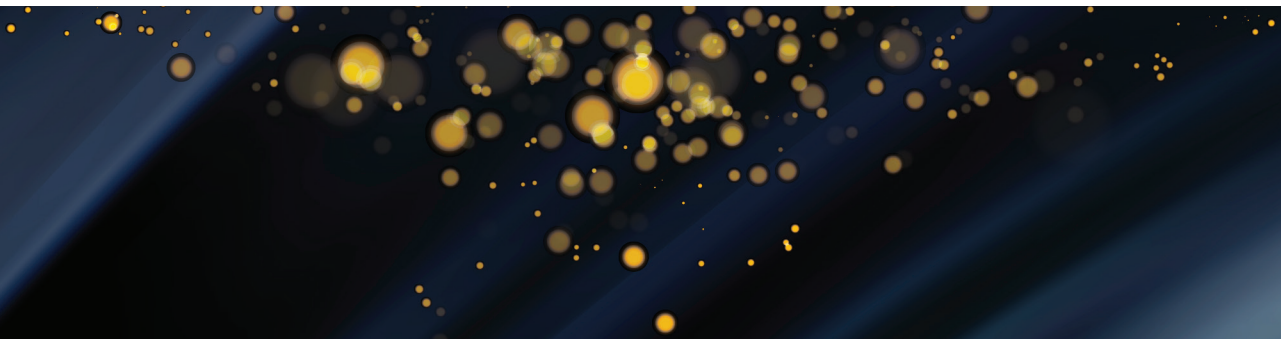


A large, stylized '40TH' in a dark blue, blocky font. The '4' and '0' are connected. To the right of the '0', the word 'ANNIVERSARY' is written in a smaller, white, sans-serif font. The background is dark blue with horizontal light grey stripes.

# 40TH ANNIVERSARY

**CELEBRATING FORTY YEARS OF FIGHTING**  
FOR EQUAL ACCESS TO HIGHER EDUCATION FOR EVERYONE

**COE** COUNCIL *for* OPPORTUNITY *in* EDUCATION

A cluster of yellow and orange bokeh lights of various sizes, resembling a starburst or fireworks, set against a dark blue background with diagonal light streaks.

1981-2021



## OUR MISSION

Achieve college access and success for low-income students, first-generation students, and students with disabilities.

## VISION

Every young person and adult has an equal opportunity to prepare for, attend, and graduate from college. Graduation from any category of postsecondary institution is achievable and not limited by economic status, family background, or disability.

## WHO IS SERVED

As mandated by Congress, two-thirds of the students served must come from families with incomes under \$37,650, where neither parent graduated from college. More than 3,100 TRIO programs currently serve more than 812,000 low-income students. Many programs serve students in grades six through 12.

# **FORTY YEARS OF FIGHTING**

## **FOR EQUAL ACCESS TO HIGHER EDUCATION FOR EVERYONE**



Turning 40 is traditionally a time to take stock, to measure the triumphs and lessons of past years and prepare for the challenges to come. In COE's 40th year, we are grateful for all we have accomplished with the help of allies who have accompanied us on our journey. Together we have made real progress in helping low-income and first-generation students and students with disabilities improve their lives by attending and graduating from college.

But for COE, this anniversary is primarily about the future. How do we significantly expand the reach of college access and success programs so that many more young people and adults can realize the promise higher education holds? How do we strengthen services through a network of committed educators innovating and sharing best practices? How do we become a thunderous, far-reaching voice for low-income and first-generation students and the educators who work with them every day? How do we wisely build upon this foundation that is COE at 40?

Each of you will define COE's future—and we are very, very grateful for the part that each of you will play.

Sincerely,

A handwritten signature in black ink that reads "Maureen Hoyler".

**Maureen Hoyler**

PRESIDENT

*Council for Opportunity in Education*



# THE DEVELOPMENT OF COE: A Timeline

## 1981

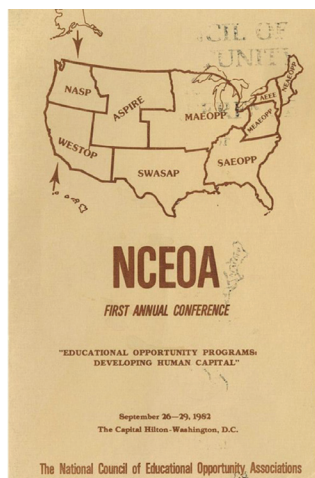
- National Council of Educational Opportunity Associations (NCEOA) — which later changed its name to the Council for Opportunity in Education — incorporates in Washington, DC in March, replacing the informal coalition of TRIO-based associations known as the National Coordinating Council of Educational Opportunity Associations.
- NCEOA holds its first annual Policy Seminar in Washington, DC.
- NCEOA opens a Washington office in June.

## 1982

- In September, NCEOA's First Annual Conference draws 490 participants to Washington.

## 1983

- In response to the Reagan Administration's goal of eliminating any federal role in education, the Republican-controlled Senate Appropriations Subcommittee reduced the TRIO appropriation by 1/3 at its mark-up on September 13. By the full Committee markup on September 25, NCEOA organizes TRIO advocates across the country who convince Appropriators to reject this proposal and add an additional \$10 million to the TRIO budget. This became known as the Twelve Day War.



## 1984

- NCEOA launches its first institutional membership drive.

## 1985

- NCEOA organizes the first annual Seminar on Relations with the Department of Education immediately following its Policy Seminar.

## 1986

- National TRIO DAY is proclaimed by Congressional resolution. This annual celebration focuses the nation's attention on the needs of disadvantaged young people and adults aspiring to improve their lives, to the necessary investment if they are to become contributing citizens of the country, and to the talent wasted if that investment is not made.
- A fifth TRIO program is authorized, the "Post-Baccalaureate Achievement Program"—later known as the Ronald E. McNair Post-Baccalaureate Achievement Program—designed to provide increases in the number of low-income, first-generation and underrepresented students earning doctoral degrees.





## 1988

- NCEOA initiates a job line to advertise employment vacancies in TRIO and other educational opportunity programs.
- NCEOA moves to its new offices at 1025 Vermont Avenue, NW.

## 1990

- The first annual National Student Leadership Congress is held for TRIO high school students in Washington, DC.

## 1991

### The New York Times

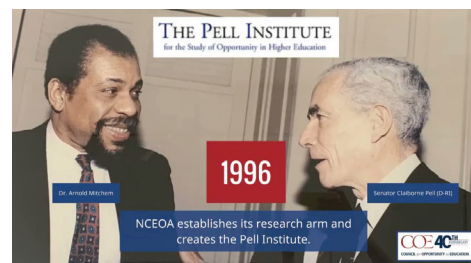
- The New York Times identifies NCEOA as a particularly effective advocacy organization.

## 1995

- War on Opportunity: NCEOA defeats the House Budget Committee's recommendation to eliminate TRIO.

## 1996

- Congress appropriates \$500 million to support TRIO students.
- NCEOA establishes the Pell Institute for the Study of Opportunity in Higher Education.



## 1998

- NCEOA officially changes its name to the Council for Opportunity in Education (COE) “to better emphasize its mission and the students it serves.”

## 2000

- The first group of study abroad students go to South Africa and Mexico.

## 2002

- TRIO funding tops \$800 million.

## 2004

- COE organizes the first briefing of the recently organized Congressional TRIO Caucus.

## 2005

- The Council's 24th Annual Conference in Washington, DC celebrates the 40th Anniversary of the Higher Education Act.
- COE defeats the Administration's attempt to eliminate Upward Bound, Talent Search, and GEAR UP and transfer their funds to *No Child Left Behind*.

## 2006

- COE defeats a renewed attempt by the Administration to eliminate Upward Bound, Talent Search, and GEAR UP.
- COE establishes the Keith Sherin Global Leaders Program to provide opportunities to study abroad for low-income and first-generation students to participate in internships focusing on public policy.

## 2007

- In the budget reconciliation bill, COE secures \$228 million (over four years) to fund nearly 200 additional Upward Bound projects in that year's grant competition.

## 2008

- In the reauthorization of the Higher Education Act, COE defeats the unethical evaluation of the Upward Bound program, establishes a formal appeals process, and wins five-year grant terms for all projects.

## 2012



- At COE's Annual Conference in New York City, the Pell Institute celebrates the 40th Anniversary of the Pell Grant program.

## 2014

- Upward Bound celebrates 50 years of service.

## 2015

- Talent Search celebrates 50 years of service.
- The Pell Institute publishes the first expanded, annual edition of the *Indicators of Higher Education Equity in the United States* trend report in partnership with the Alliance for Higher Education and Democracy of the University of Pennsylvania (PennAHEAD).

## 2017

- COE hosts its first Executive Leadership Institute at Princeton University.
- COE defeats an amendment to remove \$60 million from TRIO by a House floor vote of 153-263.

