted youth involvement and student performance?
- Has it contributed to the social capital of individual youth, schools/ groups/ programs?
- What are distinctive lessons and enhancements for each site?
- What are challenges for the program at each of the sites?

### ***Overview on Models of Intervention for School/Community-Based Outreach Programs***

#### **Issues from the Field in Developing and Implementing Effective Collaborations with Local Sites**

When designing school and community-based outreach programs, the process is driven by an idea of the mission and resources of program providers/funders and the needs and requirements of the youth and sites the program seeks to serve. Part of the mission of the BETA program is clearly based upon adopting goals and objectives of program funders in terms of the target population and the goals/success indicators for assessing the degree to which the program is

meeting its objectives.

When Haas BETA managers select a program to work with at a school or community site, there is an emphasis on the collaborative and partnership character of the effort. For example, Haas program managers seek a "buy-in" from principals or site administrators at schools or community centers and they ask that the site show a commitment to hosting the program. In school or community settings, engagement includes regular meetings between the mentors and the teacher or group leader. It also includes a dedication to work actively with the mentors when they are on-site, as opposed to leaving the teaching or mentoring activities solely to the undergraduate business student mentors. From interviews with principals and managers at program sites and from discussions with BETA staff, the importance of active collaboration to the power and success of each program intervention site is revealed.

### ***Models of Collaboration***

#### **Turn-Key Programs and Standards vs. Active Flexible Models of Collaboration**

In general there has been a dichotomy between small local one or two site outreach and retention programs based upon local needs and innovative or charismatic local program managers and larger multi-site programs based upon a standardized set of materials, practices, and program formats. The Biology Scholars Program (BSP) or the Professional Development Program (PDP) at UC Berkeley are examples of successful one-site programs which developed innovative and distinctive program content and approaches to outreach, recruitment and retention of underserved populations. However, at the other end of the scale, the most prominent programs within the K-12 outreach program environment are based upon patterns and materials that have been developed originally at one or more sites which have grown and developed out of local

experiences and program development until they are transformed into structured regional, statewide, or multi-state programs. For example, Advancement via Individual Determination (AVID) was originally developed at one school in the San Diego Unified School District<sup>10</sup> to address the need for a program targeting under-achieving students and has since grown into a multi-site, multi-district international program. Similar local programs that have grown to include statewide efforts are The California Writing Project that began at UC Berkeley as the Berkeley Writing Project, and MESA, which began at three sites (Berkeley High, Oakland Tech, and Kennedy High in Richmond), but expanded quickly with a successful statewide rollout of the program.

What is distinctive about these programs is that they were developed to meet a local need, experienced a process of program development and refinement, and then have been further refined and exported as effective platforms for other school and district settings. These other settings share a need for these types of programs. Rather than seeking to develop their own stand-alone efforts, they find it convenient and effective to adopt an existing program model with proven tools and strategies, and a reputation for power and efficiency. While programs like AVID are considered very successful, key informants report that when programs like AVID grow, their program design becomes more standardized, uniform, and regulated.<sup>11</sup> With the efficiency that

comes with standardization there is also a reduction in flexibility and ability to adjust program content and approaches to distinctive local needs and conditions.

Part of the focus of our evaluation of the BETA program involves looking at the capability of its program model as an approach that can be transferred to other UC campuses and potentially to other colleges and universities.

It is important to emphasize here that from our fieldwork at each of the BETA sites, a strength of the program appears to be its model of *active but flexible collaboration*. The program managers and mentors work with each of the sites to adapt business and economics related content to be complimentary to the needs and mission of the individual sites. The narratives from interviews with principals, managers, and teachers from each of the sites reveal that BETA is regarded as particularly useful because it complements the goals, objectives, and program content that the collaborating school or program is committed to but lacks the tools and resources to fully execute.

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<sup>10</sup> AVID: Advancement Via Individual Determination was created in 1980 in San Diego by Mary Catherine Swanson as an answer to the problem of enrolling underserved students in postsecondary education and reaching underserved students in the middle levels of achievement. Beginning with one high school and 32 students, the program now serves over 65,000 students in more than 800 schools in California alone, with more than 30,000 students primarily from California schools having graduated from AVID programs and matriculated to college at an over 90% rate. This account is based upon the program narrative from the AVID website, [www.avidcenter.org/](http://www.avidcenter.org/).

<sup>11</sup> An AVID staff member in San Diego who had worked in the program for three years recently reported that conflicts would sometimes occur in the current environment because

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the program required the school implement the program in a set manner. She reflected that for some districts this lack of flexibility in the program design and practices could be a barrier to making adjustments that district representatives believed would be helpful for addressing the distinctive needs of their individual settings and situations.

## ***The Focus of This Evaluation***

This is an evaluation of the various components of the BETA program of the Haas School of Business. This report documents findings on the characteristics and efficacy of the various BETA-sponsored program elements. The report is based upon field observations, interviews, and incorporates additional information from the quantitative analysis of survey and pre and post program test data. The report makes an evaluative assessment of program quality, program effectiveness, and program transferability at the four field sites where BETA programs have been in continuous operation for at least one academic school year.

The current document reports on key attributes and characteristics of the current BETA program in field settings at schools and community centers. It reviews the key characteristics of BETA programs at four case study sites. The report also provides a narrative description and analysis of the summer and Saturday programs that serve individual Bay Area students, with the assistance of MBA student mentors, at the Haas School of Business.

A key issue in this investigation is the effectiveness of a business, economics, and technology program as an intervention strategy. Is a business and economics related program an effective vehicle for reaching youth and supporting them in academic achievement, youth development, and entry into the post-secondary pipeline? The view of its creators and MESA staff, which we have heard echoed from the field, is that business is a good subject and content area for reaching youth in K-12 secondary school settings. As addressed in this report, BETA may be effective as an alternative or complement to the primarily math and science content of the other MESA program components.

A related issue is the transferability of the BETA program model. In terms of exportability to other sites, is the program model a good one?

Can it be transferred to other settings? Is it likely to work in other schools and contexts with other personnel? Under what conditions is it likely to work as an effective strategy? An additional core program element to evaluate here is does the model of using a large number of undergraduate business students and graduate MBA students as active mentors and teachers prove an effective one? Can we assess from our findings and related secondary data whether it is a strategic model for program delivery that can be employed or replicated in other settings?

## ***Introduction***

The BETA approach begins with certain core features and practices. In order to effectively assess it as a program, our report will focus upon evaluating and documenting program effectiveness at fulfilling major elements of its distinctive program mission and content. These include assessing its practices and success at generating and fostering:

### **★ A Collaborative Business-Based Outreach Approach**

As an outreach and youth development program targeting youth in secondary school and community settings in urban cities within the Bay Area, BETA is based upon active hands-on learning through collaborations with youth, their families, schools and community settings.

### **★ A Commitment to Excite and Engage Youth Through Business Related Materials and Hands-on/Practice-Based Learning**

BETA seeks to first capture youth interest and subsequently encourage and empower them to take the necessary coursework and learn the skills for a career in business, economics or technology. The BETA programs use business related exercises that involve hands-on practice-based learning to get youth excited and involved in the learning process. At a more intensive level, the summer and Saturday programs use the business

plan for a student-designed business and a stock market competition that involves students and allows them to learn from practical models and hands-on activities. This practice carries over to the classroom-based programs where students engage in business related “games” or simulations to learn about concepts or processes. This use of hands-on business curriculum leads students to employ critical thinking and math skills to project revenues, fixed and variable costs, and sources for generating capital and revenue.

Professional presentations and public speaking are an integral part of the BETA programs. In the process of preparing and executing presentations, students come to understand and use the language and rhetoric of public speaking and performance including the language, style, dress, voice and diction for speaking to an audience and for addressing or answering their questions and concerns.

#### ★ Business Student Mentors

A distinctive feature of the BETA program involves its use of paid undergraduate students from the Haas School of Business and volunteer graduate MBA students as leaders and mentors for its outreach, education and instructional activities. A key question for our evaluation regards the BETA model of using a large number of undergraduate business students and Haas MBA students as mentors as a key component of its intervention strategy. Our evaluation examines whether this is an effective core strategy for outreach efforts targeting middle and high school students. We also want to consider whether this program feature seems like a viable approach to staffing future intervention efforts in other settings. From our findings we assess whether this is a strategic model for program delivery.

As the discussion which follows on individual BETA sites will make clear, the use of mentors and the bonds which they establish with the students appears to be very positive, though there may be variations in the effectiveness of connections between students and mentors at

different sites, which reflect differences in mentors and differences in the intervention setting, students, and program content. The observations and field studies on the role of mentors at the program sites appear to strongly affirm the experience of other community-based programs, like the AmeriCorps programs in California,<sup>12</sup> which indicate that mentors who are younger and closer in age to the students than adult professional staff are particularly well-received by the youth participants in their programs.

Our field observation and survey and interview data on mentor experiences make clear that much of the power of the BETA program is linked to the personal, flexible, and creative role which the mentors play at each of the program sites where they guide program activities. The BETA approach of using student mentors as a core element of the program complements the program approach of other existing MESA programs, which are distinguished by the flexible use of older MESA students and former student participants in mentoring and leadership roles. However, the Haas BETA program appears to make more active use of undergraduate and graduate business students in active teaching, mentoring, and leadership roles.

#### ★ Business Content and Project-Based Learning as Pedagogy and Professional Development

The BETA program content and design is representative of the increasing focus in education and organizational development settings on project-based learning, collaboration, and the need to add strategic value to the organization and professional development of schools, administrators and teachers. Interviews with administrators, teachers and program staff explored ways in which BETA may have contributed to curriculum, teaching strategies, and

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<sup>12</sup> *Final Report: An Evaluation of selected AmeriCorps programs in California*, Institute for the Study of Social Change, University of California, and Berkeley, 1996.

organizational development for each of the sites.

### ★ Support for Completion of College and Business Education Requirements

The BETA program supports enrollment in college preparatory A-G courses, and preparation for PSAT/SAT testing and college requirements. In the school and community-based programs and in the Haas School of Business-based programs, the students receive multiple messages about the value and importance of going to college and the requirements for being admitted to a college. This includes the need to take A-G courses with a focus on the need to become enrolled in key courses like algebra and geometry, as well as assisting students, where relevant, in understanding the A-G courses that are offered at their school and the other requirements for attending college.

As part of the summer and Saturday BETA programs at Haas, students receive A-G course listings for their high schools and the program engages parents as partners in working with their children and the school to make sure that their children are enrolled in the courses that are necessary to keep them in the college pipeline. The different components of the program work to emphasize and reinforce the value of a college education and the necessary steps for admission, both in terms of practical steps and lists and in terms of role models, speakers, and counseling.

### ★ BETA Adds to the Social Capital of Schools, Community Groups, Professional Staff, and Students at its Program Sites

We consider whether BETA appears to enhance the educational and social capital of the teachers, students, schools, and organizations with whom it works. We also consider whether BETA's school and community-based programs contribute to the quality of program content, practices, and organizational capacity. This report also reviews ways in which the BETA program supports the teaching of high school business and economics and the development of effective high school

business and finance tracks.

### ★ BETA as Distinctive in Terms of Public/Private Partnerships

BETA was developed by the Haas School of Business as an extension of its East Bay Outreach Project that began operations in 1989. One component of this earlier program included working with youth from economically disadvantaged communities. The program was also built upon and informed by the use of business tools and strategies as resources for student development and strategic business development through consultation and curriculum that support youth business entrepreneurship skills. The curricular content and approach of the BETA program reflects this organizational history. It is also important to see the ways that this aspect of the BETA approach is reflected in the effectiveness of the BETA program in field settings when it is linked to project-based learning that includes development of an actual business enterprise (e.g. at the store project for the Native American Health Center) or in working through business case studies and simulations with the students in other school settings.

BETA is also organizationally distinctive in relation to other outreach programs because it retains strong links with business and corporate sponsors and advisors through its ties to faculty, alumni, and associates of the Haas School of Business. Over the past ten academic years, private givers primarily supported the Young Entrepreneurs Program at Haas (YEAH) until it received funding for the BETA program. Through the Haas School of Business and the YEAH Advisory Committee, BETA retains strong connections with the academic business program and the corporate community. These linkages provide options for future program and financial development efforts and for support in the expansion of program content and curriculum through active partnerships with members of the business community and the business faculty.

These active connections to the Haas "brand"

encourage buy-ins and support, beginning with the undergraduate students who work as mentors, and the MBA students who volunteer as mentors for the Haas-based program components. The Haas cachet extends to interest among the corporate community and other potential funders in supporting community programs sponsored by Haas.

The UC Berkeley Incentive Awards program provides a model of the leverage that a program can create when it involves a partnership among the university, public high schools, and the corporate and business community for the purpose of supporting achievement by historically underrepresented students and communities.<sup>13</sup> The program began in the early 1990's at selected public high schools in San Francisco. It now has expanded into high schools and communities in the East Bay, Central Valley, and Los Angeles Metropolitan area. Because it involves broad community sponsorship, has private and public support, and celebrates the success of award winners and finalists, it has grown in size and support with the major resources coming from businesses, corporations, alumni, and private foundations. In the process it creates a cultural bridge, bridging capital between UC Berkeley and high schools and communities where college and college planning were not subjects of thought and ambition for much of the student body.

With its mix of private and public support, roots in urban communities that have been largely left behind in terms of college access, economic or social development, student mentorship and Haas support, the BETA program has the elements that offer opportunities for following the example of the successful trajectory of the Berkeley Incentive Awards Program.

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<sup>13</sup> The Incentive Awards Program provides a \$28,000 scholarship and extensive academic services, leadership development, and community-building activities to one student from every participating high school that, despite socioeconomic hardship, exhibits exceptional academic potential and leadership promise.

## SUMMARIZING THE FOCUS OF THE BETA EVALUATION

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The final report is designed to assess the quality and role of the BETA program in its work in school and community settings and in its program work through the Young Entrepreneurs Program (YEP), working with youth and their families through summer workshops and Saturday meetings through the school year. This assessment is based on information from multiple data sources including interviews with principals, program directors, and teachers/program staff and field observations at the BETA school and community sites and at the Haas-based summer and Saturday program (YEP). It also reflects input from interviews and discussions with mentors, program directors, and findings from a review of written materials and documents.

Relevant questions for this assessment include:

- What was the program content at the school and community sites?
  - What was the program setting and context for each of the school and community programs?
  - What did the program bring in added value, if any, to these sites?
- How does the BETA school and community-based program relate to each site's own program and curricular goals?
    - What features of the program do schools/community groups find to be valuable in adding to their capacity and effectiveness in engaging their students/youth and enhancing their process of learning and development?
    - What was the program content for the summer and Saturday programs at Haas?
    - What was the program setting and context for each of the Haas-based BETA programs?
    - What did the Haas-based BETA program bring in added value, if any, to the educational and youth development experiences of its participants? For example, does BETA add to business-related knowledge and skills?
    - What did the Haas-based summer and Saturday program bring in added value, if any, to the capacity of families and community members to support business related learning and educational achievement among participants and their peers?
    - Have the program components impacted youth involvement, student performance and interest and desire and/or ability of youth participants to attend a four-year college or university?



## EVALUATION AREAS, DATA AND ISSUES

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The evaluation approach is informed by certain limitations. The BETA program is relatively new and is still being developed and implemented. Limited data is available on student performance/outcomes and pipeline enhancement effects.

Given these limitations, the focus of the study and the Final Report are on a formative evaluation of the program. The approach focuses on program activities and relationships, using field-based data collection approaches including interviews, observation, and surveys. Field data collection includes the following:

A review of program documents articulating the formal description of the program, program activities, and program goals.

Interviews with students to solicit their experiences with the program, their satisfaction with the program and their evaluation of its overall effectiveness.

Interviews with staff and school and community partners regarding their assessment of the overall design and effectiveness of the program, along with their evaluation of organizational structure and on-going practices for specific program components.

Interviews and discussions with key partners including staff at the Haas School of Business, the UC Office of the President, and at participating secondary schools and community organizations to solicit their views of how the program has developed. We report what they see as challenges of the collaborative process and what they regard as strengths and limitations of the program content and design.

An assessment of program content through direct observation of program activities by ISSC staff and graduate student researchers.

## Findings

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Drawing upon the data gleaned from these data-gathering activities, the evaluation provides narrative descriptions and assessments of BETA program activities, viability and effectiveness.

Program and documentary analysis are combined for the following discussion of school and community-based program sites using observation and interviews to build a narrative description of program activities and evaluate core and secondary program components. The discussion documents the findings on the program based upon the data collection that examines program content, process, and satisfaction from the perspectives of staff, student participants, and institutional partners.

### **1) The American Indian Public Charter School (AIPCS)**

The American Indian Public Charter School (AIPCS) is a middle school with about 100 students in grades 6, 7, and 8. The following case study discussion is based upon interviews with the school principal, Dr. Ben Chavis, and Ms. Jill Rodgers, the school's Coordinator of BETA and MESA programs and upon observation of program activities at the school.

#### **Setting**

The AIPCS is located just south of 35<sup>th</sup> Avenue and just above Macarthur Blvd in the flatlands of east Oakland above the 580 Freeway. It is located on the residential Magee Street, next door to a Chinese Protestant church. The school is a public charter school that is part of the Oakland Unified School District.

The school is located in a plain two-story stucco building. It has a limited amount of classroom and office space. However, as the principal likes to point out, their school is full with many students on a waiting list to get in. Students appear to be very focused and on task, in drills and exercises in progress under the direction of the teachers.

#### **Comparative Frame**

The American Indian Public Charter School provides a very compelling case study for

evaluating the role of BETA as a business based outreach program for two reasons:

- 1) It is a small middle school setting with both a BETA program and a MESA STC science and math program, under the direction of the same academic coordinator. It therefore provides an opportunity to see the distinctive strengths and appeal of a business-based MESA program in contrast to the science and math based MESA STC program.
- 2) It is a business-based outreach program at a school where the principal sees business and business related skills and knowledge as core features of the curriculum.

#### **BETA Supports the School Mission because at AIPCS Business Is Part of the Core Curriculum**

Principal Chavis discussed his views on the American Indian Public Charter School, its mission, and the BETA program. He reported that he views business as central to the mission of his school and talked about the ways in which he acts to involve students in understanding the ways in which the school is a business.

Chavis believes that BETA contributes to the school's mission that includes business as part of the core curriculum. AIPC wanted the program

because Chavis believes that everything is a business situation and this supports their approach that sees business as a central part of a good curriculum. Business is part of the school's mission statement: "We will provide them with an education to enhance their academic skills in reading, writing, spelling, mathematics, science, social science, business and humanities in order to be an educated person in the 21<sup>st</sup> century."<sup>14</sup>

He wants BETA because it is a good program that supports his belief that understanding the business aspects of everyday life is an important intellectual and life skill: "They [BETA] teach my kids about supply and demand, how to manage money, how to balance a checkbook. We want to teach our kids about business competition."

"We have an advantage here because we are offering BETA in middle school. We got

approval from the [school] board last night for a 9<sup>th</sup> grade." He sees this as the first step toward developing their school into a Charter middle and high school. He considers BETA part of the core curriculum and resources that will allow the school to move forward in supporting intellectual development and skills acquisition among his students. He sees the BETA program as a resource that enhances his ability to engage students and raise their level of achievement.

The following table suggests that there was substantial improvement in the test scores between the 2000 and 2001 school year.<sup>15</sup> What seems more compelling is that the highest scores are in the 7<sup>th</sup> grade. This student cohort would primarily include students who began as 6<sup>th</sup> graders under Chavis' leadership in the 2000 academic year. While these scores are still relatively low, by self-reports of school staff and one informant who was a former teacher, the school begins its work with a population that has a very low level of language and math literacy.

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<sup>15</sup> These scores are taken from the State Department of Education web database. However, we needed to check whether the scores actually reflect a movement from no students above the 50<sup>th</sup> percentile in each of the listed cells to the listed proportion of students who had scores which exceeded the 50<sup>th</sup> percentile for the Year 2001 STAR tests. In a verbal communication, Dr. Chavis indicated that the reported improvement in test reports does reflect a rise in student test performances. Given that the school averages by grade for reading, math, and English were all in the low two digits in year 2000, it appears that the massive improvements represented by the table comparing year 2000 and year 2001 scores are valid. Source: Education Data Partnership, [www.ed-data.k12.ca.us](http://www.ed-data.k12.ca.us).

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<sup>14</sup> From the AIPCS Mission Statement, Oakland California.

American Indian Public Charter STAR Comparison 2001 vs. 2000  
 Percent Scoring At or Above the 50th Percentile<sup>16</sup>

Grade	Reading		Math		Language		Spelling	
	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>
6	6%	+ 6	18%	+ 18	24%	+ 24	17%	+ 17
7	21%	+ 21	26%	+ 26	16%	+ 16	26%	+ 26
8	18%	+ 18	9%	+ 9	18%	+ 18	9%	+ 9

<sup>1</sup>2001 percent scoring at or above the 50th percentile - all students (including EL-English Learners)  
<sup>2</sup>Information displayed shows the percentage point change from 2000 to 2001 for each grade

He sees his approach and the combination of quality teachers and quality programs like BETA and MESA as contributing to real progress in teaching basic skills and improving the test scores of his students. He sees these improvements, with the help of BETA, as the first step.

