

Final Report

TULSA HIGHER EDUCATION TASK FORCE

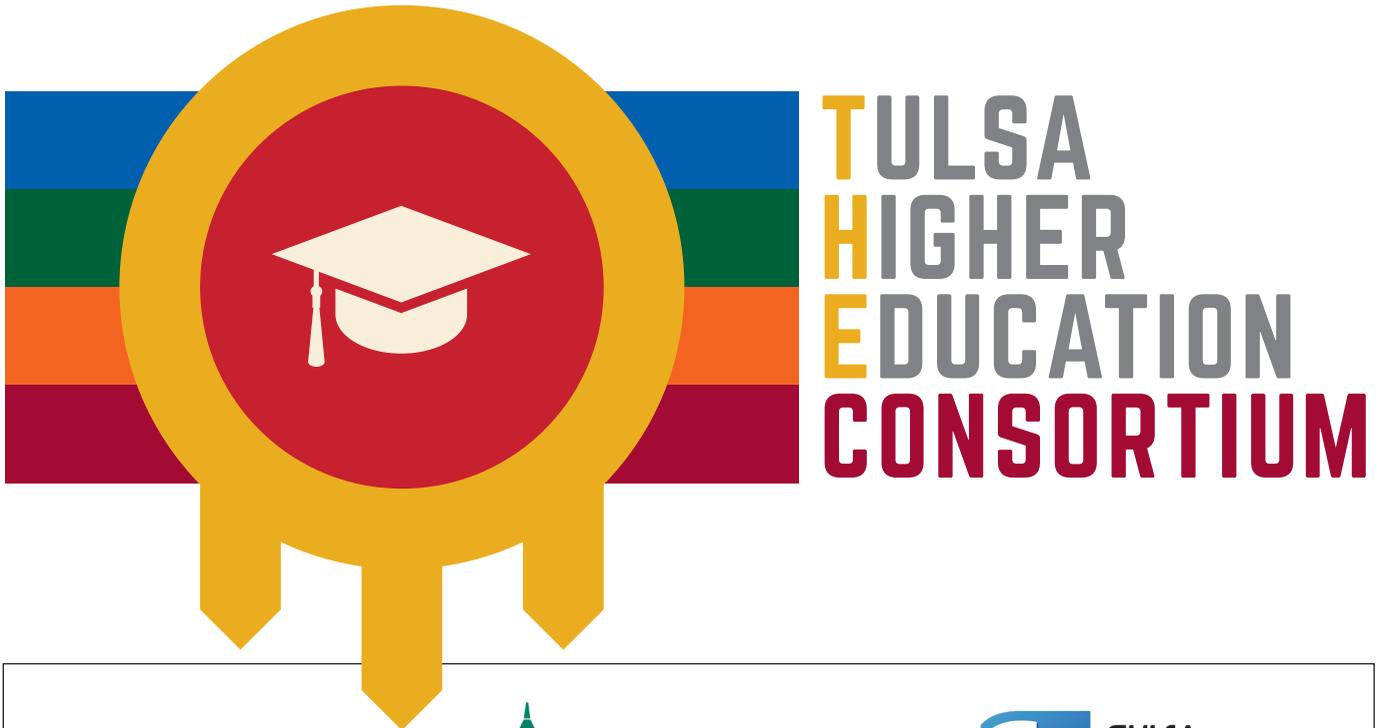




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I. Executive Summary

In fall 2017, seven higher education institutions with a presence in the Tulsa region – Tulsa Community College, Langston University, Northeastern State University, Oklahoma State University – Tulsa, Rogers State University, the University of Oklahoma – Tulsa, and the University of Tulsa – joined together to form the Tulsa Collaborative. This collaborative identified its collective priority as improving transfer student success. With support from the John N. Gardner Institute for Excellence in Undergraduate Education and the Charles and Lynn Schusterman Family Foundation, each participating institution embarked on a two-year effort to form an internal project leadership team, examine current transfer student outcomes and institutional practices supporting or inhibiting transfer success, and then create a campus-based Transfer Improvement Plan articulating a set of priorities that should be implemented internally by each institution to improve the transfer experience.

“...the leadership of participating higher education institutions determined that the experience of students pursuing a bachelor’s degree in the Tulsa area—beginning at Tulsa Community College and completing at any of our regional universities—will be meaningfully improved only if we create a formalized structure to sustain cross-institutional collaboration.”

In recognizing the value of this transfer-focused work, the leadership of participating higher education institutions determined that the experience of students pursuing a bachelor’s degree in the Tulsa area—beginning at Tulsa Community College and completing at any of our regional universities—will be meaningfully improved only if we create a formalized structure to sustain cross-institutional collaboration. So, on January 27, 2020, the Presidents of the seven participating higher education institutions issued a formal charge to establish the Tulsa Higher Education Task Force to “undertake an initial exploratory process to develop a plan for the creation of a formal structure for sustaining collaboration across the seven institutions and key community stakeholder groups.”

This report summarizes the activities, findings, and recommendations of the Tulsa Higher Education Task Force.

Principally, the Task Force recommends the establishment of the Tulsa Higher Education Consortium (“THE Consortium”). The Mission of THE Consortium will be to “advance student learning, improve student success and degree completion, achieve equity in outcomes, and meet workforce needs by working collaboratively to increase higher education opportunities in the region.”

The Strategic Priorities of THE Consortium will be to:

1. Advance and enhance student learning through institutional collaboration.
2. Increase credential and degree completion, particularly at the bachelor’s degree level.
3. Achieve equity in degree and credential attainment for underrepresented and underserved populations.
4. Create a seamless academic and student experience for those pursuing degrees and credentials in the Tulsa region.
5. Contribute to the development of a highly trained regional workforce through employer partnerships and enhanced educational opportunities.
6. Work collaboratively to provide professional development opportunities that support the strategic goals of the consortium.