## 2018

- TRIO funding cracks \$1 billion threshold for the first time in its history.
- Student Support Services celebrates 50 years of service.



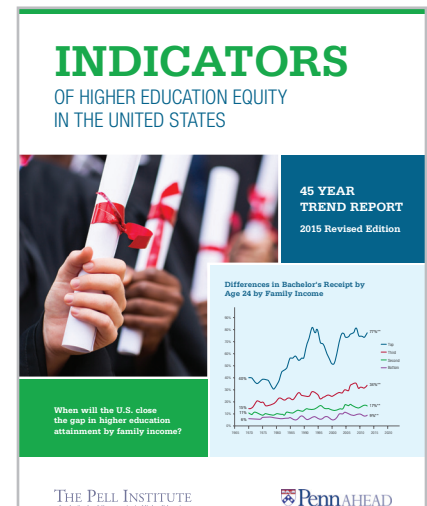
- At COE's 37th Annual Conference in New York City, the Council recognizes Academy Award-winning actress Viola Davis, her sisters, and their mother with the first-ever TRIO Family Achievement Award in recognition of the impact of TRIO on their entire family.

## 2019

- COE establishes two endowments for student services and general operating.

## 2020

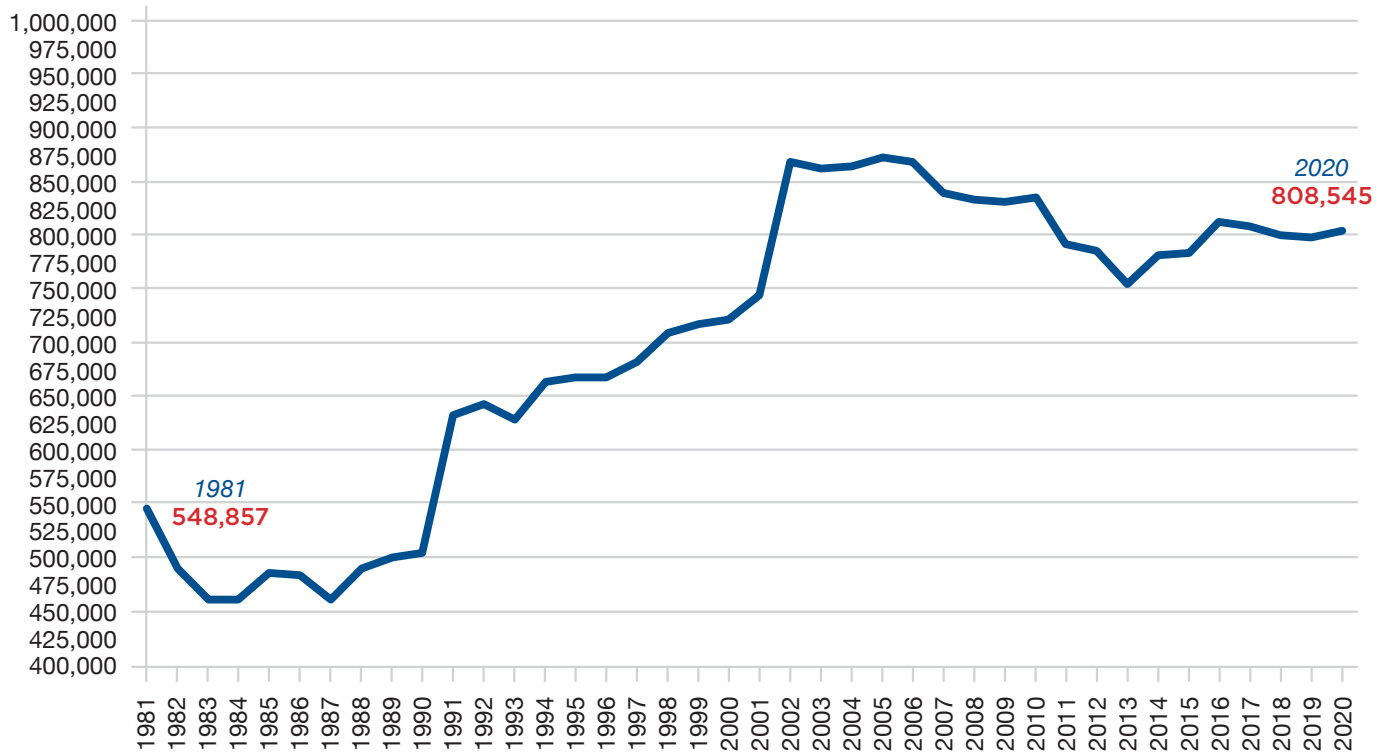
- COE launches robust online professional development offerings to respond to student needs during the COVID-19 crisis.
- Both COE's Policy Seminar and Annual Conference take place in virtual formats due to the pandemic.



## Number of Students Served in TRIO Programs

1981 - 2020

Number of  
Students  
Served





## 40 YEARS OF HISTORY & PROGRESS

### AT COE'S 40TH ANNIVERSARY: Reflections of and from TRIO

#### Henry Bonilla Counts the Ways COE Makes a Difference

*By Henry Bonilla*



COE has had a profound impact, helping millions of young people from underserved areas who had no exposure to college and are the future of our country. I shudder to think what would've happened if not for the vision that Arnold Mitchem had many years ago to start this organization, do the necessary outreach, the training, the advocacy for funds, and contact federal representatives.

My first exposure to COE—although I was a beneficiary of TRIO when I was 17—was in my freshman term in Congress. Dr. Mitchem approached me about the incredible opportunity that I suddenly had as a member of the House Appropriations Committee that funded the Department of Education to help pay it forward. We worked together for many years to increase the funds for TRIO, and we did it in a bipartisan way.

COE has just impacted so many young people around the country in underserved neighborhoods who would have otherwise had no chance. COE makes a difference in so many ways: through training, using alumni to expand its network, extending themselves from campuses to their elected officials and the staff in those offices. When elected officials learn about TRIO through COE, then they too can carry it forward for the federal financial resources TRIO needs.

When COE has its annual conference every September, you can just feel it when you walk in the room. Professionals are so fired up. They are so energetic. They can't wait to tell stories about the successes that they've had with the students back home. COE coordinates all that.

COE honors an incredible list of alumni who are examples of people who have come through the system and are now accomplished in engineering, law, broadcasting, Hollywood, and every profession in the country. Everyone leaves those conferences even more fired up, and they go back home and continue to touch those young lives in their neighborhoods.

The events I participate in generally are the ones that get into the weeds on how to reach out to your elected officials. Those contacts are priceless. And other details that matter—like how to welcome your Congressperson to your campus with a marquee sign, for example, at the entrance or letting people know—parents especially—when the visit is happening or handling photos. Elected officials can use and are very grateful for that kind of recognition to solidify their position.

TRIO helped me successfully apply to the University of Texas. In fact, TRIO changed my life. I had no idea how to fill out a form for financial aid or even to make sure that my paperwork was all proper and done the right way to get into the University of Texas at Austin. I walked into the TRIO office in my high school—it had just a little piece of paper taped to the door—and the counselor, who had that “TRIO spirit,” took the time

to help me successfully apply to the University of Texas. And he helped me with some financial aid, which I didn't even know existed because no one in my home had ever been exposed to higher ed.

I graduated from the University of Texas with a degree in broadcast journalism and had an incredible career in television news for 15 years before I switched gears and ran for U.S. Congress and had another 15-year career doing that.

So, boy, it is just good fortune that I had that hand extended to me. Later, I was able to help TRIO expand when I was a member of Congress for all those years on the Committee in charge of increasing those resources for TRIO programs.

*Henry Bonilla represented the 23rd District of Texas in the United States House of Representatives from 1993 to 2007 and is now a Partner at The Normandy Group.*

## **Sari Byerly Remembers How COE Protected Upward Bound from Attack**

*By Sari Byerly*



I was struggling in my last undergraduate year at University of Utah when I was introduced to Kathy Felker, the TRIO director there, and she gave me a job. It helped pay for my housing and my food.

This was a critical moment because I was prepared to walk away from my degree. I am the first in my biological family to attend college and complete a degree. TRIO helped me, not as a student, but as an employee. No matter how you find TRIO, whether as an employee or participant, it really changes your world.

I started as a student employee, went on to work on a master's degree (at the same institution), and every summer returned to my TRIO job. I worked up through the ranks: student employee, advisor, intern, assistant director, director, executive director, and now I supervise all the TRIO directors in my current institution.

Kathy Felker was one of TRIO's founders; she sat me down in the beginning, and she said "TRIO is bigger than this office." She showed me the big picture.

About two years after I started working as a full-time Upward Bound program advisor, the Department of Education selected our program to be a part of a program evaluation designed to limit the number of low-income and first-generation students that could qualify for Upward Bound. You couldn't opt out. You had to double-recruit students. You could serve half of them and the other half you could never serve, nor could you refer them to services elsewhere.