**Jill Rodgers, Coordinator for BETA and MESA Programs at AIPCS**

Ms. Rodgers focused on what she regards as the practical highlights of BETA's relationship to the students and the school.

**The Kids Really Like the Mentors in the Program.**

They are just asking all the time—counting the days—till the mentors come back.

For us, especially for these kids who really rely on the special bonds they have made with the mentors, it would help if [the BETA program] could shorten the gap between the fall and spring schedules. The middle school kids—many kids don't have the best home lives—it is supportive having someone they

get close to, and then having them taken away is really hard on this age kid. It wouldn't be so hard if the program wasn't so great. The mentors come and they really engage the kids in the program. I haven't had a chance to take business and economics courses. My background is in science. So they are really a help in developing material for the program.

They did Econ 10, supply side economic, supply and demand, accounting, and business operations. I learned things [from them] because my background is in the sciences. Now they [the students] are going to form their own business and do business world.

She lamented that kids have been missing the mentors and it would have been better if the program had started sooner, instead of waiting till the week of February 19<sup>th</sup>. She also regretted that with eight sessions the program this semester would be shorter than it was last semester.

**On the Relationship between the MESA/Haas BETA Program and the MESA STC Program at AIPCS**

Last year Jill combined the programs for some activities.

In one exercise students made their own silly putty.

<sup>16</sup> Education Data Partnership, www.ed-data.k12.ca.us.

She gave them the ingredients and they had to come up with their own recipes. Then they needed to come up with a promotional spot and a way to sell their product.

Jill reported that BETA students caught on fast. They understood product, promotion, and price. Other MESA students with no BETA experience had a more difficult time grasping these concepts.

One gets the clear impression from Jill's observations that the BETA business content may be a more universal and effective hook for many of the students than the math and science focus of the MESA program. Making a definitive assessment of the comparative role of business and economics vs. math and science as hooks in this middle school setting will require more field observation and an assessment of the level of engagement and active learning that is demonstrated in the two program settings. But the field experience indicated that the program components from BETA and the MESA STC program (with its math and science focus) operate in a complimentary and additive way for students who have had exposure to both programs.

## Summary

BETA brings added value to the Charter School environment by providing support for teaching about key principles of business and ways in which business is a part of many aspects of routine life. The AIPCS sees BETA as a value added resource because it provides content and exercises that help the school be one of the only middle schools with an academic focus on business and business principles. BETA increases the students' understanding of key concepts like competition and supply and demand, and the connection between investment and rewards.

At the American Indian Public Charter School, BETA provides support for a business based outreach program in a school setting

where the principal sees business and business related skills and knowledge as core features of the school curriculum and mission.

Also, the AIPCS is a small school that focuses upon basic skills including language and math literacy. BETA provides curriculum and hands-on lessons and activities that expand and enrich the school program and curriculum. Through the mentors, BETA also provides students with experiences and relationships that make the life of a college student and the process of attending college more concrete and accessible.

The AIPCS was particularly appreciative of the curriculum that BETA brings focusing on basic business concepts of supply and demand, competition, target markets, and determining profit and loss. The mentors are seen as an important element of this curricular infusion because they present materials and information in a way that engages youth and enriches their knowledge and capacity to think about the links between business and various aspects of life.

BETA has contributed social capital to the AIPCS. Association with the Haas School of Business contributes to the reputation of the school with its community of parents and community members. Potentially, it could enhance their ability to build other collaborative relationships to build the school and the educational resources for their students. For students it adds to their social capital as they work their way through the trajectory of middle school and high school.

The charter school provides a distinctive lesson on the relationship between the content of the BETA/MESA and the STC MESA program. The coordinator found that the BETA business model worked in a complimentary way with the MESA STC program. BETA helped youth to think about applications of science to product development. She reflected that some students are interested in attending college but they are not drawn to science. Business is an alternative way of capturing their interest through hands-on type lessons and exercises.

The BETA MESA and BETA STC programs at the Charter School also highlight the strengths and

weaknesses of operating in a school classroom setting vs. operating in the school setting as an after-school enrichment program. The after-school program offers more freedom for a more informal youth centered, hands-on approach to the material. Alternatively, attendance for the after-school segment is sometimes problematic, while regular classes have a low level of absenteeism. The experience suggests the efficiencies of school-based programming because it reduces the

challenges of capturing and retaining a consistent core of student participants.

A main enhancement of BETA programming at the school site that was identified by Charter School program staff was to increase the number of weeks of contact hours between the Haas BETA mentors and the students. The AIPCS students miss the program during the extended mid-December to February break. This suggestion underscores the value that the BETA mentors add to the after-school program at the charter school.

## **2) McClymonds High School**

McClymonds High is a relatively small urban high school in an economically disadvantaged flatlands neighborhood. However, under its current principal, efforts are in place to improve student attendance and enhance student engagement and performance. BETA is part of a group of efforts to implement school improvement. The following section is based upon interviews with Principal Lynn Haines-Dodd and Chef LeBlanc, the Food Science Teacher, and field observations at the school site.

### **Setting**

McClymonds Senior High School is located in West Oakland, several blocks below the main arterial of San Pablo Avenue at the corner of 26<sup>th</sup> and Myrtle Streets. The high school had a regional reputation in the 1950s, 1960s, and 1970s as a sports power. Since those days the school has shrunk in size, its active enrollment having dropped as low as 300-400 students in the last five years. Truancy and absenteeism have been major issues.

The school is located in the heart of a historically African-American neighborhood. Its student body partially reflects the process of demographic change in West Oakland with

a student population that includes 12.5 percent Latinos and 9 percent Asians. But the school remains predominantly African-American (77 percent of students in the 2000 academic year). It also serves a population with very limited economic resources, with 88 percent of the 1999-2000 student cohort coming from households on the CalWorks (formerly AFDC) program.<sup>17</sup>

Yet, over the past couple of years there have been improvements at the school. The principal indicates that enrollment has risen to 724 for the current school semester. There also has been a decline over the past year in truancy and absences.

Countering its negative trends, McClymonds has increased attendance and the number and proportion of students in magnet programs. Technology use has also increased with approximately 1 computer for each 4 students on a network server system. As discussed below, the principal feels that the school is poised to make further progress in improvements in attendance, STAR test scores, and student retention and graduation.

McClymonds is a setting where there appears to be improvement but they are operating in a community with families and neighborhoods which have limited economic and community resources. In a school district in which students and their families can

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<sup>17</sup> Education Data Partnership-data from the 1999-2000 school year, [www.ed-data.k12.ca.us](http://www.ed-data.k12.ca.us).

choose within zones in their choice of high schools, McClymonds is generally a default choice for students. It functions as a neighborhood high school for students and families who are not motivated to seek out a high school with more academic courses and a more positive recent history of academic achievement.

A review of the STAR test scores for McClymonds students for the 2000 and 2001 school years makes clear that supporting and achieving higher levels of student achievement is a challenge at McClymonds for the principal and teachers and for collaborating programs supporting academic engagement and achievement like the BETA program.

### McClymonds Senior High STAR Comparison 2001 vs. 2000

Percent Scoring At or Above the 50th Percentile<sup>18</sup>

Grade	Reading		Math		Language		Science		Social Science	
	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>
9	3%	- 5	12%	- 3	18%	- 1	11%	+ 2	14%	- 3
10	5%	+ 2	9%	+ 3	8%	+ 3	13%	+ 10	7%	0
11	3%	- 8	7%	- 7	7%	- 15	3%	- 2	24%	- 1

<sup>1</sup> 2001 percent scoring at or above the 50th percentile - all students (including EL-English Learners)  
<sup>2</sup> Information displayed shows the percentage point change from 2000 to 2001 for each grade

Reviewing the table above, one sees that the level of student test scores at the McClymonds site is quite low. However, the 9<sup>th</sup> and 10<sup>th</sup> grades in 2001 are the first classes under the tenure of the current principal. While scores are low, this cohort (which has had the greatest exposure to the current administration and school leadership) shows improvements in math and science over the past two years. The student body, particularly in the 11<sup>th</sup> grade, tested at a higher level on the social science sections of the test than in reading, math and science.

### Principal Lynn Haines-Dodd

*How does the BETA program add value to your own classes and curriculum?*

Do you want to know what I think about the program? I can tell you in one word: outstanding.

We have a Business and Finance Academy. The Haas program has been providing invaluable service to the teacher and the students in the classroom.

We targeted Business and Finance because of the nature of Haas. It was focusing on 10<sup>th</sup> graders at that time and a 9<sup>th</sup>/10<sup>th</sup> grade honors class. The chemistry [of the program] was perfect for a 9<sup>th</sup> grade honors class between the Haas mentors, the teacher and the students.

<sup>18</sup> Education Data Partnership, [www.ed-data.k12.ca.us](http://www.ed-data.k12.ca.us).

This year they moved the Haas mentors into a new initiative, the 9<sup>th</sup> grade small schools, in an English 1 class.

It works extremely well. Lessons are being developed. Students are actively involved.

Now to move the same kind of enthusiasm into another area it takes somebody who wants it. The person needs to understand that it adds on additional responsibilities—it means more work. For a teacher to say I want this partnership means they are ready to work in a collaborative way. It's not going to be where the teacher is relinquishing responsibilities to an outside entity.

For [working with] Haas, dialogue has always been open and honest. We respect each other—the mutual respect that we both share. We have our agreed upon outcomes. Haas has always made sure that the students at McClymonds are at the top of their agenda

She seemed to appreciate the combination of commitment and flexibility on the part of the Haas staff.

Oscar [Wolters-Duran, YEAH program director] has always said that we are going to make this work. He came on board—if we are small we will grow the program.

I am hoping that the Haas relationship will be part of the overall new McClymonds. We will make sure students are improving on standardized tests and that we are retaining a minimum of 90%. I think it will take us three more years but I believe that we can make real improvements in student performance and student retention.

As reported they have already made real advances in student attendance—now they need to enhance learning, performance, and retention.

#### *How the BETA program fits with the needs and objectives of McClymonds*

McClymonds is a small school but it has grown over the last few years while Haines-Dodd has

been principal. She said her mission at McClymonds begins very simply. First she has to get the students to come to school. And when they come she needs to get them involved and interested. Then you should see both an increase in attendance and an increase in their scores on the STAR tests.

She said her next goal is to increase student retention. The key is to get them coming and keep them coming to school. She said, “It’s that simple.”

But in order to succeed in that mission, they need teachers and curriculums that can get the students engaged and keep them interested and coming to school. That’s where BETA comes in: “We need programs like BETA because they work in getting the students involved in school and the learning process.”

#### **Chef LeBlanc (Food Science): Culinary Academy**

This semester they are working with Chef LeBlanc, who is the food science instructor with extensive experience as a caterer, running his own restaurant, and marketing custom food products. He is excited about working with BETA and planning and growing the culinary program. Chef LeBlanc now has 140 students taking his food science classes. The enrollment in the Introduction to Finance class was declining while enrollment in Food Science continues to expand. He is charismatic and has links with catering companies and restaurants in the community so that he can link up interested students with paid jobs in the food industry.

Chef Le Blanc and the school are looking to the BETA program to help them to develop the program and curriculum for the expanded food sciences program. His major hope is that BETA will remain an active partner helping him to build the structure, format, and curriculum of the emerging Culinary Academy.

The food and cooking process involves math,



business concepts, marketing, and assessing what makes a quality product for each category of food. Chef recounts how the students sometimes complain that he makes them do too much math, saying, “I already have a math class.” His approach requires students to compute the costs of all ingredients and determine the cost per serving for each type of food item that they are preparing. The BETA mentors support his teaching of the business aspects of the food service industry including analysis of fixed and variable costs, margins, target markets and marketing strategies. In terms of business concepts the BETA mentors have taken the lead in developing lesson plans and content, including case studies, to illuminate and teach the business elements that are foundations of a successful restaurant, specialty food, or catering business. BETA helps to support the business and economics component of the curriculum.

### **The Haas BETA School Program Director on her Approach to Working at McClymonds High School**

BETA program director Tanya Fraley relates the specific challenges for developing a successful BETA program to fit the school and classroom environment at McClymonds and discusses the kind of support and structures McClymonds needs that BETA provides. BETA collaborated with school administrators to seek to create a successful outreach pipeline program in the McClymonds High School setting

### **BETA’s Collaboration with Schools**

The BETA program likes to find out from the administration what their goals are. We check in after each semester, so that’s a mid-year review that we go over—these are the goals that you guys had, this is what we have been able to accomplish, these were the successes, these were the things that we still need to work on—and then at that point they can say they want to change some goals, they want to add some goals, or whatever. We are there to support the school, we are not

there to just have a BETA program. We are only there to make sure that the BETA program helps that school attain its goals and its mission.

We felt that through the BETA program one of the ways that we would be able to help is go into core academic classes. During that first year we targeted a combination of an honors English class in the freshman level, an English freshman class, and an introduction to business class through their Business Academy. And through that combination we were able to serve over 40 students. Here our primary goal was to just build self-confidence, get them excited about business which in turn gets them excited about a career, which then gets them thinking about the path to that career. But also to instill in them a sense of self-esteem—that I can do it, that I deserve to go to college, that college is an option for me and open for a student like me. Where a lot of those students had felt very insulated and didn’t feel like they should go to college.

Part of BETA was wanting to broaden their perspectives not only through talking about careers and talking about business, but bringing in mentors who were diverse from the general ethnic group there, and talk about their pathways to school, talk about their life outside of school and see that there is a lot of similarity and you don’t need to think that they’re entitled and you’re not. And to do a little bit of academic strengthening. By us only being there 8 times, but back in that first year it was 16 times a semester, we could see right away that their basic grammar and English skills, and math skills were very low. Instead of trying to bring students into an academic level that would be satisfactory, which would just be the average academic level, we felt like that was too big of a problem for BETA. All we could do was say, “If you get to this level these opportunities are open to you. And until you exceed where you are right now, which is below average, you are always going to have a tough time.”

So we did that in the beginning, and we have seen in the last two years that we were able to definitely effect change, people wanting to go to college. The way that we are helping those Mack [McClymonds] students do that is to not only show them the CSU/UC route, to talk about the

tons of scholarships the Mack students have access to, but also to talk about the community college route. We have a lot of students that work at Mack, our mentors, that did go through the community college to get to UC.

## Summary

McClymonds is a relatively small high school that currently has about 720 students. But in terms of average attendance it has made strides in student attendance and engagement over the past three years that Ms. Haines-Dodd has been the principal.

She said her next goal is to increase student retention. The key is to get them coming and keep them coming to school. BETA fit well with this mission for four fundamental reasons:

1) It was willing to work with the principal and the teachers to develop a business based curriculum that would be linked with the class curriculum while teaching key business concepts and business literacy through lectures and hands-on learning exercises.

2) It brought a group of engaging and charismatic Haas undergraduate student mentors to the school who could capture the interest and attention of the McClymonds students. They both engaged the students in the business related curriculum and heightened their interest and awareness of college as a possible goal for life after high school.

3) They worked with the principals and the teachers to create curriculum that strengthened the needs that the educators saw as primary, including basic literacy, practical math and business literacy skills. This contributed to strengthening the capacity and quality of the McClymonds educational program.

4) They supported the social capital of the school by collaborating with other outreach and support efforts including EAOP, and school to career programs of the district. This support included the participation of the Haas BETA school programs director who attended the

McClymonds High School faculty and staff retreat. This also enhanced the status of the school and the Principal in the school and non-profit communities. Principal Haines-Dodd was named Principal of the Year for the 2001-02 School Year by the Oakland Unified School District.

The program strengthened UC's school/university partnerships by involving Principal Haines-Dodd as a member of the Haas YEAH/BETA Advisory Committee while supporting McClymonds' efforts to develop a Culinary Academy by engaging in business consultation and supporting the efforts of Chef LeBlanc and Ms. Haines-Dodd to develop the program content, curriculum, and requirements for the Culinary Academy.

Enhancements to BETA programs at McClymonds have been an area of interest and potential barriers in the relationship between Haas BETA and McClymonds. McClymonds would like Haas to provide it with more consultation support in building the Culinary Academy curriculum for McClymonds. They would also appreciate support for development efforts to get needed culinary equipment donated or funded by some external source. The Haas program is ready to support the efforts of its partner schools, but programmatically it reaches a threshold in its ability to support the day-to-day activities and programs of a collaborating school.

### **3) Mission High School Business and Finance Academy**

At Mission High BETA works with the school's Business and Finance Academy. It supports school efforts to enroll and engage students in business and finance courses. It also assists the school by supporting development of flexible curriculum for academy courses. The following discussion is based upon interviews with two Mission Business Academy Teachers and observations at the school site. Mr. Alan French teaches *Introduction to Finance* with BETA support and Ms. Nancy Rodriguez teaches *History* as part of the core courses that are blocked with Business courses for Academy students.

#### **Setting**

Mission High is located on 18<sup>th</sup> Street between Dolores and Church Streets, just to the north of Dolores Park. The school is located in the Upper Mission District neighborhood but it has an ethnically diverse population that is drawn from neighborhoods beyond the Mission. According to the most recent demographic data, the school had a plurality of 43.5 percent Latinos. However, it also had a substantial Asian population of approximately 25 percent of the student body. The Filipino population of students was about 10 percent, while African-American students comprised about 15 percent of the students. As with most other high schools in the City, the student population is drawn from multiple neighborhoods. The school is in the initial stages of developing a Business Academy at their site. The curriculum and standards for the course are based upon the program of the National Academy Foundation (NAF).

BETA has been an important resource tool for the Academy because it has assisted the teachers in developing business related curriculum and exercises for the Finance course as well as working with the History teacher to develop curriculum that deals with core periods and events

in US history while illuminating business and economics issues that are central to major historical events.

For example, for Ms. Rodriguez' junior *US History* course, BETA mentors took the lead in developing curriculum which illuminated the economic and business issues involved in core events like the Boston Tea Party (issues of taxation without representation) and the triangle of trade in the colonial period.

#### **Alan French: Introduction to Finance**

*How does the BETA program add value to your own classes and curriculum?*

They cover areas that I am not doing. They infuse subject matter that I wouldn't get to and they are very successful. They make it really exciting for the kids so the kids retain a lot [of the content]. They are successful partly because you have three mentors with different personalities which increase the attention [of the students]. Also the material that they bring is important content that I don't have available as curriculum—it is something which I would have to develop.

[The Haas mentors] have dealt with interview skills, resumé writing, how to communicate and how to write a business proposal. So these are all things which the students need. These are the kinds of skills that will help when they are offered an internship or the opportunity to apply for an internship. [Internships are part of the curriculum for Academy students.]

Does the program provide enough time to make an impact on the curriculum and the student since the BETA class meets only once a week?

Because the class meets only once a week for an hour and 45 minutes, Alan French reported that he handles the administrative duties (such as checking on attendance and returning homework)

early in the class period.

So when the Haas people are at Mission High there is more time. [The Haas mentors] can go straight into the lesson while I deal with the administrative tasks. If they weren't there I would have to deal with the administrative matters for 15-20 minutes before getting to the curriculum.

Mentors also bring value because they offer a different perspective and are received differently by the students because they are young and they speak the "lingo" of youth with the students. Mr. French reflects that the Haas and Mission students understand each other's language: "That is a very positive reinforcement."

A review of STAR 9 test scores for Mission High for the 2001 school year indicates that while the school is committed in policy to getting all graduates to meet A-G course requirements, many students appear to be below grade level. However, as indicated in the following table, the class cohorts do better on the math segment of the test than they do on the language and reading segments. This may partly be a reflection of the fact that 43 percent of the student body is reported for the 1999-2000 school year to have been EL (English [language] Learners).<sup>19</sup>

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<sup>19</sup> Student Profiles for AY 1999-2000, Education Data Partnership, [www.ed-data.k12.ca.us](http://www.ed-data.k12.ca.us).

**Mission High STAR Comparison 2001 vs. 2000**  
**Percent Scoring At or Above the 50th Percentile<sup>20</sup>**

Grade	Reading		Math		Language		Science		Social Science	
	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>	2001 <sup>1</sup>	Change <sup>2</sup>
9	8%	- 3	33%	+ 1	17%	- 5	18%	0	19%	- 5
10	7%	+ 2	22%	- 8	11%	0	12%	- 6	10%	- 2
11	10%	+ 2	26%	- 6	16%	- 2	16%	+ 2	36%	+ 9

<sup>1</sup>2001 percent scoring at or above the 50th percentile - all students ((including EL-English Learners)

<sup>2</sup>Information displayed shows the percentage point change from 2000 to 2001 for each grade

**Nancy Rodriguez: History**

The students have been asking for a while “When are the Haas students coming?” When the mentors were present it brought up the attendance. The attendance went up dramatically during the time that they were there. They brought in new energy, concepts, and music. That took it to another level; integrating the business concepts into the study of history.

The Haas Business School can really help with curriculum enhancement. The 11th grade history students started the Fall 2001 semester with the industrial revolution. Ms. Rodriguez met with the Haas BETA mentors to develop the curriculum for the start of the semester. We spoke with her before the first class meeting of the semester with the mentors.

