The Legacy of a Promise: Examining the Educational & Economic Impacts of the Daly Fund

by
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Abstract

The rising cost of higher education in the United States has created increases in tuition at colleges as well as growing demand from students and families for sources of support in attending college. Over the past decade, beginning with the creation of the Kalamazoo Promise in 2005, local governments and groups of private individuals have either proposed or begun funding place-based scholarship programs, leading to the proliferation of "promise programs" across the United States. These promise programs are quite recent, but a notable exception exists in Lake County, Oregon – a natural experiment nearly 100 years in the making. This study investigates the educational and economic impact of the Daly Fund, America's oldest place-based scholarship. Through the lens of human capital theory this study describes fund recipients' educational attainment and economic status, utilizing survey data to show that the Daly Fund has strong positive benefits associated with time to undergraduate completion, advanced degree attainment, and economic circumstances for recipients.

Introduction

"Legacy…What is a legacy? It's planting seeds in a garden you never get to see."

– "The World Was Wide Enough," Hamilton, An American Musical

Lake County, Oregon is a remote place. Covering 8,358 square miles in central southern Oregon, it shares its southern border with California. Its main population center, Lakeview, is 175 miles south of Bend, Oregon and nearly 100 miles east of Klamath Falls. Lake County is home to fewer than 8,000 people, and has a landscape consisting mainly of high desert, alkali lakes, and rocky outcrops. It also is home to more than $10 million of educational endowment. How does a remote, rural county end up with that much money endowed for higher education? It begins with a promise.

In January of 1920, Dr. Bernard Daly of Lakeview, Oregon – a doctor, state senator, banker, rancher, and judge – passed away. His will stated that:

> It is my earnest desire to help, aid and assist worthy and ambitious young men and women of my beloved county of Lake, to acquire a good education, so that they may be better fitted and qualified to appreciate and help to preserve the laws and constitution of this free country, defend its flag, and by their conduct as good citizens reflect honor on Lake county and the state of Oregon (Cooper, 1986).

To that end he left the majority of his estate, valued at $624,000 in 1920, to create the Daly Fund. While many refer to the Kalamazoo Promise as the first place-based scholarship (Bartik, Hershbein, & Lachowska, 2015; Miller-Adams, 2009)[1] the Daly Fund had been awarding scholarships for 83 years when the Kalamazoo Promise was announced in 2005. In many ways, the Kalamazoo Promise is unprecedented, but its creation highlights just how ahead of its time the Daly Fund was when America's oldest place-based scholarship began. Place-based scholarships, often referred to as promise programs[2], are scholarship funds where the primary determinant of eligibility is a recipient's location (Miller-Adams, 2015). Bernard Daly's gift was a promise to his community before the idea of promise programs even existed, as his will ensured that generations of Lake County students would have funding for their higher education.

The fact that the Daly Fund is nearly 100 years old has created a unique natural experiment. One could easily imagine a thought experiment asking "what if you were able to ensure access for the majority of students in a community who wanted to go to college for 100 years?" and consider what the effects might be. In Lake County that thought experiment is a reality, and one where research on the topic could not be more timely. Even though in the 12 years since the Kalamazoo Promise was launched over 30 Kalamazoo Promise-style programs have been founded – as have a number of other related place-based scholarship programs – there is little data on the long-term effectiveness because the programs and their outcomes are so recent (Bartik et al., 2015). The Daly Fund is unique in that it provides an opportunity to take a much longer view of the effectiveness of a place-based scholarship.

[1] Interestingly, Miller-Adams (2009, 2015) discusses a scholarship program in Philomath, Oregon, as perhaps the first place-based scholarship – the Philomath fund was inspired by the Daly Fund.
[2] For the purposes of this paper, the two terms will be used interchangeably.

This paper will review the literature on human capital theory and its appropriateness as a lens through which to view place-based scholarships generally as well as the Daly Fund specifically. This paper will then briefly discuss support for higher education via governmental and private means, place-based scholarships, and an explanation of how the Daly Fund operates. Following that overview, there will be an outline of this project's methodology followed by an examination of the impact of the Daly Fund's educational and economic impact on its recipients as well as a discussion of possible policy implications as well as where further research should lead.

Background

This background will cover three main sections serving as the foundation of my research: human capital theory (as the lens for this paper), support for higher education and place-based scholarships, and an overview of the Daly Fund.

Human Capital Theory

Human capital is defined as a kind of wealth that is derived from the "labor, skills, and knowledge" of persons (Tan, 2014). Education can improve an individual's human capital through the knowledge and skills that are acquired during postsecondary training. A discussion of place-based scholarships is in many ways a discussion of investment by a community - with money spent on education today paying dividends in terms of productivity and earnings later both for the individual and for the community. Education can be a pathway to economic stability and security, with multiple studies showing that higher educational attainment is correlated to higher incomes, even when controlling for various other factors (Becker, 1993). Though the kinds of marketable skills acquired through higher education are not the only mode of capital

that is important for individuals, it is undeniable that most well-paying jobs today require some form of postsecondary credential, which has become a focus of national rhetoric and attention (White House, 2016). This means that investments in students' education allow for those individuals to become more productive economically - a benefit that human capital theory posits is greater to both the individual and to society than the costs incurred to educate individuals (Becker, 1993). Educational attainment can also be a buffer against unexpected risks that arise in the economy – more education allows for flexibility and cushion against changes in or lack of employment. Thus, the value of investing in human capital and education provides benefits for individuals that include "stability, security, and greater self-reliance…" (Miller-Adams, 2009, p.15). Many advocates of place-based scholarships propose that money spent on education be spent thoughtfully with the community as well as the individual in mind. Generally, those who have invested in such programs make it clear that "these [promise] initiatives are not just about students and schools; they are also about transforming the communities in which these schools are located" (Miller-Adams, 2015, p.11). This focus on the community is a key aspect of promise programs that sets them apart from many other scholarships that consider only the individuals receiving scholarships in their rationale for existing.

Because human capital theory is the idea that access to higher education has both private and societal benefits – and that these benefits are greater than the cost incurred – this means that the expense of higher education is worth the cost relative to the high value of education because the returns on the investment of present time and capital will be outweighed by benefits (both individual and communal) accrued over a person's lifetime (Becker, 1994; McMahon, 2009). For individuals, economic benefits include greater earning power, improved flexibility in the job market, critical thinking skills, and specialized training, which are all components of higher

education. However, those outcomes are all beneficial to society as well, which gives education the characteristics of both a private and public good.

Human capital is not the sole reason Bernard Daly willed this fund into creation, but even in 1920 there was a recognition that access to higher education would give students of rural Lake County access to opportunities that would not necessarily be available without more education. As this paper will show, there is a substantial difference in economic circumstances for the median resident of Lake County as compared to our sample – an outcome consistent with human capital models of earnings and education. These individuals are also more likely to be living elsewhere (though the majority of recipients surveyed still live in Oregon if not Lake County), but anecdotally, the fund seems to have benefits for Lake County residents who return after college as well. The residents of Lake County have supported the Daly Fund over the past 95 years, which appears to confirm the idea that residents of Lake County view the Daly Fund as a boon to their community. Lake County's high quality schools, the fund's effective management by the Daly Board of Trustees, and several other scholarship programs created by recipients of the Daly Fund lend credence to the notion that this fund has tangible benefits seen by recipients and community members, which is all consistent with human capital theory.

For place-based scholarships more generally, research surrounding the human capital benefit to students and communities is still in its early stages. However, the early returns are promising. Bartik et al. (2015) found that:

> As of six years after high school graduation, the [Kalamazoo] Promise increases the percentage of students earning any postsecondary credential by 12 percentage points...credential attainment effects imply a large internal rate of return in increased

> earnings—over 11 percent—relative to the costs of the [Kalamazoo] Promise's tuition subsidy.

This suggests that the money invested in the Kalamazoo Promise is bringing about economic returns for students that exceed the initial investment - a finding that is consistent with human capital theory and promising for the future of place-based scholarships.

Despite the promise of these early results, however, human capital is not the only metric by which the efficacy of place-based scholarships or postsecondary success should be judged. Many scholars have been harshly critical of human capital, describing it as a normative system that elevates "familiar middle-class virtues--the traits that receive ideological and social sanction in our society" (Steinberg, 1985, p.68). The confluence of human and capital, then, may be problematic if it turns the human solely into capital[3]. Therefore, when measuring outcomes of place-based scholarships and their influence on educational achievement, it is important to look at other metrics of success besides purely economic measures. There is much debate about how higher education should be framed, but for the purposes of this paper the focus will be simply on the fact that these benefits exist – both in terms of those listed above as well as benefits involved in the idea that "…institutions such as democratization, the rule of law, and political stability are themselves heavily dependent on education becoming more widespread" (McMahon, 2009). In ways both easily measurable (dollars and other outputs) and harder to quantify (sense of satisfaction, personal growth, deeper understanding of the world, commitment to pluralism, and fostering democratic modes of life), higher education has real effects on the human "capital" for both individual persons as well as society.

[3] For some discussion around other forms of capital see Coleman, 1998; Lamont & Lareau, 1998; and Putnam, 1995.