The University of Utah Institutional Review Board said they would never sign off on a study where you are basically telling an at-risk population, "Yeah, thanks for filling out the application but no, we get to watch and see if you fail compared to the people who do get served."

I knew Kathy was working with COE and the region and having phone calls about this awful study. One of the students who didn't get selected was actually a little brother of two students who were already in the program. I had a relationship with that mother. They were a refugee family, and I had to tell her, with her kids translating, that her youngest son was never going to be in the program, based on the study.

Later, I parked on the side of the road and cried. Arnold Mitchem asked Kathy to get on a red-eye flight to DC and make a presentation to Senator Orrin Hatch. Kathy was ill, though, so she sent me. I am a first-generation

## 40 YEARS OF HISTORY & PROGRESS

college student, and I'd never been to Washington DC. I went to Nordstrom Rack, bought a suit, figured out the red-eye, trains, and hotel and, after a couple hours' sleep, walked into COE for the first time.

My whole world shifted. Sitting in a room with a leader like Dr. Mitchem, getting to tell a student's story, and to understand advocacy changed me. It changed how I do my work and how I see the purpose of service, not just within my community, but how service and advocacy must work at the national level—or we don't exist.

I was hooked.

Visiting Senator Hatch was very scary, but I sat in the room with Arnold Mitchem and one of COE's lawyers. They prepared me for everything. When we walked into the Senator's office, I felt comfortable telling the students' stories. Sen. Hatch listened to what I was saying and said, "We've got to do something about that." I felt very supported.

The evaluation went away. All across the nation, people were fighting the Department of Education to say you can't do this. COE was fighting the whole way, and all these different pieces fell into place. I was only one puzzle piece, but every single puzzle piece had to come together. Advocacy at every level and everyone stepping up is really important, because no one individual piece is going to solve it. COE creates all those pieces so we can make sure that these programs continue to serve our communities.

The younger brother of the two Upward Bound students was eventually accepted into the program. I do know he went on to get his bachelor's degree from the University of Utah.

TRIO would not exist without COE. I 100 percent believe that. We would not exist in our current form or probably at all.

The support COE gives on advocacy is, hands down, probably the number one benefit. The other is grant writing. If you do not write a good grant, your community does not continue to be served. I have analyzed other grant-funded programs and no other organization provides the support and grant-writing coaching that COE provides.

COE stays rooted in the communities that it serves. We are a very diverse country; we have territories, regions that have an entire time zone difference in their communities. COE takes all those voices into account. Every single person that's connected to a TRIO program is COE. You stay relevant because you're not just the staff of 10-20 people. The staff help push things forward. But the community is COE.

TRIO gave me the gift to see myself in a different way. I would not be an assistant vice president without having come through professional experiences in TRIO, without having experienced leadership on the COE Board, in my own TRIO community, and without TRIO colleagues and students rooting me on. I hope that I will continue to try to give that gift back.

I just feel honored to be part of this organization, to be able to do the work I do with TRIO.

Being part of COE is the reason I get up every morning, even on the hard days. The number one thing you can ask for is having a purpose.

*Sari Byerly is the Assistant Vice President for Student Affairs at Idaho State University and the 2020-2021 Chair of the COE Board of Directors.*



## Congressman Tom Cole, a First-Generation College Student: COE is an Extraordinarily Effective Lobby

*By Rep. Tom Cole*



Many years ago, I was an academic, a British historian. I saw the opportunities that TRIO provided for first-generation college students at the University of Oklahoma. I'm a huge believer. These are very modest investments that return big time in multiple ways. You help the person achieve their dreams, but TRIO has a national imperative: societies that develop and use human talent the best, are the ones that are going to succeed the most in the 21st century. TRIO is a way that we've historically done a pretty good job of giving people who have not had opportunities a chance to participate. It's paid off terrifically for our country.

I was a first-generation college student myself. My parents couldn't have been more supportive, but they didn't really know how to help me because that wasn't a path that they had walked.

Oklahoma is full of kids that are first generation. We're historically a little bit poorer and a little bit less educated than the rest of the country. This is a big program for our state.

I think sometimes TRIO gets overlooked because it's worked so well for so long. Everybody wants to do something new in education—there's nothing wrong with that—but sometimes you have programs that work. I made it my ambition, when Chairman, to move TRIO to become a billion dollar a year program. It was getting a little over \$800 million when I became Chairman of the Labor, Health and Human Services, Education Subcommittee, and we got it north of a billion dollars. We keep trying to add to it every year; it more than pays for itself repeatedly.

COE is an extraordinarily effective lobby. I always tell people, "Just get your member to go meet your kids. Just get them onto a campus; the program will sell itself." Dr. Mitchem did a wonderful job of building up a good grassroots organization. COE was also developing TRIO alumni, which I think is such a cool thing, because you'd see these very successful people come in and talk to you about the circumstances that they were in when they were kids. They never thought they would have a chance to go to school, they never knew what was possible, and how many things they discovered and the support network that TRIO provided for them.

It's really the American Dream unfolding in front of your eyes. It's exactly the thing that we're all brought up to believe: you work hard, you play by the rules, you're going to be given a chance and you can go as far as your talents can take you. If that's not the essence of TRIO, I don't know what is.

A young woman from my district testified. She was in an abusive family, had an abusive spouse, two kids, got divorced and never had any kind of education at all. She talked to TRIO people in East Central University's booth at a county fair in Paul's Valley, Oklahoma. She said she didn't even have a high school education. They said, "We can help you get a GED, and you can come to East Central, and your life can be very different." She went on to the University of Iowa, got a doctorate, was a research fellow at the University of Iowa and was teaching at a junior college. One of her kids graduated last year, valedictorian of a high school class, and he's now at the University of Iowa and doing well. His younger brother is on track to do the same thing. TRIO changed the trajectory of her family. Isn't that what you want to do? Provide people that have not had opportunity in the past with the chance to get in?

I think TRIO does that frankly better than any program that we have in the federal government. It's a modest cost: it delivers enormous benefits to thousands of individuals across the country, and now millions of people over the course of its existence and made America a better place.

## 40 YEARS OF HISTORY & PROGRESS

I want another 40 years' minimum commitment. There's a lot of eligible kids for these programs and we don't have the funds to provide them for them. That's not TRIO's fault, that's Congress' fault. This is a spectacularly successful program, and I appreciate all the thousands of people and the visionaries like Dr. Mitchem. Congress only must write the check.

I just want to thank COE for 40 years of great work. And, you know, helping Americans fulfill their dreams, making America come closer to our own ideals. And making us a better place, better country, better society by creating the kind of citizens we can all be proud of.

*Tom Cole represents the 4th District of Oklahoma in the U.S. House of Representatives and serves as the Deputy Whip for the Republican Conference. He is a Member of the Congressional TRIO Caucus.*

### Ann Coles Reflects on Student Support Services and the Beginning of the Pell Institute

By Ann Coles



I was one of the founders of the New England Educational Opportunity Association (NEOA) in 1976. Prior to that we had a regional council appointed by the U.S. Office of Education regional officer overseeing the TRIO programs. I was on the first board of COE in 1981 when I was NEOA's president elect.

TRIO funding was year-to-year with no assurance from one year to the next that you'd be funded. When Congress mandated that prior experience be incorporated into TRIO funding decisions in 1980, we developed criteria for "prior experience" points that ED incorporated into regulations for TRIO. That was a huge achievement, because it assured some continuity. The other big issue was increasing funding significantly. And multi-year funding for three years, then five, was big because it strengthened continuity of programs.

I've always been very interested in college affordability and financial aid issues. When I worked in the Student Support Services program at North Shore Community College, the Department of Education was giving people money to pay for college and the Department of Agriculture was taking away people's food stamps, because of the money that people were getting to pay for college. We got a judge in Springfield, Massachusetts to issue an injunction saying the Department of Agriculture couldn't count financial aid as family income in calculating eligibility for food stamps.

My conceptual framework for Student Support Services was the primary prevention model.

Primary prevention means you directly serve students and assist them with whatever problems they have. Secondary prevention is education to prevent problems that require direct intervention. Tertiary prevention is focusing on the systemic issues that create the problems in the first place and removing systemic barriers. That's always the way I've thought about this type of work.

In the early '90s, when Pell Grants weren't increasing, I approached Dr. Mitchem and said I think we also must pay attention to financial aid: Upward Bound and Talent Search raise kids' expectations that if they work really hard, they get to go to college; but then they can't go because they don't have the money. So, I started the financial aid subcommittee of the COE Board and co-chaired that for several years with TRIO Director Pam

Boisvert at the Worcester Consortium for Higher Education. We prepared reports, boiling down all the research studies on what was happening with federal funding for financial aid and state funding. People used that information in their states, with the regional and state associations, and in their own work on their campuses.