“This was my first year in the Business Academy and I don’t have a business background. They [mentors] were really creative in figuring ways to integrate business into history.”

Last semester they focused on the Boston Tea Party and the Triangle of Trade in the colonial period.

The diversity of the mentors reflected our student population- that is really critical. It allowed the students to see themselves in the position of the mentors, thinking about the future. It gave some kids a vision about what they are going to do after high school. When [the mentors] took kids to Berkeley, they asked what do you need to get into Berkeley. And they were interested in the dorms and all of the things that go with going to Berkeley.

[The mentors] are really an asset in addressing business and finance issues. Manny [the lead mentor] worked with them to create resumés for ‘historical figures.’ [The BETA program] motivates them to take their courses more seriously. In some cases you can see it in more and better work, in some places we need to work more to get forward.

For example, the mentors expressed concern last semester with the number of students who were not turning in their homework.

“We are working to address that problem, including completing some work assignments in the school setting. But in attendance and in their involvement and excitement you can really see the effect of the Haas mentors on the students”

<sup>20</sup> Education Data Partnership, www.ed-data.k12.ca.us.

## Summary

At Mission High the BETA program was able to address subject areas that the teachers weren't able to research or include in their lessons, and do it in a way that allowed students to participate actively in learning. The mentors were able to offer additional support to students and modeled instructional diversity through their presence, different teaching styles and differing perspectives. The presence of mentors with lesson plans allowed classes to have more instructional time, as teachers were able to do their record-keeping work while the lesson was underway.

BETA complimented the work underway at Mission by emphasizing skills and preparation for the A-G requirements that Mission also uses as performance benchmarks. The BETA mentors also worked with the teaching staff to design appropriate lessons. BETA senior staff worked with Mission High staff before the program began to develop and compliment the Business and Finance Academy, and Mission thought that a partnership with the Haas School of Business would help achieve their programmatic goals.

The mentors covered practical topics that students would need to know for both their entry into higher education and into the job world. Exercises including resumé building and business proposal writing teach both writing and presentation skills while offering glimpses into the kinds of formal competencies that they will need in applying for jobs or to further education. The mentors helped students get excited at the possibility of college by taking them to the Berkeley campus and engaging in discussions about what college life was like and what the students would need to do to prepare.

Mission High students looked forward to the mentors each week in class, and class attendance rose due to the mentors' presence. The mentors related more as peers with Mission's students than teachers were able to do, and in this way the students had a different relation to the lessons and experiences the mentors were leading than in the regular classroom. The presence of Haas students as teachers created relationships that allowed the mentors to engage the students more directly than non-peers could. Having mentors from the same backgrounds as the students allowed the students to feel that success was possible, and ask questions from people who had "been there" in terms of preparing for and succeeding in higher education. Students took themselves and their work more seriously and this motivated them to work towards their potential.

The BETA program worked with the Mission Business Academy and other business academies in the Bay Area to address strengthening the college pathway elements of the curriculum in the academies. On November 14, 2001 they convened a joint meeting of a number of academy programs at the UC Berkeley Faculty Club.

More directly, BETA managers worked with the Mission Academy to plan and design their student recruitment effort for the coming 2002-03 school year. As a result of this collaboration, in which BETA took the lead, the Mission Business Academy doubled the size of their student enrollment.

Students are still working to be able to fulfill what is required of them. Homework completion has been a problem in the past and the teachers are working with the mentors to strategize solutions, including doing work in class.

#### **4) Native American Health Center Youth Council (NAHC)**

The Native American Health Center (NAHC) provides extensive recreational and support services through its youth programs. This includes a full range of sports and recreational activities, and support for youth empowerment through Youth Council activities. The BETA program worked with the Youth Council at the NAHC, collaborating with their efforts to engage and educate youth around plans for a community store to be operated by community youth with support from the Youth Programs counselors and managers.

#### **Setting**

The Native American Health Center is located in Oakland's Fruitvale District, just a few doors north of the busy intersection of International and Fruitvale. The Center is located in a four story building with a full range of medical, dental, and community-related health services. It focuses upon delivering outpatient health services for Native Americans in the Bay Area. It also provides health services to a multi-cultural population in the East Bay.

The following section is based upon an interview with the Native American Health Center's Director of Youth Programs, Clay Akiwenzie. It also reflects observation of Youth Council activities and discussions with youth program directors Solis Alguilera and Josh, as well as some open-ended discussion of activities and processes with BETA mentors, who are undergraduate students at the Haas School of Business.

#### **Clay Akiwenzie, Director of Youth Programs**

*How has BETA added value to your own programs and activities?*

It's been huge for us. It came at a real useful time. We were involved in trying to figure out a hook that would attract high-risk kids. What we are looking at is a hook to keep them involved in programs at the Center as a way of translating street business energy into an enterprise.

They want something concrete that can change their financial situation and possibly to improve their future. We work with Barrios Unidos and we sponsor a lot of athletic teams. They all need uniforms, so we began thinking about a store where we will probably be our own best customer. We will work from artwork to selling. We may also commission local artists too.

Haas came in just at the point when we were trying to figure out, "How are we going to do it?" The Haas mentors came along just when we needed them to work out the process of developing the store concept and supporting the youth in figuring out costs and margins, how to determine their product mix and stocking and pricing strategies.

The youth director, Clay and the staff felt that they didn't have kids yet who were ready for the intensive YEP summer and Saturday program with internships at Berkeley, but they wanted to build toward having kids who could participate in and benefit from that program. They saw the Youth Center based store project as an appropriate hands-on project that would make sense in both street and business terms while offering opportunities to build the skill level of the youth participants.

Piece by piece the mentors led the youth through the requirements for developing a business plan for the storefront on International Avenue. The timing worked out well because the Youth Council recognized that they needed a more hands-on program with real practical goals and the attraction of building up a store, including a business plan and deciding the types of goods and target markets for the store.

## The Native American Youth Center and BETA Program

The youth center's idea is to prepare and develop the entrepreneurial skills of youth by providing job experience through the creation of a youth-run business in the Fruitvale district. One of the goals of the BETA program is to expose and engage in the idea of higher education, in particular the business profession, while at the same time assist the organization with its mission of developing entrepreneurial skills of their youth. BETA mentors and NAHC staff have come together to collaborate in the development and implementation of this mission. These goals are interjected in and through project-based learning and business plan activities that relate to a business incubation project underway.

BETA assists the center through the preliminary stage of the storefront business through the creation of a business plan. Today BETA mentors focus on engaging, exposing and preparing interested youth in what could be a professional process and work setting. Through the BETA program, Native American youth from middle to high school are learning and working on the process of building a business plan for the planned storefront.

The partnership is an experiment in process. Both parties invest resources of human capital and time to assist in each other's goals. There is general agreement that the creation of partnership takes a social process, a lot of communication, and formal meetings where priorities are assessed and negotiated. One of the challenges faced and overcome is the expectation of a goal priority that each party holds. The BETA program's goal is to work with the kids directly and at the pace of the youth, while the center wanted a professional plan that could be implemented. In the end both parties communicated and agreed on a curriculum plan that meets the level of the youth. It is agreed that partners share the intent to expose and create learning opportunities for students to develop skills and talents appropriate to the interests and

needs of participants. The center staff especially appreciates the availability and quick response of the BETA management team. The center staff especially appreciates the flexibility of management and their prompt feedback. The NAHC program director stated that Tanya Fraley is always available and willing to discuss any concerns.

Overall there is positive feedback about the process itself and the preliminary gains of working together. Both partners appear optimistic about their work but find room for development and improvement in meeting current challenges and obstacles to meeting and sustaining their mission ideals.

## BETA Program

The BETA program serves eight to twelve participants that attend a charter school or are on independent study. The youth program depends on word of mouth, mass mailings, and outreach at the surrounding elementary, middle and high schools for participants. Undergraduate counselors meet with participants twice a week for an hour and a half. The BETA-NAYC model is based on a social learning process exposure of college and business information, knowledge and experience. The center especially appreciated the YEP summer and a Saturday business plan curriculum as it applies to their storefront mission. The center's youth program is primarily focused on enhancing resiliency and the prevention of substance abuse and violence. The technical business curricula meet the expertise gap of the business program.

The objective of the business program is to expose and teach young participants business technology, entrepreneurial skills and leadership development in a safe and positive after-school space. The challenge faced by the social providers is how to create a serious learning environment without recreating the classroom context. Students come to the site after school and to maintain the interest of the youth the setting has to appear to be



different. The engagement between mentors and students is open and less structured but nonetheless effective communication. The obvious limitation of group activities lies in the limited physical space. The center is going through construction and quiet space for instruction is scarce. Students and mentors meet in the Youth Center's office. Despite the ongoing activity, people seem attentive and focused on the task. There is a limit on readily available high-speed technologies. Mentors manage this problem by printing materials beforehand. Though it is an apparent deficiency, the mentors said that the process was more work for them but still functioned in the delivery of tasks.

### **Organization of the BETA Program**

BETA mentors provide technical expertise and business curricula run by undergraduate students. The center assists student mentors in this project by injecting social community expertise. For example, undergraduates embody and relate academic business knowledge to the students while the center's program managers engage student discussion and relate real life and business experience within a low-income context. Each partner acknowledges that together they are able to meet each other's deficiencies and maintain the interest of the youth. The mentors said that at the beginning of the program it was a challenge to relate to and engage the youth in discussion and connect their knowledge with the youth. Some of the relevant issues are the difference in class, cultural background, and expectations of students. Mentors mentioned surprise at the low literacy levels of the students, and Center management recognized this difference at the beginning of the program as well. It was observed that the mentors were at first speaking to the youth using business language and terms that were beyond the students' literacy level but not above their learning capacity. There was an obvious cultural language gap between the mentors and participants. The mentors have limited experience relating high-level technical knowledge to a young population

that is confronted with few opportunities. In time the mentors learned ways to communicate business material and concepts using language and examples that were comprehensible to the Youth Council participants.

Besides the social cultural gap, one student mentioned how the mentors' knowledge gap on Native American values interfered in the discussion. The participant notes that students are shy and sometimes feel talked down to. While generally positive about the experiences with mentors, the participant sensed that the mentors are not exposed to Native American culture and innocently disrespect youth. Most agree that training mentors to relate concepts to a culturally sensitive population with low literacy but high capacity for learning can add value to the BETA program.

Overall the mentors feel positive about their work, especially when it is placed in context. One mentor in particular enjoyed and felt inspired by the BETA training seminar when it set their work in a social context. The mentors feel that they have learned a lot about social issues through their work at the Native American Health Center. The center management staff believes that the participants' exposure to university students coming from different cultures is valued in the way of breaking stereotypes and in terms of assisting in their own social exposure and communication skills with other groups. The belief is that through constructive engagement with people from diverse backgrounds, participants gain tools for productive communication and conflict resolution. These are viewed as skills that are transferable and beneficial to community development goals.

The center social providers stated that participants' contact with the Haas mentors assists them in delivering the message and value of pursuing higher education and self-development. The project managers believe that the more college-oriented people that participants come in contact with, the better, as it helps these youth see different people who support academic

achievements.

The consistency of mentors over the period of the program is valued. This allows mentors and participants to develop a personal relationship that allows communication and improves the interaction seen in the sharing of information about interests, goals, and misunderstandings. Everyone believes that time is key to this process.

The center related that the BETA leadership is flexible, open and easy to work with. This assists the development of projects. BETA management is considered to work well with center staff in creative ways and the mentors feel that the center staff is also very supportive of their efforts.

### Project-Based Education: Learning Through Experimentation

The BETA program's involvement with the Native American Health Center is centered on project-based learning. Project-based programming is based on the idea that youth need an activity with an end point that gives a sense of completion. For instance, one of the projects involved the creation of a business plan for a student run storefront. BETA mentors work with the youth on understanding the concepts, technology skills and processes of creating a business plan. The program involved helping participants with writing résumés and discussing self-presentation on paper and during interviews. While a staff member has been hired to create a viable business plan for the storefront, social service providers believe it important for their participants to experience and learn from the process of creating and sustaining a storefront through the business plan. Students are taught business concepts and market survey methods. One of the most valued aspects of the program is the hands-on experience of partners.

The mentors bridge the business curricula and knowledge gap of the students. The transfer of such skills is valuable and viewed as important for the young participants, as they will be the ones in charge of the storefront. BETA volunteers provide

the curriculum, provide a structure and facilitate the process of writing a business plan. The center especially appreciates this service as it serves the "teaching mentality to the classroom" and meets a need that the center does not have.

Project-based programming also facilitates the process and serves the purpose of learning time management skills. Service providers stated that setting deadlines provides insight as to how youth respond to stress. The reaction is used to guide youth through basic problem solving techniques. This is part of the life skill set that the program seeks to transfer to their participants.

Both mentors and participants seem to appreciate the personal contact as it allows the development of connection and feedback. It is often mentioned that the direct contact is beneficial and necessary for participants as they rarely receive quality attention at school. However, interaction is limited given the demand for personal attention, limited time available, and low student to mentor ratio. The time constraint of the BETA program makes it challenging to engage and motivate students. BETA counselors and social providers remarked that one and a half hour sessions made it difficult to accomplish the goals of the program. The time limits presented a challenge in meeting all of the priorities of the program. The center social providers wish that BETA mentors could spend more time with participants.

BETA mentors say they learn more about the reality and applicability of business concepts through their experience working in a low-income community. Teaching business concepts strengthens their academic knowledge. As one mentor put it, "When I have to teach abstract concepts I learn in school to the youth, I have to really pay attention and learn them. I notice that the practice of relating these concepts has led me to truly understand what I am saying." Overall, the mentors believe they have a stronger sense of social issues while at the same time are strengthening their business knowledge. Both appreciate gaining a better understanding about

social responsibility from working in Fruitvale and state that it improves the overall quality of their résumés.

### **Field Trips**

One of the ways BETA exposes the youth to the college experience is through field trips to the university. One of these field trips was to the regional BETA conference held at the UC Berkeley conference facilities. Since part of the BETA-Native American Health Center agenda is to develop the business plan for the storefront project, students were taken to the gift shop of a university museum. This site visit fueled ideas and led to a brainstorming session. This exposure gave a shared experience that sustained the brainstorming discussion during the after-school program. BETA mentors also were able to exchange information about college requirements and personal experience onsite.

The university field trip is considered to be positive by most of the providers and attendants, as it exposed participants to the college environment and connected the program to other participants. The mentors mentioned that the BETA conference could take place at the beginning of the program rather than at the end. The idea is that the conference would give the students a sense of being part of a larger program and could add to the BETA group identity earlier rather than later.

### ***Exposure to the University***

The BETA mentors and social providers at the center stated that one of the positive benefits of the program is introduction to college and the requisite skills through discussion, social relationships, and site visits to the university. The mentors stated that the participants had either limited knowledge or false understanding of college requirements and experience. The social providers and mentors noted a difference in attitude after the program's start. The participants appeared more positive in their perceptions and

articulated interest in pursuing higher education. When asked about whether students were planning to attend college, the response changed from "I don't know" to "When I go to college..."

### **Symbolic Value: The Native American Youth Center Benefits from the Haas School Partnership**

Community based organizations that serve populations directly find it difficult to continue the provision and development of services in the context of declining public and social investment. These organizations function under low resources at a time of increasing demand for service. The NAHC asserts that it has benefited from the assistance of the BETA program in the way of technical expertise and the mentorship that BETA mentors afford participants. The agency does not have the economic resources to develop business curricula and sustain the work that the BETA mentors provide.

Another way the center benefits is through its association with the Haas School of Business. Program managers stated that the partnership enhances the legitimacy and appeal of program plans with the agency's board members and other funding agencies. The partnership with a highly regarded department at the University of California enhances the credibility of the organization. The legitimacy that comes with a valued partner increases the value of programs and generates more support of funding proposals that lead to expanded services.

The organization itself has also learned and incorporated business lessons into other programs. The youth center director mentioned ventures where students have learned how to market and sell ongoing art projects and greeting cards.

### **Haas School Undergraduates Learn from Participating Youth**

The mentors state that their involvement in a

community center within a low-income milieu supports their educational goals, increases social sensitivity, reinforces knowledge learned in classrooms, and enhances their understanding of social responsibility. Both mentors stated that teaching business forced them to understand rather than memorize concepts and the ways to explain relationships. They both learned through and with the creativity of their students.

BETA mentors said that the interaction with the youth increased their ability to interact with people of diverse backgrounds and at the same time helped them understand and explain academic concepts learned in the classroom. Working with participants of different socioeconomic backgrounds "sensitized" and taught them to be more direct and honest. They broke the ice through other shared interests and beliefs, such as sports. Both agreed that it would be valuable to recruit Native American undergraduates to support this effort.

BETA mentors share a philosophy that mentors are valuable and influential in supporting and instilling positive college-going values. They both have benefited from mentors themselves through guidance and direction. They both hope that their work has helped the youth get to a better place. One mentor mentioned how difficult it was to relate to the students at first but through time the challenge was overcome. Both mentors felt satisfied with their work as they began to hear the positive change in attitude of the youth in relation to college.

When asked about their recommendations towards improving the program, they stated that the most important elements of the BETA program are: 1) to focus on the participants' needs and interests; 2) allow the student mentors to develop the curricula. They argue that the participants are the consumers and the mentors are the "experts" onsite as they are the ones who implement the project. The flexibility of the management at Haas and the youth center is also valued especially in a place where the conditions are unknown and uncertain.

## Summary

BETA helped the Health Center address the needs of "at-risk" youth by offering a program that taught business skills and was directed by the interests of the youth. The Health Center was not sure how to implement their plans for a business, and BETA serendipitously was able to offer help at the right time. This site is actively engaged in setting up a business enterprise and BETA offered practical training in the considerations of this sort of undertaking. The mentors were able to deliver knowledge in a setting that mirrored a classroom, and this academic orientation helped broaden the vision of the Center's youth. The NAHC does not have the time or educational resources to develop a business curriculum, and BETA provided help in this regard. Additionally, the lessons learned in the course of developing the store are being applied in many aspects of the center, not just those directly related to the store project.

NAHC's Youth Council wanted hands-on training for the youth and BETA was able to provide instructional help in this respect. On a more general note, the Health Center focuses on life skills training in general as an esteem-building function. BETA helped the Youth Council integrate many aspects of life skill training into the store project. BETA was able to contribute valuable business knowledge that the students lacked. The NAHC found their goals were supportively addressed and the mentors also felt appreciated for their efforts. BETA helped the Center's emphasis on education and self-development, and the different mentors showed that it is possible to be individuals and still be part of an educational system.

BETA was able to bring the proposed store closer to reality by helping the students with the practical aspects of financing and stocking a store. Students learned about important considerations and how to gauge the potential success of the project. The Health Center found BETA to be responsive, accessible, and flexible in addressing concerns that came up during the program's

implementation. BETA's emphasis on designing a practical business plan was very useful to the goals of starting a storefront.

BETA's help in developing the business plan and procedures for the store supports the students' goals of learning professional competencies and their component educational skills. Students in both middle and high schools are participating in their goal of being able to run a store. The youth are inspired by making this plan a reality, and they have adopted more positive attitudes, increased their participation, and adopted more business-oriented perspectives as the program has progressed.

Through exposure to university-related skills and environments, students learned realistic expectations of their educational plans. As the program progressed, students began to express more positive attitudes about university attendance, as well as having a better sense of the skills they would need to achieve success in this milieu.

Through association with Haas students and programs, the NAHC feels that their programs gain legitimacy and are enhanced by the partnership with BETA. The program translates into better access to funding and credibility for all the programs at the Center. The Haas team also worked to connect the NAHC with the school-to-career program. This offers the possibility that youth who are working on the store could be supported (on a fifty percent basis) as part of a school-to-career work placement.

BETA seeks to work with NAHC in developing a concrete and ongoing business program that goes beyond what some of the classroom sites are doing. BETA adds an educational component into

the entrepreneurial project, which gives it an extra dimension. The skills that students learn can be applied above and beyond the store, and should extend into their formal classrooms.

A pronounced issue at this site was the need for culturally sensitive teaching, and mentors welcomed the experience they gained through their stay. There could be more emphasis on this element of the program in terms of identifying and addressing the cultural norms of the students.

The NAHC and BETA have encountered differences in the goals that they prioritize. BETA focuses on the educational process and is perhaps not as goal-oriented as NAHC in that the Health Center wants to start up a functioning store as soon as possible. BETA is interested in working with the youth at the educational level they can handle, and this meant a slower pace sometimes. The mentors were surprised at the educational levels of the students, and were at times inaccessible by not being able to address the students at their learning level. The two programs resolved these differences and addressed the issue of skills acquisition in a realistic timeline.

This site also brought to light some of the cultural issues at play when BETA mentors come from "outside" to teach. There were class and cultural differences between the mentors and the youth at the Health Center. The mentors were unfamiliar with Native American cultural values, a lack of knowledge that potentially reduces the engagement of youth in program activities that demand a large degree of communication.