Scholarships and State Aid

A case for both private persons and government to become involved in financial aid follows logically from a human capital framework. If society as a whole or specific communities benefit from more economically productive, democratic, or thoughtful citizens, and these are benefits we believe can be achieved through higher education, then it makes sense to improve both access to and completion of higher education. Federal aid has evolved over time, going from almost nonexistent in the early 20th century to a highly influential factor in higher education by the latter portion of the century. Larger involvement began with the GI Bill in 1944 and continued throughout the 1960s with the Higher Education Act and Lyndon Johnson's Great Society programs as well as the introduction of Pell Grants and federally subsidized loans, and it continues into the present – as of 2013, the federal government provided nearly $80 billion in student assistance (Mumper, Gladieux, King, and Corrigan, 2016).

The mechanisms of scholarships typically fall into either the category of merit or need, aligning with the goals of higher education to serve both the "needy and [the] deserving" (McPherson and Shapiro, 1999, p. viiii). Need-based scholarships focus on a student's ability to pay for college, with those who are less able to pay receiving a greater amount of aid. Financial aid packages, as they are known, were originally conceived of as ways to help students access college through a combination of grants, loans, and work while not shouldering an undue debt burden after finishing their education. However, it is also "unmistakable that [our current financial aid industry] is a system that rewards talent in a big way" (McPherson & Shapiro, 1999, p. 143). Merit based scholarships focus on students' past academic successes as metrics for receiving financial aid, and universities have various motivations to provide these scholarships, including prestige and attracting more affluent students – who tend to achieve more highly on

average due to environmental factors in their favor (McPherson & Shapiro, 1999). As we will come to see, place-based scholarships such as the Daly Fund straddle the line between merit and need based scholarships, while exhibiting interesting characteristics of their own.

Since state governments provide subsidies for in-state students to pay less than the "true" cost of education while out-of-state students pay a higher cost, one that is often more than "twice the price of resident tuition," state aid can be considered a form of place-based aid (Jaquette, Curs, and Posselt, 2016, p. 636). Outside of in-state tuition, states provide other state and institution-specific aid for public universities in the form of scholarships for high achieving or needy in-state students where the first level of eligibility is residency in that state[4]. Though institutions are reorienting their student aid policies to maximize tuition revenue[5], the ways in which state aid is targeted are important in both determining where students attend as well as the ways in which state aid shows a trend towards helping in-state students. Though distinct from place-based scholarships as they have been defined in this paper, this sense of the importance of place in postsecondary financial aid is part of an ethos that carries over into promise programs as well.

Promise Programs

In 2005 the city of Kalamazoo, Michigan began what has been described as "an unprecedented experiment in education-based economic renewal" when it joined with anonymous donors to create the Kalamazoo Promise (Miller-Adams, 2009, p. 2). The first of its kind as a first-dollar, fully funded place-based scholarship, the Kalamazoo Promise is part of a

[4] Though states also provide support through other means such as research dollars and capital investments, our focus here will be on student-centered aid.
[5] For a more comprehensive overview of these strategies and the existing literature on the topic see Jaquette, Curs, and Posselt, 2016

unique group of scholarships in that it distributes scholarship resources based on location rather than merit or need. In Kalamazoo, from 2006 onward, "every [Kalamazoo Public Schools] graduate who has been enrolled in and resided in the district since Kindergarten receives a scholarship covering 100 percent of tuition and mandatory fees at any of Michigan's 44 public colleges or universities" (Miller-Adams, 2009, p.3). While location-specific scholarship programs have existed for many years in some locations (even prior to any consideration of state financial aid as place-based aid), in a great many respects the Kalamazoo Promise program *is* unprecedented . Indeed, the Kalamazoo Promise's creation spurred many other communities around the nation to introduce their own place-based scholarship programs, both because of the national media attention it received and the idea of economic revitalization through education was highly appealing to communities looking for alternative development tools (LeGower & Walsh, 2014; Miller-Adams, 2015). How then should one define a promise program or place-based scholarship?

Today, depending on how broadly you define a promise program, there are at least 40 major, and perhaps as many as 75 total active place-based scholarship programs in the United States (Mulhere, 2015; Cities of Promise, 2014). These programs are generally similar and all are in the business of funding scholarships on the basis of location, though scholarship programs differ with regards to funding mechanisms, secondary scholarship requirements other than location, amount of aid given, whether the scholarship is first dollar (meaning that the scholarship is applied without regard to any other state, federal, or institutional aid) or last dollar (where the scholarship amount varies, but works to make up the difference between other sources of funding and the total cost of attendance at an institution up to a predetermined maximum level), as well as other smaller differences. The Kalamazoo Promise is an example of

a universally targeted program, in which the only eligibility requirement is that the student has graduated from high school after living in and attending school in the school district where the scholarship exists. Other place-based programs, however, such as those in Denver and Pittsburgh, utilize a secondary need-based component to target specific populations – meaning that they apply to students based on financial need once the location requirement has been met (Miller-Adams, 2010). Other programs without the resources to pay for all students living in the promise area have instituted merit components, with minimum GPA requirements or threshold cutoffs depending on the amount of money available – a model that the Daly Fund uses. As of 2015, roughly half of Promise programs in the US include some type of merit component (Miller-Adams, 2015). Despite their differences, however, the fact that promise programs use location as the first order factor in determining whether someone is eligible for the scholarship is enough to justify grouping various place-based scholarship programs together as a unit for research purposes[6].

The Daly Fund

The Daly Fund is a remarkable natural experiment and a program that at its creation was far ahead of its time. While place-based scholarships have entered the national consciousness only in the past decade or so, students have been going to college with assistance from the Daly Fund for 95 years as of this writing. Though it is much older than other promise programs in the United States, the Daly Fund was constructed with many of the same rationales as other place-based scholarships. The location specific nature of the Daly Fund was created with the idea that not only would it aid students in acquiring an education but that it would, in the words of Dr.

[6] A view shared by Miller-Adams, 2015; LeGower & Walsh, 2014; Swanson et al., 2016; and Stern and Hensley, Forthcoming.

Daly, mold citizens that "may be better fitted and qualified to appreciate and help to preserve the laws and constitution of this free country, defend its flag, and…reflect honor on Lake county and the state of Oregon" (Cooper, 1986). Though Bernard Daly's will lacks the explicit economic development mission that characterizes the Kalamazoo Promise and many other more modern place-based scholarships, it is clear from Daly's writings that a public benefit is expected from this scholarship in addition to the educational benefits and opportunities accrued by those students receiving the fund.

The Daly Fund has several components within its place-based model in Lake County. The first is that, as with many other more recent promise programs, students are required to have attended a Lake County High School for the entire four years of their high school experience. To apply for the fund, students must fill out a simple one-page form, and are considered automatically via a formula that considers their standardized test scores and GPA[7]. Student names are then hidden and students are ranked according to their score via this formula. Using the interest on the principal of the Fund, minus the amount that is already tied up with current students, the Daly Board of Trustees determines how many scholarships they can take on for that year. For years in which data is available (1999-2015), just over 52% (345 of 660) applicants were accepted onto the Daly Fund. Not all the students who graduate from a Lake County high school in a given year plan to attend college, so that number represents a somewhat smaller proportion of the total graduating class from Lake County schools over that time span. The existence of several other place-based funds in Lake County[8] means that some proportion of students who are not accepted onto the Daly Fund are covered by various other scholarship

[7] This formula was developed by a partnership of the chairs of Psychology at OSU and UO in 1960s.
[8] Including the Collins-McDonald, Anna Jones, Burt Snyder, and Ousley.

programs that have been created in the wake of the Daly Fund. For instance, the Anna Jones scholarship is only available to students from the town of Paisley, the Burt Snyder scholarship covers graduate school, and the Collins-McDonald scholarship allows students to use their award for private or out-of-state institutions. The Collins-McDonald scholarship is most closely aligned with the Daly Fund, and the award amount and fund requirements are the same as the Daly Fund. Because the two funds function almost identically in many respects, Collins-McDonald recipients who completed our survey are included in the analysis of Daly Fund recipients[9]. For the opposite reason, students who received one of the other scholarships only are excluded from our analysis.

Students on the Daly Fund can use the Daly Fund at any public state institution in Oregon, and the fund is automatically renewed if several criteria are met. The first is that students are required to take a full load of coursework, typically 45 credits per academic year at institutions on the quarter system. The second is that students are required to maintain GPA requirements of 2.2 as a freshman, 2.35 as a sophomore, and 2.5 as a junior. Students must use the fund in consecutive terms (not counting summer) for a maximum of 4 academic years or 12 terms on the quarter system. Currently, the Daly Fund currently covers about 1/3 of the projected total cost of education for an in-state four-year university in Oregon, which as of 2016 was $8,400 per year[10].

Methodology

[9] For the purposes of this study, the two groups of recipients may at times be conflated into the pool of "Daly Fund recipients."
[10] For a list of historical Daly Fund award amounts, see Appendix C.

To understand the impact of the Daly Fund on its recipients, Dr. Sam Stern and I developed a survey to examine the impact of the Daly Fund. This survey[11] was first reviewed by Oregon State University's Institutional Research Board (IRB) and administered following approval. Using Qualtrics, our survey consisted of 37 questions about the impact of the Daly Fund, including recipient's educational and economic lives[12]. Before we could administer this full survey, however, we needed contact information for Daly recipients so that we had a population that could take the survey at all. To this end, we were given the list of Daly Fund recipients from 1922-2016 containing recipients' names and year of high school graduation by the Lynch &Vandenberg Law Office who administer the Daly Fund and maintain the Daly Fund Board of Trustees' records. This list of recipients contained 1,918 names and years of graduation but no other contact information. We were aware that it was highly unlikely that persons having graduated before 1945 or so would still be alive and that names, especially for married women, may have potentially changed between their high school graduation and the present. Therefore, contact information had to be acquired before recipients could be surveyed.