The Task Force has expanded on these six strategic priorities for THE Consortium by recommending a year one implementation plan featuring 10 priority initiatives. These include the expansion of scholarship support for students; creation of an agreement to establish common transfer processes, procedures, and expectations of all member institutions to support a streamlined transfer experience; development of internship and job placement opportunities; and facilitation of professional development for faculty, advisors, and staff across member institutions. Furthermore, the Task Force has identified longer-term collaborative opportunities to improve the student experience through (a) cost savings and financial aid opportunities for students, (b) more robust cross-institutional student advising, (c) cross-institutional alignment on admissions and enrollment processes, (d) coordinated communication to students and shared services between institutions, and (e) collaboration in recruitment and marketing targeted at under-served student populations.

Additionally, the Task Force’s intent is for the consortium to serve as the coordinated voice for higher education in the Tulsa region. To that end, the consortium will continue to partner with the John N. Gardner Institute, as well as the Oklahoma State Regents for Higher Education and Institutional Research staff from participating institutions to curate data through a streamlined approach to data collection, storage, and reporting on regional key performance indicators. These regional higher education key performance indicators will include: transfer rates of TCC students to four-year institutions; percent of transfer credits accepted towards majors at the receiving universities; and bachelor’s degree completion rates of TCC transfer students, retention of graduates in the Tulsa MSA, and employment outcomes—all disaggregated by demographic characteristics. With these key performance indicators and a set of data-sharing procedures in place, the consortium will be positioned to produce aggregated reports and a data dashboard on regional higher education outcomes.

The Task Force proposes that THE Consortium will begin under the umbrella of the Tulsa Community Foundation as its fiscal sponsor and will adopt a set of bylaws establishing membership qualifications and articulating policies and procedures for setting up a Board of Directors to oversee THE Consortium’s leadership and implementation of the mission and priorities in the years ahead. Importantly, the Board of Directors will consist of Full Members and Affiliate Members. Full Members are higher education institutions that will have two voting seats on the Board; Affiliate Members are regional and statewide partners that are committed to advancing higher education in the Tulsa region and will have one voting seat on the Board. Founding Full Members include TCC, Langston, NSU, OSU-Tulsa, Rogers State, OU-Tulsa, and TU. Founding Affiliate Members include ImpactTulsa, the Tulsa Regional Chamber of Commerce, Tulsa Community Foundation, the City of Tulsa, the Broken Arrow Chamber of Commerce, the Oklahoma State Regents for Higher Education, and the Charles and Lynn Schusterman Family Foundation.

Upon approval by the Presidents, the Task Force’s officers and facilitators will lead the following steps to establish and operationalize the Tulsa Higher Education Consortium:

“...the Task Force’s intent is for the consortium to serve as the coordinated voice for higher education in the Tulsa region.”



1. Set up the Tulsa Higher Education Consortium as a Designated Fund of Tulsa Community Foundation.
2. Form the Consortium Board of Directors by securing appointments from leadership of Full Member institutions and Affiliate Member organizations.
3. Form the CEO Search Committee.
4. Secure payment for Year One operations from the Charles and Lynn Schusterman Family Foundation, which has committed to providing the Consortium with start-up general operating support.
5. Execute the CEO Search Process and hire a Founding CEO.

The Tulsa Higher Education Task Force is grateful to the numerous individuals and organizations who made this possible. Especially:

- The seven Presidents initiating this important collaborative effort;
- The leaders of the City of Tulsa, ImpactTulsa, the Tulsa Regional Chamber of Commerce, the Broken Arrow Chamber of Commerce, Tulsa Community Foundation, and the Oklahoma State Regents for Higher Education for their ongoing partnership and support of higher education in the Tulsa region;
- The Task Force facilitators from the John N. Gardner Institute, ImpactTulsa, and the Schusterman Family Foundation for guiding the Task Force over seven months and through countless meetings;
- The 29 members of the Task Force who validated the concept of a regional higher education consortium, identified many challenges and opportunities within Tulsa's existing higher education landscape, and provided many creative ideas to move all institutions forward in a collaborative way that puts the student experience at the center of our work; and
- The Task Force Officers—Dr. Cindy Hess, Nick Doctor, and Carlisha Williams Bradley—who took on the responsibility of the President's Charge and led the Task Force to produce this report.

II. Background on the Tulsa Transfer Project

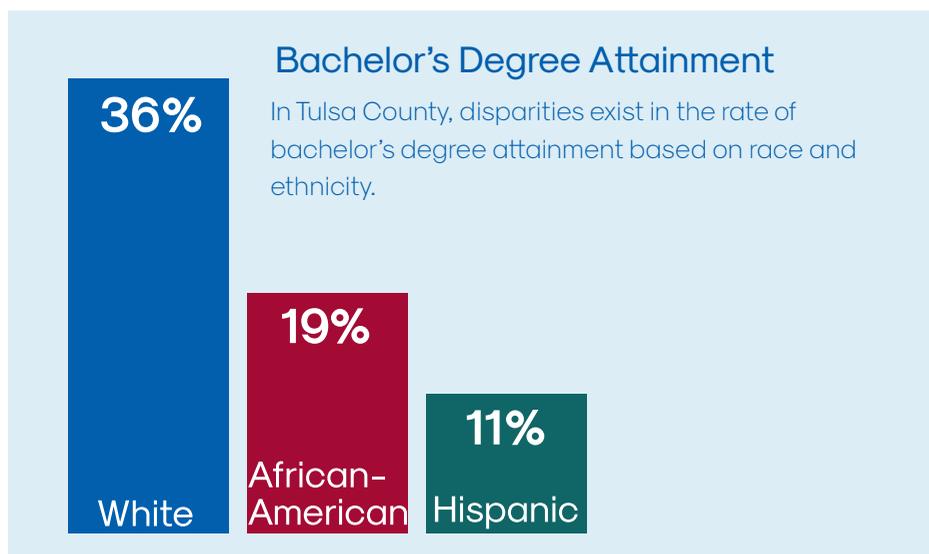
In 2017, seven Tulsa area higher education institutions formed the Tulsa Collaborative – consisting of Tulsa Community College (TCC), Oklahoma State University-Tulsa, Northeastern State University, the University of Oklahoma-Tulsa, Rogers State University, Langston University, and the University of Tulsa – to identify opportunities to build partnerships and improve the experience and outcomes of students pursuing their degree in the region. The formation of the Collaborative led member institutions to launch the Tulsa Transfer Project, in partnership with the John N. Gardner Institute for Excellence in Undergraduate Education and with support from the Charles and Lynn Schusterman Family Foundation. The project’s over-arching purpose has been to increase the number of students who attain post-secondary credentials in northeastern Oklahoma through enhanced transfer student success with a specific focus on the following goals:

1. To increase the transfer rate of TCC students to four-year institutions,
2. To increase the percentage of transfer credits accepted toward majors at transfer-receiving universities,
3. To increase rates of bachelor’s degree completion, and
4. To build a sustainable structure to ensure ongoing coordination and collaboration among partner institutions.

Why Focus on Transfer?

The inadequate number of students beginning higher education at a community college and efficiently and successfully completing a bachelor’s degree is a national, state, and regional concern. Despite the introduction of alternative post-secondary program offerings and credentials in the United States, it remains true that earning a bachelor’s degree leads to higher individual earnings and supports national and regional economic activity. In fact, in Tulsa County in 2017, individuals with a bachelor’s degree earned nearly 38% more annually than those with some college or an associate degree and 67% more annually than those with a high school diploma.¹

Tulsa County’s rate of degree attainment exceeds the state average and is on par with the national average as 30.9% of adults 25 and older have earned a bachelor’s degree or higher. However, disparities persist based on race and ethnicity as the rate of bachelor’s-degree attainment among White residents in Tulsa County (36%) is nearly twice as high as the rate among African-American residents (19%) and over three times higher than the rate among Hispanic residents (11%).²



15.5%

...in Oklahoma only 15.5% of the students who started higher education at a community college in 2010 completed a bachelor's degree in six years.

66.5%

In 2017-2018, 3,419 students transferred from TCC; of these transfer students, 66.5% went to one of the universities in the Tulsa Collaborative.

In terms of transfer student outcomes, in Oklahoma only 15.5% of the students who started higher education at a community college in 2010 completed a bachelor's degree in six years. This low rate of bachelor's-degree attainment is, in part, because only 43.4% of the students transferred, and of those students 35.6% completed a bachelor's degree by spring 2016.³

Tulsa's context is particularly unique, posing both challenges and opportunities for those seeking to earn their bachelor's degree while staying in the region. By statute, Tulsa Community College (TCC) is the primary provider of lower-division coursework among the public institutions in Tulsa County. This factor, along with the lower tuition and the availability of 100% funding for tuition and fees through Tulsa Achieves scholarships for high school graduates living in Tulsa County, makes TCC an ideal starting point for college. Pathways developed for many bachelor's-degree programs make it easy for students to transfer from TCC to one of the area universities. In 2017-2018, 3,419 students transferred from TCC; of these transfer students, 66.5% went to one of the universities in the Tulsa Collaborative.⁴

Given this context, Tulsa must improve the transfer experience of students through cross-institutional collaboration in order to increase bachelor's-degree attainment rates and the earnings potential of area residents, particularly among people of color who have historically received insufficient support in navigating higher education pathways.

What progress have we made so far?

Since spring 2018, members of the Tulsa Collaborative have worked with the Gardner Institute to undertake the Tulsa Transfer Project through a process called Foundations of Excellence® Transfer. The process involved a systematic self-study and the development of action steps leading toward improvement of transfer for both the two-year sending institution and four-year receiving institutions.

Across the participating institutions, a total of 278 administrators, faculty, staff, and students participated in the evaluation of transfer at their institution. As part of the evaluation they reviewed data on their transfer students, their current institutional policies, transfer services, and practices. Each institution conducted two surveys: one of their faculty and staff and one of their students. A total of 1,798 employees and 2,124 students shared their perceptions of the transfer experience in these surveys. (See Table 1.)

Table 1 Responses of Faculty/Staff and Students to Foundations of Excellence Transfer Surveys

Tulsa Collaborative Institutions	Faculty/Staff Survey Responses	Student Survey Responses	Task Force Members
Langston University	125	130	16
Northeastern State University	378	325	67
OSU-Tulsa	81	157	36
Rogers State University	186	471	68
The University of Tulsa	609	311	56
University of Oklahoma -Tulsa	27	48	16
Tulsa Community College	392	682	19
Total for Tulsa Collaborative	1,798	2,124	278

These institutional self-studies led to the development of action plans comprised of a total of 123 recommendations for improving transfer across the participating institutions. Themes from these institutional transfer improvement plans can be found in Table 2.

Table 2 Current Implementation Priorities for Tulsa Collaborative Institutions

Current Implementation Priorities:		
Adopt Transfer Philosophy Statement	New Transfer Office/Roles	Re-design Transfer Website
Improve Transfer Orientation	Faculty and Staff Engagement with Transfer Students	Update Recruitment Materials
Update Articulation Agreements	Improve Communications and Advising for Transfer Students	Collaborate and Share Data with Partner Institutions

These cross-institutional themes have resulted in changes at each institution and in concert with the larger collaborative project. For example, seeing gaps in how the unique needs of transfer students are sometimes unmet, several institutions re-configured transfer offices, hired new staff to serve in existing offices, or rethought intake and advising processes in light of lessons learned from evidence collected through the self-study process, such as creating processes for sharing student admission lists to support reverse transfer opportunities and updating articulation agreements. Improving communications was a theme that ran across the priorities of several institutions, and everything from web page content to the emails sent became a focal point for improvement. Keeping information current and relevant to transfer students remains a priority as the participating institutions continue to work together to smooth pathways for students.