Because the plan that NAHC wants to implement is very time-intensive, they expressed regret that BETA was not able to spend more time at the site with the youth participants.

## **5) Young Entrepreneurs Program (YEP):**

### ***The Summer and Saturday BETA Programs at the Haas School of Business***

#### **Background:**

The model of using hands-on business based learning to enhance the social capital and life skills of educationally disadvantaged youth in surrounding Bay Area schools stems from a more than ten year programmatic history of working with selected youth in the Haas School of Business setting. Support of the BETA program by the UC Office of the President (UCOP) in the last two years has increased the degree of implementation in school and community settings outside of Haas, allowing the program to serve more students. The services provided in these additional contexts borrow from BETA's origins as an intensive summer and Saturday business and entrepreneurship outreach program at Haas. The current two-year, Haas School of Business based program is offered in two stages. In the first year, students develop a business plan. In the second year students learn the mechanism of trading by developing a stock market portfolio.

#### **Target Audience for YEP Outreach**

The target population for the program is consistent with the 1997 Outreach Task Force (OTF)<sup>21</sup> recommendations that outreach initiatives focus on educationally disadvantaged students from the low-performing secondary schools. Drawing from more than 20 public and private middle and senior high schools within the Bay Area, the cohort is designed to include students with low, medium, and high levels of academic performance, so that student GPA's at the start of the program range from 4.0's to 2.0's. "We look for students who are almost, but not quite, on the path to college," says program director Oscar

Wolters-Duran. "There are a couple of students with 4.0 grade point averages and a few with 2.5's. But we mostly try to attract the ones in the middle who are falling through the cracks."

#### **Recruitment and Selection of YEP Participants**

The program selects forty students for a 2-year program commitment. The recruitment process employs multiple strategies to solicit applications from a diverse group of youth within the Bay Area. Program directors and managers frequent target schools where they talk with counselors, teachers, and administrators about program objectives and goals. They make presentations to individual classrooms of 8<sup>th</sup> and 9<sup>th</sup> grade students. Commonly a counselor, teacher, or a family friend whose own child has participated in the program refers students. Last year several of the mentees were actually younger siblings of older brothers and sisters who have gone through or are in the program. One objective of the current recruitment process is to encourage youth who are participants in the classroom and after-school based BETA programs to apply to the more intensive summer and Saturday program. This year's 2002-03 cohort includes five students from the BETA programs at school and community sites.

The selection process is detailed and thorough in that students must submit an application, provide school transcripts, and undergo a group discussion interview with a panel of three program staff who gauge student commitment and interest in learning business. Because the focus in the first year is on developing a business plan, students are asked what their business idea is and what steps they see as critical to executing a successful business venture.

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<sup>21</sup> University of California Outreach Task Force, "New Directions For Outreach."

## The Summer Segments

Summer sessions are designed as intensive crash courses that prepare students for the projects that will be worked on throughout the school year with their mentors. First year participants meet for a two week, 80 hour program that prepares them for the year long objective of drafting and presenting a complete business plan. In the second year, participation includes a one-week, 40-hour program that introduces students to a simulated stock trading game. In both segments, two MBA students teach the material and facilitate the activities that provide students with a preliminary introduction to all the components and skill sets necessary to complete a business plan and invest in a company or stock offering. Group leaders who have been recruited from the preceding cohort of second-year students function in a support role. They lead small groups of six to seven students, coaching, sharing, and supplementing the lectures and formal program content with experiences from their two years of program participation.

Phillip O'Neill, who taught this summer's program, says:

It is designed to give [the students] a crash course in an introduction to the language and to a conceptual understanding of the basic pieces of running a business and writing a business plan. You know marketing, finance, product definition, executive summaries. Sort of get them to understand the language of the plan, and to get them to recognize that 'Yeah, to run a business I need a product or service. My product or service needs to be unique somehow, I then need to be able to identify my customers and figure out what my market is. And then I need a plan to attack this market and advertising and price and position. And then once all that's there, well then I need to make a profit; I need to understand my financials, I need to be able to look at my costs and my revenues and make sure that I'm turning a profit. And then understand how long it's going to take me to get out of debt.' And that's the basic goal of those two weeks.

It's a rehearsal for what they're going to do all year. The program is working to give them the language and the concepts they will need to be able to interact with their MBA mentors during the regular school year. Now when the mentors come in and they start talking about the business plan, and the cash flow analysis, and related concepts, the kids have an understanding of what they mean. And then the mentors will be able start to run with things so that they don't have to say, 'Well, a marketing plan is this or an executive summary is this.'<sup>22</sup>

## Pairing Mentors with Students

An important feature of the program is the attention paid to the relationship between mentors and mentees. Because the two don't have daily contact, it is important for them to have a good rapport. The program achieves this goal, in part, by giving the participants some say in the pairings. Early in the program they convene a social gathering with two hours of structured activities. There are group activities, "ice-breakers," that encourage conversation and interaction between the mentors and mentees. At the end of the activities both mentors and mentees fill out a form indicating which three people (mentors or mentees as the case may be) they would most like to work with, in order of preference. Staff reports that this process yields good results in matching people: "For probably about 40 to 50 percent of the pairings then it's first choice to first choice. And then another 30 percent is probably second choice. And then maybe another 10 percent is third choice." Staff reports from personal experience that even when the pairing happens at random, there is often success in the program, though ideally both partners have an explicit desire to work together.

## How the Business Plan Competition Motivates Mentors and Students

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<sup>22</sup> Interview with Phillip O'Neill, lecturer and program consultant for new YEP curriculum, 14 August 2002.

The business plan as a process and the business plan competition as a goal and target are fundamental cornerstones of the program. Mr. O'Neill reports "The Business Plan [competition] was part of the way that I tried to motivate the mentors. It's a long process for the mentors and the kids; their interest waxes and wanes. And the mentors get really busy with school and they've got other things going on in their lives. And trying to keep them engaged and motivated is a challenge as well. And one of the things that I used for them was to tell them about my experience the year before. And to explain to them how powerful the final competition was. How impressive the students were at that competition. I think that the competition experience is really a critical piece of the whole process."<sup>23</sup>

By this account the Business Plan competition is very important as a motivating vision for the mentors. Observing the first year students preparing their business plans, one could see the powerful influence of the competition as a motivator that moved them forward. In the last week of March, slightly less than a month before the Business Plan competition, we observed the progress students had made in working with their mentors. In the opening period of the class, students listened with partial engagement to a lecture on preparing an executive summary. The lecturer, Phillip O'Neill, then went over the other requirements for the business plan.

Later that day the mentees spent two hours in the computer lab working with their mentors on their business plans. Many still had unfinished sections and were unsure of various elements of their plans. However, their work with their mentors was largely focused and engaged with the pressure of the competition coming near. Less than a month later, observations of the Business Plan competition made clear the level at which students were now working. Students were presenting their plans in a coherent way, summarizing their key points using PowerPoint,

and looking and speaking in a poised and professional manner, including answering questions from the panel of judges. In less than four weeks they had come a remarkably long way.

The presentations and the professional quality of the atmosphere surrounding the presentations were ebullient with quiet enthusiasm, including the assembly of friends, family members, alumni, and interested members of the community. There was an air of lively professionalism and satisfaction combined with a spirit of interest in the competitive race in each of the presentation rooms. When one considers that these were students going into the 9<sup>th</sup> and 10<sup>th</sup> grades, their accomplishment appears a testament to the focusing effect of the business plan process and competition.

### The General Framework of the Program's Efficacy in Engaging its First Year Cohort

The program works to integrate disadvantaged students into an academic environment where learning is a supportive, fulfilling, and competitive experience. These students embrace high expectations by engaging in rigorous coursework that challenges their math, critical thinking, time management and technology skills. The two-week summer component of the program can be examined in a number of practices. First, the instructional methodologies take a multi-dimensional approach to teaching and learning. Program logistics require that students receive intensive instruction where they are learning as little as two and sometimes three lessons a day. This is because students need to have a foundation of basic business knowledge to efficiently maximize their one-on-one time with mentors during the school year. The lessons during the school year cover a spectrum of business concepts and ideas from product and service definitions to market overviews to execution plans. And while retention of such a large breadth of material may seem problematic (especially when one considers the relatively low level of academic preparation

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<sup>23</sup> Ibid.



that marks some of these students as educationally disadvantaged), the program's multi-dimensional approach to teaching and learning appears to successfully ameliorate this potential obstacle.

A Socratic-style group-discovery method of learning business through hands-on experiences is employed. In this respect, BETA programming follows the MESA model of motivating students through hands-on learning experiences. The program then builds on this experiential process with lectures and exercises until mentees are seen embracing the material and applying its concepts and content to their own creative output. The program's instructional methodology harnesses the mental stamina of its participants by rewarding their involvement with "Biz Bucks," team points, and an overall competitive spirit. It invites the class to engage in lengthy group discussions on business ethics and current events where they can be seen challenging each other's premises and deconstructing standard practices and norms of industry professionals.

During both the summer and the school-year program, lectures comprise about one third of the program period. During the summer program the bulk of the eight hours is students applying business concepts to real life situations. Group activities such as the "Lemonade Stand" where students compute costs, revenues, and profits for operating the business, "Biz World" where students assume industry roles and go through the process of designing, agreeing, building, marketing, and selling the actual jewelry, or the "Camping Trip Planning" exercise that exposes students to the process of decision making under pressure are just a few examples of the way the program extrapolates the creative agency of youth. Many of the youth participants, and in an increasing proportion over time, rise to act assertively and decisively in these business related simulations.

The instructional content and format of the program also brings the students into the technology pipeline where students spend a few hours each day in the computer lab learning how

to use Word and PowerPoint software. They also are encouraged and get access to using the internet for research to support their business planning activity. They all receive e-mail accounts and many later use their accounts to communicate directly with their mentors about their work and concerns. Considering the technological gap between low and high-income students, this is a significant feature of the program's approach to alleviating some of the differences that contribute to an achievement gap in accessing post-secondary educational opportunities.

### **Supporting Higher Educational Aspirations**

In talking with staff, student participants and mentors one sees the different components of the program working together to transform youth attitudes and expectations about post-secondary opportunities.

### **UCB Campus as an Intervention Vehicle: Feeding the Pipeline**

BETA follows a pattern of many other outreach efforts over the past three decades; it convenes students on the campus to encourage and support their interests in higher education and their sense of comfort in being in a college related environment. Program staff reflected that the process of coming and meeting regularly at Berkeley with Haas MBA student mentors really influences the students' awareness of and desire to attend college.

Phillip O'Neill says "I think that exposing them to the campus is another one of the big advantages. To get them to come to UC Berkeley and spend every other Saturday there for the school year and to talk to people regularly who have gone to college and be in that environment. All the second year kids who finished last year, I don't remember what the context was, but at one point I think Steve [an MBA teacher] just asked them 'How many of you want to go to college?' and every hand in the room went up. I think

asking the first year kids that same question you don't get that. You get maybe 15-20% of the kids get their hand up."<sup>24</sup>

This brings us to the next level in which the program can be examined in light of one common goal that virtually all academic based outreach initiatives share: to increase the academic advancement of underrepresented minorities in higher education. Actualizing this ideal depends on making college the norm and not the exception. Given the environmental characteristics of low-performing schools and poor community resources, this is not a small hurdle. Creating an academic culture in the Haas BETA environment becomes a product of program content supported by the Haas Business School and UC Berkeley environment. The content of activities and the work that students do with MBA mentors supports a process of group construction where students build positive and supportive peer relationships with other program participants who share familiar experiences and harbor similar aspirations. In groups with low documented rates of college attendance, the program group has been an essential feature of programs with success in increasing minority advancement in higher education.

### **The Creation of Group Bonds Among First-Year Students**

Those practices that facilitate the construction of a group identity among this first year cohort begin at the program orientation where students and parents are told that they are now "Haas students." Building from this, students experience the college atmosphere by attending class in Haas rooms, eating in the same cafeteria as MBA's and undergraduates, and working in the same computer lab with the same equipment as other Cal business students. It is in this space that the formation of positive peer relationships becomes an evolving facet of the program's capacity to retain youth interest in learning business. The

power of the program group is much more than the ability of participants to work and compete effectively in teams of six or seven. It is about the way that students motivate each other to expel low expectations and embrace rigorous pursuits. It is about proving to their peers that they are agents of their own creative ingenuity. They value each other's unique business plans, they bounce ideas off one another, showcasing their PowerPoint graphics. Somewhere in between the first and the last day students find their voice in so far as making comments and participating in discussions becoming a "cool" thing and such that the most popular kids are the most involved, focused, and outspoken.

### **Building Esteem, Agency, and a Work Ethic among the First Year Cohort**

On another level the program can be examined for its effect on individual self-concepts and identities. A number of program practices appear to foster increased confidence and work to heighten individual students' sense of self-esteem. The structure of the business plan presentation is such that students experience a sense of authority in deciding what their business will be, have a vehicle for exercising their creative agency, and are provided a place to showcase their accomplishments. Challenging students with the rigorous course material from the lessons, probing their capacity to critically think through the ethics of business practices in current event discussions, increasing their computer literacy and proficiency with Word and PowerPoint, exposing them to the professional expertise of guest speakers, and providing them the opportunity to use their interests and skills in an academic environment through the business plan development process, are mechanisms that support individual self-improvement.

In addition, recognizing individual student talents and strengths through the award ceremonies like those on the final day of the summer program, where students received

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<sup>24</sup> Ibid.

personalized participation citations from their group leader, validate that they are noticed and worth the attention. The pattern of staff to student relationships sends this message and reinforces it through the whole of the program. You find it in the side talk, in the awareness of the backgrounds of different students, in the chatter about friends and family, and in the nicknames given to students. The program individualizes student participants as special individuals with unique social worlds and concerns as opposed to a more bureaucratic or hierarchical program where students work with program staff who do not get to know the individual kids and their social worlds.

### **Mock Career Fair: Rehearsal for the Connection between Schooling and Various Career Paths**

A major concern in assessing the effectiveness of an outreach program like the BETA programs is the success of the approach in motivating youth to plan on going to college. The following discussion reviews the way in which the program simulated the career fair experience in order to give the mentees an opportunity to role play the process of applying for jobs in various employment sectors. In turn, the “representatives” of different fictive companies engaged students in discussions about the education and experience that would be needed for a job in their sector.

Phillip O’Neill describes the program’s format:

During the 2001-02 school year there were three Saturdays dedicated specifically to college. Like last year we did a career fair where we had other MBA’s who weren’t mentors and weren’t involved in the program, I recruited about 25 of them to come in and put on a fair. So we had 6 stations set up, we had a high-tech company, a biotech, consulting, marketing, and finance. There were groups of 3 to 5 MBA’s at each of these stations and we rotated the kids through them and they came by and did a little mock presentation. I had the MBA’s set up like they were a company and they were there recruiting. I had them give a

little presentation and a little job description and we had just done the résumés so all the students had their résumés and we had them dress up for the occasion as well. So the students got to practice introducing themselves and handing out their résumés just to show them what a career fair looks like.

When I was 22 and I went to my first career fair, I was intimidated out of my mind. I walked around the place, afraid to talk to people and not really knowing how to engage and interact. And now they have this experience. When they are looking for a job 4 or 5 years from now I think that it will be meaningful.

### **The Role of Guest Speakers**

The salient contribution made by professional industry representatives as daily guest speakers during the summer sessions had a remarkably unanticipated effect on the students. The significance of connecting business education to the real world is what makes the involvement of business owners and entrepreneurs such an important component. From the founder and CEO of NOLO Publishing, to a BETA alumni whose small business ventures in wholesaling helped finance his college education, exposing students to the first hand experiences of credible business people made the learning process come alive. The class would apply concepts and ideas learned in lectures to the questions and comments posed for discussion with the speakers. Not only did students want to impress the visitors with their business knowledge but they also wanted to situate their understanding in their field of expertise. The opportunity to learn the dynamics of their field from business professionals was taken in by even the more quiet students who otherwise might not participate in group discussions.

### **The Role of Peer Leaders**

The significance of using BETA graduates as peer leaders during the summer intensive subject

instruction is two-fold. First, they epitomize the goal that program participants strive to realize, and second, they validate that the goal is achievable. From classroom observations and brief conversations with some of the group leaders it becomes clear how the value-added benefits of their involvement work to fuel the vitality of the program on a number of levels. On one level the efficacy of group leaders who oversee small groups of six to seven students allows the large class of forty to be broken down into manageable units. Learning occurs in different arenas, with closer supervision creating a safer and more controllable environment that enables the teachers to focus more on teaching and less on discipline.

Further, students receive the individualized attention necessary to ensure that each participant is both contributing and benefiting from program lessons, discussions, activities, and lab time. Leaders reward their group members with “Biz Bucks” when they answer questions and show initiative (taking notes, being on time, working effectively as a group). They also support the learning process by explaining content, assisting with lab exercises, and offering examples or illustrations that build on or amplify the teacher’s instruction.

On another level, they are role models for the students, who see them as older versions of themselves. Having hurdled similar obstacles and encountered many of the same challenges, peer leaders are able to quickly gain the trust and respect necessary for a supportive relationship with the youth. Time is not wasted trying to bridge ethnic, cultural, and class borders; they are coming from similar circumstances and they know that they represent (as one group leader commented) “role models for students of color that are younger.” Just as their involvement supports the effectiveness of teachers to teach and students to learn and be encouraged and motivated by their example, group leaders benefit from the opportunity to demonstrate leadership skills, mastery of basic business principles, and the rewards of being taken seriously for academic

and/or social achievements. So much of the groups’ liveliness depends on group leaders being enthusiastic, focused and involved in the material. They participate as much if not more in group current events and ethics discussions. They have questions for guest speakers whose experience and expertise they value. That the program should provide them the opportunity to display and build on the business knowledge and confidence learned and experienced in two years of program participation nurtures and supports their future academic and career successes. As one group leader who will be attending UC Berkeley in the fall commented, “Being a group leader prepared me for Cal kids. It helped me build my maturity and self-control. I learned more business knowledge teaching it than sitting in a classroom as a student.” The program uses group leaders to help build the skill set of the new cohorts while supporting the success and leadership trajectories of the group leaders.

## **Parents’ Role in YEP**

### **Using parent power for competitive eligibility**

The purpose of the parent workshop is to acquaint parents with the college going process and “steps to success.” Making parents partners in their children’s educational lives is necessarily dependent on their being informed on the opportunities available and the ways to access them. Oscar Wolters-Duran, the BETA Program Director, begins by explaining the different pathways to college (i.e. UC, CSU, Community College, private and historically African-American colleges) and humanizes the process through relating his own experience as a community college transfer student. He then moves on to describe what admissions officers look for in applications, emphasizing competitive eligibility through competitive grades and test scores and completion of A-G requirements. He brings the focus on parents as advocates for students who get shuffled and placed in remedial courses that don’t meet UC eligibility requirements. He discusses the way that the

comprehensive review at UC campuses works to acknowledge those students who have overcome challenges and have taken advantage of opportunities. He gives an example from his admission workshop where an urban student with a 3.5 GPA was chosen over a suburban student with a 4.0 GPA. While the former had a lower GPA, his personal statement reflected his overcoming challenges and taking advantage of opportunities.

Oscar's discussion of what parents can do now to guide their children toward future academic achievement focuses on their role as advocates for students at school, especially with A-G courses. He also emphasizes the importance of creating an environment where college is the norm and supporting the student in realizing that preparing for college takes commitment and sacrifice. In sum, parents need to understand the significance of "setting up an atmosphere of success" where students have access to computers and printers at their home and where students balance schoolwork with extracurricular activities. Through the parent workshop and continuing parent events and participation through the two years of the program, the summer and Saturday BETA program engages the support of parents and family in the educational trajectories of their children.

### **Intensifying the College Preparatory Focus: The Second Year Experience**

The primary focus in the second year is on enhancing the college preparatory effectiveness of BETA programming. Academic enrichment services build on the first year's foundation of business start-ups and creating a business plan with a focus on investing, risk and returns, and stock market forecasting and investment. By providing a second year follow-up, the program continues to build youth development, interest in business and motivation to attend college.

Instructional activities focus on increasing youth awareness in and understanding of the stock

market, global economy and personal finance. The second year begins with an intensive week-long crash course in stock market research, portfolio analysis, and simulated trading. Much like the experiences in the first year, the program's approach of hands-on project-based learning engages youth to actively relate to business ideas and concepts in the context of stock market research and a portfolio development competition. As with the first year participants, the summer session for second year students is designed as an introduction to the vocabulary and skill sets that will be necessary for school year work with MBA mentors.

By the end of the week long summer program, students will have become somewhat comfortable with the mechanisms of evaluating stock, summarizing attributes of different companies using internet research and Excel to organize the data, and looking forward to building a portfolio and trading stock.

### **Harnessing the Program Group**

The second year of the program draws on the momentum and group process and identity that had been developing the previous year. The sense of connection and shared group experience exhibited by the students is a real source of connection and engagement for the student participants.