To obtain with this contact information so that we would be able to send a full survey to Daly recipients we pursued several tactics. The first was to create a preliminary survey[13] in Qualtrics asking almost exclusively for contact information. Using a snowball sampling technique involving contact information Dr. Stern had already gathered over several years of informal interviews with Daly recipients, we were able to distribute this first survey to several recipients. We also created a Facebook page[14] so that those interested in our project could share the link to

[11] See Appendix A.
[12] It should be noted that this paper will focus solely on the educational and economic impact of the Daly Fund on recipients.
[13] See Appendix B.
[14] https://www.facebook.com/DalyFundResearch/

our Qualtrics survey and follow the progress of our research. Additionally, we contacted both the Oregon State University (OSU) and University of Oregon (UO) foundations, both of which agreed to provide basic enrollment and contact information (where available) of Daly recipients in their records for our research. We decided to use a snowball sampling methodology due to the fact that our research project focused on Daly Fund recipients – a distinct group that would be difficult to track down without insider information supplied by other classmates, community members, and scholarship recipients (Biernacki & Waldorf, 1981).

It should be noted that Biernacki & Waldorf (1981) identify five main issues with snowball sampling: (1) finding respondents and starting referral chains, (2) verifying the eligibility of potential respondents, (3) engaging respondents as research assistants, (4) controlling the types of chains and the number of cases in any chain, and (5) pacing and monitoring referral chains and data quality. Respondents were found via Dr. Stern's personal contacts, through the Oregon State University (OSU) and University of Oregon (UO) Foundation database lists, and via referrals from other Daly recipients and interested Lake County community members across Facebook. The eligibility of respondents was determined via a question on our survey asking whether the respondent had received the Daly Fund or Collins-McDonald scholarship, as well as through our ability to cross reference survey respondent names with the official list of Daly Fund recipients provided by the Lynch-Vandenberg Law Office. We were able to engage respondents as research assistants by asking them to forward emails with links to the survey as well as engaging respondents and Lake County community members to follow our research page on Facebook and share our survey over social media. We were not able to control the chains of respondents and referrals, but because we had the names of all Daly Fund recipients and because the entire survey process was online lack of control was not a major issue for our study.

Additionally, due to the quantitative and online nature of our survey we did not need to worry about pacing. We expect that survey data quality should be relatively high given the positive associations recipients have about the Daly Fund and their desire to "pay it forward" by helping our research.

Response Rates and Demographics

In response to our first survey and snowball methodology in asking for Daly recipients' email addresses, we received 130 email addresses. From the OSU Foundation, we received a list of 261 persons, 90 of whom had email addresses. From the UO Foundation we received a list of 296 persons, 95 of whom had email addresses. Combined with information given to us by Lake County community members, we ended up with 301 unique email addresses[15]. Though there have been 1,918 Daly recipients since 1922, we conservatively estimate that any person who graduated high school before 1950 is likely to be deceased, given that they would be in their 80s and the current average life expectancy in the United States is just under 79 years (Kochanek, Murphy, Xu, & Tejada-Vera, 2016). After subtracting the 447 recipients who graduated before 1950 we are left with a total estimated living population of scholarship recipients of 1,471.

Emails were sent to the 301 email addresses we received, explaining our research project with links to both our survey and Facebook page asking them to take the survey and share it with other individuals who received the Daly Fund. Two weeks after our first email went out to individuals, we sent reminder emails in case there were willing participants that did not complete the survey the first time around. From these 301 emails, combined with our snowball methodology, we received 303 survey responses, which is just over 20% of our estimated

[15] There was a level of overlap between the various lists of email addresses we received.

population of living scholarship recipients. This number does include a small number of Collins-McDonald scholarship recipients who did not receive the Daly Fund[16] who are outside our sample population but who are included in our study.

Though not every person we emailed took the survey, enough people shared the results that we received more responses than we originally had emails for. However, because I want to examine both the educational and economic impact of the Daly Fund I have chosen to exclude responses from Daly recipients who finished high school after 2011 due to the fact that those survey respondents are less likely to have finished college or entered the workforce. I also excluded any respondent that did not respond affirmatively that they had received either the Daly Fund or Collins McDonald scholarship. Having culled those responses, 245 survey responses were left, which form the basis for my analysis of the Daly Fund's impact on advanced degree completion and recipient's economic circumstances. A breakdown of survey responses by decade during which they graduated from high school can be found below in Table 1.

Table 1: Survey Responses by High School Graduation Cohort

Cohort	Number of Respondents	Cohort Size	% of Cohort
Pre-1950	2	447 (likely deceased)	-
1950-59	10	154	6.5%
1960-69	52	232	22.4%
1970-79	40	285	14.0%
1980-89	52	220	23.6%
1990-99	37	173	21.4%
2000-11	52	280	18.6%

[16] N=21

Table 2: Survey Responses by Lake County High School

High School	% of Respondents	Count
Lakeview	91.4%	n= 224
Paisley	6.6%	n= 16
North Lake	1.6%	n= 4
Other[17]	0.4%	n= 1
		n = 245

As we hypothesized, our response rate from Daly recipients pre-1950 was almost nonexistent, with only two responses received. We also only received 10 responses from Daly recipients who graduated in the 1950s. However, with the exception of the 1970s, our survey response rate was near or above 20% of the cohort for each decade. Table 2 shows the demographic breakdown of respondents by high school attended. Our usable survey sample of 1943-2011 respondents is largely from Lakeview, which is to be expected given Lakeview's size relative to the communities of Paisley and North Lake. Although there are three high schools in Lake County, the majority attend Lakeview High School. As of the 2016-17 school year, Lakeview High School enrolled 248 students, the k-12 Paisley School enrolled 33 students between ninth and twelfth grade, and North Lake School (also k-12) enrolled 73 students between the ninth and twelfth grade (Oregon Department of Education, 2017).

[17] One homeschooled student received the Daly Fund.

Table 3: Survey Results by Bachelor's Degree Granting Institution

Institution	%	Count
Eastern Oregon University	6.6%	15
Oregon Institute of Technology	5.3%	12
Oregon State University	43.8%	99
Portland State University	1.3%	3
Southern Oregon University	6.2%	14
University of Oregon	16.8%	38
Western Oregon University	6.6%	15
Other	13.3%	30
Total		226

When the Daly Fund began awarding scholarships in 1922 there were only three public institutions of higher education in the state – Oregon State University (then Oregon Agricultural College), the University of Oregon, and Western Oregon University, known then as the Oregon Normal School. Today, there are seven major public universities and seventeen community colleges in Oregon. The plurality of our survey respondents attended Oregon State University, which is perhaps unsurprising given the researchers' affiliation with the university and our prior connections to Daly recipients at OSU which in large part sparked interest around the project. However, outside of Portland State University the other major public universities in Oregon each make up at least five percent of our sample. Though the University of Oregon is perhaps underrepresented in our sample, the data from their foundation gives them a fuller influence in time to completion data if not in full survey completion.

Educational Impact

Table 4: Survey Four and Six-Year Completion Rates, Survey only

Cohort	4-year completion rate	6-year completion rate	Sample Size
Total	138 (58.5%)	208 (88.1%)	n=236
1960-69	32 (66.7%)	42 (87.5%)	n=48
1970-79	15 (37.5%)	33 (82.5%)	n=40
1980-89	20 (40%)	42 (84%)	n=50
1990-99	23 (65.7%)	33 (91.4%)	n=35
2000-11	37 (71.2%)	49 (94.2%)	n=52

Table 5: Survey and University of Oregon Foundation Data Completion Rates

Cohort	4-year graduation rate	6-year graduation rate	Sample Size
Total	247 (55.6%)	375 (84.5%)	n=444
1960-69	39 (51.3%)	58 (76.3%)	n=76
1970-79	33 (50.8%)	58 (84.1%)	n=65
1980-89	28 (43.1%)	56 (86.2%)	n=65
1990-99	30 (54.6%)	44 (80%)	n=55
2000-11	40 (65.6%)	53 (86.9%)	n=61

To examine four- and six-year completion rates, data was reviewed from both the survey data alone as well as combined data from the Qualtrics survey and the UO Foundation. Table 4 (above) shows both the total four- and six-year completion rates of survey respondents by raw total and as a percentage of the cohort. The total number of individuals in Table 4 were calculated by taking the total response after removing respondents who had not received either the Daly or Collins McDonald scholarship, respondents who indicated that they had received a bachelor's degree but did not indicate a year of graduation, and those who completed associates degrees only as we wanted to focus on degree completion among those attempting to receive bachelor's degrees. Table 5 shows the four and six-year completion rates by for the combined total of survey respondents and UO Foundation data both in total and by cohort. The information

provided by the UO Foundation was not as complete as our full survey results, but did provide both the year of matriculation and the graduation date for recipients that had attended the University of Oregon, allowing the time to graduation to be calculated. The UO Foundation data is likely to make our outcomes more conservative in terms of completion because their data simply provided the year of high school completion as well as when the recipient finished at UO, regardless of whether that completion was because of a bachelor's degree or an advanced degree[18]. Due to this we hypothesized that compared to survey respondents, our population from the University of Oregon will have somewhat worse outcomes in terms of attainment and time to graduation, and we compared the two sets of data to see if there was a significant difference in time to graduation between the two.