I was also involved in the beginning of the Pell Institute. This was because in 2000, I became founding director of the Pathways to College Network, an idea of then-Secretary of Education Richard Riley, to have all of the different organizations that work on college access and success issues collaborate. This goes back to the (above-mentioned) idea of tertiary prevention. We had 30 member organizations—COE included—with the central idea being to translate research into action for policymakers and practitioners and scale all this work in a meaningful and impactful way. The Pell Institute was involved; they developed a set of tools to help practitioners use data to drive decisions and improve policy and practice.

*Ann Coles is a Senior Fellow for College Access Programs at uAspire.*

## Barry Cosgrove: TRIO and COE Are Both Needed Now More Than Ever

*By Barry Cosgrove*



I first encountered TRIO when I was a sophomore at Marquette University. I saw an advertisement for a tutoring job there. But much better yet, I actually qualified for the program, and I am proud to be involved with the program to this day.

It really woke me up to the idea of having a cause, something you believe in and commit to. And to what it is to be a leader, to believe that there's something that you should do, get behind it, and to try to get people to understand the issues and hopefully serve some greater purpose than just yourself.

I've come to appreciate more and more over the years that giving young people opportunities is crucial, and it's great to give them the financial support in pursuing these opportunities, but if you put young people in situations where they can't succeed, you're not helping them at all. In fact, you're hurting them.

The TRIO—and COE—difference: It's the support services, the ability to help somebody graduate from college—not just get enrolled into a college but to graduate. Look at the data in Milwaukee, for example, where only around 8 percent of all kids of color so much as achieve an associate's degree. It's the support services which actually help people succeed most once they're in a school and learning environment.

I think COE remains relevant now because it's needed more now than ever. Look at the data I just mentioned: we've got to do something about creating not just opportunities for people to get into school but the ability for these students to graduate, and thereafter break the cycle of poverty.

Breaking the cycle of poverty is more important than ever, particularly when you look at the data. The rich are getting richer and the poor are getting poorer. Looking into the future, if you look at the raw demographics, we must have an educated population in the United States for the country to be successful. People always talk about China, and say, "China's so much more educated than the United States of America." Only about 10 percent of the people in China have a college degree. To be competitive internationally, [TRIO] is going to be a huge advantage to all of us because when people get more educated, they're not going to tolerate dictatorships, and inequality. It's just better for the whole world that people are educated.

TRIO is viewed in too many institutions as just another nomenclature for financial aid. That has to be fixed. We have to have a system at the university level where the TRIO-funded programs obligate the deans of



## 40 YEARS OF HISTORY & PROGRESS

every college to be active participants in driving the TRIO and COE mission. I don't think TRIO can be a small, isolated function within the university. I think instead that it has to be an umbrella function at the university-wide level. Every dean in every college should have a specific set of goals and timetables for what they're going to do to further the TRIO mission. [TRIO programs] should be integrated and engaged and involved in each of the departments, in each of the schools with the deans making sure that this happens.

I heard somebody say during the pandemic that they got a good laugh out of this idea of social distancing because a lot of TRIO kids feel that they've been socially distanced from the other kids in college their whole life, only they didn't need to wear a mask to know it.

It's this notion of the power, the skills and the perspectives that TRIO-eligible kids can bring to the non-TRIO-eligible kids. That marriage of ideas and different cultures is where the real opportunity happens.

It won't happen operationally in a bureaucratic university setting unless you say to all the deans, "Look, this is how this is going to be done and you have to make sure in your own college that these students are fully integrated into your programs."

I want to say thank you to COE, to Marquette University and the Marquette TRIO program and all the people engaged. It's extremely hard work, and must be very frustrating at times but I don't know where we would be without them. So thank you.

*Barry Cosgrove is a founder of DaVita dialysis centers and is the President and CEO of Blackmore Partners, LLC.*

## Charles Desmond: TRIO, With COE, Makes Expectations Real

*By Charles Desmond*



When I came back from Vietnam, I was concerned about the circumstances that led to my being drafted. I was left for dead on a battlefield and wasn't sure I was going to come home alive. I just said, "How did I end up here?" I hadn't gotten an education, hadn't thought about my future, and hadn't thought about the consequences of my decisions. I had a battlefield (religious) conversion and said, "If I get out of here alive, God, I will go back and do something constructive with my life."

I got back to the States, got my degree from Northeastern [University], and then I took a job as an Upward Bound director because there are a lot of kids that, like me, made terrible decisions. I wanted to find a program where I could work with young people who were like me when I was their age.

That led me to the University of Massachusetts-Boston Upward Bound program. Through it I became involved with the national group spearheaded by Arnold Mitchem, Maureen Hoyler and others, organizing efforts around opportunity agenda issues, college costs and affordability, access, choice, retention and higher ed.

It was during the desegregation of the Boston Public Schools, a very volatile, difficult period. Boston had a historic pattern of segregated, separate, and unequal schools. The courts got involved so there was an extreme sense of volatility regarding social justice issues, opportunity issues, and the separation of communities along racial and economic lines.

[TRIO offers] a combination of complementary services. The programs focus on preparing students for higher education. Getting students ready intellectually, emotionally and socially, to recognize that higher education is something that's real for them is a critical part of the complementary services. Motivation and inspiration are as important as developing the academic skills that you need to succeed. Minority kids and low-income kids confront a big social reality when they realize that they are different from middle-income and upper-income kids who prepared all their lives for higher education.

Arnold Mitchem really educated, inspired, and motivated me to realize that I could do more than I thought I was capable of doing myself. Many times I used myself as an example to the kids I worked with. I'm the youngest of 10 children. I came from a broken home. My father was an alcoholic. I did not get the guidance and support I needed to make good decisions, but that doesn't mean your life has to stop there. I told students I worked with, "This is your opportunity to choose a different path. And these are benefits that can come to you as a result of higher education." That was a very inspiring message, and it made a big difference.

Early on in the COE movement, we did research around the alignment between aspirations and expectations of students we served. They had high aspirations—they wanted a degree, a good job, and a home—but if you asked if they really thought that was going to happen, they would generally say, "No I really don't know anyone who actually got out of the projects, went to college, or got a good paying job downtown making a lot of money."

COE is talking to young people, poor people, low-income people of all colors, all persuasions, all backgrounds, all across America, saying, those aspirations that you have can become real expectations.

COE is always going to be relevant because its roots are so deep in the communities, families and neighborhoods in which we work. There's an awful lot of trust in what COE is trying to do. It's providing leadership, it's cultivating a whole cadre of young people who are going on to wonderful things. We've got a United States Senator now and elected members of Congress who were TRIO kids.

We have a long way to go on the equality agenda in the United States. Democratizing education is what TRIO is all about. We've got work to do. As long as we're going to continue to see the savage inequalities that we see in America today, the need for what we do will constantly be present.

Every movement takes time. Forty years seems like a long time but it's not really that long of a time. We've learned an awful lot, become much more effective and are much more engaged.

We know how to organize people and get involved in political conversations and discourse about the need for what we're doing. And there are still many, many sectors in our society that would benefit from higher education if we simply did a better job of delivering it.

Major studies say the lack of education is holding back the American economy. We could be an even more prosperous nation, we could spread wealth much more equally, we could have great influence internationally. if we had a better educated citizenry. It's a national security issue and a national opportunity.

After 40 years, more people are listening to us and we're getting more support.

TRIO said there are great things I could be achieving and I shouldn't limit myself.

I completed my degree, got my doctorate degree, and I have three honorary doctorate degrees. Who could have imagined, growing up in the family that I grew up in, that I would have been able to do the things that I've done? I was the Chair of the Board of Higher Education for the Commonwealth of Massachusetts, appointed by the Governor. That never would have happened without TRIO. We all have horizons we are unaware of and that we can strive for—if we get someone to point us in the direction of our North Star and travel with us along

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that path. That's what TRIO does. TRIO does not abandon kids, it doesn't abandon the people who work in our programs, it doesn't walk away from the issues.

I just want to say congratulations to Maureen and Dr. Mitchem and to all of the people on the COE Board, the wonderful people that are leading and the outstanding staff. To the countless students who have come to these programs and those enrolled today. I wish you all the benefits the program can bestow on you as you go through it.

*Charlie Desmond is a former board chair of the Massachusetts Board of Higher Education and served as the 1984-1985 Chair of the COE Board of Directors.*

### How COE's Voice in Washington Strengthens Community, Empowers Students

*By Jennifer Engle*



**M**y first job out of graduate school was working with the Pell Institute. I had an opportunity to research issues affecting low-income, first-generation students, like myself and to understand the barriers they face and the practices and policies we can put in place to help them through the college-to-workforce pathway.

COE's voice in Washington is critical as it represents TRIO programs, program staff, and the students they serve—especially given that so much of the conversation in higher education is dominated by elite institutions. Many TRIO programs come from less resourced institutions that don't have lobbyists speaking on students' behalf. That voice is critical to protecting and growing TRIO funding.