As discussed in the case of first year participants, the group process in the program has two important effects. First, it binds the youth to the program, motivating them to participate and continue their engagement throughout the eight month duration of the program. Second, the group relationships both motivate youth by engaging them personally over time as friends and co-workers and by establishing a spirit of standards and competition which helps to drive the process of meeting and completing the challenges of learning and utilizing new program content and tasks. During the first year this focus on competition and shared tasks is centered around

the creation of a business plan culminating in the Business Plan competition at the end of the program in April. The central focus in the second year is on the processes of stock market research, valuation, and portfolio building and simulated trading. It ends with a stock market competition based upon small group work teams that are formed, with only minor adjustments later, in the beginning of the program at the first day of the summer meeting.

When the program activities began, staff guided the students to organize themselves in the same teams as the previous year. Some students objected. These programs were created before they had shared a year of experiences. The students asked to be allowed to create new teams. Program staff supported this request, with the standard that they needed no fewer than six members and no more than seven, and that they needed to have at least one member of a different gender so that teams would not be broken down solely on gender lines. Responding to these guidelines, it took the students only a few minutes to form into teams.

To initiate this team component, each group was responsible for creating a team logo. In groups, students learn to value each member's ideas and incorporate individual creativity into the overall team effort. Teams must agree on the name, design, layout, colors, and other logistical concerns and the role of group leaders is to ensure that each student's voice is part of this activity. Members asked each other who is the best at drawing or writing. Here the students were seen utilizing individual artistic, creative, and cultural skills to produce the team logo. One of the groups, "Son of a Stock," was made up of the same members who in the previous year called themselves "Son of a Business," and had as one of its teammates a girl from North Africa who is fluent in Arabic and wrote each team member's name in Arabic. It was interesting to see the way that the class members grouped themselves. "Son of a Stock" and "The Dynasty and the St. Luna-thicks" were the only two groups to have retained

all their members from last year. They were the most efficient groups and finished their activity first. A new group, "MIB" (Money in the Bank) was an all-Asian group. Other group names included "Corp. Assassins" and "Ballers Stockcallers." The names and the sense of group spirit illuminated the way in which the program supports youth ideas, energy and cultural styling while providing training in business, technical, and presentation skills.

After this activity had been completed, the class moved on to an ethics and current events article taken from the *Wall Street Journal*. The theme was the stock market excitement and development of a new technology industry. Students learned how the "new economy" is based on the "bubble economy" period of hi-tech dot com, internet, and computer industry development. They discussed the dot com bubble and how the "buy-buy-buy" spirit was followed by company and market failures, working to disillusion people from participating in the market. The lecturer, Steve, asked, "What are some of the issues in this article?" A student replied, "Lying, greedy CEO's."

### **How the Program Supports Practical Considerations of Investing, Business Ethics and Public Policy<sup>25</sup>**

The program uses current events and guest speakers to support hands-on discussions of business ethics and the problems of investing, valuation, risks and returns. The discussion then leads to considering the advantages of going to college for getting a good job and some greater personal security.

The day begins with an ethics and business discussion on a current event article about a stock analyst who pretended to be a patient and took

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<sup>25</sup> This discussion is primarily based upon observing the discussion of business ethics and public policy through the lens of current events at the August 9<sup>th</sup> Summer Period of the new YEP II 2002-03 cohort. It draws upon the field notes of an observer.

sleeping pill drugs. Steve asks, "Do people read stock analyst reports and go out and make trades?" All the students reply, "Yes." Phil continues, "What is his justification? Explain his side." One student answers, "He was trying to bring truth to the investors." Phil probes, "Is his interest medical?" Student replies, "No. He's trying to protect them from buying bad stock." Students make a comparison between this article and the movie *Wall Street*, demonstrating their critical literacy skills.

Steve discusses the practice of hiring doctors for stock analysis, explaining that the point is to set-up the doctors. Phil then discusses the concept of short-selling.

For the next hour students will ask the surprise guest speaker, Dana Hobson, questions about his industry experience. Dana's background includes a PhD in applied science, a teaching job at MIT, working on a military base in Massachusetts and a shift from rocket science to finance. He explains the financial difference between the two fields, saying that he went from making \$60-70,000 a year as a professor to \$100,000+ as a financier. He says, "Finance is more high-stress." One student asks, "Which was more rewarding, but not money wise?" Dana says, "Rocket Science."

The class discusses their stock quest competition with Dana as one student explains, "You have to do your research and then you invest." Dana advises the students to "Go find low price stocks. Buy one of them. If you flip a coin enough times eventually you'll get that one that will go from 50 cents to \$5...you'll have \$10 million." This invites the class to discuss investing strategies using concepts like expected value, short-siding, and diversifying.

Dana asks the class, "What do you want to do with your lives?" One student quickly responds, "I plan on majoring in business. The first part of the program really influenced me. I plan on investing, but the market is too up and down for me." Dana follows with a general question for the class, "Why do you want to go to college?" One female student says, "You can't get a good job if

you don't go to college." This comment sparks a discussion on the value of a college education. Students talk about the difference between hiring a college graduate and a non-college graduate in terms of networking, reputation, and the presentation. Students are interested because he is perceived as a credible source of information. Using professional industry people effectively excites kids about a career in business.

After the guest speaker has left, students take a break. When they return, the lesson on stock picking and evaluating begins. Students learn what the indicators of a healthy stock are, including current ratio as assets, equal market, BETA, and so on. They learn how to determine the actual price of stock. Stock valuation has three components: book value, dividend discount model, and growth discount model. Steve asks, "What does stock entitle you to?" Student answers, "A piece of the company. The assets." Steve questions, "What are assets?" Student replies, "What the company owns." Steve continues to probe, "What kinds of things does the company own?" Students give examples like building and equipment. And one student remarks, "Assets can be sold. Stock can be thought of as the value of a company's assets."

Phil then discusses each component of stock valuation beginning with the concept of book value; saying that books are the financial record for a company and that "cooking the books" is what Enron and WorldCom did.

After lunch, students meet up in the lab where they work on their research report. Students choose a company, locate its base, describe the products and services offered, discuss the industry and the competition in that industry, and they record revenues, profits, and dividends per year. They also justify why it is a good and bad investment. The basic idea behind the research report is for students to understand how to evaluate data and do a research template. They use this research in Stock Quest, which is an internet game where they create an imaginary portfolio. They buy and sell stocks and it tracks

their performance. It also allows them to compare their ranking with their classmates and access classmates' portfolios. The game is a vehicle to use to understand basic trading processes.

What is interesting is that the majority of the class finished their first report and then started a second and sometimes third research report. Their ability to move quickly and with competence through the Excel spreadsheet work was striking. Their technology proficiency in this second year owes a lot to the exposure gained in the first year.

### **The Saturday Program During the School Year**

The following handout on the stock market competition among second year students helps to illuminate the focus of the monthly meetings

during the second school year. The focus is on the stock market, which includes making assessments of opportunity and risk based upon a review of financial statements and other materials. Students are rewarded for working effectively as a group, making good choices in the stock market simulation and documenting the reasons for these choices. The program also has a strong college preparation component with an emphasis on engaging students in exercises that will help them understand and anticipate the steps they need and should want to take to prepare for college admissions. This includes the application process, selecting and ranking possible college programs, and researching business and economics based careers that require post-secondary training.



## **Competition Guidelines:**

***The stock competition starts now. GO.***

*Be careful though, the winners are not required to have the best portfolio, but rather, will have made sound investment decisions, performed well in class, and acted as a team. Do you think you can win? Then keep reading...*

### **A) Monthly Team Investment Report**

*30% of overall Competition*

Two-part document:

First part reviews current holdings, and shows changes to those holdings.

Second part lists new stock picks and the rationale behind each pick.

- At least one new investment report is handed in anytime before the beginning of each class. However, if team wants to make more than one stock selection in the month, they can hand in as many reports as they would like during the month.
- Graded on scale from 1 to 5, with 5 as best.
- Supported by mid-month, small-group mentor meeting.

### **B) Books / Class Material / Class Lectures**

*20% of overall Competition*

- Primary Material: *Peter Lynch, Learn to Earn*

- Each lesson will be taught 3 times:

First, there will be an in-class Lecture.

Next, students will be provided with Reading Material and questions to review between classes.

Finally, there will be a Review Game in the following class.

- In the class following each lecture there will be a short Quiz to be held after the Review Game.
- Tests graded on same 1 to 5 scales.
- Although tests are graded on an individual bases, the total score of the team determines Competition success.
- Supported by mid-month, small-group mentor meeting.

### **C) Collegiate**

*10% of overall Competition*

- *Product:* List of top ten college picks separated into Reach, Probable and Safety Picks
- List shall be supplemented by the following:

5-point rationale behind each school

Requirements spreadsheet that highlights course shortcomings

Synopsis of 2 different conversations with admissions personnel

- Paper to be handed in second to last class.

### **D) Presentation**

*30% of overall Competition*

### **E) Class Participation**

*10% of overall Competition*

- *YEAH Dollars* will be awarded in class for students who participate. The Dollars will be held till the end of the last class, then counted to determine the Team's score.

### **Competition Scoring**

- Competition scoring to follow rational as outlined in below *example*:
- Total prize money: \$10,000.
- Monthly Team Investment Report is worth 40% of Competition. Therefore, \$4,000 is allocated to this section.
- All grades are summed and divided into the prize allocation (here, \$4,000) to arrive at the prize per point. Then the prize per point is multiplied by team's cumulative score to arrive at total prize for team.
- For example, let's say that there are only two teams. They each submitted two reports and scored perfectly. The sum of all points therefore is 20. Dividing this into \$4,000, we arrive at \$20 per point. Since each team earned 10 points, they each get \$2,000.

## **Monthly Team Investment Report**

The Monthly Investment Report counts for **30%** of the **Competition**. It should be divided into **Three Sections** as follows:

### **Section I: *Holdings Review***

This section is probably best completed in an **Excel Spreadsheet** format and should include the following for full credit:

- List of **current holdings**
- **Acquisition Price** of each stock
- **Current Price** of each stock
- **Return** of each stock since **last investment period** and over **holding period**. A **daily price chart** should supplement each of these.
- A review of **significant developments** for each company
- Review of dates of any **significant price changes** and what news caused those price movements.

### **Section II: *New Investments***

This section will simply include any **new investments**, the **price** of each stock, and the **quantity** to be bought.

### **Section III: *New Investments Research***

This section will include research on any new investments. **ALL NEW INVESTMENTS MUST BE SUPPLEMENTED BY RESEARCH**. Failure to do **research** will **dramatically** affect team **grades**. Research will be conducted according to the **format** previously **taught in class** and provided below.

Teams who chose **not** to make any **changes** to their portfolio must **submit a document** for this section **showing** which **companies** they **researched**, and why they chose not to invest, again according to the class format.

## Student Views of the Second Year Program

In speaking with program participants, there were a number of areas where there was a general consensus on successful program features. From the students' view, the strongest components include the guest lectures, new friendships that emerged from small group team activities, incentive awards like the Biz Bucks, and working on computer program software such as PowerPoint. A common theme that virtually all students expressed was that BETA was teaching them subject areas and skills which they would not be learning in their regular schools. They felt privileged and at an advantage especially in terms of heightened software skills with Word, PowerPoint, and Excel. When asked about areas where they would like to see changes or enhancements in program services the most common responses were requests for increasing the number of fieldtrips. Looking toward the future year students were excited with the prospect of working with their mentors and developing strategies and skill sets for college admissions.

When students begin the program they are motivated by an interest in the idea of business. As the program progresses, students become more involved with the practical requirements for getting into college. Increasing their access to higher education becomes a central focus for participation in the second year and students come to understand the concrete steps necessary for careers in business. Four Saturday sessions are devoted to college and career planning. These provide students with an opportunity to research college and business options. Later students will write a two page report summarizing their college search and present their findings to the class. This type of activity has a dual purpose. It both sharpens students' writing and presentation skills while providing them with practical experience and tools useful for the university application process. The personal statement where actual admissions officers review the individual student

essays is another activity that crystallizes the degree of college preparation that the program provides.

## YEP III (Springboard): The third year BETA program at the Haas School of Business

The current Springboard program is designed to support youth from the two-year Haas Summer and Saturdays Program and alumni from the school and community-based BETA programs. During the past year, the program emerged out of the YEP III program that was designed as a follow-up program for last year's (2000-01) Young Entrepreneurs Program second year cohort. The program focus is on the college selection, application, college testing, and college transfer processes. BETA provided a series of workshops, each addressing the steps in the college application and admission process.

In the last year there were some problems with turnout among the YEP II cohort. There was a mixture of students, including some who were older and already currently attending community college. Different ages occurred because these students entered the program before it began with a younger and fixed age cohort as a MESA BETA program. The cohort had diverse interests. Elements of the "getting ready for college" workshops were good for high school students who were beginning to look at the college application process. They were less well suited to the interests of community college and potential transfer students who were already in the post-secondary pipeline. Other content (e.g. course information on transferring to UC Berkeley, supported by the Community College Transfer Center staff on the Berkeley campus) had more direct relevance and appeal for older students working towards transferring to UC or to another four-year college or university.

In the coming year all graduates of the two-year Haas School of Business based summer and Saturday program will be invited to attend the Springboard Program in their third year. Other

students who are alumni from the school and community-based BETA programs will be encouraged to apply to attend the Springboard program at Haas.

The Springboard program is growing and evolving. It is designed to extend the contact with students from the other BETA programs, to

support them in the college preparation and application process, and to provide scholarship stipends for expenses related to the college preparation process. For example, Springboard will provide scholarship awards to cover the cost of SAT test preparation, and other college application costs.

## Quantitative Outcome Analysis

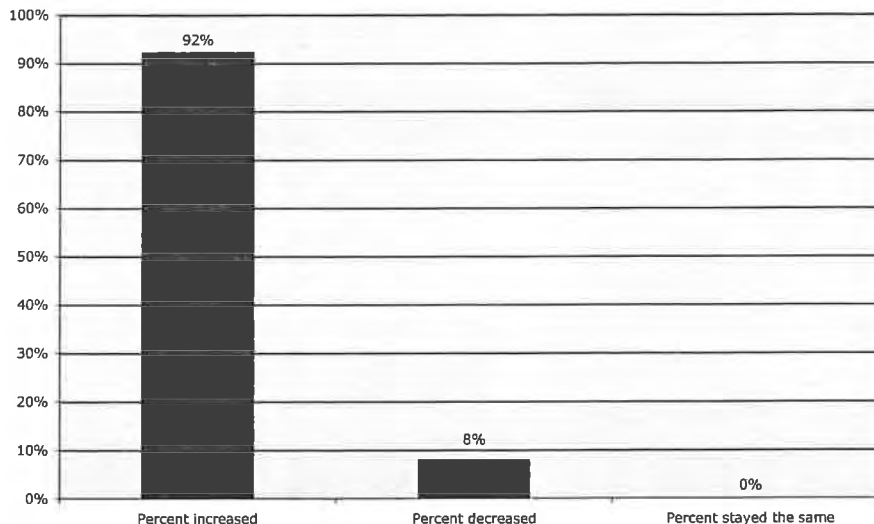
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Here we report on limited quantitative assessments of the achievement and progress of program participants based upon a quantitative analysis of two data sets for which we have program related data on most of the participants. We report on outcomes of pre- and post tests of students/youth in individual (YEP I) and school/group-based components of BETA. These pre and post tests were designed to assess pre and post program knowledge of business related information, college readiness and A-G pipeline information.

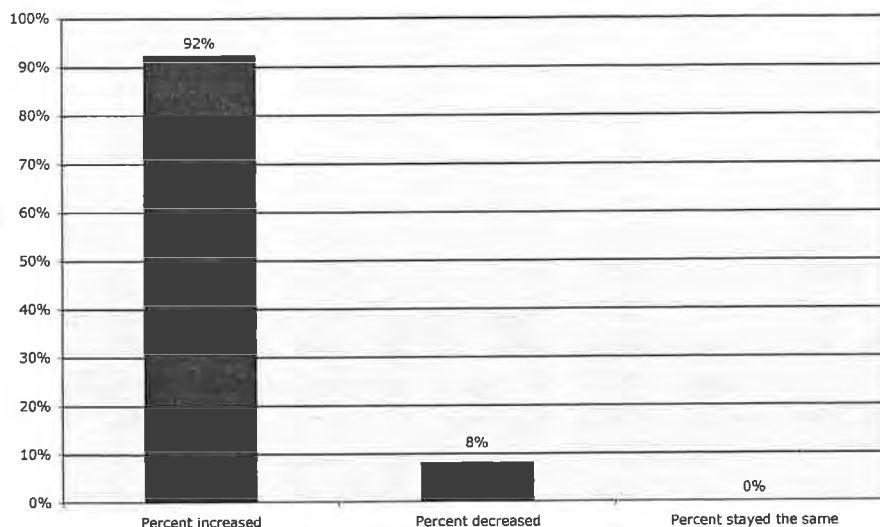
The following three tables document the summary results of student scores on short surveys administered before and after completion

of YEP I and II programs at the Haas School of Business. The tests were designed to assess pre- and post-program knowledge of business related information, college readiness and A-G pipeline information. As documented in the three tables, 92 percent of the participants in the 2002 YEP I Summer Program, 92 percent of the students in the YEP II 2002 Summer Program, and 95 percent of the students in the YEP I 2001-02 program improved their scores between the pre-test at the start of the program and the post-test at the end of the program.

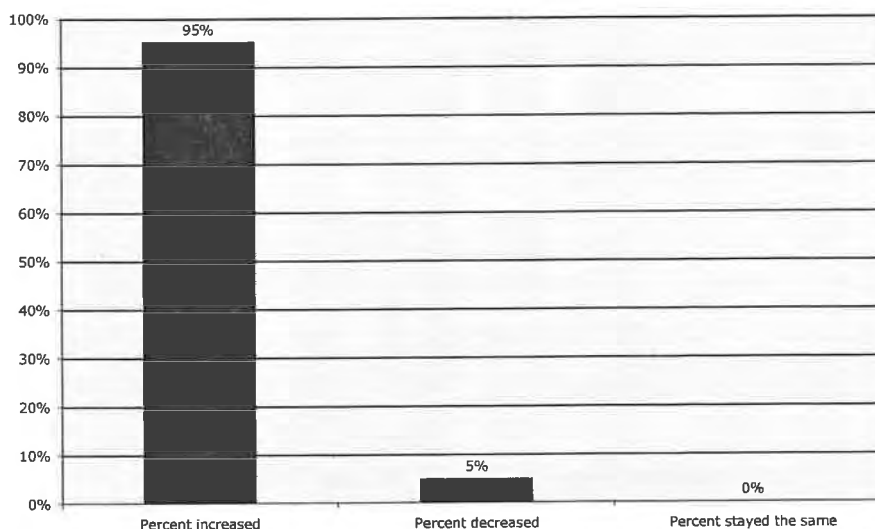
YEP I Summer Program 7/2002 Business Plan Survey



### YEP II Summer Program 8/2002 Stock Market Survey



### YEP I 2001-2002 Pre/Post Tests



When we look at the three school and community sites for which we have data on a short survey comparing pre- and post-program knowledge of business related information, college readiness, and A-G pipeline information we find a different pattern of test outcomes in the different settings.

At Cole Middle School in Oakland we find that 71 percent of the students improved their scores between the pre-test earlier in the

Spring semester and the post-test near the end of the BETA program activities at the school. In contrast to this pattern, the pre- and post- tests administered to students in the classes at McClymonds High School in Oakland show little or no improvement in the test scores between the pre- and post-test while students from Mission High School in San Francisco show only limited improvement.

How do we explain these results? We found in our observations at McClymonds High School

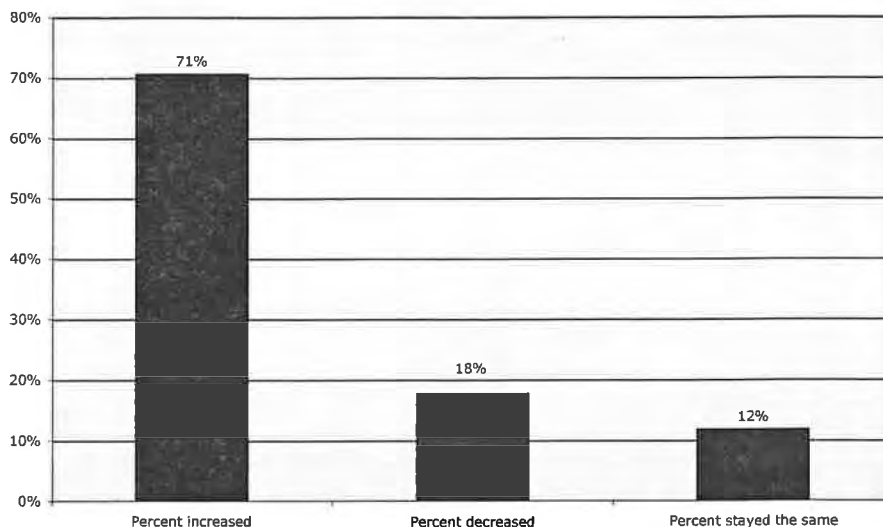
and Mission High School that the students in these courses were engaged in the BETA hands-on activities as active participants and that participants seemed to exhibit some knowledge of the business related information that was the focus of the course content in each of the classrooms. From this perspective the test scores do not appear to be a very good indicator of student involvement or student learning or development in the programs. Both schools have school histories of relatively low scores on standardized tests. Conditions include both an environmental deficit in the level of achievement for many of the students and a tendency for students to not be engaged in closed ended tests or surveys. If you compare these score sets to the discussion of the program at the two schools, one must conclude that the test scores are not a good indicator of the level of involvement or student development at the two sites.