Though the combined table was very similar to the data from only the survey respondents, a t-test was conducted to see if the UO data was statistically significantly different than our survey response data. Since the bias could possibly run in either direction and because the amount of variance was uncertain, a two-tailed t-test assuming unequal variances was conducted. The null hypothesis was that the difference between the means of both samples would be zero, therefore Ho= 0. If the means of the two samples were statistically different than zero, we would have to reject the null hypothesis.

[18] For instance, it seems likely that some students in the UO Foundation sample that finished in eight or nine years completed advanced degrees at the University of Oregon, but we cannot be certain.

Table 6: t-Test of Differences in UO Foundation and Survey Response Data

t-Test: Two-Sample Assuming Unequal Variances		
	UO	*Surveys*
Mean	5.4	4.9
Variance	5.3	6.7
Observations	279[19]	222
Hypothesized Mean Difference	0	
df	444	
t Stat	2.484	
P(T<=t) two-tail	0.013	
t Critical two-tail	1.965	

After running the test, we find that our estimated t-value is 2.484. This value is greater than our critical t-value of 1.965, and therefore we must reject the null hypothesis and say that the effect is statistically significant and that the means of the data received from the UO Foundation is statistically different than the data from our survey respondents. This suggests one of two main possibilities: either that our survey respondents were more likely to finish on time than other Daly recipients, or, more likely, that the UO Foundation data is giving an underestimation of time to completion due to the fact that their information only gives data about recipient's year of high school graduation as well as their year of graduation from the University of Oregon, but not whether that completion represents a bachelor's degree or a graduate/advanced degree, nor information about when the recipient began at UO.

This likely underestimation effect of the data from the UO Foundation strengthens the argument that the effect of the Daly Fund on on-time completion is a powerful one. When one compares the results of our data on Daly recipients to the state of Oregon's averages, we see that Daly recipients are graduating on time at a much faster rate than the rest of the state. In Oregon

[19] There is a level of overlap between UO Foundation data and survey respondents.

at public four year institutions, 30.3% of students graduate in four years, with 55.5% of students graduating in six years, compared to 55.6% and 84.5% of Daly recipients respectively (Chronicle of Higher Education, 2015). This lends credence to the idea that the structure of the Daly Fund is important – the fact that it is only available for four academic years or twelve academic quarters coupled with the fact that students are required to maintain a full load of courses to continue receiving the scholarship creates incentives for students to finish in four years – incentives that recipients are responding to.

Table 7: Highest Level of Education of Survey Respondents

Educational Attainment	%	Count
Less than high school	0.00%	0
High school	0.8%	2
Some college	3.7%	9
Associate's degree	3.3%	8
Bachelor's degree	52.2%	128
Master's degree	27.4%	67
Advanced degree (PhD, JD, MD, etc)	12.7%	31
Total		245

A question asked of our survey respondents was "What is your highest level of education?" We can see that among our sample of Daly recipients, over 92% have a bachelor's degree, and over 40% have either master's or advanced degrees. This stands in stark contrast to both Oregon, where just over 30% of the population holds a bachelor's degree or higher, and the United States as a whole, where approximately 32.5% of the population is estimated to hold a Bachelor's degree or higher with 12% estimated to hold an advanced degree (Ryan and Bauman, 2016; U.S. Census Bureau, 2015). These numbers suggest that the Daly Fund has a large impact

on both completion of bachelor's degrees as well as advanced degree attainment. Students finishing on time means that students do not have to take out as much debt, which allows for more flexibility in decisions relating to recipients' ability to move for work or pursue a graduate education.

Table 8: Survey Responses to: Would You Have Attended College without the Daly Fund?

Answer	%	Count
Definitely would have attended	56.4%	133
Probably would have attended	31.8%	75
Probably would not have attended	8.5%	20
Definitely would not have attended	3.4%	8
Total		236

The final indicator of educational impact that will be examined is whether recipients would have gone to college without the Daly Fund. Interestingly, the vast majority of recipients in our population said that they would have attended college even without the Daly Fund. Only 11.9% of respondents said that they were unlikely to or would definitely not have attended college without the fund. It is also notable that 88.2% of survey recipients from Lake County, Oregon, where only 17.7% of residents have a bachelor's degree or higher, believed that they would go to college even without the Daly Fund. This speaks to something that we have seen in our visits to Lake County and our discussions with fund recipients and community members – namely that the presence of the Daly Fund over the past 95 years has helped to create a college-going culture in Lake County, one where students know that if they work hard money will be

available for them to go to college[20]. It is an attitude that is passed down via generations of college-educated family members and recipients, as well as something that is highlighted in the education system from an early age. Though it is challenging to quantify, it is hard to deny that people in Lake County feel that college is within their reach. Overall, it seems clear that the Daly Fund is a driver of educational attainment for recipients, both in terms of on-time completion of undergraduate degrees as well as advanced degree attainment.

Economic Impact

Table 9: Sources of Survey Respondents' Funds for College

Source of College Funds	Average % of college funds
Scholarships (Daly + Others)	51%
Family	15%
Work	23%
College Debt	7%
Other	4%
n=245	100%

An important feature of the Daly Fund is that in recent decades it has provided about one third of the total cost of attendance[21] at one of Oregon's public universities – an amount set annually by the Daly Fund Board of Trustees. This amount has seemed to be sufficient to get students to take the leap into post-secondary education despite the fact that it requires a significant contribution to student's educational costs from sources outside of the Daly Fund. This was not always the case, and the roughly 1/3 figure is a kind of natural equilibrium that Daly Trustee members arrived at over the years in balancing a meaningful amount of aid with

[20] For more information about how schools shape college choice see McDonough, 1997.
[21] See Appendix C

helping the greatest number of students. In asking Daly recipients about the ways they paid for college, a pattern started to emerge. Looking at the mean of responses in Table 9, we see that on average a Daly recipient payed for about half of their expenses with scholarships, suggesting that Daly recipients are also qualifying for other scholarships in addition to the Daly Fund. As we will see, the vast majority of Daly recipients work during college, and work funds contribute the second largest amount at just over 20% on average. Notably, recipients report having less than 10% of their total costs represented by student debt. We were curious as to whether that number was skewed by recipients who graduated in the 1960s and 1970s prior to college costs rising so sharply, but a view of recipient funds from 1980-2011 looks almost identical to the results reported in Table 9. This suggests that the Daly Fund incentivizes students to minimize the amount of debt they take on by working while in college and by acquiring other scholarship sources, likely due to the fund's credit and GPA requirements.

Table 10: Proportion of Daly Recipients Working During College

Work During College?	%	Count
Yes	77.8%	189
No	22.2%	54
Total		243

Table 11: Proportion of Daly Recipients Working During College Summers

Work Summers?	%	Count
Yes	98%	238
No	2%	5
Total		243

With work averaging over 20% of Daly recipients' college funds, it is perhaps unsurprising that a very high percentage of Daly recipients worked during college, with nearly all of them working during their summers between academic years. This fact does not make them unique – per Carnevale, Smith, Melton, and Price (2015), 70-80% of college students are "active in the labor market" while formally enrolled, with 25% working full time (p. 1). The overwhelming majority of Daly recipients who worked during their undergraduate degree reported working part time between six and twenty hours per week, with only about 8% working 25+ hours per week, or about a third as often as the national average. It is notable that even though students on the Daly fund receive a fairly generous scholarship they still work during college at rates similar to the national average, which suggests that minimizing (or the possibility of zero) debt and gaining experience are driving factors on top of paying for their education.

Table 12: Proportion of Daly Recipients Finishing College with Debt

Finish with Debt?	%	Count
Yes	37.2%	90
No	62.8%	152
Total		242

While the number of Daly recipients working is not particularly surprising, the amount of survey respondents who report graduating from college with zero debt is. Though the amount of Daly recipients who reported finishing with debt has increased with time[22], compared to national averages – where, for instance, 66% of the graduating class of 2011 had debt with an average of $26,000 per student – Daly recipients are better off than the average graduate (Reed and Cochrane, 2012). Finishing in four years rather than six or more is almost certain to reduce

[22] A slight majority (51.7%) reported graduating with debt between 1990-2011 (n=89)

students' debt burdens. It follows naturally that when students are incentivized to finish on time their likelihood of debt is reduced as well, assuming that the incentives are strong enough to influence students' behavior. Studies have shown that while working and nonworking students are equally likely to have debt, students who work are likely to have less debt (Carnavale et al., 2015). This effect is likely mitigated to a degree with the Daly Fund due to the fact that work done by students adds to the overall amount of money students are able to turn toward their education. The fact that Daly recipients are working while receiving the fund lowers the likelihood that students will finish with debt while increasing the likelihood that even if students take on debt that it will be a more manageable amount than it might otherwise be without the fund.