Tulsa Community College Transfer Findings and Priorities

As the sole provider of lower-division coursework in Tulsa County and the primary transfer-sending institution participating in the Tulsa Transfer Project, Tulsa Community College’s transfer improvement plan is particularly relevant to the success and sustainability of this collaborative effort to improve transfer student outcomes in the region.

Through its institutional self-study process, TCC collected valuable data from students and faculty regarding the extent to which the college prioritizes and supports the transfer experience.

As a result of its self-study, TCC produced a plan with 25 recommendations. The themes of these recommendations⁵ include:

1. TCC Transfer Culture, which calls for adopting an institutional Transfer Philosophy Statement, regularly communicating within the college and to community stakeholders TCC’s progress on transfer outcomes, and making transfer a priority in the college’s 5-year strategic plan.
2. Organizational Roles and Support, which calls for a revised organizational structure within TCC to support transfer, leading to the creation of TCC’s University Transfer Office.

Transfer Student Survey

71.3% of transfer-bound students would highly or very highly recommend TCC as a good place to acquire the first two years of a four-year degree.

64.6% of transfer-bound students rate the degree TCC is meeting their academic needs as high or very high.

63.9% of transfer-bound students indicate the encouragement to learn about universities to which they intend transfer has been moderate, slight, or not at all.

49.2% of transfer-bound students indicate their academic advisors explanation of the transfer process has been slight or not at all.

59.5% of transfer-bound students indicate TCC has provided moderate, slight, or no help in making decision about transfer.

3. Communication and Resources, which calls for redesigning the TCC transfer website and a consistent and intentional transfer marketing campaign.
4. Curriculum and Exploration Opportunities, which calls for highlighting clear and supported transfer pathways as a priority for all academic programs, along with regularly updated articulation agreements and transfer maps with partner 4-year universities, and more assistance for students preparing to transfer to address concerns about financial resources, housing, and navigating a new campus.
5. Data, which calls for more purposeful and timely review of data and reporting related to the transfer experience, the addition of an intent-to-transfer question on the TCC application, and notifications for advisors when transfer students earn a certain number of credit hours so they can lead transfer-focused conversations.
6. Professional Development, which calls for supporting faculty with interdisciplinary collaboration, recognition for faculty and staff for championing transfer student success and providing annual professional development to faculty on state transfer policies.
7. Relationships, which calls for formalizing the Tulsa Transfer Collaborative with a consortium agreement to define regional priorities and solidify commitments to make institutional decisions that help Tulsa-area students achieve their goals, consistent review and update of articulation agreements for all programs with transfer partners, more frequent communication opportunities for faculty, advisors, and academic leaders across institutions, and more financial aid and scholarship opportunities for TCC transfer students.

III. Background on the Tulsa Higher Education Task Force

The Tulsa Transfer Project has facilitated a valuable process in which the seven participating institutions have learned from their own data on transfer student outcomes, heard from their own students and faculty about the extent to which transfer is perceived to be an institutional priority, and reviewed current practices that may or may not support a smooth transfer experience – all leading to the creation of campus-based transfer improvement plans.

However, a formalized structure to ensure regular coordination and collaboration across institutions is needed in order to support a more streamlined transfer experience for students and to achieve the ambitious goal of increasing bachelor's-degree completion rates in the Tulsa region. The case for the creation of a formal coordinating structure to sustain and build on regional improvements to the transfer experience is simple:

1. All institutions share an interest in increasing bachelor's-degree attainment in the region, which is vital to both individual and regional economic prosperity.
2. TCC plays a central role as the primary provider of lower-division coursework in the Tulsa region and is the largest transfer-sending institution in the state.
3. Transfer students are an enrollment driver for 4-year receiving institutions, so that transfer student success is closely tied to institutional viability.
4. There is significant room to improve transfer outcomes, in terms of the percentage of community college students transferring to a 4-year institution and the percentage of those transfer students persisting and completing their bachelor's degree.

When we look at the data in Tulsa County, it is clear that there is much room for

improvement and the seven Tulsa Collaborative institutions must work together to drive increased college enrollment and degree attainment.

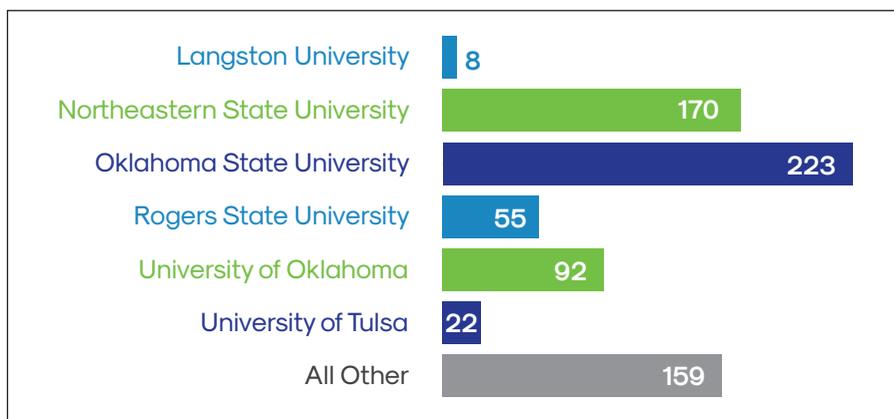
College Enrollment and Persistence

Tulsa County has a sizable number of students enrolled in college (37,896); these students are diverse in terms of age as about half (51%) are young adults (between ages 18-24), 28% are between ages 25-34, and 21% are 35 and older. Additionally, enrollment in college among young adults is relatively low as two-thirds (39,023) of Tulsa County residents between ages 18-24 are not enrolled at all.⁶ Of students coming out of Tulsa area high schools in 2018, 51% matriculated to an Oklahoma college or university, three percentage points higher than the matriculation rate of high school graduates from the rest of the state. Of the students from the Tulsa area who are matriculating, 43% are enrolling at TCC, and of these students 38% are still enrolled or have completed a credential after six years; however, this rate is lower among students from Tulsa Public Schools (TPS) high schools (16-24%) compared to suburban high schools (38-65%).⁷ Overall, among the 1,373 TPS graduates in 2014, 1,125 of these students (82%) did not complete a college degree within six years.⁸