COE is an unapologetic advocate on behalf of low-income and first-generation students

The War on Poverty was never won. Some of the advances in the '60s and '70s retrenched in the '80s under different leadership, setting back the cause and generations of students. The work over the last 20 to 30 years has been making up some of that lost ground.

Our policies, as they're related to poverty, have not kept up with the increased demands on students. This is especially so, given what we've seen during the pandemic. Low-income, first-generation students are first to interrupt their college plans—even drop out—as a result of COVID. It's more important than ever that these students are able to leverage college as a way to experience upward economic mobility. The size of the Pell Grant, or even how many students TRIO can serve, is an important part of bridging that gap.

COE has an important role to play in changing perspectives in Congress and generating a sense of community, as well as being an unapologetic advocate on behalf of low-income first-generation students. As a chaperone on student visits to Capitol Hill to speak with legislators, I saw how these visits could change a Congress member's perspective. When a legislator looks a student in the eye and explains to them why the system is insufficient to meet their needs, it makes a difference.

The other piece is the power of the TRIO community. When you get exposed to TRIO staff at the Policy Seminar and annual meeting, it's like a shot in the arm of optimism. It's palpable how much this whole professional community cares and is looking out for low-income, first-generation students. If they weren't there, so many people would not have been able to access that college dream and really make it a reality.



There is a lot of momentum with the new administration, as well as in Congress, to really push the affordability agenda in a way that we have not seen in years. If we leverage this moment, COE will leave a legacy for current students and future generations.

*Jennifer Engle is a former assistant director of the Pell Institute and is now the Acting Director of U.S. Program Data at the Bill & Melinda Gates Foundation.*

## At COE's 40th Anniversary, A Reminder to TRIO Professionals: "We Are COE"

*By Kyle Ethelbah*



I first encountered COE at my first professional position with TRIO at the University of Nevada, Las Vegas. My supervisors directed me to COE's national conference because I was brand new: they wanted me to know about the organization and understand what my role in my new profession was going to be.

When I first encountered COE, the issue was how *No Child Left Behind* affected TRIO. COE helped us think about this in a way that made sense, both to our programs and at the national level. Up until then we all knew that TRIO worked, but we hadn't had an opportunity to tell a strong, nationwide cohesive story. COE helped us direct our programming and to tell our stories with impact.

Prior to working for TRIO, I'd been to other national conferences but never really felt like I was plugged in. Conversations on the policy level were above my pay grade. COE was the first time in my career that I felt that I was part of a larger organization, a body of individuals that really had a say.

From access of services to certain populations to extending services to immigrants or non-U.S. citizens—DACA recipients specifically, COE engages in conversations that bring issues forward to the national level. And COE encourages building on lessons first engrained by TRIO.

One of the most helpful lessons COE teaches is the importance of engaging with legislators locally and at the national level. That has allowed us to engage in more nuanced conversations within our populations in terms of what it means to be a TRIO professional. The Executive Leadership Institute and the Emerging Leaders programs were born of this.

Many leaders within the TRIO community come from the populations we serve. In a lot of cases we're the first in our families to be at the table on anything. The executive leadership programs assist professionals in using their very powerful voices that are otherwise unknown in a lot of our institutions.

As a TRIO alumnus, I learned many lessons, too. First, the basics of how to engage in a classroom. Sit at the front and ask questions if you're unsure about what's going on. I always sit up front because people need to know who I am, that I represent a constituency that's not usually represented and to use my voice because it's going to impact students that I serve and their families and communities. The next one is family. TRIO has been my family. It has guided me through my professional and personal life. Were it not for TRIO, I don't believe I would have the life that I have. Engaging in these conversations is important for my professional development and keeps me connected to people I have come to know as family members from across the country.

If you're a TRIO professional, you are COE.

We've always done advocacy very well, making sure that our different regions had the resources to provide services for our low-income communities. At the turn of the century, when "first-generation" began to emerge

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as a conversation in higher education, we saw that we could mold the conversation at the national level. We're partnering with organizations around this. Our professionals have the sense of the larger conversation in higher education, associations and industries. Early on, TRIO really kind of sat in the corner by ourselves. We are now at the table.

I wish more people understood that COE is not the oversight organization. It does not dictate what policy is going to be. The reality is COE brings people together for conversations about current policy, what our voice means to this conversation, and how we can have an impact.

If you're a TRIO professional, you really are COE because COE seeks your input, seeks your voice, and seeks the voices of your students. Students in Salt Lake City don't have the same issues as those in a village in Alaska who might have to fly to get to the program. We make sure needs are not overlooked; COE does not dictate that.

When I'm engaging in conversations with my colleagues in the TRIO community, I feel I'm heard. We can disagree on the way we approach and handle certain things, but at the end of the day we are fighting for a common cause and that ultimately binds us and makes us family. COE has really given me that confidence to be able to now speak up.

*Kyle Ethelbah is the Director of College Programs at the University of Nevada Las Vegas and the 2019-2020 Chair of the COE Board of Directors.*

### **Kathy Felker: “With Support from COE, TRIO Staff Are Not Alone on Their Campuses”**

*By Kathy Felker*



**B**efore COE was established, around 1975, my colleagues and I pulled together some TRIO people to have our own training in Utah and Colorado. Brooks Anderson from Montana and I went to the second annual Mid-America Association of Educational Opportunity Program Personnel (MAEOPP) conference in Wisconsin. We were excited to see TRIO people doing something independent of the Office of Education; also, Congresswoman Shirley Chisholm was the keynote speaker.

Brooks and I returned to our region and cajoled our colleagues into forming an organization: ASPIRE—Association of Special Programs in Region Eight. We had our first conference in October 1977 in Park City, Utah. Arnold Mitchem and other early TRIO activists—Oscar Hernandez, Marian Belgrave-Howard—came to support us. Then in December 1977, the three ASPIRE officers attended the first meeting of the National Coordinating Council of Education Opportunity Associations (NCCEOA), which became NCEOA, National Council, which became COE.

[The period] 1977 to 1981 was really an organizing period. We just jumped right in, naive as we were, to tackle reauthorization of the Higher Education Act—and were very successful at it. That was my first introduction. I was on the Board of the Coordinating Council because I was then vice president, then president and past president of ASPIRE.

We were writing a grant every single year. We'd get funded, function for a few months, and then write the grant again. If you had multiple programs, it was crazy. We pushed for multi-year grants. It was incremental, but the grant period is up to five years now. There were also discrepancies in the criteria for the various projects. For example, Student Support Services's criteria included "rurally isolated" and "culturally disadvantaged." Upward Bound and Talent Search had different criteria, and "culturally disadvantaged" did not sit well with a lot of people.

We thought it was very important to establish a standard set of criteria across the programs and came up with low-income, first-generation college students. Student Support Services, at that time called Special Services for Disadvantaged Students, also targeted students with disabilities and that was put in as a specific criterion for the program. As I recall, Maureen Hoyler wrote up the language and gave it to the Congressional representatives who were pushing our position, and it passed.

In about 1975-77, TRIO was "level-funded" for three years during a period of very high inflation. Projects were being cut for lack of money, we had no real political voice, our constituency was low-income kids (not a powerful lobby), and TRIO consisted of a few hundred isolated projects spread across the country. For the most part, TRIO personnel had no idea about how to affect the system. Since the 1970s, there have been many battles and threats to TRIO. Without the organization, the push and training from COE (and NCCEOA and NCEOA) on how to talk to Members of Congress, put together a letter and rally the troops, TRIO would have been gone.

The biggest benefit was the support system for program directors and personnel. Back in the '70s and '80s, my university wasn't overwhelmingly supportive of TRIO. We sometimes felt like outcasts, but we always had COE and ASPIRE and felt like part of a bigger thing.

There was also training to help navigate issues from Washington like grant writing or *No Child Left Behind*. Not all staff members could go to a national conference, but there were regional conferences and regional associations. Because of COE, it was a national network. I knew people that I could call.

In 2007, the Department of Education commissioned a big study of Upward Bound and the program I ran was a part of it. The requirement was to select double the number of eligible students that you had space for.

You invest a lot in recruitment. You're talking to the kid, to their parents, you're trying to convince the parents—especially immigrant and refugee parents—that you're not going to do bad things to their kid. We got the parent's tax returns so that we could evaluate the low-income status; we had all kinds of personal information about kids and about their families.

So, we double the number of kids, submit the names, and some researcher randomly selects which of these kids we admit. A nightmare, logistically and ethically. They were going to track both admitted kids who would be getting the Upward Bound services and all those to whom we'd said, "No, you can't be here."

COE pushed us to get involved. We wrote to our Congressman. I went to the university director of research ethics, and he said, "This is horrible, unethical, and we don't want to be associated with it." He wrote to the Department of Education and to Senator Orrin Hatch. COE called me to come to Washington and meet with Senator Hatch. I was violently ill, but Sari Byerly, then an Upward Bound counselor, went in my place. Later, the study was scrapped. It was because of the efforts of TRIO personnel and institutions under the guidance of COE.