Table 13: Daly Recipient Reported Income

Household Income Past Year	%	Count
Less than $25,000	2.3%	5
$25,000 to $34,999	5.4%	12
$35,000 to $49,999	5.0%	10
$50,000 to $74,999	20.3%	45
$75,000 to $99,999	18.0%	40
$100,000 to $149,999	24.8%	55
$150,000 or more	24.8%	55
Total		222

One of the more notable findings from this study is the earning power of Daly Fund recipients. 64.1% of survey respondents reported the Daly Fund having a great impact on their

economic circumstances. When one considers that the median household income in Lake County is $32,369 but that 93.3% of our respondents reported having an income greater than that amount, the idea of the Daly Fund's economic impact becomes quite plausible (U.S. Census, 2016). More strikingly, almost half (49.6%) of respondents reported a household income of over $100,000. This is likely influenced by the large number of Daly recipients with advanced degrees, as well as the fact that 92% of our sample have at least bachelor's degrees. This is the result one would expect to see, given that human capital theory posits that higher levels of education will correlate with higher incomes given the skills and abilities generated.

Table 14: Reported Income Relative to Parents'

How does your current income compare to that of your parents' growing up?	%	Count
My current family income is much less than that of my parents when I was a child	5.0%	11
My current family income is somewhat less than that of my parents when I was a child	5.9%	13
My current family income is similar to that of my parents when I was a child	11.7%	26
My current family income is somewhat more than that of my parents when I was a child	21.2%	47
My current family income is much more than that of my parents when I was a child	56.3%	125
Total		222

This effect does not appear to be concentrated in recipients whose families were previously wealthy, either. 77.5% of respondents reported that their family income is either somewhat more or much more than their parents growing up. This suggests that the Daly Fund is providing opportunities for upward financial mobility – a promise of the "American Dream" that

is today becoming less and less realistic for many young people in the United States[23]. If a person can graduate on time, saving themselves both the cost of extra years of college as well as the opportunity cost of whatever they might be able to earn without debt, it opens opportunities that might not previously have been available. 40% of our respondents have graduate degrees – compared with just 12% of the U.S. at large – very likely because they had not accrued debt in their undergraduate work, but also, in the opinion of this author, because they had been primed to achieve by a community that has financial supports in place for students who are hardworking and capable. Though Lake County is remote and in some ways lacking in economic opportunity, Daly Fund recipients are able to translate their educational success into economic successes elsewhere in Oregon and across the country. 62.4% of our respondents live in Oregon, although many of them live in more populous places where employment opportunities are more numerous and where they can more effectively put their education to work. The rest of our respondents cover 20 states and at least one foreign country. Daly recipients are highly mobile and earn much more than they would likely be able to had they stayed in Lake County and not been able to get an education. Post-secondary credentials open up more opportunities for employment in sectors that do not exist in Lake County. Therefore, many Daly Fund recipients end up in more populous areas with more diverse economies.

Policy Recommendations and Reflections

Since this is a private fund managed by private dollars, the question can be posited: what public policy utility does studying the Daly Fund have? Despite the private nature of this and other place-based scholarship programs, the structural design of the Daly Fund can perhaps give

[23] For further discussion see Putnam (2016) and Mettler (2014) among others.

insight into ways to better craft public scholarships as well. We find that Daly recipients graduate within four and six years at rates substantially higher than the general college population. Given that finding, I would recommend that financial aid policymakers give some thought to the aspects of the Daly Fund that can be replicated at other levels. In particular the ways in which the Daly Fund is a "targeted" scholarship – that is to say, the ways in which the Daly Fund demands certain progress and minimal GPA requirements to continue education on the fund – may be more effective at helping students not only enter but complete college than "simple" scholarships where the requirements around scholarship receipt are done by the time the student receives the money.

The Daly Fund has also sustained itself by having competent management since 1922. Dr. Daly, in his will, determined that representatives from all public universities be present at the Daly Board of Trustees meeting each June. Though over time the representation has shifted from the presidents of the University of Oregon and Oregon Agricultural College (today's Oregon State University) to lower level administrators representing all seven public four year institutions, the fact that the recipient selection process is open, transparent, and shared among various stakeholders has helped to keep it viable for nearly a century. This engagement of university staff allows for feedback and information sharing that has led to the creation and continuation of effective fund management practices over time. Money is not the only factor that determines whether a program is able to stand the test of time; it is also committed individuals who keep the program going. This commitment is evidence of the efficacy of human capital theory – people put a large amount of effort into running the Daly Fund because they fully believe that their investment in the higher education of the young people of Lake County is

worth it. Those who run the fund hold the expectation that both the individual recipients as well as the community will benefit from the Daly Fund.

To that end, and to also examine the role of community engagement, norms, and attitudes that have been built up over time, I would recommend that more qualitative research be done in Lake County specifically, as well as among other Daly recipients. This is one of the most exciting things about the Daly Fund in particular and promise programs more generally - research on the topic is just beginning. Our study, for instance, did not ask all the questions that could have been asked, both for clarity and to create something manageable for our respondents. My work focuses solely on educational attainment and economic returns – areas that are important, but not the only metrics that can be considered. As other researchers of place-based scholarships note, "Focusing on earnings understates [overall scholarship] benefits because it omits education's nonpecuniary returns: improved health, reduced crime, and increased civic participation" (Bartik et al., 2016, p. 8).

It is also important to study a wide variety of place-based scholarship programs to understand where there are similarities and especially for policymakers where there are key differences that can make these types of scholarships more or less effective in given communities. More research into place-based scholarships is important because most of these programs have been in place for less than 10 years, meaning that "we still know very little about the impact [of promise programs] ...with hundreds of millions of dollars being invested…understanding their true impact is an important task for policy research" (LeGower and Walsh, 2014, p. 2).

It is likely that various types of place-based scholarships, whether first dollar, last dollar, or various amounts, will work differently in different environments. It may be possible that

promise programs that are smaller in size and have more community engagement can be effective in different ways than scholarships that are more simple or universal. In studying the Kalamazoo Promise, Bartik et al. (2016) have found that place-based scholarships may help various groups heterogeneously. In the context of Lake County and the Daly Fund, which is a fairly homogenous community, this may not matter as much in terms of scholarship design. In other communities, this potential aspect of place-based scholarships could be more salient. Comparative studies between targeted and simple scholarships would also be interesting in this regard, as well as studies that compare similar localities with and without funds – in instance of Lake County, perhaps a comparative study with Harney County. Finally, the Daly Fund has begat multiple scholarships, with the Collins-McDonald, Burt Snyder, Anna Jones, and Ousley scholarships tracing their lineage back to the Daly Fund in Lake County alone. Research into how philanthropy grows and builds upon itself within the context of the Daly Fund could help us understand how the notion of place plays in to our policymaking, and how community engagement provides motivation and incentive for programs to flourish.

Bernard Daly - who as a boy immigrated from Ireland to the heart of the confederacy during the civil war - became a doctor, a rancher, a banker, a county judge, and a state senator. Despite all he accomplished during his lifetime, it is unlikely that he could have foreseen that his greatest success would be sending nearly 2,000 people from Lake County to college over the past 95 years. The Daly Fund has strong positive effects on its recipients in terms of educational outcomes and economic gains. It is a remarkable gift that has continued to give with each life that it has enriched. There is nothing about Lake County or its citizens that destined these outcomes that cannot be found elsewhere, except for one thing: a promise. People can achieve

great things if they are given the tools to succeed, and young people in Lake County can know that success is possible thanks to the Daly Fund.

Conclusion

Compared to other Oregonians, Daly Fund recipients are more likely to graduate on time, are less likely to have debt, and are more likely to have advanced degree attainment. It is striking that among our survey respondents, 92% had bachelor's degrees and 40% had master's or advanced degrees – a large increase over both Oregon and the U.S. averages. Daly recipients reported household incomes are much higher than Lake County, Oregon, and U.S. averages, and over three quarters of our respondents say that their standard of living as an adult is better than their family's when they were growing up. The Daly Fund represents an unprecedented natural experiment – one with nearly 100 years of information to teach us about the efficacy of promise programs – an undertaking that has had clear and measurable benefits for Daly recipients. While more research is needed, it is becoming clear that place-based scholarships represent an important sector of investment in the human capital of young people – one that carries the weight of communities' hopes for economic development and a brighter future for both the individual and the collective.

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Appendix A – Daly Fund Survey

Daly Fund Survey

Q1 Thank you for taking this survey. The purpose of this research is to assess the impact of the Daly Fund and the Collins McDonald scholarships. Completion of this survey will take about 15 minutes. Participation in this study is voluntary. We hope you will complete all of the questions that are relevant to you. If you have any questions about this survey or the research study, please contact Professor Sam Stern at 541-737-6392 or by email at sam.stern@oregonstate.edu. If you have questions about your rights or welfare as a participant, please contact the Oregon State University Human Research Protection Program (HRPP) office, at (541) 737-8008 or by email at IRB@oregonstate.edu Thank you for your participation!