In part, these scores reflect the fact that the students bought into the program but not into

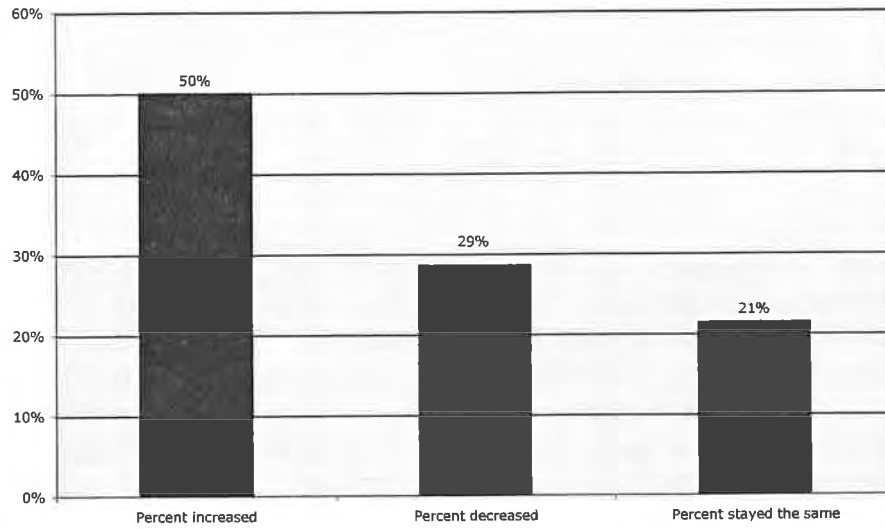
this aspect of the evaluation. The evaluation activity began after the program and the school year was already underway, and the instruments for the pre-test were not ready and reviewed for administration until the beginning portion of the BETA segment in the courses at McClymonds and Mission High. For the students the pre-test and post-test on business-related information was not a task which they embraced. Observation and field data from the programs, including the information summarized on the review of school and community-based programs at these two school sites provide more reliable data on the engagement of the students in the BETA related curriculum, activities, and mentoring.

In contrast, we might explain the higher test scores at Cole Middle School in relation to the specific classroom environment and skill levels in the classrooms participating in the BETA program. These were both classrooms that were at a higher achievement level than some of the other classes at the site.

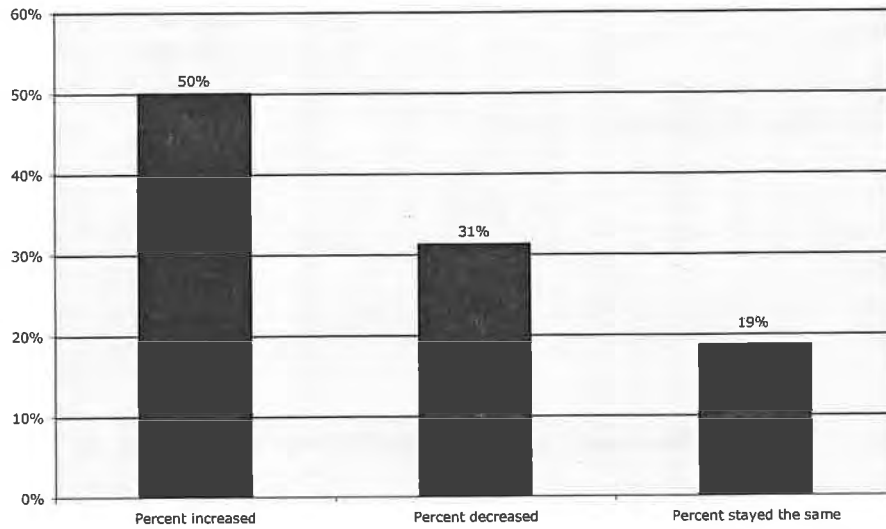
BETA- Cole (English) College Pre/Post Tests



### BETA- Mission (Intro. to Finance) College Pre/Post Tests

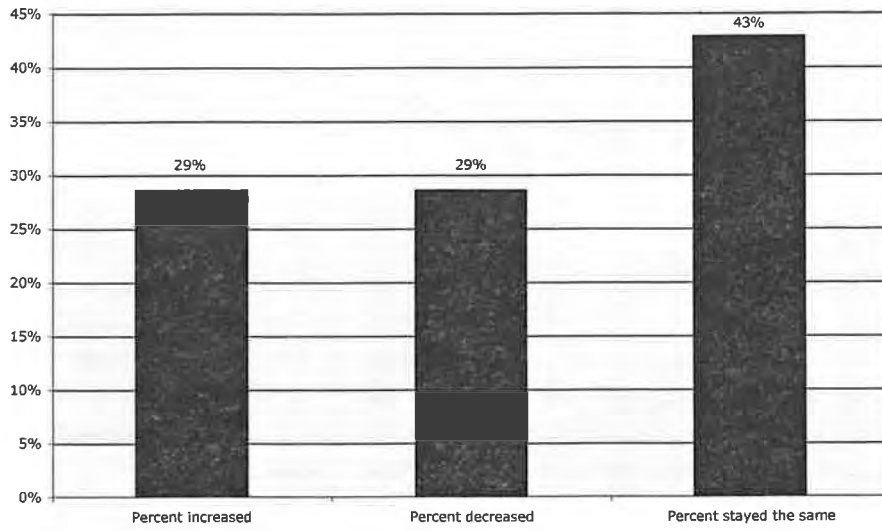


### BETA- Mission (US History) College Pre/Post Tests

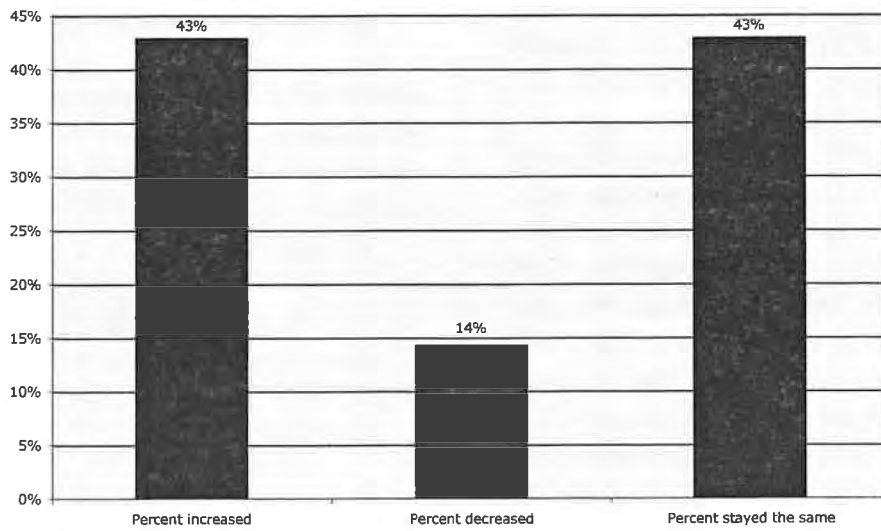




BETA- McClymonds (English) College Pre/Post Tests



BETA- McClymonds (Food Science) College Pre/Post Tests



## Meta-analysis

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### ***Lessons from Other Programs on Program Effectiveness***

#### **How BETA relates to the program components of other successful outreach programs**

BETA is a relatively new program. As such our ability to collect data on its longer-term outcomes, including its enhancement of the competitive eligibility of cohorts of students from historically underrepresented ethnic and racial groups is limited. This is one reason that we have chosen to support and strengthen our assessment of the viability, quality, and cost-effectiveness of the program by supplementing our primary research with a meta-analysis of research findings on other comparable outreach, development and retention efforts. This will allow us to look at the current program through the lens of the types of interventions that result in positive outcomes in other settings. The following discussion will highlight the most common and variable program elements of comparable or related outreach and enrichment programs. We will look at the programs and the core program components that are associated with program viability and success. In the section that follows this discussion of the relationship between program components and program success we will provide a preliminary cost assessment analysis estimating the relative cost of some of these programs, per participant, in comparison to the comparable segments of the BETA program.

Our meta-analysis will be based upon looking at the relationship between program content and program effectiveness in terms of six core types of program services that are all integral to the program content and practices of the BETA programs. These six core areas of the program are: 1) counseling; 2) academic enrichment; 3)

mentoring; 4) parent involvement; 5) personal enrichment and social integration; and 6) program group. We will look at program design and best practices for these other youth outreach and development programs, to support our ability to assess the potential power and viability of the BETA program and the component parts of its intervention strategy:

#### **K-12 Outreach Programs**

- *What are the component parts of comparable or related outreach programs?*
- *Who is their target population?*
- *What features do researchers identify as the successful features of their programs?*
  
- *Method of Delivery of program services?*
- *Personnel: Do they use mentors?*
- *Settings and unit of delivery:  
Do they work with individuals and small groups?  
Do they work with classrooms/ schools?  
Do they have after-school programs?  
Do they involve families in the program?  
What techniques do they use to involve families?*

The following discussion reviews the findings in the literature on core outreach programs and relates these findings with a focus on core program components or services to the BETA programs. We also provide tabular summaries of the types of services delivered by core programs which are comparable or similar to BETA programming or its component parts. These tables make clear the core components that BETA shares with other outreach, enrichment, and retention programs. The mandate raised in the 1997

Outreach Task Force (OTF) report<sup>26</sup> was that the ban on affirmative action “greatly magnified the role of outreach as the primary means for achieving a demographically diverse student body”<sup>27</sup> that ultimately reflects the state’s population. As such, programs are charged by the report with the responsibility of providing a comprehensive array of services designed to help ameliorate the obstacles of “educational disadvantage” experienced by ethnic minority students in California’s low-performing schools.

The following discussion focuses upon core features and services of outreach programs that seek to address the need to enroll more competitively eligible underrepresented students in four- year college and university programs including the University of California. For this discussion we rely on a number of reports that summarize the program characteristics of various outreach, enrichment and development programs. However, in many cases the information available on specific program components of particular programs is limited, in that it is at the more general rather than the detailed and specific level.

This reflects the fact that there is often no detailed account in the public domain on program components, services, and associated outcomes or outcome indicators for even larger and well-established programs. This also reflects the fact that many programs have only recently begun to initiate data record keeping and tracking that is integrated with efforts to assess the impact of the program(s) on clients and on outcome indicators including records on post-secondary enrollment and retention, entry into college track A-G courses and AP courses in middle and high school, and indicators of post-secondary outcomes including enrollment in a college or university program.

The following discussion reviews the ways in which various programs deliver core services that

are comparable or related to elements of the BETA program’s intervention services. It discusses the ways in which these services are designed to strategically intervene in the K-12 pipeline to eliminate barriers to access to college and support the acquisition of skills and the taking of courses that will support eligibility for UC or comparable four-year college programs.

## Counseling

Counseling services are a core feature of most middle and high school based programs that are designed to increase the number and percentage of educationally disadvantaged students who will attend a four-year college or university. Counseling is a primary component of these programs because both qualitative and quantitative research, as well as personal anecdotal accounts of experiences in the secondary school system, suggest that getting on or off the college track of courses in middle school is a primary factor determining college eligibility and college attendance at graduation.

Gandara’s 1998 study indicates that high school counselors who provide access to college prep curricula and information on college opportunities are “barriers” for minority students.<sup>28</sup> Taking into consideration the remedial tracking of minorities and the lack of rigorous academic preparation and expectations at low-performing schools, it is imperative that programs be charged with the responsibility of both academic and career advising. EAOP and MESA develop individual academic plans for students so that they take the necessary prerequisites that meet UC eligibility requirements.<sup>29</sup> AVID and PUENTE also work with their student participants to advise them and enroll them in courses necessary for college preparation. From the review of the relationship of programs to “barriers” for minority students,

<sup>26</sup> University of California Outreach Task Force, “New Directions For Outreach.”

<sup>27</sup> *Ibid.*, p. 7.

<sup>28</sup> Patricia Gandara et al, “Capturing Latino Students in the Academic Pipeline.” Report From the California Policy Seminar *Brief Series*, May 1998.

<sup>29</sup> UC Annual Outreach Report, 1998.

counseling and support for college preparatory A-G course selection are features of most sustained outreach programs targeting middle and high school youth.

Students and parents need to receive information about course requirements, the role of admissions tests, and financial aid opportunities before the start of 9<sup>th</sup> grade. But as the 1997 PACE policy report indicated, a good counselor does more than inform and encourage students to take college prep classes at one point in time. A good academic counselor should monitor student performance, provide support and assistance in resolving deficiencies or obstacles, and should have periodic meetings with the student to discuss progress and post-secondary education and career opportunities<sup>30</sup>. As the Haas School based portion of BETA programs redesign their college preparation curriculum and programming, they are moving towards a more systematic and intensive counseling and advising role. Plans for the 2002-03 academic year include placing both the first and second year cohorts in the summer and Saturday program at Haas in one set of college pipeline seminars and programs. This will tighten and amplify the message on A-G course selection through the group structure of the cohorts and the program.

The capacity of BETA to provide effective counseling reflects three program strengths of the BETA intervention:

- 1) Through its affiliation with UC, BETA staff makes college advising an efficient and accurate service. The program director attends admissions workshops where he learns the latest review process by actually reviewing and judging real applications. He is up to date with the latest admissions policy changes like the comprehensive

review, the four percent program, and the dual admissions currently under Regent review. The director presents himself as a credible source for parents who are confused about what tests students need to take and the difference between remedial and on-track courses. In the “kick-off” session for the YEP program component, which includes outreach to the parents on their role in helping their children to get on and stay on the college track, the director demystifies some of the myths, including that without strong SAT scores students will not be admitted to UC. He explains the importance of personal statements and the way that applications are reviewed so that parents and students become socialized to the admissions process (an experience that they themselves may not have been part of because they often did not go to four-year colleges).

- 2) Because YEP markets itself as a special program with limited and select enrollment where students must complete a comprehensive application process, the program has organized records for the students. These include the student grades at entry (8<sup>th</sup> or 9<sup>th</sup> grade—they will be 9<sup>th</sup> or 10<sup>th</sup> graders in the fall), and the prospective high school that students will be attending. Student profiles are already in place, which makes expansion of this component a much more manageable endeavor for tracking program participants in the future.
- 3) The role of BETA program staff is one of personal commitment and dedication. They are frequent observers of classroom activities and participate in almost all of the program services conducted through the Haas School of Business site. Students in the program know, trust, and like them.

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<sup>30</sup> G.C. Hayward, B. Brandes, M.W. Kirst, and C. Mazzeo, *Higher Education Outreach Programs: A Synthesis of Evaluations*, A Report Commissioned by the Outreach Task Force, Board of Regents, University of California, January, 1997.

## Academic Enrichment

The 1996 CPEC report recommended that program expansion in outreach programs focus on intensifying “academic enrichment services and activities due to the increasingly competitive nature of college admissions.”<sup>31</sup> However, academic enrichment services are more costly per student than informational services and as such tend to benefit fewer people. This leads to a recommendation that program managers and funders should be aware of the difference in both the type and intensity of program services for each project component. Program costs can then be seen in light of the related program benefits. When BETA programs are seen through this lens it suggests the need to distinguish between the school and community-based programs and program and workshop services that are also delivered to this group population and the more intensive academic enrichment services delivered to individuals and their families through programs at the Haas School of Business. BETA delivers both intensive academic enrichment services to its students in the Haas-based summer and Saturday programs and less intensive, more informational enrichment services to the youth in the school and community-based BETA programs. With changes discussed under program enhancements later in the report, they are moving towards drawing alumni from the less-intensive BETA community programs into individual and small group programs at Haas. For the 2002-03 school year, one-eighth of the summer and Saturday first year cohort are alumni from BETA community-based middle school programs.

The point of academic enrichment is to prepare students for a competitive college and work experience. The expansion of funding and types of enrichment services that programs provide is

partly in response to the OTF’s 1997 report<sup>32</sup> that indicated educational disadvantage as the primary obstacle for low-income minorities. Academic enrichment services should be fun and rigorous. YEP students are expected to engage in challenging business curriculum and the program fosters a competitive environment where students compete with business plans, earning Biz Bucks and team points. What is unique about the program is that students are challenged to understand complex but very applicable and practical knowledge and are also competing with peers who they depend on for support and encouragement. The program makes learning and succeeding a challenging, competitive, and supportive experience.

The program is unique in its approach to engaging and exciting youth through business related materials. It uses business as a tool to engage students in critical thinking skills through daily current events discussion on business and ethics. It also supports the development of mathematical problem solving skills through applied reasoning where students break down finances and compute prices, costs and revenues, and profits and losses. In the second year the program includes using Excel to summarize financial attributes of various companies.

BETA offers a new coordinated set of services. It does this with the help of program graduates who devise activities and lesson plans grounded in their personal experience that articulate with the experiences and cultural worlds of the younger students.

Academic enrichment in this instance becomes an evolving facet of the program’s ability to bridge education and business as real life situations. Exposing the students to the world of business plan development and stock market dynamics is not only educational but also practical. Second year students learn the how stock portfolios are managed, and how to

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<sup>31</sup> CPEC, “Progress Report on the Effectiveness of Collaborative Student Academic Development Programs: A Report of the California Postsecondary Education Commission (6/1996),” Sacramento CA, 1996, p. 8.

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<sup>32</sup> University of California Outreach Task Force, “New Directions For Outreach.”

minimize investment risks. Understanding the ways that businesses develop, grow and sustain themselves in a competitive economy are valuable life skills that generally either go unlearned or are taught in college. Students become literate consumers and are potentially better prepared for the school-to-work transition out of high school.

As mentioned earlier, BETA program services compliment existing MESA intervention strategies in a number of practices. The YEP summer and Saturday program is comparable to MESA's Saturday Academies in terms of recruitment and selection of participants, individual and group hands-on learning experiences, competitive events, and field-specific exposure to career options. While MESA's students work in groups on science projects for a MESA Day competition, BETA's YEP students create individual business plans using PowerPoint software and professional presentation skills, competing among their peers for first place in the annual Business Plan competition. Both programs

rely on the expertise of industry professionals who provide "in-kind" support through guest lectures and field trips to businesses that enhance the life trajectories of program participants by involving them in the larger sectors of society. Using senior high school program alumni students as group leaders for the summer activities is a strategy that both programs find particularly effective for mobilizing the energy and creativity of younger students who see their older peers as role models. In both programs, "leadership camps" are designed as one-week training seminars for older students to continue program participation with a heightened level of involvement in facilitating program delivery and implementation.

As documented in the table that follows on Academic Enrichment Services by Program, BETA shares a program focus on multiple components of enrichment services with other successful and long-established programs like GEAR UP, SOAR, and Upward Bound.

*Academic enrichment services provided, by program*

Program	Summer Program	Tutoring	College-based or college-level courses/programs	High school or after-school academic preparation program	Assessment	SAT/Test preparation
BETA	X	X			X	X
A Better Chance				X		
AVID		X		X		X
Baltimore College Bound						
BioPrep	X			X		
College Bound		X		X		X
College Kids		X		X		
College Now (+remedial)			X		X	
CROP		X		X		
DAPCEP	X			X		
GEAR UP	X	X	X	X	X	
I Have a Dream		X		X		
ICPAC					X	
IL EOP	X	X				
Kids to College						
King-Chávez-Parks						
MBEC						X
NAI				X		
NJ College Bound	X		X			
OHLAP						
Postsecondary EOP			X			
Prep for Prep				X		
Project GRAD		X			X	
Project Step		X		X		
PUENTE		X			X	
SOAR	X	X		X	X	X
Step to College						
Summerbridge	X	X		X		
TexPrep	X					
The Posse Program		X				
Upward Bound	X	X			X	X
Urban Partnership Program						
Virginia EIP	X	X	X	X		X
Wisconsin EIP		X		X		X

Source: These tables are based upon the tables and research comparing various outreach programs conducted by Patricia Gandara and her team of researchers. She has also conducted her own research on the PUENTE Program and related inter-segmental outreach and retention programs.

For the above tables and related narrative discussion see: Patricia Gandara, "Paving the Way to Postsecondary Education: K-12 Intervention Programs for Underrepresented Youth," Report of the Postsecondary Education Cooperative Working Group on Access to Postsecondary Education, NPEC-National Postsecondary Education Cooperative, US Department of Education, Office of Educational Research and Educational Improvement, Washington, DC 2001, 177p.

## Mentoring

The 1996 CPEC report recognized the significance of involving college students as tutors and mentors in outreach initiatives. Student mentors are cost-effective and enable programs to expand services to more students and schools. Because they are closer in age to the students than industry professionals, teachers, and most staff, their shared experiences promote mutual understanding and respect. Research on other programs has supported the finding that tutoring and mentoring by college students or recent graduates who are closer in age and experiences to their mentees is an effective form of intervention.