Transfer Outcomes

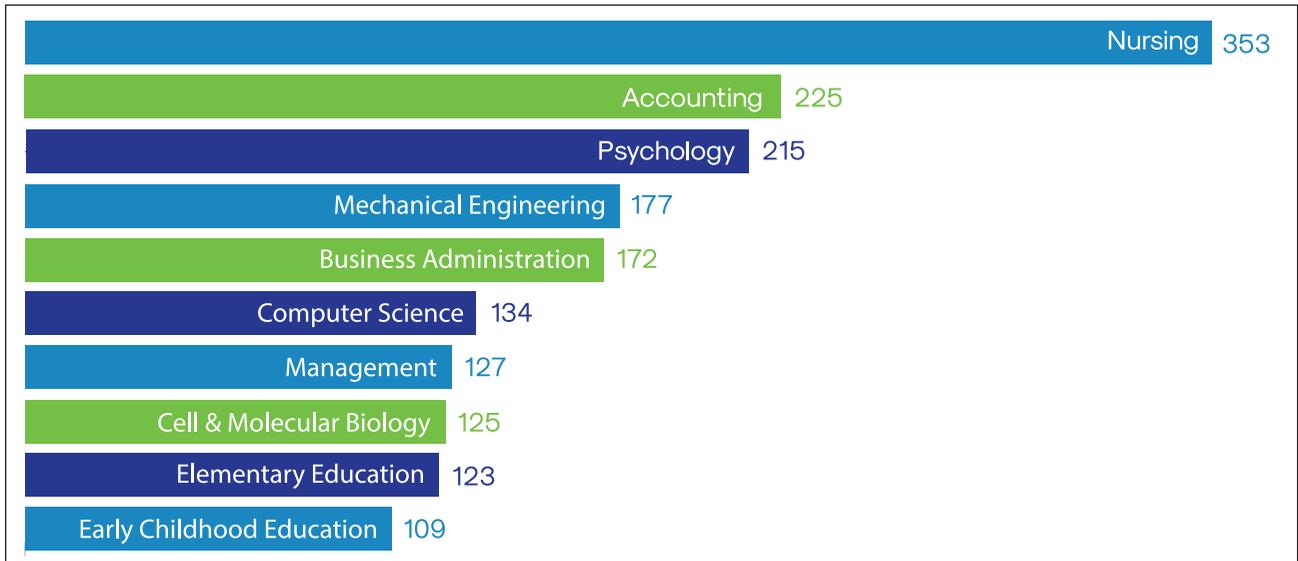
Looking more closely at students transferring from TCC, we see that 29.8% (663) of the 2,227 Fall 2017 TCC first-time entering students who were in a transfer major (AA/AS) transferred to a four-year institution within three years. (See Figure 1.) Eighty-one percent (581) of those students went to one of the Tulsa Transfer Project partner universities. Of these transfer students, just 4.5% (44) were African American and 12.5% (121) were Hispanic.⁹ These transfer rates among African-American and Hispanic students are lower than the proportion of African-American students (9.7%, 215 students) and Hispanic students (14.7%, 327 students) in the corresponding cohort entering TCC in 2017, signifying that the equity pipeline begins to narrow early in the college careers of students of color.

Figure 1 TCC Fall 2014 First-Time Students Who Transferred to a Baccalaureate Institution Within Three Years



As TCC students matriculate to 4-year institutions in the region, the top majors are Nursing, Accounting, Psychology, Mechanical Engineering, and Business Administration. (See Figure 2.)

Figure 2 The Top Majors for TCC Students Enrolled at a Tulsa Collaborative University



In terms of bachelor's-degree completion, 1,889 degrees were awarded by the Tulsa Collaborative Universities during the 2018-2019 school year to students who had previously transferred from TCC.¹⁰ (See Table 3.)

Table 3 2018–2019 Bachelor's Degrees Awarded by Tulsa Collaborative Universities to TCC Transfer Students

Tulsa Collaborative University	Tulsa Community College Transfer Students
Langston University	6
Northeastern State University	594
Oklahoma State University	898
Rogers State University	53
The University of Tulsa	49
University of Oklahoma	289

Note. These data include all campuses of universities.

Educational Attainment

Tulsa County is home to 131,475 bachelor’s-degree holders—30.9% of working-age residents (between ages 25-65).¹¹ However, the Tulsa Regional Chamber of Commerce has found that Tulsa is short by about 19,700 bachelor’s-degree holders to reach parity with our peer cities around the country that are averaging bachelor’s attainment levels of 35.5% among working-age adults.

In terms of Tulsa’s attainment levels by race and ethnicity, we can see significant disparities between White residents (36%) and African American (19%) and Hispanic (11%) residents. White residents are vastly over-represented among bachelor’s-degree holders, accounting for 61% of the total population but 82% of bachelor’s degrees. By contrast, African-American residents, while accounting for 11% of the population in Tulsa County, are under-represented in terms of attainment as 5% of bachelor’s-degree holders are African American (7,207); and Hispanic residents, while accounting for over 13% of the population in Tulsa County, make up just 3% of bachelor’s-degree holders (4,497).¹² (See Table 4.)