Q2 Name
First Name (1)
Last Name (2)
Maiden Name (3)
Q11 High school graduation year

- 1922 (1)
- 1923 (2)
- 1924 (3)
- 1925 (4)
- 1926 (5)
- 1927 (6)
- 1928 (7)
- 1929 (8)
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- 2009 (88)

- ❍ 2010 (89)
- ❍ 2011 (90)
- ❍ 2012 (91)
- ❍ 2013 (92)
- ❍ 2014 (93)
- ❍ 2015 (94)
- ❍ 2016 (95)

Q12 High school
- ❍ Lakeview (1)
- ❍ Paisley (2)
- ❍ North Lake (3)
- ❍ Other (4) _____

Q13 What is the highest level of education you have completed?
- ❍ Less than high school (7)
- ❍ High school (1)
- ❍ Some college (2)
- ❍ Associate's degree (3)
- ❍ Bachelor's degree (4)
- ❍ Master's degree (5)
- ❍ Advanced degree (PhD, JD, MD, etc) (6)

Display This Question:
If What is the highest level of education you have completed? Some College Is Selected
Or What is the highest level of education you have completed? Associates Degree Is Selected
Or What is the highest level of education you have completed? Bachelor's Degree Is Selected
Or What is the highest level of education you have completed? Master's Degree Is Selected
Or What is the highest level of education you have completed? Advanced Degree (PhD, JD, MD, etc) Is Selected

Q14 What year did you first attend college?

- ❍ 1926 (1)
- ❍ 1927 (2)
- ❍ 1928 (3)
- ❍ 1929 (4)
- ❍ 1930 (5)
- ❍ 1931 (6)
- ❍ 1932 (7)
- ❍ 1933 (8)
- ❍ 1934 (9)
- ❍ 1935 (10)
- ❍ 1936 (11)
- ❍ 1937 (12)
- ❍ 1938 (13)
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- 2014 (89)
- 2015 (90)
- 2016 (91)

Display This Question:
If What is the highest level of education you have completed? Bachelor's degree Is Selected Or What is the highest level of education you have completed? Master's degree Is Selected Or What is the highest level of education you have completed? Advanced degree (PhD, JD, MD, etc) Is Selected

Q15 What year did you receive your bachelor's degree?

- ❍ 1926 (1)
- ❍ 1927 (2)
- ❍ 1928 (3)
- ❍ 1929 (4)
- ❍ 1930 (5)
- ❍ 1931 (6)
- ❍ 1932 (7)
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- 2014 (89)
- 2015 (90)
- 2016 (91)

Display This Question:
If What is the highest level of education you have completed? Associate's degree Is Selected

Q16 What year did you receive your associate's degree?

- ❍ 1960 (1)
- ❍ 1961 (2)
- ❍ 1962 (3)
- ❍ 1963 (4)
- ❍ 1964 (5)
- ❍ 1965 (6)
- ❍ 1966 (7)
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- ❍ 2011 (52)
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- ❍ 2013 (54)
- ❍ 2014 (55)
- ❍ 2015 (56)
- ❍ 2016 (57)

Display This Question:
If What is the highest level of education you have completed? Bachelor's degree Is Selected
Or What is the highest level of education you have completed? Master's degree Is Selected
Or What is the highest level of education you have completed? Advanced degree (PhD, JD, MD, etc) Is Selected

Q17 What undergraduate institution did you graduate from?

- ❍ Eastern Oregon University (1)
- ❍ Oregon Institute of Technology (2)
- ❍ Oregon State University (3)
- ❍ Portland State University (4)
- ❍ Southern Oregon University (5)
- ❍ University of Oregon (6)
- ❍ Western Oregon University (7)
- ❍ Other university or college (please enter the name) (8) _____

Display This Question:
If What is the highest level of education you have completed? Some college Is Selected
Or What is the highest level of education you have completed? Associate's degree Is Selected
Or What is the highest level of education you have completed? Bachelor's degree Is Selected
Or What is the highest level of education you have completed? Master's degree Is Selected
Or What is the highest level of education you have completed? Advanced degree (PhD, JD, MD, etc) Is Selected

Q18 Did you attend more than one college?

- ❍ Yes (1)
- ❍ No (2)

Display This Question:
If Did you attend more than one college? Yes Is Selected
Or What is the highest level of education you have completed? Some college Is Selected

Q19 Please give the names of any colleges you attended, the years attending, and any degrees received.

Display This Question:
If What is the highest level of education you have completed? Some College Is Selected
Or What is the highest level of education you have completed? Associates Degree Is Selected
Or What is the highest level of education you have completed? Bachelor's Degree Is Selected
Or What is the highest level of education you have completed? Master's Degree Is Selected
Or What is the highest level of education you have completed? Advanced Degree (PhD, JD, MD, etc) Is Selected

Q20 Which of the following best describes your undergraduate major?

- ❍ Agriculture and natural resources (1)
- ❍ Architecture and related services (2)
- ❍ Biological and biomedical sciences (3)
- ❍ Business (4)
- ❍ Communication, journalism, and related programs (5)
- ❍ Communications technologies (6)
- ❍ Computer and information sciences (7)
- ❍ Education (8)
- ❍ Engineering (9)
- ❍ Engineering technologies (10)
- ❍ English language and literature (11)
- ❍ Family and consumer sciences (12)
- ❍ Foreign language, literature, and linguistics (13)
- ❍ Health professions and related programs (14)
- ❍ Homeland security, law enforcement, and firefighting (15)
- ❍ Legal professions and studies (16)
- ❍ Liberal arts and sciences, general studies, and humanities (17)
- ❍ Library science (18)
- ❍ Mathematics and statistics (19)
- ❍ Parks, recreation, leisure, and fitness studies (20)
- ❍ Philosophy and religious studies (21)
- ❍ Physical sciences and science technologies (22)
- ❍ Psychology (23)
- ❍ Public administration and social services (24)
- ❍ Social science and history (25)
- ❍ Theology and religious vocations (26)
- ❍ Visual and performing arts (27)
- ❍ Other (28) _____

Display This Question:
If What is the highest level of education you have completed? Some college Is Selected
Or What is the highest level of education you have completed? Associate's degree Is Selected
Or What is the highest level of education you have completed? Bachelor's degree Is Selected
Or What is the highest level of education you have completed? Master's degree Is Selected
Or What is the highest level of education you have completed? Advanced degree (PhD, JD, MD, etc) Is Selected

Q21 Please list any academic awards or recognition that you received in college.

Q22 Did you receive a Daly Fund scholarship (please check all that apply)

- ❑ I received the Daly Scholarship when I graduated from high school (1)
- ❑ I received the Daly Scholarship, but not for the year immediately following high school (2)
- ❑ I received the Collins McDonald Scholarship when I graduated from high school (3)
- ❑ I received the Collins McDonald Scholarship, but not for the year immediately following high school (4)
- ❑ No, I did not receive the Daly Fund or Collins McDonald scholarship (5)
- ❑ I received a different scholarship (please enter the name of the scholarship) (6)
  _____

Display This Question:
If What is the highest level of education you have completed? Some College Is Selected

Q23 What was the main reason you withdrew from college? (check all that apply)

- ❑ Marriage (1)
- ❑ Illness/injury/trauma (2)
- ❑ Lack of funds (3)
- ❑ Poor grades (4)
- ❑ Did not meet scholarship requirements (5)
- ❑ Pregnancy (6)
- ❑ Other (7) _____

Display This Question:
If What is the highest level of education you have completed? Some College Is Selected
Or What is the highest level of education you have completed? Associates Degree Is Selected
Or What is the highest level of education you have completed? Bachelor's Degree Is Selected
Or What is the highest level of education you have completed? Master's Degree Is Selected
Or What is the highest level of education you have completed? Advanced Degree (PhD, JD, MD, etc) Is Selected

Q24 Did you work during college?

- ❍ Yes (1)
- ❍ No (2)

Display This Question:
If Did you work during college? Yes Is Selected

Q25 How many years did you work while attending college?

- ❍ One year (1)
- ❍ Two years (2)
- ❍ Three years (3)
- ❍ Four years (4)
- ❍ Other (please describe) (5) _____

Display This Question:
If Did you work during college? Yes Is Selected

Q26 About how many hours did you work per week?

- ❍ 1 - 5 (1)
- ❍ 6 - 10 (2)
- ❍ 11 - 15 (3)
- ❍ 16 - 20 (4)
- ❍ 21 -25 (5)
- ❍ More than 25 (6)

Q27 Did you work during summers while attending your undergraduate college?

- ❍ Yes (1)
- ❍ No (2)

Display This Question:
If Did you work during summers while attending college? Yes Is Selected

Q28 How many summers did you work?

- ❍ One summer (1)
- ❍ Two summers (2)
- ❍ Three summers (3)
- ❍ Four summers (4)
- ❍ More than four summers (5)

Q29 At the time that you stopped your undergraduate studies (whether you graduated or not), did you have any debt associated with attending college?

- ❍ Yes (1)
- ❍ No (2)

Display This Question:
If At the time that you stopped attending college (whether you graduated or not), did you have any d... Yes Is Selected

Q30 At the time you completed your undergraduate studies, approximately how much college debt did you have?