We immediately called as many of those kids that we had denied and admitted them to whatever we had available. It was very disruptive to the programs and the kids. There were institutions that didn't want to host Upward Bound anymore. People quit. Some parents called and yelled at me. But we fixed it.

With the support COE staff gives to programs—training, advocacy, and rallying the troops—TRIO staff are not just out there all by themselves on their campuses. I think that to some extent they don't know what it

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would be like without COE. Without COE, how do you know there's somebody in Salt Lake City who has been trained to talk to a Senator and can get on a plane? That we wouldn't still have that study going on or be targeting culturally disadvantaged students? Or that there wouldn't be a TRIO anymore?

Being with a national group of people, both urban and rural, white and people of color, all committed to the same purpose was personally enriching. COE fostered inclusiveness, a culture of getting along, of caring for low-income students and first-generation college students. I never could quit until my husband insisted, "It's time to retire."

*Kathy Felker retired from the University of Utah Educational Opportunities office in 2012 after 42 years as the Director of Student Support Services and Upward Bound.*

### T. Chris George Thanks COE for Developing Leaders in TRIO

By T. Chris George



I started in TRIO in 1999. When you're just an advisor, you don't really know much about what's going on outside of your campus or your state. My first encounter with COE was around 2005. My then-director told me to go to the COE Policy Seminar. President Bush wanted to zero out Talent Search and Upward Bound. Dr. Mitchem instructed us, "flood the call center at the Capitol, show them our power!"

That was the first time I got to do a congressional visit. I was excited and hoping to see Jim Bunning, (the only baseball player ever elected to the U.S. Senate and the Baseball Hall of Fame), but we only got to see a legislative aide. That first visit is captivating: you're wide-eyed. We tell people going for the first time to embrace the experience. We're there to do business: we need money for low-income, first-generation students and students with disabilities. As Dr. Mitchem says, "No permanent friends, no permanent enemies, just a permanent agenda."

Not only did those TRIO programs not get zeroed out, after sequestration, TRIO was one of the only sets of Department of Education-funded programs that got its money back. And we've since gone over a billion dollars in funding. COE knows what it's doing and gets the job done.

I don't think we would have been anywhere near that success without the vision of Dr. Mitchem and Maureen Hoyler and their making us a bipartisan program. We don't have a partisan issue. Democrat or Republican: I'm down with whomever is down with TRIO.

This group of programs that started in the 1960s with the War on Poverty wouldn't be where they are without COE's vision, mission and organizing that started in the 1980's. We're a very small lobby in the grand scheme of things, but we're low-hanging fruit that can probably get pulled quickly in appropriation discussions. TRIO professionals and students need to understand that in COE they have a very powerful lobby in DC with the track record to prove it.

And on the 40th anniversary, we see how the center has held during COVID. Being nimble is important, and out of crisis came creativity. One year ago, we were set to go to Policy Seminar and Maureen pivoted and took us online. TRIO became a leader in virtual education. We had to quickly pivot to make sure that Upward Bound students had their summer component, McNair students' research components continued, and SSS students had FAFSAs done. COE was at the forefront of putting on workshops, teaching people how to



support students in a virtual world. COE kept pushing and had a great annual conference, another Policy Seminar this year, and we're set for a big reboot in Atlanta.

In the process, leadership development has really gone up to another level. We've probably had more participants in our onboarding in a virtual capacity. With virtual you're reaching more and more people and in cost-effective ways.

I was very fortunate to go to the European Access Network conference as part of COE's study tour in Europe in 2019. It enabled me to connect with the people I traveled with and speak with European leaders in higher education and it changed my worldview. A small group of us visited a concentration camp. I still haven't fully processed that.

It's just a privilege to be able to walk in the footsteps of some giants in the TRIO and COE movement. It's not a job to me; it's a passion, it's a movement, and I would do it for free.

*T. Chris George is the 2021-2022 Chair-Elect of the COE Board of Directors and is director of Student Support Services at Southcentral Kentucky Community and Technical College.*

## Dick George: The Importance of Measuring Higher Ed Equity and Protecting Vulnerable Populations

By Dick George



[My acquaintance with COE] goes way back to the early days when Dr. Mitchem was still at Marquette University. He was working with the Educational Opportunity Program in Milwaukee, a program we supported. We got to know him very well and when he relocated to Washington to take the helm at COE we followed his progress. Everything he and COE were doing was directly relevant to our mission here at Ascendium. It was a natural fit for us.

We are a nonprofit with a mission very similar to COE's: postsecondary access and success. The TRIO programs direct their efforts to many of the same low-income constituencies Ascendium serves: first-generation students, incarcerated adults, rural community members, students of color, and veterans.

One thing COE does that's most relevant to us is its annual report, *Indicators of Higher Education Equity in the United States*, [produced by the Pell Institute for the Study of Opportunity in Higher Education]. The metrics measured in that report on a longitudinal basis are the very metrics that we use for most of our philanthropic grantmaking. Having that report tracking those metrics over time gives us a much clearer view of things that are changing, things that aren't changing, and policies and practices that need to be reinforced. It fits very well with how we go about our grant making on the philanthropy side of Ascendium operations.

Dr. Mitchem has often reflected that the programs have come under attack, almost regularly, from various administrations. COE's efforts over the years to bring awareness to what TRIO really means for our society's most vulnerable cohorts has been probably one of the paramount objectives and accomplishments over the years. We're seeing almost a revision—instead of cutting these programs—that we need to be increasing because of the meaningful results they achieve for these vulnerable cohorts.

Being the voice for the TRIO programs and for the hundreds of thousands of vulnerable individuals TRIO serves is probably the most critical aspect of what COE does. As a practitioner in grant making for college access and success, we find a lot of value in the communities of practice where COE brings together practitioners to share things that are successful and have the most impact for the constituencies that we serve. It's absolutely critical that practitioners have access to what each other are doing, not just successes, but failures as well. If we repeat

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failures, we are doing a disservice to the limited resources. The Pell Institute similarly analyzes those things that work best and shares them with others—these are critically important services.

Not enough people understand the impact that one-on-one services have with the vulnerable cohorts that we're trying to serve. We would always like more information disseminated to more people—particularly to our political leadership that sometimes talks about these issues without a deep and resonating understanding of how these programs really touch people on a daily basis.

We hope the next 40 years are even more successful than the past 40 have been and that we will be able to continue the relationship we have with COE and the critical work that they have been doing. And we hope COE continues well into the future.

*Dick George is Chairman, President, and Chief Executive Officer of Ascendium Education Group, formerly the Great Lakes Higher Education Corporation. He was the recipient of COE's Lifetime Service Award in 2015.*

### Pastor Jonathan McKenzie Prays that COE Continues for Years to Come

*By Jonathan McKenzie*



Around 1990, I was a Student Support Services program coordinator. We had a site visit, and we learned that we needed training and help. The auditor suggested that we reach out to other programs and COE. I attended Maureen Hoyler's regulations and management training session where she was teaching about the power of regulation and law. It was just such a powerful session.

It changed my life.

I learned while serving. I got involved in our state association, regional association and on a national level. A lot of people say, "I don't really have time for advocacy." But it was through that work that I grew, learning about budgeting, organizational development, training, and advocacy strategies.

I learned everything and I got so excited that I decided to leave higher education. I started my own nonprofit organization in 1998, based on leadership strategies and principles I learned from assisting COE.

COE changes lives. Not only the lives of students but the lives of practitioners. I left higher education with courage, knowing that I had tools to be a better servant in the community to families and to low-income, first-generation students. It was a risky move, but that's the way COE operates. They work without fear.

You can't be afraid to speak truth to power. Everyone at COE has a boldness about them. If we're going to impact change, that's the way we must be...to advocate and to serve in areas where others are afraid to go.

I worked with [TRIO programs] at three colleges so I had a lot of history, a lot of training in directing TRIO programs. When I was at the institution, a young man came by the Talent Search room and asked if we had jobs, if we helped with resumes or interview skills. I said, "No, we're a Talent Search program; we help students to go to college." He asked why we were here in the community.

Sometimes the needs of the community exceed the regulations. And it requires that you really be present and speak to the needs of people and so I decided that I wanted to do more.

I stepped out on faith, and, writing an Upward Bound grant, read the regulations that show that you can run this as a nonprofit organization. The grant was funded, and it was the start of something beautiful. I'd never worked as hard in my life. The support was there to support everything I had to do, but I had to learn about IRS law, budgeting, finance.

The training is very helpful. They teach you how to receive a grant program. We started with one and now have seven. More importantly, they teach you how to run the programs once you receive the funds—so you can keep the funding.