Table 4 Racial and Ethnic Educational Attainment in Tulsa

Ethnicity	% of Population	% of Bachelor’s
African American	11%	5%
Hispanic	13%	3%
White	61%	82%

The map in Figure 3 shows significant geographic disparities in terms of educational attainment in Tulsa County. In Census tracts shaded dark brown (north of downtown Tulsa), the majority of residents have not completed high school (4-6% of residents have earned a bachelor’s degree in those areas); in Census tracts shaded light brown (mostly in north, east, and west Tulsa), the majority of residents have earned no more than a high school diploma (4-16% of residents have earned a bachelor’s degree in those areas); in Census tracts shaded light green (dispersed across the county), the majority of residents have completed some college coursework or earned no more than an associate degree (15-30% of residents have earned a bachelor’s degree in those areas); and in Census tracts shaded dark green (midtown Tulsa, south Tulsa, Broken Arrow, Jenks, and Owasso), the majority of residents have completed a bachelor’s degree (40-75% of residents have earned a bachelor’s degree in those areas).¹³

These disparities by race, ethnicity, and geography indicate that through improved institutional collaboration, more intentional efforts can and should be made to support access, persistence, transfer, and completion of degree programs among those who have historically been excluded from higher education in the past.

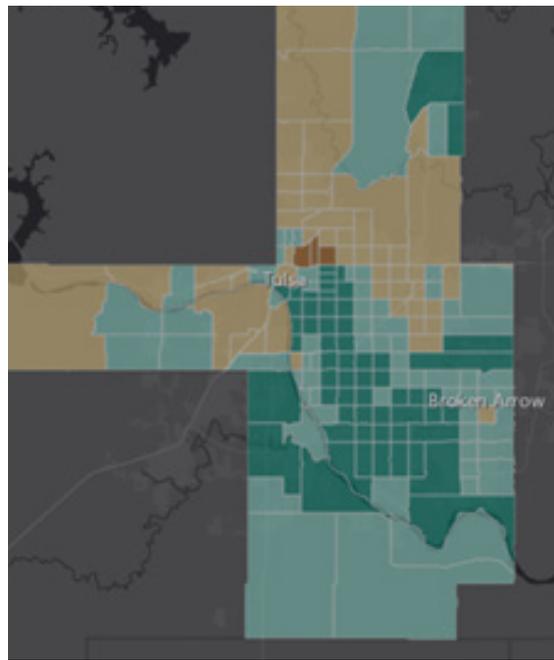


Figure 3 Mapping of Educational Attainment in Tulsa County

- The majority of residents have not completed high school.
- The majority of residents have earned no more than a high school diploma.
- The majority of residents have completed some college coursework or earned no more than an associate degree.
- The majority of residents have completed a bachelor's degree.

Presidents' Charge and Input

After two years of collaborating informally through the Tulsa Transfer Project, leaders from the seven participating institutions agreed in early 2020 to explore formalizing the collaborative. On January 27, 2020, the presidents of the seven institutions joined leaders from the City of Tulsa, the Tulsa Regional Chamber of Commerce, ImpactTulsa, Tulsa Community Foundation, and the Oklahoma State Regents for Higher Education in signing a formal charge to establish the Tulsa Higher Education Task Force to “undertake an initial exploratory process to develop a plan for the creation of a formal structure for sustaining collaboration across the seven institutions and key community stakeholder groups” that will “leverage our shared institutional resources and facilitate a seamless academic and social experience for students pursuing baccalaureate degrees in the Tulsa region.” See the Presidents’ Charge in Appendix A.

Prior to launching the Task Force, the Presidents met on April 6, 2020, to provide input on the direction of this collaborative exploratory work. The Presidents provided six areas of guidance for the Task Force.

- 1. Alignment with Institutional Transfer Priorities and Plans:** The Task Force should build on the work that institutions have started with their Transfer Plans.
- 2. Coordinated Communication of Transfer Pathways:** As Transfer Maps are being created by TCC and partner 4-year institutions, the Task Force must ensure that these are being used as tools to help students make decisions early in their college journey. We also need a coordinated marketing plan and a single regional portal for program navigation that can serve as a “front door” to higher education in the region.
- 3. Respond to Workforce Needs:** As a collaborative, we need to understand regional workforce needs, and how together we can meet the needs of each sector. The Task Force needs to actively get input from the Chamber and local industry leaders.
- 4. Student-Centric Approach:** The Task Force needs to think through our processes, pathways, and articulation agreements from the vantage point of students. All

institutions need to build and sustain a strong, welcoming transfer culture with involvement from everyone (faculty, administrators, etc.).

5. **Faculty Collaboration:** We will need faculty working together from the different institutions to make sure learning outcomes are aligned to ensure a smooth transition for students transferring and to validate the courses they have already taken at TCC.
6. **Resources and Opportunities for Students:** We need to expand scholarships for juniors and seniors that have transferred from TCC. This collaborative could serve as a centralized hub for coordinating all internships for college students in the region so businesses have one point of contact to engage.

With this support and input from the Presidents, the Tulsa Higher Education Task Force launched on April 15, 2020, with 29 members and eight facilitators (see Appendix C). Members came from the following institutions and organizations: Tulsa Community College, Langston University, Northeastern State University, Oklahoma State University – Tulsa, Rogers State University, the University of Oklahoma – Tulsa, the University of Tulsa, the City of Tulsa, the Tulsa Regional Chamber of Commerce, the Broken Arrow Chamber of Commerce, ImpactTulsa, Tulsa Community Foundation, and the Oklahoma State Regents for Higher Education. The facilitators came from the John N. Gardner Institute for Excellence in Undergraduate Education, ImpactTulsa, and the Charles and Lynn Schusterman Family Foundation.