Display This Question:
If What is the highest level of education you have completed? Some college Is Selected
Or What is the highest level of education you have completed? Associate's degree Is Selected
Or What is the highest level of education you have completed? Bachelor's degree Is Selected
Or What is the highest level of education you have completed? Master's degree Is Selected
Or What is the highest level of education you have completed? Advanced degree (PhD, JD, MD, etc) Is Selected

Q31 For each of the following sources of college funds, enter the approximate percentage of your total costs (must total 100%)

_____ Scholarships (Daly Fund or other) (1)
_____ Family (2)
_____ Work (3)
_____ College debt (4)
_____ Other (5)

Display This Question:
If Did you receive a Daly Fund scholarship (please check all that apply) I received the Daly Scholarship when I graduated from high school Is Selected
Or Did you receive a Daly Fund scholarship (please check all that apply) I received the Daly Scholarship, but not for the year immediately following high school Is Selected
Or Did you receive a Daly Fund scholarship (please check all that apply) I received the Collins McDonald Scholarship when I graduated from high school Is Selected
Or Did you receive a Daly Fund scholarship (please check all that apply) I received the Collins McDonald Scholarship, but not for the year immediately following high school Is Selected

Q32 Do you believe that you would have attended college if you did not receive the Daly or Collins McDonald Scholarship?

- ❍ Definitely would have attended (1)
- ❍ Probably would have attended (2)
- ❍ Probably would not have attended (3)
- ❍ Definitely would not have attended (4)

Q33 What is your mother's highest level of education?

- ❍ Less than high school (8)
- ❍ High school (1)
- ❍ Some college (2)
- ❍ Associate's degree (3)
- ❍ Bachelor's degree (4)
- ❍ Master's degree (5)
- ❍ Advanced degree (PhD, JD, MD, etc) (6)
- ❍ Unsure (7)

Q34 What is your father's highest level of education?
- ❍ Less than high school (8)
- ❍ High school (1)
- ❍ Some college (2)
- ❍ Associate's degree (3)
- ❍ Bachelor's degree (4)
- ❍ Master's degree (5)
- ❍ Advanced degree (PhD, JD, MD, etc) (6)
- ❍ Unsure (7)

Q35 Did your parents receive the Daly Fund or Collins McDonald Scholarship?
- ❍ Neither of my parents received the Daly Fund or Collins McDonald Scholarship (1)
- ❍ My mother received the Daly Fund or Collins McDonald Scholarship (2)
- ❍ My father received the Daly Fund or Collins McDonald Scholarship (3)
- ❍ Both of my parents received the Daly Fund or Collins McDonald Scholarship (4)
- ❍ I'm not sure (5)

Q36 Do you have siblings?
- ❍ Yes, older than me (1)
- ❍ Yes, younger than me (2)
- ❍ Yes, both younger and older than me (3)
- ❍ No (4)

Display This Question:
If Do you have siblings? Yes, and they are older than me Is Selected
Or Do you have siblings? Yes, and they are both younger and older than me Is Selected

Q37 Did your older sibling(s) receive a bachelor's degree?
- ❍ Yes, all of them (1)
- ❍ Yes, some of them (2)
- ❍ No (3)
- ❍ Unsure (4)

Display This Question:
If Do you have siblings? Yes, and they are younger than me Is Selected
Or Do you have siblings? Yes, and they are both younger and older than me Is Selected

Q38 Did your younger sibling(s) receive a bachelor's degree?
- ❍ Yes, all of them (1)
- ❍ Yes, some of them (2)
- ❍ No (3)
- ❍ Unsure (4)

Q39 Do you have children who have graduated from high school?
- ❍ Yes (5)
- ❍ No (6)

Display This Question:
If Do you have children who have graduated from high school? Yes Is Selected

Q40 Indicate college status and highest level of educational attainment for each of your children who have completed high school.

	Highest level of education					College status			
	High school (1)	Associate's (2)	Bachelor's (3)	Master's (4)	Advanced (PhD, MD, JD, etc) (5)	No college (1)	Some college (2)	Currently attending (3)	College graduate (4)
First child (1)	❍	❍	❍	❍	❍	❍	❍	❍	❍
Second child (2)	❍	❍	❍	❍	❍	❍	❍	❍	❍
Third child (3)	❍	❍	❍	❍	❍	❍	❍	❍	❍
Fourth child (4)	❍	❍	❍	❍	❍	❍	❍	❍	❍
Fifth child (5)	❍	❍	❍	❍	❍	❍	❍	❍	❍

Display This Question:
If Do you have children who have graduated from high school? Yes Is Selected

Q41 For any additional children, please list their college status and highest level of education.

Q42 What is your current employment status?
- ❍ Employed for wages (1)
- ❍ Self-employed (2)
- ❍ Out of work and looking for work (3)
- ❍ Out of work but not currently looking for work (4)
- ❍ A homemaker (5)
- ❍ A student (6)
- ❍ Retired (7)
- ❍ Unable to work (8)

Q43 Which of the following best describes the occupational area that best represents your work? (either current or, if you're retired, before retirement)

- ❍ Architecture and engineering occupations (4)
- ❍ Arts, design, entertainment, sports, and media occupations (9)
- ❍ Building and grounds cleaning and maintenance occupations (14)
- ❍ Business and financial operations occupations (2)
- ❍ Community and social service occupations (6)
- ❍ Computer and mathematical occupations (3)
- ❍ Construction and extraction occupations (19)
- ❍ Education, training, and library occupations (8)
- ❍ Farming, fishing, and forestry occupations (18)
- ❍ Food preparation and serving related occupations (13)
- ❍ Healthcare practitioners and technical occupations (10)
- ❍ Healthcare support occupations (11)
- ❍ Installation, maintenance, and repair occupations (20)
- ❍ Legal occupations (7)
- ❍ Life, physical, and social science occupations (5)
- ❍ Management occupations (1)
- ❍ Military specific occupations (23)
- ❍ Office and administrative support occupations (17)
- ❍ Personal care and service occupations (15)
- ❍ Production occupations (21)
- ❍ Protective service occupations (12)
- ❍ Sales and related occupations (16)
- ❍ Transportation and material moving occupations (22)
- ❍ Other (please describe) (24) _____

Q44 What was your total household income before taxes during the past 12 months?

- ❍ Less than $25,000 (1)
- ❍ $25,000 to $34,999 (2)
- ❍ $35,000 to $49,999 (3)
- ❍ $50,000 to $74,999 (4)
- ❍ $75,000 to $99,999 (5)
- ❍ $100,000 to $149,999 (6)
- ❍ $150,000 or more (7)

Q45 How would you describe your total current family income in comparison to your parents' family income when you were a child?

- ❍ My current family income is much less than that of my parents when I was a child (1)
- ❍ My current family income is somewhat less than that of my parents when I was a child (2)
- ❍ My current family income is similar to that of my parents when I was a child (3)
- ❍ My current family income is somewhat more than that of my parents when I was a child (4)
- ❍ My current family income is much more than that of my parents when I was a child (5)

Q46 How has the Daly Fund impacted each of the following:

	Amount of Impact			
	Great impact (1)	Some impact (2)	Little impact (3)	No impact (4)
College attendance (1)	❑	❑	❑	❑
College major (2)	❑	❑	❑	❑
College graduation (3)	❑	❑	❑	❑
Time to graduation (4)	❑	❑	❑	❑
Grade Point Average (GPA) (5)	❑	❑	❑	❑
Economic circumstances (6)	❑	❑	❑	❑
Other (7)	❑	❑	❑	❑

Q47 Is there anything in particular you'd like us to know about you or the impact of the Daly Fund?

Q59 Contact Information
Phone Number (1)
Email Address (2)

Q58 Contact Information
Street Address (1)
City (2)
Zip Code (3)

Q7 In which state do you currently reside?

- ❍ Alabama (1)
- ❍ Alaska (2)
- ❍ Arizona (3)
- ❍ Arkansas (4)
- ❍ California (5)
- ❍ Colorado (6)
- ❍ Connecticut (7)
- ❍ Delaware (8)
- ❍ District of Columbia (9)
- ❍ Florida (10)
- ❍ Georgia (11)
- ❍ Hawaii (12)
- ❍ Idaho (13)
- ❍ Illinois (14)
- ❍ Indiana (15)
- ❍ Iowa (16)
- ❍ Kansas (17)
- ❍ Kentucky (18)
- ❍ Louisiana (19)
- ❍ Maine (20)
- ❍ Maryland (21)
- ❍ Massachusetts (22)
- ❍ Michigan (23)
- ❍ Minnesota (24)
- ❍ Mississippi (25)
- ❍ Missouri (26)
- ❍ Montana (27)
- ❍ Nebraska (28)
- ❍ Nevada (29)
- ❍ New Hampshire (30)
- ❍ New Jersey (31)
- ❍ New Mexico (32)
- ❍ New York (33)
- ❍ North Carolina (34)
- ❍ North Dakota (35)
- ❍ Ohio (36)
- ❍ Oklahoma (37)
- ❍ Oregon (38)
- ❍ Pennsylvania (39)
- ❍ Puerto Rico (40)
- ❍ Rhode Island (41)
- ❍ South Carolina (42)
- ❍ South Dakota (43)

- Tennessee (44)
- Texas (45)
- Utah (46)
- Vermont (47)
- Virginia (48)
- Washington (49)
- West Virginia (50)
- Wisconsin (51)
- Wyoming (52)
- I do not reside in the United States (53)

Q48 Thank you for completing the survey. The results of this survey will be of great value to others. Please share this survey link (www.bit.ly/dalyfund) by email, text, or Facebook with friends and family who may have received the Daly Fund or Collins McDonald scholarships

Appendix B – Daly Fund Contact Information Survey

Daly Fund

Q19 Help us learn about the impact of the Daly Fund by providing your contact information below. In the fall of 2016 we will send you the link to the full survey. Thank you for your participation!