Gandara's 1998<sup>33</sup> study attributes the ineffectiveness of PUENTE's mentoring component to the large age difference between the mentors who had graduated from college and were established for some time professionally and the 9th grade students who were more concerned with high school social experiences and personal identity development.

The PACE policy report also cites mentoring as one of the more problematic components to organize and implement. It further indicated a need for a "system-wide or even statewide design for recruiting, training, placing and making effective use of community members as mentors to K-12 students."<sup>34</sup> Programs that employ college students with a connection to their educational institution have greater control over recruitment and quality of tutoring and mentoring activities.

BETA addresses the need for committed mentors through rigorous recruitment processes, training, and clear expectations about standards and practices of job performance for their undergraduate business student mentors, and to a

lesser degree for the graduate MBA student mentor volunteers.

The BETA model takes the positive aspects of the mentoring relationship reported by other programs and program evaluators while providing a more structured institutional and organizational approach to mentor recruitment, training, and oversight.

As documented in the table that follows, BETA also provides a range of different types of mentoring services, including mentoring by business professionals and academics, in addition to their more intensive use of paid undergraduate business students and volunteer graduate MBA students as mentors in their programs.

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<sup>33</sup> Patricia Gandara et al, "Capturing Latino Students in the Academic Pipeline."

<sup>34</sup> G.C. Hayward, B. Brandes, M.W. Kirst, and C. Mazzeo, *Higher Education Outreach Programs*.



*Mentoring provided by various participants, by program*

Program	Peer-based	University and/or high school staff and/or faculty	Volunteers	Corporate/ professionals
<b>BETA</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
A Better Chance				
AVID				
Baltimore College Bound				
BioPrep				
College Bound		X	X	X
College Kids			X	
College Now				
CROP		X		
DAPCEP				X
GEAR UP		X		
I Have a Dream		X		X
ICPAC				
IL EOP				
Kids to College				
King-Chávez-Parks				
MBEC				
NAI				
NJ College Bound		X		
OHLAP		X		
Postsecondary EOP				
Prep for Prep				
Project GRAD				
Project Step				
PUENTE	X		X	
SOAR	X			
Step to College / Mission				
Summerbridge	X			
TexPrep				
The Posse Program	X	X		
Upward Bound				
Urban Partnership Program		X	X	
Virginia EIP				
Wisconsin EIP				

## **Parent Involvement**

BETA sees parents as partners in their children's education. The program hosts an orientation where parents become familiar with the goals and expectations of the program. The Program Director explains the admission process, and parents are provided with their child's school course listings so that they can guide them to take on-track classes. Parents are also told that they are responsible as partners with the BETA program

and the schools for supporting the academic achievement and advancement of their children. The BETA program brings the parents to campus, engages them through orientation and workshop activities, and brings them back to the campus to participate in potlucks and the presentations and competitions of their children in Haas BETA programs. However, as indicated in the table that follows, the focus of the program activities of BETA (in terms of parent involvement), is upon programs and orientations services for parents.

*Parent involvement activities, by program*

Program	Orientation to program for parents	Parents as volunteers	Programs for parents	Parents as program designers, developers, staff
BETA/YEP	X		X	
A Better Chance				X
AVID				
Baltimore College Bound			X	
BioPrep				
College Bound				
College Kids	X	X	X	X
College Now				
CROP			X	
DAPCEP				
GEAR UP			X	
I Have a Dream				
ICPAC			X	
IL EOP			X	
Kids to College				
King-Chávez-Parks	X			
MBEC			X	
NAI			X	
NJ College Bound			X	
OHLAP	X			
Postsecondary EOP			X	
Prep for Prep				
Project GRAD			X	
Project Step				X
PUENTE	X	X	X	
SOAR	X			
Step to College / Mission				
Summerbridge				
TexPrep				
The Posse Program	X			
Upward Bound	X		X	
Urban Partnership Program				
Virginia EIP				
Wisconsin EIP				X

## **Personal Enrichment and Social Integration**

The Haas BETA program employs a range of strategies and exercises to support the personal enrichment and social integration of its youth participants. In speaking with undergraduate business mentors and graduate student MBA mentors, both groups report that the role of BETA in exposing youth to a wider social world, in bringing them to campus, in leading them to consider college as an alternative for them are part of the most powerful aspects of the program. One of the considerations in literature on the achievement gap is that youth from many urban schools and communities where there is an achievement gap lack the educational and cultural resources in their schools, families, and communities to support academic involvement and achievement in higher education. One of the roles of effective outreach programs is to build social capital that creates a bridge between urban

youth and a wider world of educational and social options including possible careers in business, economics, and technology. As summarized in the table which follows, BETA provides program content to build leadership skills, supports youth in artistic and cultural activities which relate local cultural knowledge to business concepts and has an extremely powerful series of program activities which enhance the role of positive peer support.

These approaches are similar in their content to much of the MESA program model. Both MESA and BETA work on building social capital and self-esteem through leadership, and building skills and knowledge through practice-based learning. With BETA the program also draws on the business content and business related presentation and analytic skills to build competencies and self-esteem. In terms of the programs that focus on personal enrichment as a core component, BETA may share the broadest overlap in program content with PUENTE and GEAR UP.

*Personal enrichment and social integration (PESI) strategies, by program*

Program	Leadership	Arts and cultural activities	Field trips	Speakers	Peer component
<b>BETA</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
A Better Chance					
AVID			x	x	x
Baltimore College Bound					
BioPrep					
College Bound					
College Kids	x	x	x		
College Now (+remedial)					
CROP					
DAPCEP			x	x	
GEAR UP	x	x	x	x	
I Have a Dream		x			
ICPAC					
IL EOP				X	
Kids to College			x		
King-Chávez-Parks			x		
MBEC					
NAI					
NJ College Bound			X		
OHLAP					
Postsecondary EOP					
Prep for Prep	x		x		
Project GRAD			X		
Project Step					
PUENTE	X	X	X	X	X
SOAR	X		X	X	X
Step to College / Mission		X			X
Summerbridge					X
TexPrep			X	X	
The Posse Program	X	X			X
Upward Bound					
Urban Partnership Program			X	X	
Virginia EIP					
Wisconsin EIP					

## Peer Component and Program Group

The role of a peer component in selected outreach programs is integral to supporting the program's objective of creating a culture of academic success. Like AVID students, BETA's YEP participants receive special "Biz Bags" that identify their group membership. Students form new academically oriented friendships that work to support and nurture the development of academic identities. The time that students spend together during the summer working and competing in teams of six to seven, going on field trips and other daily activities supports this process. During the year, the Saturday BETA program at Haas School of Business sustains a two-year program that creates enduring peer relationships among the first and second year cohorts.

In addition, attitudes toward schooling change when learning is fun and the students see the rewards (e.g. Biz Bucks), and support and esteem from their peers. The program heightens college and career aspirations through field trips, guest speakers, and personal relationships with mentors.

Using program alumni from the summer and Saturday program as group leaders is the embodiment of what outreach strives to create: minority leaders who seek educational advantages and display leadership skills which allow participants to see their options and trajectories in new ways.

Students learn cultural competence for succeeding in a school environment; learning that academic success through class participation and rigorous coursework is positive and rewarded through Biz Bucks and participation awards. In a competitive and supportive environment, students are encouraged to voice ideas and opinions, taking creative initiative in analyzing business and ethics through current events discussions on the latest headlines concerning Enron's corporate fraud. Connecting current events to school content and personal experience is a distinguishing trait of the

program's ability to engage students in learning. Students learn what their talents and skills are so that they can best utilize them in propelling future aspirations. In the business plan and in other smaller hands-on learning simulations, students are encouraged to do something that they know and like in developing a product or a service for a business.

## Literature and Graphical Summaries from the Meta-Analyses

There are a number of areas of agreement in the literature on best practices for outreach, enrichment, and retention programs which target underachieving youth and/or youth from populations that are underrepresented in post-secondary college and university programs. The literature review provides graphical summaries of core components that are integral elements of a variety of successful outreach programs. In the graphical figures in this section on meta-analysis of successful program components, we offer summaries from the literature of common components which frame best practices and the needs and strengths of the current outreach initiative environment. These graphic tables offer a shorthand summary that validates the fact that BETA programs include most of the core components shared by other larger, well-known outreach and enrichment efforts. The reader can see the program elements that BETA shares with other programs by comparing its core components with the inventory of component services and approaches of other well-known programs. This includes the target of services and outreach activities for different outreach programs, e.g., mentors, K-12, families, school and age segments. The graphical review informs us in a shorthand manner that BETA's tools, services, and program components include most of the core approaches and target populations of the outreach and enrichment programs that are reviewed in the literature. In the following table it is clear that BETA includes all of the core program components that are linked to a range of programs

designed to bring underrepresented youth from lower performing educational environments into the college pipeline looking towards enrollment in a four year college or university program. Well-known programs like GEAR UP and I Have a Dream use multiple intervention tools. BETA is similar in its use of multiple tools but differs from these programs in terms of the age and time

period of the program intervention activities. BETA works with youth between the 8<sup>th</sup> and the 12<sup>th</sup> grades while these other programs include intervention activities beginning with program service for students while they are in the elementary school segment of the K-12 school pipeline.

## Summary of features, by program

Program	Counseling	Academic enrichment	Parental involvement	Personal and social enrichment	Mentoring	Scholar-ships	Target audience (Ind.= individual)
BETA	X	X	X	X	X	X	Ind. H.S. students, class 8 <sup>th</sup> -10 <sup>th</sup> , secondary schools
A Better Chance	X	X	X				Ind. H.S. students
AVID	X	X		X			Ind. H.S. students
Baltimore College Bound	X		X			X	H.S. students by class (9th & 10th)
BioPrep	X	X					Ind. secondary (8-12)
College Bound	X	X		X	X		Secondary schools
College Kids		X	X	X	X		Ind. K-12
College Now		X					Ind. H.S. students
CROP	X	X	X		X		Ind. secondary (6-12)
DAPCEP	X	X		X	X	X	Ind. K-12
GEAR UP	X	X	X	X	X	X	K-12 students by school
I Have a Dream	X	X		X	X	X	6-12 students by class
ICPAC	X	X	X			X	Ind. secondary students
IL EOP	X	X	X	X			Ind. secondary (7-12)
Kids to College	X			X			6th graders by school
King-Chávez-Parks	X		X	X			Ind. secondary (6-12)
MBEC	X		X				K-12 studs. by school
NAI	X	X	X		X		Ind. H.S. students
NJ College Bound	X	X			X	X	Ind. secondary (6-12)
OHLAP	X		X			X	Ind. H.S. students
Postsecondary EOP		X	X			X	Ind. secondary students
Prep for Prep	X	X		X			Ind. HS. students
Project GRAD	X	X	X	X		X	K-12 students by school
Project Step		X	X				
PUENTE	X	X	X	X	X		H.S. students by class
SOAR	X	X	X	X	X		Ind. secondary students
Step to College / Mission	X			X			
Summerbridge		X		X	X		Ind. secondary students
TexPrep	X	X		X			Ind. secondary students
The Posse Program	X	X	X	X	X	X	Ind. H.S. students
Upward Bound	X	X	X		X		Secondary students by class
Urban Partnership Program	X			X			K-12 students by school
Virginia EIP	X	X					Ind. secondary (8-12)
Wisconsin EIP	X	X	X				Ind. secondary students



## **COST-EFFECTIVENESS OF BETA VIS-À-VIS OTHER OUTREACH PROGRAMS:**

### **A PRELIMINARY FRAMEWORK AND DISCUSSION**

The cost per student for programs providing a more comprehensive array of academic enrichment services including career and academic counseling, mentoring, and hands-on business-related curriculum and coaching is going to be significantly higher than single component programs where the primary focus is upon informational or motivational activities. Similarly, the context in which program services are delivered affects the cost per student of the programs. Delivering services in a school classroom to group cohorts will be less expensive than delivering services to a cohort of individuals in a dedicated setting, drawn from the school and residential population of neighboring communities.

Compounding the problems of comparing the cost of different programs, per client, is the fact that data is not available in the public domain with annotations of the cost basis for determining the estimated cost per individual client. Instead, the available data from reviews of outreach programs (c.f. Gandara, 2001) provides a set price for the average cost per client. For instance, AVID and PUENTE are examples of class cohort based programs which include academic enrichment, tutoring or mentoring, and individual tracking of courses and academic progress. These programs have a reported per-student annual cost of \$625 for AVID and \$500 for PUENTE.<sup>35</sup> These are modest costs compared to individual based programs like Neighborhood Academic Initiative that operates with an estimated cost per student of \$2000 and Upward Bound, which costs about \$4200 per participant (not counting the scholarship costs these programs provide to their graduates).<sup>36</sup> The BETA summer program is like a

day school version of a program like Upward Bound, where both of the programs offer intensive versions of academic enrichment, mentoring, and counseling but Upward Bound is of longer duration and may include a period of college residence at some sites.

BETA is a stellar example of how outreach programs housed at a UC campus can efficiently and effectively maximize campus resources and minimize per student annual costs by drawing on existing services and university resources including space, classrooms, computer labs, staff, students, and faculty. The summer and Saturday component of BETA has a cost of \$400 per student for the summer program and \$500 per student during the fall and spring semester Saturday program. For the cost, it delivers a very intensive, hands-on program with flexible mentoring, teaching, and counseling utilizing active business school student mentors.

BETA programs provide students with both individualized academic enrichment and counseling services with nearly 5,000 hours of undergraduate and MBA mentoring and ancillary services in individual and small group settings during the 2001-02 school year. BETA also delivers academic lectures, curriculum, academic enrichment, and support services in a predominantly classroom or small group setting at the community-based school and community after-school BETA program sites with an estimated 20,000 hours of instruction by mentors in classes or small groups for the 16 weeks of the school and community-based programming. It is important to stress at the conceptual level that the current Haas BETA program offers extensive high quality business related mentoring and academic services at a relatively low cost because the services are largely provided by employed undergraduate business mentors and MBA students who volunteer to work with the program

<sup>35</sup> Patricia Gandara, "Paving the Way to Postsecondary Education: K-12 Intervention Programs for Underrepresented Youth."

<sup>36</sup> Ibid.

in a teaching and mentoring role.

In addition, the program's organizational and institutional network within the Haas School of Business has enabled it to draw on UC Berkeley campus and Haas Business School resources including a range of "in-kind" services while focusing its own resources from UC and private funders on areas that strengthen the program's supportive capacity to teach business, economics, and technology skills to educationally disadvantaged youth. For instance, the program doesn't have computer lab or classroom costs because Haas can reasonably provide this space and computer network equipment as a supportive feature of the learning experience during summer and Saturday sessions. By reducing or eliminating certain costs, the program can use its funds to provide students with other enrichment and support services like extensive program development of original and modified curriculum to meet the needs of specific settings and populations, a high number of mentoring contact hours, and incentive awards where excellence is rewarded with money, a highly motivational tool that validates program participation for these youth.

Because students meet for eight-hour days during the summer and for five-hour days during Saturday sessions, the program provides breakfast and lunch. Additionally, the program draws from a wide community area (Richmond, Oakland,

Berkeley, and in other Contra Costa County locations of Pinole, El Cerrito, and Hercules) and transportation is often a barrier for students. The program successfully addresses this barrier by providing each participant with a BART and bus pass. Other costs include the "Biz Bag" given to each new participant in the program at the start of the summer program. This equipment set includes a Palm Pilot, calculator and school supplies that make youth participants feel special and recognize the program as a special opportunity. The program's organization reflects the idea that program spending should strengthen strategic components of service delivery while at the same time leveraging existing resources from the Business School and UC Berkeley, and the surrounding Haas, business, and non-profit community.

Perhaps most cost effective programmatically is the use of undergraduate business students and volunteer MBA's who make the program a special, unique, and compelling experience. These students make it cost effective to offer a large number of hours of one-on-one and small group contact, mentoring, and teaching. These are part of the Haas community resources and understanding their role in the effective delivery of outreach strategies is part of the organizational strength and cost effectiveness of program operations.

## RECOMMENDATIONS: BENCHMARKS AND ENHANCEMENTS

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### **Context:**

Project funders and program managers need indicators and benchmarks of program effectiveness. This information is useful to satisfy the concerns of program funders and managers and should also be useful as formative feedback to assist a program in adjusting to the needs of its client population. In turn, the mandate for project enhancements should be driven by feedback from qualitative and quantitative data on the effectiveness of BETA program services and from clear guidance from the meta-analysis of other successful outreach programs and program components.

### **Benchmarks and Benchmark Data**

Outreach programs are advised by the 1997 OTF Report to provide for effective evaluations of the outcomes, costs, and benefits of their K-12 outreach efforts. Starting from this perspective, the BETA program needs to develop ways of documenting their success in the goals and methods that are integral to their programs. In order to facilitate assessing the impact of the program on increasing the number of educationally disadvantaged students who are in the pipeline leading to college eligibility, relevant records on program effectiveness might include the following:

- information on indicators of pipeline enhancement including increases in the number of A-G courses taken by program participants;
- assessment data on keeping students on the college prep pipeline including high school courses and student grade point averages;
- the number and proportion of secondary school students from BETA program alumni who

are admitted to college and university programs by name and type of institution;

- the number and proportion of BETA program alumni admitted to business school programs;
- the number and proportion of BETA program participants receiving SAT and/or ACT test preparation; and
- developing a system for collecting data on former BETA students who are college graduates from four-year college and university programs, by institution.

BETA is working to enhance the quality of their academic enrichment services. The following discussion outlines recommended areas of enhancements in BETA programming and service delivery. These changes are consistent with both observations and feedback from the field on BETA programs and with reports on the relative effectiveness of different types of project intervention components from research on other outreach and enrichment initiatives.

BETA may want to consider enhancements for intensifying academic enrichment and the tracking of related program benchmarks through the following *short and medium term* enhancements to their program practices:

Support for creation of individual student academic plans (like EAOP and MESA) for participants in the two-year summer and Saturday programs at Haas School of Business.

Extending the duration and range of contacts with student participants. This would involve providing a range of BETA program services to youth beginning in their 8<sup>th</sup> grade year and continuing through their junior or senior year in high school.

The first stages of implementation of this proposed enhancement have been initiated by BETA with their creation of the Springboard

component in 2002. Springboard is a program component designed to provide support for students who are alumni from other BETA programs in choosing A-G courses, accessing resources, and preparing for applications to college. It extends the time and opportunity for providing services and support to alumni of current BETA programs. These enhancements should extend the duration and intensity of program contact for BETA's client population.

Increase the number of students in BETA school and community based programs who receive more hours of BETA services including college counseling support on A-G curriculum and enrollment in individual summer and Saturday BETA programs.

This would suggest that BETA, if it follows in PUENTE's and EAOP's program approach, should strengthen program contacts with students following their first two years in the program. The BETA rollout of the Springboard program this year should contribute to the objective of keeping contact with an outreach cohort for a longer period of time after they have participated with the summer and Saturday Haas program or the BETA school and community-based group program component. This enhancement of the BETA program would present itself much like PUENTE with a strong first two years of services (in 9<sup>th</sup> and 10<sup>th</sup> grade) followed by two potential years of academic and career counseling that monitors and supports student progress and college aspirations.

### ***Longer Term Enhancements of BETA Programs***

We are currently operating in a state and private funding environment where there are significant constraints on funding for new programs or operations. However, based upon our evaluation to date, the core features of BETA, a business-based outreach program targeting educationally disadvantaged middle and high school students, utilizing business student mentors and active but flexible collaboration with schools, community organizations, and other programs, appears to be an attractive platform which could be moved to other settings and/or sites.

This could include the following:

- a) A UC Berkeley BETA pilot program targeting community college students. BETA had developed plans and proposals for a community college component in 2001-02 that remain unfunded. The appeal of this approach would be the application of BETA's tested tools of hands-on learning of business and economics to a cohort that is ready for competitive eligibility through the Community College Transfer Program to UC campuses. State higher education plans mandate an annual 6 percent growth in the number of community college transfers to UC. The community college population offers access to a sub-population of historically educationally disadvantaged students who are in a structural position to be on-track for UC eligibility.
- b) A BETA program component at other UC campuses targeting middle and high school students. The practicality of this option is explored in the following discussion on transferability of the BETA program.

## TRANSFERABILITY

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### ***Exploring the Transferability of the BETA Model to Other Sites***

An important feature of our evaluation of the BETA program involves looking at the likely effectiveness of the program model as an approach that could be transferred to other sites and settings. Based upon our field work at each of the BETA sites, including the programs based at the Haas School of Business, our research documents the strengths of the program relative to its model of active but flexible collaboration and use of business school students as mentors for a curriculum based upon active hands-on learning of business, economics, and technology. The following discussion focuses upon a preliminary case study of a potential expansion site at the Riordan Program of the Anderson School of Business at UCLA. This case study provides preliminary support for the transferability of the business school based component of the BETA program to other UC business school sites.

#### **Case Study: The Riordan Program**

The following discussion provides a preliminary approach to the question of the transferability of the BETA program model. What can we learn from a case study model of the Riordan Program at The Anderson School of Business at UCLA?