Then they challenge you to be responsible, to have a code of ethics. It's not enough to write and receive the grants. What will you do as far as advocating to continue the funding, not just for yourself, but for the entire nation? Having that voice out there is important. I've received funding from other agencies, and I've seen those programs come and go because they don't have a voice.

COE is the voice of TRIO, and its staff teach and train in such a way where we can all speak truth to power and play a role in the continuation of advocating on behalf of low-income first-generation students. COE has its finger on the pulse of Washington, DC, and the community, and it helps those in power understand and speak to the issues.

COE remains relevant by listening to the constituency in the field and responding appropriately.

The pandemic is an example. The regulations said nothing about serving in a pandemic. There was no process for serving, recruiting, and finding the right technology to reach and serve students. We started hearing from others within the community, and COE found leaders and practitioners who were doing creative things: people who had been using technology for years to automate programming and automate programs, services, and video to reach families and online learning and instruction. They shifted their approach to continue to meet the needs of the constituency and of low-income, first-generation families.

I wish others knew how important it is to have a voice in Washington that can speak to both sides of the aisle, to have a presence in Washington that understands the power of legislation.

Those who were behind the Civil Rights Movement understood the power of the law and were able to bring change to Black America through legislation. COE brings change to low-income families through its legislative actions but also through its ability to organize us out here. I've seen other federally-funded programs dismantled and discontinued because no one was speaking up for them on their behalf.

I feel that we are so blessed to have COE, and I'm glad that we're celebrating this 40th anniversary. I'm glad that I can speak my heart. Regarding this organization, I pray that it continues for years to come.

*TRIO Alumnus Jonathan McKenzie is the Chief Executive Officer of the Family Centered Education Agency and served as the 2002-2003 Chair of the COE Board of Directors. He is also the Pastor of Hopewell Missionary Baptist Church in Chicago, Illinois.*

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### How Congresswoman Gwen Moore Applies a Deep Yearning for an Education to her Policymaking on Capitol Hill

By Rep. Gwen Moore



**M**y first exposure to the TRIO program manifested for me the deep yearning I had for a college education. I had gone to the University of Wisconsin Milwaukee's Upward Bound program, and spent the summer on campus with other students. I had some bad experiences in high school, where counselors were not encouraging me to go to college and instead were urging me to try something more "suitable," so Upward Bound was where my TRIO experience started. Then I saw a flyer on the bulletin board publicizing a meeting with Dr. Mitchem who was recruiting for the Educational Opportunity Program at Marquette University.

I wanted to go to college, but number one, I couldn't play football. So I was not going to get any scholarship that way. My parents didn't have any money to do anything. I was just very, very poor. And I didn't know that I would become pregnant in my senior year of high school. So I thought going to college was really off the table for me.

There is something that outsiders don't understand about TRIO programs. We know that TRIO programs do a great deal in terms of academic outcomes, of matriculation and graduation, but TRIO students learn unexpected lessons from their experiences in the program that aren't so academic. These lessons help you navigate life.

TRIO helped me find my way through my own personal social problems. The people I met through TRIO became my social network. I relied on them. They staffed the TRIO programs and gave kids tutoring, but I didn't need tutoring so much. I needed social support from tutors, staff, and the extended family that was TRIO. You see, I was not only low-income by definition of the amount of money I had, but poor in terms of the resources that were available to me. And honestly, that my education came with the social support, financial support, and academic support; it was just of immeasurable importance.

But the TRIO programs cared about me on a personal level. Many TRIO programs really do focus on recruiting people locally. Program staff were invested in actually getting a bachelor's degree, and not just checking some box and saying, "Oh yeah, we served an African American female." It actually mattered that I graduated. Other students who were volunteers in the tutoring programs came in and really became big sisters and brothers on a wide array of other things. But I do think that TRIO programs integrate into the larger communities. The local recruitment empowers those communities. You develop a community of TRIO alumni who find themselves serving on the City Council, or becoming the local doctor.

So, the Civil Rights protests and the development of this TRIO program brought me along—someone who is now a member of Congress—who would not otherwise have had that path.

*Congresswoman Gwen Moore represents Wisconsin's 4th Congressional District in the U.S. House of Representatives. She is the Democratic Co-Chair of the Congressional TRIO Caucus.*



# Inaugural COE Board Chair Hal Payne Reminds Us that COE's Influence Extends Internationally

By Hal Payne



My involvement in this work started with my involvement with the Ohio Association [of TRIO professionals] around 1973. We were among the first in the country to organize professional staff working with TRIO students. But the very first such state organization was put together largely by Arnold Mitchem, in Wisconsin.

It was during my service with the Ohio Association that I was invited to the Mid-America Conference in 1973, which met in Wisconsin. I first met Arnold Mitchem and Maureen Hoyler at the conference. We debated how we were going to organize the college professionals helping TRIO students nationally. TRIO, of course, had really started with the Upward Bound program back in 1964, and it led to the development of the other programs, like Talent Search and Student Support Services. But they were discretionary programs, and we were worried about how to sustain them.

COE started in 1981, but a whole lot of water had to flow under the bridge before this national organization formed. I became the first Chair of the Council's first Board of Directors. Our biggest problem was that we didn't have any money. The rent for COE's office space came from donations from several of the regional officers who took out mortgages on their own homes. So, we decided on membership fees to fund the first office of the Council.

COE makes a difference through its vision that a group of TRIO professionals would be a logical interest group to talk to Congress. That's the genius of the Council. We have, over the years, developed a bipartisan approach to lobbying. Our own TRIO students come from all over the country to lobby congressmen. They do so on Capitol Hill and in their home offices. We have avoided an association with just one party to gain support from both sides, without any regard to who's in power. That's the magic! And so far, it's worked.

The TRIO Achievers program honors alumni from colleges all over the country who have done enormous things. They've flown in space. They have won Emmys, Tonys, and Academy Awards. They have been elected to the House and Senate. We pull support across all political parties. And we have a wonderful lobbying platform that is bipartisan. When we needed support, even members of the Freedom Caucus within the Republican Party decided to support us. COE has made that possible. No other organization has the same voice for TRIO students.

What most people don't appreciate about the Council is this: COE has been very influential, not only in the United States, but internationally, in the founding of similar organizations [that help low-income, first-generation students and those with disabilities gain access to college]. For that reason, Arnold Mitchem is a hero in Europe. That's part of our history that many do not know. The college opportunity movement has reached Europe. Those countries provide a great deal of government support for college, at a much more significant level than the support that we get in the United States. But for a long time, that funding amounted to support for an elite group of students. Since the fall of the Berlin Wall there has been support for different, emerging classes of people to go to college, and COE has helped with that evolution.

*The 1981-1982 Chair of the COE Board of Directors, Hal Payne retired in 2017 after 27 years of service as Vice President of Student Affairs at State University of New York at Buffalo.*

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### Monte Perez Reflects on Developing the Irrefutable Principles, the Framework for COE

*By Monte Perez*



When I was a TRIO program director in the 1970s at California State University, Los Angeles, I attended a national conference put on by what's now the Department of Education, met other program directors, and became aware of an interest to organize associations across the country. I was particularly interested in organizing my home state, California, and the western region. While working on that, I and my friend, Gus Chavez (TRIO director at San Diego State University) attended the Mid-America conference (that Dr. Mitchem was part of) to meet Mitch and talk with Mid-America leadership about their organization and goal.

I shook Dr. Mitchem's hand and said, "I very much would like to collaborate with you." We struck up a partnership, a friendship. I then organized the National Association of Educational Opportunity Programs, one of the founding associations of COE with Mid America, the Northeast, Northwest and Southeast regions. We came together in a national meeting and created the National Coordinating Council of Education Opportunity Associations in New Orleans in December of 1977.

Prior to that meeting, we had the Columbia Conversations, where six association presidents across the country came together. At that time, we had the Columbia Conversations, where association presidents across the country came together in Columbia, Maryland and developed "Irrefutable Principles." It was a document like a charter: this is what we're about, what we're trying to accomplish, and we're going to focus on the Congress. That was the framework for the Council for Opportunity in Education.

We got really involved, particularly on the congressional side. We had concerns about the executive branch being overly dictatorial toward our programs. The Department had regional offices. There was a sense of "This is the way it's supposed to be, and this is what we expect you to do and if you don't, your funding will be affected," as opposed to the people running these programs having a say about how to deliver.

We organized and created a better relationship with the executive branch, but we were not seeing much growth in terms of appropriations. So, we organized nationally to influence legislation and appropriations. Our focus was on Congress, because we knew that if we could get those appropriations, the executive branch would carry out the wishes of Congress.

I organized our first testimony on the Hill. Arnold Mitchem, I, and others testified in Washington. They were blown away. We were a coalition of Latinos and African Americans, from all parts of the country, all saying the same thing—that we needed to ensure that low-income individuals receive the dollars and support to succeed in higher education.