Q20 Part 1: Contact Information

Q1 First name

Q2 Last name

Q4 Maiden name

Q5 High school graduation year

- ❍ 1922 (1)
- ❍ 1923 (2)
- ❍ 1924 (3)
- ❍ 1925 (4)
- ❍ 1926 (5)
- ❍ 1927 (6)
- ❍ 1928 (7)
- ❍ 1929 (8)
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- 2008 (87)

- ❍ 2009 (88)
- ❍ 2010 (89)
- ❍ 2011 (90)
- ❍ 2012 (91)
- ❍ 2013 (92)
- ❍ 2014 (93)
- ❍ 2015 (94)
- ❍ 2016 (95)

Q16 High school
- ❍ Lakeview (1)
- ❍ Paisley (2)
- ❍ North Lake (3)

Q18 College (if college graduate)
- ❍ Eastern Oregon University (1)
- ❍ Oregon Institute of Technology (2)
- ❍ Oregon State University (3)
- ❍ Portland State University (4)
- ❍ Southern Oregon University (5)
- ❍ University of Oregon (6)
- ❍ Western Oregon University (7)
- ❍ Other university or community college (please enter the name of the college) (8)

  _____

Q18 Did you receive a Daly Fund scholarship (please check all that apply)
- ❑ Yes, when I graduated from high school (1)
- ❑ Yes, but not for the year immediately following high school (2)
- ❑ No, I did not receive a Daly Fund Scholarship (3)
- ❑ I received a different scholarship (please enter the name of the scholarship) (4)

  _____

Q10 Street address

Q11 City

Q19 College graduation year

- ❍ 1926 (1)
- ❍ 1927 (2)
- ❍ 1928 (3)
- ❍ 1929 (4)
- ❍ 1930 (5)
- ❍ 1931 (6)
- ❍ 1932 (7)
- ❍ 1933 (8)
- ❍ 1934 (9)
- ❍ 1935 (10)
- ❍ 1936 (11)
- ❍ 1937 (12)
- ❍ 1938 (13)
- ❍ 1939 (14)
- ❍ 1940 (15)
- ❍ 1941 (16)
- ❍ 1942 (17)
- ❍ 1943 (18)
- ❍ 1944 (19)
- ❍ 1945 (20)
- ❍ 1946 (21)
- ❍ 1947 (22)
- ❍ 1948 (23)
- ❍ 1949 (24)
- ❍ 1950 (25)
- ❍ 1951 (26)
- ❍ 1952 (27)
- ❍ 1953 (28)
- ❍ 1954 (29)
- ❍ 1955 (30)
- ❍ 1956 (31)
- ❍ 1957 (32)
- ❍ 1958 (33)
- ❍ 1959 (34)
- ❍ 1960 (35)
- ❍ 1961 (36)
- ❍ 1962 (37)
- ❍ 1963 (38)
- ❍ 1964 (39)
- ❍ 1965 (40)
- ❍ 1966 (41)
- ❍ 1967 (42)
- ❍ 1968 (43)

- 1969 (44)
- 1970 (45)
- 1971 (46)
- 1972 (47)
- 1973 (48)
- 1974 (49)
- 1975 (50)
- 1976 (51)
- 1977 (52)
- 1978 (53)
- 1979 (54)
- 1980 (55)
- 1981 (56)
- 1982 (57)
- 1983 (58)
- 1984 (59)
- 1985 (60)
- 1986 (61)
- 1987 (62)
- 1988 (63)
- 1989 (64)
- 1990 (65)
- 1991 (66)
- 1992 (67)
- 1993 (68)
- 1994 (69)
- 1995 (70)
- 1996 (71)
- 1997 (72)
- 1998 (73)
- 1999 (74)
- 2000 (75)
- 2001 (76)
- 2002 (77)
- 2003 (78)
- 2004 (79)
- 2005 (80)
- 2006 (81)
- 2007 (82)
- 2008 (83)
- 2009 (84)
- 2010 (85)
- 2011 (86)
- 2012 (87)

- 2013 (88)
- 2014 (89)
- 2015 (90)
- 2016 (91)

Q12 In which state do you currently reside?

- ❍ Alabama (1)
- ❍ Alaska (2)
- ❍ Arizona (3)
- ❍ Arkansas (4)
- ❍ California (5)
- ❍ Colorado (6)
- ❍ Connecticut (7)
- ❍ Delaware (8)
- ❍ District of Columbia (9)
- ❍ Florida (10)
- ❍ Georgia (11)
- ❍ Hawaii (12)
- ❍ Idaho (13)
- ❍ Illinois (14)
- ❍ Indiana (15)
- ❍ Iowa (16)
- ❍ Kansas (17)
- ❍ Kentucky (18)
- ❍ Louisiana (19)
- ❍ Maine (20)
- ❍ Maryland (21)
- ❍ Massachusetts (22)
- ❍ Michigan (23)
- ❍ Minnesota (24)
- ❍ Mississippi (25)
- ❍ Missouri (26)
- ❍ Montana (27)
- ❍ Nebraska (28)
- ❍ Nevada (29)
- ❍ New Hampshire (30)
- ❍ New Jersey (31)
- ❍ New Mexico (32)
- ❍ New York (33)
- ❍ North Carolina (34)
- ❍ North Dakota (35)
- ❍ Ohio (36)
- ❍ Oklahoma (37)
- ❍ Oregon (38)
- ❍ Pennsylvania (39)
- ❍ Puerto Rico (40)
- ❍ Rhode Island (41)
- ❍ South Carolina (42)
- ❍ South Dakota (43)

- Tennessee (44)
- Texas (45)
- Utah (46)
- Vermont (47)
- Virginia (48)
- Washington (49)
- West Virginia (50)
- Wisconsin (51)
- Wyoming (52)
- I do not reside in the United States (53)

Q13 Zip code

Q14 Email address

Q15 Phone number

Q21 Is there anything in particular you'd like us to know about you or the impact of the Daly Fund?

Q19 Thank you! Please encourage other Lake County high school graduates to go to our Facebook page and push the "Contact Us" button to complete this survey.

Appendix C – Daly Award, 1922-2016 and OSU Cost of Attendance, 1988-2016

Year	Daly Award[24]	OSU Estimated Total Cost (where available)
1920		
1922	600	
1923	600	
1924	600	
1925	600	
1926	600	
1927	600	
1928	600	
1929	600	
1930	600	
1931	600	
1932	600	
1933	600	
1934	500	
1935	500	
1936	500	
1937	500	
1938	450/350/500	
1939	405	
1940	405	
1941	375/315/75	
1942	375/315/75	
1943	375/315/75	
1944	375/315/75	
1945	375/315/75	
1946	375/315/75	
1947	375/315/75	
1948	375	
1949	375	
1950	450	
1951	510	
1952	510	
1953	510	
1954	510	

[24] Dollar amounts reflect those year's dollars – they are not adjusted for inflation.

1955	510	
1956	510	
1957	600	
1958	600	
1959	600	
1960	600	
1961	600	
1962	600	
1963	600	
1964	600	
1965	600	
1966	600	
1967	720	
1968	720	
1969	720	
1970	720	
1971	810	
1972	810	
1973	810	
1974	900	
1975	900	
1976	960	
1977	1020	
1978	1110	
1979	1110	
1980	1320	
1981	1320	
1982	1590	
1983	1800	
1984	1800	
1985	1830	
1986	1920	
1987	2100	
1988	2100	$6,210
1989	2190	$6,660
1990	2400	$7,050
1991	2700	$8,430
1992	2790	$8,790
1993	3000	$9,690

1994	3300	$10,080
1995	3300	$10,650
1996	3300	$10,992
1997	3300	$11,631
1998	3300	$11,694
1999	3900	$12,032
2000	3900	$12,288
2001	4200	$12,567
2002	4200	$13,233
2003	4500	$14,487
2004	5250	$15,666
2005	6000	$15,978
2006	6000	$16,719
2007	6600	$17,283
2008	6600	$18,261
2009	6600	$19,131
2010	6600	$20,723
2011	7200	$21,393
2012	7800	$22,698
2013	8400	$23,658
2014	8400	$24,594
2015	8400	$26,316
2016	8400	$25,434

Appendix D – American Community Survey Results Compared with Survey Respondents

	Lake County	Oregon	United States	Daly Recipients
Income				
Median Household Income	$32,369	$51,243	$53,889	-
Mean Household Income	$44,303	$69,040	$75,558	-
% of Population with income <50k	67.60%	48.70%	46.60%	20.05
% of population with income 50-100k	23%	31.10%	29.90%	20.18%
% of Population with income >100k	9.40%	20.10%	23.50%	59.77%
Education				
Less than HS	15.60%	10.20%	13.30%	n/a
HS	33.40%	24.30%	27.80%	0.80%
Some College	24%	26.30%	21.10%	3.70%
Associate's Degree	9.40%	8.40%	8.10%	3.30%
Bachelor's Degree	17.70%	30.80%	29.70%	92.20%
Graduate or Professional Degree	5.60%	11.50%	11.20%	40.00%
				n - 245
ACS Survey - Education attainment for persons 25 and older				