We met with the Executive Director and the Program Director of the Riordan Program at The Anderson School of Business, and with the Director of the Haas BETA Program, Oscar Wolters-Duran. We met with the program managers of the Riordan Program following their inquiry to the Haas BETA program regarding program curriculum that they believed might be useful to the UCLA Riordan Scholars Program.

Following up on this contact, we arranged to meet with the Riordan staff and the BETA director to talk about what the two programs might learn from each other and to consider whether they might fit as complimentary sites for BETA programs, if the BETA program were to be expanded to multiple campuses of the UC system.<sup>37</sup>

The Riordan Program has been operating since 1987 as a business based outreach program which provides academic enrichment, training in business concepts and analysis, mentoring by Anderson School MBA students, and coaching and workshops to support preparation for college for current 10<sup>th</sup>, 11<sup>th</sup>, and 12<sup>th</sup> graders. The design of the program supports competitive eligibility for historically underrepresented and educationally disadvantaged minority students for admission to selective four-year colleges and universities including Berkeley and UCLA.

While both Riordan and BETA developed autonomously with their own individual visions and distinctive sponsorship and funding, upon reviewing their current program design, method of delivery, and services, these programs share many of the same strategic components. Both the BETA and the Riordan Scholars programs:

- have students meet for monthly Saturday sessions where they have first hand exposure with a prestigious business schools' resources;
- involve corporate, business, and community representatives as guest speakers;
- use the prestige of their business schools to engage youth in a journey toward post-secondary achievement;

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<sup>37</sup> We met at UCLA on July 25<sup>th</sup>, 2002. Attending the meeting were Ms. Ardena Bartlett, Executive Director and Kathy Domiguez, Program Manager of the Riordan Program, Mr. Oscar Wolters-Duran, Director of the BETA Program of the Haas School of Business and David Minkus of the Institute for the Study of Social Change.

- provide individualized college plan counseling, including A-G course selection and test preparation;
- teach professional skill sets including risk and return analyses, resumé writing, drafting personal statements, and interviewing techniques;
- organize field trips to businesses and financial institutions;
- provide logistical support including transportation to campus, continental breakfast and lunch; and lastly
- both began with and continue to rely on public/private partnerships for project funding.

In terms of their approach to curricular and academic enrichment, both programs use a simulated business experience that enhances youth understanding of finance through a stock market competition. What distinguishes Haas's BETA program from Anderson's Riordan program is that the former takes a somewhat different, and perhaps more encompassing approach to a business education. The 9<sup>th</sup> and 10<sup>th</sup> grade BETA students in the summer and Saturday program at Haas spend two years in the program with the first year program focused around a business plan presentation where they write a business plan, and learn Word and PowerPoint proficiency skills as they prepare and present their business plans. Then, in the second year, BETA cohorts share a common focus with the Riordan Scholars program on a stock market based simulation and competition.

BETA offers a more intensified version of business education through more contact hours and a more involved mentorship role where MBA students act as one-on-one coaches for the business plan process. In the second year of the Haas program, the MBA mentors serve as tutors for small groups of four in stock market valuation and trading, finance, and related business skills. The Riordan program also links a mentor with each mentee, in a manner that parallels the first year of the Haas Program. However, the Anderson mentors meet with their mentees only at lunchtime. And while they share experiences, the mentors are not involved in the actual teaching

and coaching of the business curriculum and pedagogy. Conversely, Haas program mentors are actively involved in teaching and engaging youth in a business curriculum. Further, the Riordan Fellows program differs from the Haas BETA programs with its focus on high performing older cohorts and its focus on the importance of pursuing post-graduate education and careers in business, the professions, and graduate academic fields.

The Riordan Program also appears to be recruiting students who are higher on the high school to college pipeline than those in the BETA program. A recent Riordan Scholars cohort is reported to have an average GPA of 3.73. For the most recent 2002-03 cohort of YEP I students in the BETA program, the average grade point average is 3.2, well below 3.73. In the BETA program only 39% of the incoming students have grade point averages in the 3.5 to 4.0 range, while 30 per cent of the cohort are students with grade points below 3.0.

The Riordan Program is also currently broadening its model of using business school students and faculty as coaches for youth from underrepresented groups in its Riordan Scholars program. Last year, the Riordan Program expanded their use of mentors and coaches beyond the Anderson School of Business to include the Law School and graduate law students as mentors for the Scholars program. The Riordan program is also looking at the possibility of expanding its domain of mentorship and youth development into the areas of Public Health and Public Policy.

With a growing number of secondary schools initiating health academies, the notion of extending the program of mentoring and hands-on learning into the domain of public health resonates with the policy mandates that have been enunciated by the California Wellness Foundation and The California Endowment. Both health foundations have identified a need for California to train a more diverse and representative population in medicine and the allied medical

professions.

The success of the Riordan Program, and the similarity of substantial elements of the Riordan Scholars program and the BETA program, suggests potential for creating a transferable but flexible model of a business-based MESA

program at multiple UC campus sites with business schools. However, it should be clear that adoption of a BETA type program at UCLA would be dependent on the availability of private and public resources to support the program expansion.

## CONCLUSION: SUMMARY OF MAJOR FINDINGS

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### ***Competitive Eligibility: Seeing BETA through a competitive lens***

The BETA program is relatively new. Though based upon a business and entrepreneurship program with more than a decade of experience, the current program of school and community-based sites and the two-year old Young Entrepreneurs Program (YEP) summer and Saturday component of BETA at the Haas School of Business are just beginning their third year of operations.

In this situation, the cohort of youth and students who have been served by these programs are not old enough to have matriculated into four-year college or university programs. We are faced with the situation of assessing current program operations and practices along with observed indicators of academic progress and maturation among student participants, to make a measured assessment of the potential of the program to produce students who can be admitted in the future, competitively within the UC system, or to other colleges and universities of higher education.

#### **Positive Indicators**

1. The student cohorts in the summer and Saturday program perform at a high academic level. They are drawn from a largely underrepresented student population from a mix of predominantly public and some private high schools in the Bay Area. When they have completed the second year of the program they exhibit a high degree of commitment to the importance of attending college, and they have acquired enhanced business, oral and written presentation skills with stellar proficiencies in Word, PowerPoint,

and Excel software. They exhibit critical thinking skills, and are being trained in the requirements for college applications, SAT preparation and preparation of personal statements.

2. The BETA program is responsive to the mandate in the 1997 OTF call to improve outreach efforts to educationally disadvantaged students at low-performing secondary schools. By drawing upon a mix of low, medium, and high academic achievers and engaging them in a rigorous program with an advanced curriculum, the program, where successful, builds a potential pool of educationally and culturally competent students from among historically underrepresented students of African American, Latino and Native American descent. The program's potential to enhance secondary school pipeline achievement bodes well in an institutional context where the number and proportion of UC eligible students from historically underrepresented groups remains strikingly low.
3. The BETA programs are building the cultural competence and capacity of participants and collaborating schools, communities and institutions. This provides potential support in the future for enhancing the commitment to academic achievement in families, communities, schools, and community organizations and supporting effective pathways to future support for youth development, youth achievement and enrollment at post-secondary institutions.
4. As BETA continues to implement itself in the secondary landscape, it establishes



linkages between different program components. In the new 2002-03 summer and Saturday program at Haas, one eighth of the new cohort are alumni from the middle school BETA programs. The new Springboard program will further strengthen connections among different BETA program components, extending the potential timeline of BETA services for a growing number of students from middle school through the 11<sup>th</sup> grade. This is an important indicator of pipeline development.

## **Major Findings**

### **1. Models of Collaboration: Turn-Key Programs and Standards vs. Active Flexible Models of Collaboration**

The strength of the BETA program appears to be rooted in its model of *active but flexible collaboration*. For school or community sites, BETA program managers and mentors work to adapt business and economics related content to be complimentary to the needs and mission of the individual sites. At each of the community sites, school or program staff and administrators found the BETA program to be particularly useful because it supported the distinctive goals, objectives, and program content that the school or program was committed to, but lacked the tools and resources to fully execute. For the summer and Saturday programs at the Haas School of Business, the program also exhibited flexibility in terms of adjusting program content and style to the specific needs, learning styles, and skills of the individual youth participants. This flexibility, which was modeled by program staff, was continued during the school year through the one-on-one mentor relationships between the Haas MBA's and the students.

The active BETA model of flexible collaboration differs from turn-key programs like AVID which have expanded to many sites because of their history of success, but which

provide a fixed package of mandatory program content. Schools in particular face many mandates for curriculum and organizational change. BETA was particularly well received within school and community settings because it offers flexible support to implement or enhance existing programs and organizational resources at its sites.

### **2. The Role of Business School Student Mentors**

Undergraduate and graduate business students are at the core of the BETA approach to delivering program services. A key issue for the evaluation is assessing the effectiveness of the model of using a large number of Haas students as mentors, teachers, and organizational consultants for BETA programs. Our fieldwork suggests that this model was generally well received by the teachers, program managers, and youth at each of the BETA sites. In the summer and Saturday programs at Haas, the MBA mentors played a fundamental and effective role in coaching the student participants, engaging them in the program and the work tasks. Along with program staff, the mentors represent a flexible connection with the mentees, providing the types of support and skill set development that individual students need. Both the MBA mentors and the undergraduate business student mentors serve as role models who embody what it means to be a college student for the mentees. They become a link for program participants to the meaning and advantages of a college education, increasing student interest in the process and requirements for being admitted to a college or university. Our findings suggest that this is a strategic model for program delivery that has special efficacy for reaching and engaging youth who are not yet engaged in the college preparatory pipeline. Our research also highlights the social and emotional appeal of the program's use of Haas Business School student mentors as a link to participants.

This emergent and personalized approach to program delivery counters a tendency to evaluate

outreach programs in terms of their more formal curriculum content and program structure. The student reaction to the mentors in urban community settings reveals the key role of the social and human quality of personal interactions between the mentors and local youth. Program effectiveness requires engaging youth who are often disengaged from conventional school curriculum and teaching strategies. The power of the BETA program extends beyond the quality and content of its curriculum and program structure to the power of the human connections between the BETA mentors and the youth with whom they work.

### **3. Business Content and Project-based Learning as Pedagogy**

The BETA program content and design is representative of the increasing focus on project-based learning and collaboration in education and organizational development. However, it is relatively unique in its use of business and economics as tools for adding value to the curriculum, teaching, and youth development activities of schools, teachers, and community organizations serving youth in middle and high schools. The BETA business model appears to be effective because business content seems to be relevant to a wide range of courses and settings while having a widespread appeal to youth from divergent school and community settings. The hands-on business content of the program also appears to be an effective hook for reaching urban youth because business is experienced as connected to the real world outside school of money, jobs, and consumption, including the worlds of street and youth culture. It provides a link for connecting personal experience and intuitive intelligence to school-related information and concepts. This process is facilitated with hands-on learning projects because tasks are concrete and connected to features of the world which draw out mentees' knowledge, interests, and intuitive understanding of the worlds of business, economics, and public policy. Project-

based learning functions to take youth from the practical and concrete to greater competence in using concepts and language which enhance their critical thinking and writing skills.

### **4. BETA is Distinctive in Terms of Public/Private Partnerships**

BETA is organizationally distinctive in relation to other outreach programs because it retains and is seeking to build upon its strong links with business and corporate sponsors and advisors through its ties to faculty, alumni, and associates of the Haas School of Business. Over the past ten years, private givers primarily supported the Young Entrepreneurs Program at Haas, until it received funding for the BETA program from the UC Office of the President. However, it continues to receive approximately 40 percent of its funding from businesses and private givers. It is currently engaged in a development campaign targeting private givers for funding of the program over the next five years.

Through the Haas School of Business and the YEAH Advisory Committee, BETA retains strong connections with the business and corporate community. These linkages provide options for future development efforts and for building support for the development of program content and curriculum through active partnerships with members of the business community and the business faculty.

On a routine basis, Haas faculty, alumni and people from the local business and corporate community support the program through guest lectures, and contributions to developing the BETA program. The public/private partnership supports both program content and program development. This is consistent with the MESA model, where private and corporate individuals and organizations contribute to program content and underwrite a significant portion of program costs.

## 5. BETA Benefits the Social Capital of Participating Groups and Individuals

The education and social science literature talks about the achievement gap in urban communities as being rooted in a lack of social capital and cultural resources in the families, schools and communities where urban youth reside. Other social theorists go beyond the particular limitations of the urban landscape to discuss the processes of social disorganization and cultural fragmentation that beset contemporary urban life in post-industrialized societies. Putnam, in his famous monograph *Bowling Alone* (1995)<sup>38</sup> develops the empirical markers for the importance of the concept of social capital and provides commentary on the multiple arenas in which it is in decline. In Putnam's work, the proposed antidote to this condition is to enhance opportunities for bridging and binding social capital.

Social capital is an "umbrella concept" that helps to remove the barriers to positive collective action in neighborhoods or communities. Social capital in this context is "the resources embedded in social relations among persons and organizations that facilitate cooperation and collaboration in communities."<sup>39</sup> Social capital is used in multiple ways to describe the strengthening of social relationships and ties that operate as "social glue" made from various social ingredients that help to hold communities together and allow them to achieve common goals. The following section documents ways in which the BETA program enhances the social capital of the schools and groups through its school and community-based programs, enriches the social capital of the youth and their families who are served by the BETA programs, and strengthens the social capital of the Haas School of Business

and the Haas "brand" including enhancing the education of its undergraduate and graduate MBA students who participate in the program as mentors for BETA programs.

### a) The Schools and Community Groups Benefit from the Haas School Partnership

Schools and community-based organizations that serve populations directly often find it difficult to continue the provision, development, and delivery of services and organize for program changes and social and financial support. This is particularly true in the current political and economic environment where there are declining public and private resources available for public and social investment in schools and community-based services. Even in better economic times, schools and organizations function with limited resources and limits in their organizational capacity to develop and implement new programs and initiatives. At each of the settings where BETA operated a school or community based program, it added to both the symbolic and organizational capital at the sites by supporting content and curriculum development, organizational and professional development, and hands-on teaching and mentoring of the youth in the setting. It provided content and support for lessons and projects with business and economics content and mentors to support the teaching of business and business literacy. The presence of the Haas School of Business at the sites added to the social capital and stature of these schools and organizations with educators, school boards, and private and public funders.

At Mission High School, BETA helped develop curriculum and programming for their Business Academy and then worked to plan and execute a recruitment plan to gain support for the Academy among Mission High students. As reported above, student enrollment in the Academy doubled in response to this recruitment campaign. The BETA program also helped to establish collaborative bridges among Bay Area business academy

<sup>38</sup> Robert D. Putnam, *Bowling Alone: The Collapse and Revival of American Community*, New York: Simon & Schuster, 2000. 541 p.

<sup>39</sup> R. Gittel, and A. Vidal. *Community Organizing: Building Social Capital as A Development Strategy*. Thousand Oaks, CA: Sage Press, 1998.

programs, convening a one-day meeting at UC Berkeley on strengthening the college pathways of business academics.

### **b) The BETA Program Adds to the Social Capital of Students and their Families**

In school and community settings, the BETA program offers opportunities to build the social capital of its youth participants, their families, and the school and community settings where BETA programs operate, particularly in the summer and Saturday Haas based program.

The BETA programs provide a distinctive intervention approach because their program content, in conjunction with their pedagogy, offers supporting social capital through:

- *Hands-on learning* based upon concrete and practical business-related tasks and activities; and
- *Cohort Formation*: the opportunity to participate in a learning and friendship community of other youth with a supportive and challenging program content.

The effect of the program is unusual because it allows for knitting new social networks and relationships that support a new culture of engagement in the learning process among the youth in the program. Particularly in those settings where the BETA program is most intensive - the summer and Saturday programs of YEP I and YEP II - one observes the ability of the program to support the formation of new emotional ties with other youth in the cohort, with MBA mentors, and with program staff. This emotional “binding social capital” constitutes a form of emotion work that the program supports and nurtures. What is important here is that the program has created routines and social supports along with the process of hands-on learning that support the active personal and emotional involvement of youth and their families in learning and changing their orientation towards school and higher education.

### **c) How BETA Builds the Social Capital of the Haas School of Business**

The active connections of the BETA program to the Haas “brand” encourage buy-ins and support, beginning with the undergraduate students who work as paid mentors, and the MBA students who volunteer as mentors for the summer and Saturday programs. The Haas cachet extends to interest among faculty, alumni, and the corporate community in supporting a community-based business program sponsored by Haas.

With its mix of private and public support, roots in urban communities that have been largely left behind, and student mentorship and Haas support, the BETA program has program elements that offer opportunities for following components of the successful trajectory of the UC Berkeley Incentive Awards Program. It is attractive and builds bridges because it makes everyone look and feel good. It builds the social capital of the Haas brand while contributing to the content and value of the BETA program for students and collaborating community partners.

#### ***Benefits to Haas Mentors***

In looking at the effects of the BETA program on the Haas School of Business students who participate in the program, we anticipated from our field observations that students would affirm the value of the program because it provides a real and tangible service to youth and their communities. BETA fits with the perspective, which is part of the Haas brand, of making business relevant to the needs and concerns of people in the surrounding community. However, our findings suggest that we did not fully anticipate the opportunity that the BETA program provides for educating Haas undergraduate and graduate students in business concepts because it offers them a hands-on opportunity to teach material in a challenging and engaging context.

One area which was particularly striking is the first year of the summer and Saturday BETA

program at the Haas School of Business in which volunteer MBA mentors assist their mentees in writing and presenting a business plan. One of the staff members who is also a former mentor reflected that this component of the program is quite useful for the MBA students as a test-bed for their own learning of the concepts, organization, and drafting of a business plan. When they enter Haas, most MBA students have not had the opportunity to draft a business plan. Effectively, Haas has mentors who come in “who don’t know anything about writing business plans and have a lot of anxiety about that.”<sup>40</sup>

Even if MBA students do have some understanding of business planning and writing business plans, teaching offers them another means to master the business plan concept. This is an area in which the BETA program provides opportunities for individual mentors to benefit educationally from their participation in the program as mentors. Undergraduate business students experience related opportunities when they get to develop lesson plans and lead middle

and high school students through business concepts and hands-on business exercises. BETA provides a test-bed for student mentors to learn by teaching core business concepts.

Another area where the program adds to the social capital and development opportunities for MBA students is in the leadership opportunities that it provides within the program for MBA’s. It provides leadership opportunities with groups of mentors, groups of students, and project management organizational opportunities for MBA students who take on leadership roles in BETA programs. There are also more intangible benefits that many mentors realize from being able to share their business knowledge or their MBA experience with youth in a special mentoring relationship. Many reflect on becoming involved in sharing their time and knowledge with their mentees as representatives of their communities. They observe that they were drawn to the program by the opportunity to give something back to the community.

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<sup>40</sup> Interview with Phillip O’Neill, Haas MBA, August 12, 2002.

## CONCLUDING REMARKS

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### ***BETA succeeds by building the social capital of urban youth, families, and communities***

From the standpoint of our preliminary research, the BETA program fills a gap in outreach program options with its focus on business and economic content. In style it draws from and builds on the MESA tradition of flexible collaboration with school and community partners. Based upon our preliminary discussions with the program managers at the Riordan program, and our research, the BETA curriculum and program approaches appear to be attractive and transferable elements for other campus' business-based community outreach efforts. Our findings suggest that the program fills unmet needs, serves an underserved but targeted population, has established good collaborative relations with institutional and community partners, adds value and content to practices of collaborating programs and schools, and appears to be viable and transportable to other sites.

It is conventional to focus on the curriculum, pedagogy, and program design of outreach and enrichment programs and strategies. While these aspects are all vitally important, a good program in the abstract will often be unviable when taken to the world of teenage youth who are not integrated into the pipeline of college preparatory work. What is special and unique about the BETA programs is that they have designed a process and a pattern of relationships in which learning about business is connected to the experience and intuitive intelligence of the youth with whom they work.

The social and personal relationships that support program activities provide personal, emotional and group support for the youth in the program. The combination of mentors and group cohorts provides a framework that helps create a context for the youth's engagement in learning

experiences.<sup>41</sup>

The BETA programs build the social capital of all collaborating participants. It represents a successful model for exciting and engaging educationally disadvantaged youth. The model appears flexible, transferable, cost-effective and viable as an outreach strategy to increase the number of educationally disadvantaged youth eligible for admission to the University of California or other four-year colleges or universities. The model is particularly compelling because its combination of effective program strategies with hands-on business based curriculum and active participation by undergraduate and graduate business student mentors appears to be particularly effective in engaging educationally disadvantaged youth who are outside or on the borders of the academic pipeline when they enter the program. The UC Outreach Task Force and the Legislature have mandated that outreach programs should be developed to serve educationally disadvantaged youth from lower performing schools. BETA serves this population, which is historically underrepresented in college and university programs, and appears to have developed program strategies that can successfully prepare a portion of this youth population to be eligible for admission to UC or other four-year college or university programs.

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<sup>41</sup> Yuri Triesman received the MacArthur "Genius" Award for his research demonstrating the importance of what seemed like a simple concept: students learn more quickly and achieve at higher levels when they are incorporated within a small work and friendship group.

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