From there we moved forward. In 1978, during the time we were organizing nationally, I received a Health Education Welfare fellowship and ended up working for the Commissioner of Education in the Office of Education as a policy analyst for one year. I was sort of an insider-outsider. I was inside the executive branch and communicating with the associations.

That's how it all started for me, and it's been a great ride so far. The most valuable service, first and fundamentally, is COE's relationship with Congress. Then, its ability to organize the country: relationships

with regional associations on a national basis, unifying and sharing a common vision. People from different parts of the country, different types of backgrounds, multicultural, multi-racial, that may have had different views, but COE cemented and brought together perspectives in one common vision, to impact legislation or appropriations for the programs and policy—making sure that we serve persons with disabilities, making sure that we protect the gains of these programs.

TRIO was seen as a group of discretionary programs. Before COE, programs were totally at the discretion of the Department of Education or Office of Education in terms of funding. You may have had a program for three years and your funding ends. You reapply, but you may or may not get funded. [With the prior experience provision,] COE helped ensure that previously funded, high-performing programs would be given extra points to help them over the top. That protected the programs.

The third accomplishment is research and the Pell Institute. Then, COE's work on the international level, with the European countries.

I've always been a sort of a builder. I've built other initiatives in my work and my primary goal, to serve the underserved, was shared by a lot of us in COE. I grew up in a community where nobody went to college. They were either in the military or got jobs or got incarcerated. There is something wrong with this picture: we have a lot of talented people from these communities. We all knew that we had an important role to build a movement that will serve the underserved, the marginal, the vulnerable, and those who were not given an opportunity to access higher education. So, without COE would we be able to articulate that vision on a national basis?

Today the Biden administration is recommending an increase of \$200 million. When I started in TRIO, it was \$70 million. And we built it. Without COE the ability to articulate the need would have been lost. COE is unique. We may lump them with other associations that do this type of work, but COE is unique because it has a specific, focused mission: higher education for low-income and those from underserved communities. That is different from, let's say a portfolio that serves institutions, colleges, and universities.

COE is focusing on the students and making sure they have access and complete degrees. Institutions are the vehicle. The focus on the students is what's kept me going and continues to keep COE going. These are lasting friendships. Even though I don't get to interact or see many of the COE folk, in particular Arnold Mitchem, Maureen Hoyler, and then my good friend Oscar Hernandez and many of the key people I supported and work with and learn from, there will always be a lasting friendship, a lasting alliance, and lasting heartfelt feeling for them.

We were pioneers. We took a chance. We didn't know each other. But we said that we all have that common vision, that common goal to serve the underserved and low-income communities who lack opportunities. We got to know each other, trust each other, and work together. I learned a lot, gave a lot, as they all did. The friendships are forever.

*Monte Perez is the past president of Moreno Valley College and recently retired as president of Los Angeles Mission College. He currently serves on the Los Angeles County Board of Education.*

## 40 YEARS OF HISTORY & PROGRESS

### Pat Roe: TRIO Programs Are a “Beacon of Hope”

By Pat Roe



I first got to know COE in the 1990s through one of the trustees at USA Funds (now Strada Education Network), Dr. Marshall Grigsby. I flew into Washington, DC, and he introduced me to Arnold Mitchem. I also met Maureen Hoyler. It was an in-depth opportunity to engage with the two of them and invest in the work COE was doing, as a sponsor. I was also once a TRIO recipient. So, yeah, I go way back.

COE has evolved. It evolved because the way you serve students has evolved. Students definitely still need the same or similar types of support, but the way you support them really has evolved to really make them feel engaged in the institution, mentored, to help them navigate the territory, and help them when they're having crisis situations in their lives.

A lot of the work with helping students is to also identify their pathway, understand the skills that they're developing along the way, articulate those skills, and connect to the pathway or the industry of interest.

COE is really helping students to hone in, probably earlier than they used to, on what they are really interested in doing. And sometimes you need to understand how that career opens you up for just so many different opportunities...so that you don't become stagnant. The employer benefits because you're really passionate about the work, passionate about what you're doing, and the student benefits because they are really satisfied, and they're able to live the lives that they want to live.

It's still about building leaders, and COE has really continued to stay focused on their mission in terms of student engagement, student development, and helping students remove some of those financial barriers in order to be able to live the dream. But it's still the core to get your academics, be engaged in those academics, so that you can be developed and you can go into these careers.

Also, demonstrating to others that are coming after us that perseverance, research, the connection, the networking, just the opportunities to take advantage of—all of these are so important to success.

TRIO programs on campuses are the beacon of hope for so many students, in just helping them to persevere, helping them be retained and persist. Those TRIO directors are rock stars, they are the people that really engage the students, the ones that really help them understand their meaning and how academics can truly push them further in terms of their life goals.

They know how many more students they can help. COE, having their pulse [of TRIO students and leaders], can say “double TRIO.” Double the number of students that we're bringing into the institution, but you cannot do it without the support that you put around those students. That's tuition. That's Pell Grant dollars, that's also the mentoring, tutoring, helping to build networks to expose students to different types of scenarios, different situations, different types of businesses, because that's how you grow.

The advocacy, the way in which COE talks to the masses, the way in which they really lobby for us with the government is useful, and helping them (government) to understand the benefits of “Double TRIO, Double Pell.” Because K-12 has its place. But college also has its place in society.

Sometimes the government concentrates on the bottom, on what didn't happen the way it was supposed to. Let's talk about what did happen with those who really took advantage of the opportunity and have really



taken this to another level. Let's focus on those TRIO directors who are really in the trenches, working with students and helping them. Utilize them to understand why that bottom did not succeed in the manner that we wanted them to: What do we need to do differently to elevate students and to help them succeed?

I love the bipartisan opportunities that we have to grow our nation in the right way. And we can do this through education.

[COE must] continue to develop strong leaders and not be discouraged by the challenges that we face day after day. We have the ability to help so many more to gain leadership opportunities. But also, they're going to be our successors. And that's the other thing: that we have a responsibility of shaping who our successors are in order to lead.

*Pat Roe is Strada Education Network's Vice President of Philanthropy.*

## Trinity Thorpe-Lubneuski: Transforming Lives and Helping End Intergenerational Poverty

*By Trinity Thorpe-Lubneuski*



I was 15, in Upward Bound, and attending the COE National Student Leadership Congress in DC. My first time on Capitol Hill, and I met COE leaders and learned about advocacy from others who were doing this on a daily basis. It was absolutely inspiring!

That's where I really started to develop an interest in research and policy. When I was in college at Pepperdine University, COE asked me to share my story in a legislative briefing. [TRIO programs] were up for reauthorization, seeking additional funding, and there were some proposed budget cuts. I was able to travel from California to Washington, DC to speak.

A staffer for Senator Mike Enzi, from my home state of Wyoming, invited me back to provide testimony in a Senate hearing. I was 20 or 21 and testified before some Senate celebrities, including Senator [Hillary] Clinton. This experience solidified my desire to go, advocate and be a part of COE's force for good and change.

Now, established in my career, I benefit from COE's alumni network. I've been able to reach out and get to know many others, especially fellow National TRIO Achievers. I can connect with this amazing group of people across different industries and walks of life, learn from them, utilize that network, and help be a force for good.

As a student in the Upward Bound Math/Science Initiative program at the University of Wyoming, I was assigned a specific research project and had to go to the library and learn skills about identifying peer-reviewed research.

Those skills and that interest in positioning data to create narratives led me to where I am today. I was an underperformer when I first entered TRIO. I was able to get caught up on a lot of the things I had missed out on earlier in my life. The tutoring was extraordinarily essential to that success.

In college it was amazing to put those skills to work. I became a data analyst and ended up leading teams of researchers and data analysts. It's crazy to think how fearful I was of math at one point.

Had COE and TRIO not entered into my life and been such a positive force for me and an encouragement, I would not have gone to college. That's the breadth and scope of impact that COE can have on communities and people. They're transforming lives and making a significant impact on ending generational poverty.

## 40 YEARS OF HISTORY & PROGRESS

COE keeps the TRIO programs going and acts as the advocate to make sure that those programs are funded. COE acts as the organizing power behind these otherwise relatively disparate groups of people all across the country who are on the mission to do the same thing. It allows them to work with each other to learn best practices and understand more about the populations that they're trying to reach and that it's not always a one-size-fits-all approach.

There's always someone there from COE who can help put the work in context on a national scale. They help guide and discuss direction or identify problems or issues that need to then be taken up from an advocacy perspective.

Comcast is working with COE on an initiative called "Build Your Own Future with STEAM" that will change the demographics in science, technology, engineering, art, and mathematics (STEAM) careers. It raises awareness of the importance of STEAM careers and the steps that students—who have had no direction—need to take to get to those careers. It pairs those students with people who look like them and are already in those careers.

*Trinity Thorpe-Lubneuski is Senior Director, Internet Essentials, at the Comcast Corporation.*



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