Upon launching, the Task Force elected Dr. Cindy Hess to serve as Chair, Nick Doctor to serve as Vice Chair, and Carlisha Williams Bradley to serve as Secretary. The Task Force also voted to establish four sub-committees to lead various aspects of research and planning. These included the Mission and Purposes Sub-Committee, led by Emily Tichenor (TCC); the Student Experience Sub-Committee, led by Heidi Hoskinson (RSU); the Data, Programs, and Workforce Sub-Committee, led by Mary Millikin (RSU); and the Governance and Finance Sub-Committee, led by Jerrid Freeman (NSU).

The Task Force met eight times between April and October 2020. Subcommittees also met dozens of times during that period with the stated purpose of developing a plan for the creation of a formal structure for sustaining collaboration across the seven institutions and key community stakeholder groups.

Consortia in Context

After its launching, the Task Force began with a review of consortium models nationally. Since the first collaborative institutional partnerships were established by Claremont Colleges in 1925 and the Atlanta University Center in 1929, colleges and universities have continued to create formal collaborative structures. Institutions form a consortium for one main reason, and that is to better serve their member institutions. Collaborations are considered when organizations in regional proximity (or with a shared mission) identify similar concerns or issues. Today, there are consortia of every type, size, and emphasis throughout the United States, most commonly focused on partnerships supporting academic program collaboration, coordination with local business and industry, and shared services and technology planning. As individual institutional resources have become increasingly strained, consortia frequently top the list of best-practice recommendations. [The Association of Collaborative Leadership \(ACL\)](#), which serves as the voice and support for collaboration in higher education, lists 56 active consortia that are Association members. ACL promotes and supports higher education partnerships through professional development, resource sharing, and program enhancement, and has guided the Tulsa Higher Education Task Force during



As individual institutional resources have become increasingly strained, consortia frequently top the list of best-practice recommendations.



this exploratory process. For more information on the national landscape of formal collaborative structures, see the John N. Gardner Institute’s Primer on Consortia in Appendix D and an Overview of Consortium Models in Appendix E.

Having reviewed this landscape, the Task Force then adopted the Gardner Institute’s Framework for Building Consortial Collaboration as a guide to building a consortium model for the Tulsa region. This framework emphasizes the unique value proposition of a consortium to facilitate cross-institutional collaboration in a way that addresses (1) existing “Pain” in terms of unmet student needs and changing workforce needs, (2) “Trust” that moves institutions toward operating as partners and looking after each other’s students and institutional needs, (3) establishing a collective “Vision” for what institutions can accomplish working together, and (4) protecting each institution’s individual identities and retaining institutional distinctiveness. See this Framework in Appendix F.

The Task Force then held virtual panels with several regional and national consortium leaders: Virginia Tidewater Consortium, North Texas Community College Consortium, the Southwestern Ohio Council for Higher Education, Colleges of the Fenway, the Association for Collaborative Leadership, the Lehigh Valley Association of Independent Colleges, and the Alamo Colleges South & Central Texas Transfer Compact. From these panels, the Task Force noted the following themes (see Appendix G):

- Student needs and experiences must come first.
- Shared professional development is a significant benefit of a consortium.
- Relationships across institutions are critical and create a foundational building block for cross-institutional structures and processes.
- It is critical to develop aligned and standardized transfer processes, such as articulation agreements and data sharing.
- Stay close to the mission, prioritize simplicity when developing structures, avoid mission drift, and collect mission-centered data.
- Get creative in developing a funding structure that promotes sustainability.
- Listen closely to community needs, match community resources, such as internships, with student needs, and regularly produce regional impact studies to demonstrate the value of collaboration in higher education.

Tulsa Area Needs for Higher Education

Tulsa area universities offer a total of over 220 bachelor’s-degree programs, but the absence of clear program pathways can lead to confusion among students navigating Tulsa’s higher education system, and because of Tulsa’s fragmented higher education landscape, it is unclear whether our regional institutions are producing a sufficient number of graduates to meet the needs of employers.

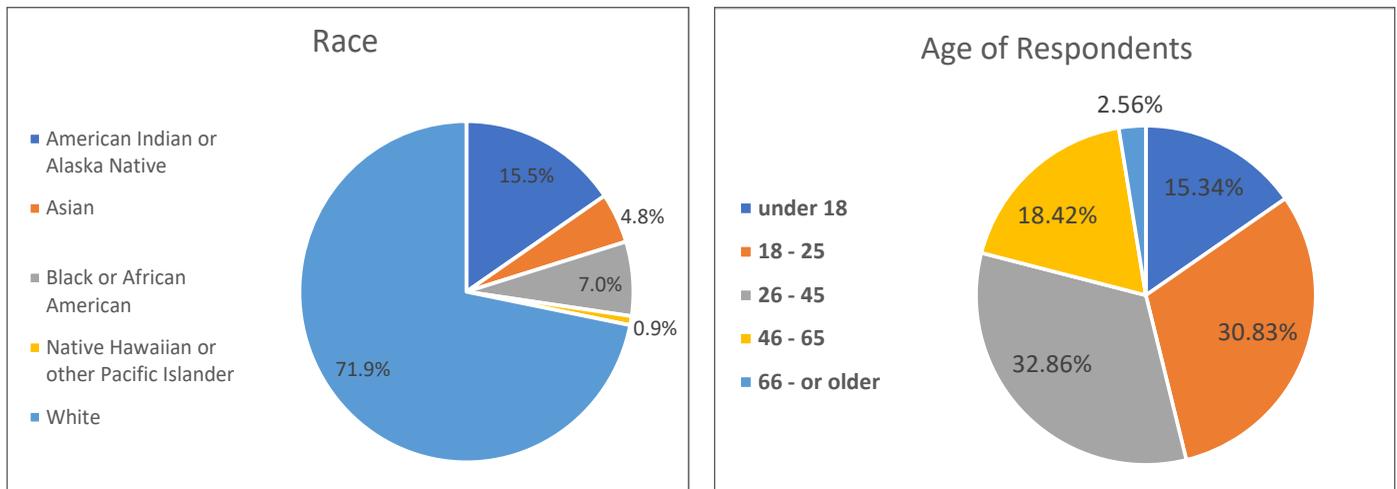
In September 2020, the Task Force launched a community-wide survey to collect information on experiences with, and perceptions of, higher education among stakeholders in the Tulsa region. See detailed summary of results in Appendix H. Over

2,000 community members responded to this survey including 222 Tulsa area employers, 184 high school personnel, nearly 1,000 prospective college students, and over 800 current or recent college students.

The majority of survey respondents (over 64%) were 45 years of age or younger. Nearly one in five identified their ethnicity as Hispanic while the majority (nearly 72%) identified their race as White. (See Figure 4.) About 60% of respondents reported that one or both parents had at least an associate degree, while over 30% held a bachelor’s degree or higher. Another 19% had some college but had earned no degree.

Surveys were completed by residents distributed across the Tulsa region as follows: East Tulsa, 328; Midtown, 208; South Suburbs (Bixby, Jenks, Sapulpa), 171; South Tulsa, 153; North Tulsa, 100, and West Tulsa, 80.

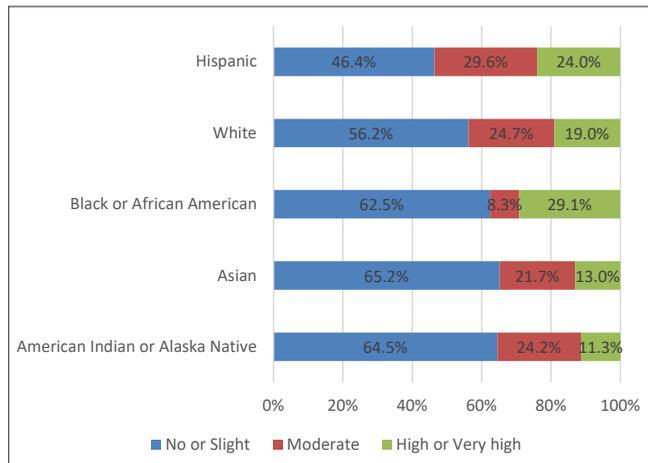
Figure 4 Community Survey Respondents by Race and Age



Awareness of Tulsa Higher Education Options:

- The vast majority (over 80%) of the General Public who responded to the survey felt that they were at least moderately aware of the Tulsa area higher education programs and that information about those programs was accessible and could be easily understood.
- The majority (88%) of High School Personnel who responded to the survey agreed at least moderately that students were encouraged to pursue credentials, but only 62% of these respondents agreed at least moderately that students were actually informed about different pathways that they can take to complete a bachelor’s degree, and only 27% agreed highly or very highly that students were so informed.
- However, over 55% of Prospective Students reported that high school counselors did not help them understand the degree programs available in the Tulsa area, including even higher rates of dissatisfaction among Black students (63%) and Native American students (65%). (See Figure 5.) Among Prospective First-Generation College Students, less than 15% agreed highly or very highly that high school counselors were helpful.

Figure 5 Perceptions of Help Provided by High School Counselors by Racial/Ethnic Group



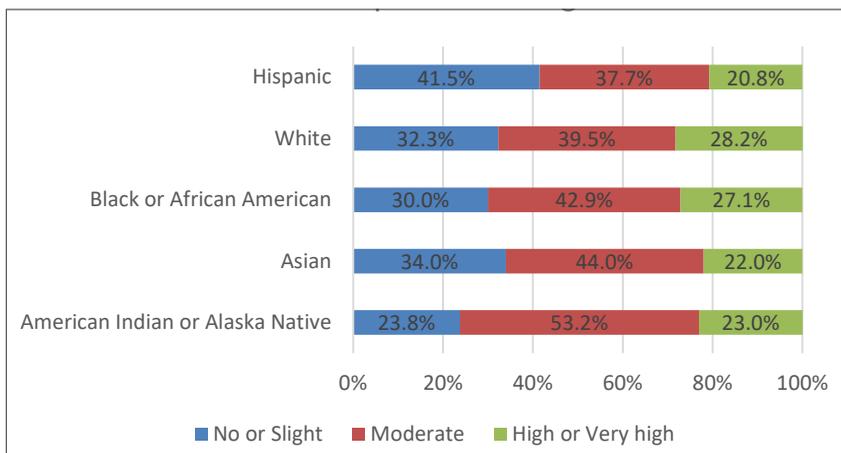
So, while the public believes that information about Tulsa area programs is available, accessible, and moderately well known, and high school personnel agree that students are encouraged to pursue post-secondary degrees, according to students those personnel are providing insufficient information about multiple pathways to a bachelor’s degree and programs available in the region.

Access and Affordability:

- Just over one-third of the General Public (34%) disagreed with the statement that low-income and first-generation students have equal access to higher education in the Tulsa region while 65% agreed at least moderately that this access was equitable.
- Two-thirds (67%) of Prospective Students agreed at least moderately with the statement that college seemed affordable while one-third did not agree, including over 41% of Hispanic respondents and 36% of prospective first-generation college students.
- Most (74%) of Current Students or Graduates from Tulsa area schools agreed at least moderately that college was affordable.
- However, at least half of the Students who Transferred from TCC reported that cost was a barrier to transferring to a 4-year institution.

While the majority of the respondents felt that college was equitably accessible, a full third of the public disagreed. Cost is an issue to a meaningful portion of the Tulsa community. One-third of the prospective students and their families and one-quarter of graduates perceive higher education to be unaffordable. (See Figure 6.) Finally, students transferring from TCC may represent a particularly high-need population as the majority reported that cost was at least a moderate barrier to continuing to a 4-year institution.

Figure 6 Prospective College Students Perceptions of Affordability by Racial/Ethnic Group



Quality of Academic Programs:

Between 80-90% of Prospective Students and the General Public are at least moderately satisfied with the selection of Tulsa-area academic programs. Specifically:

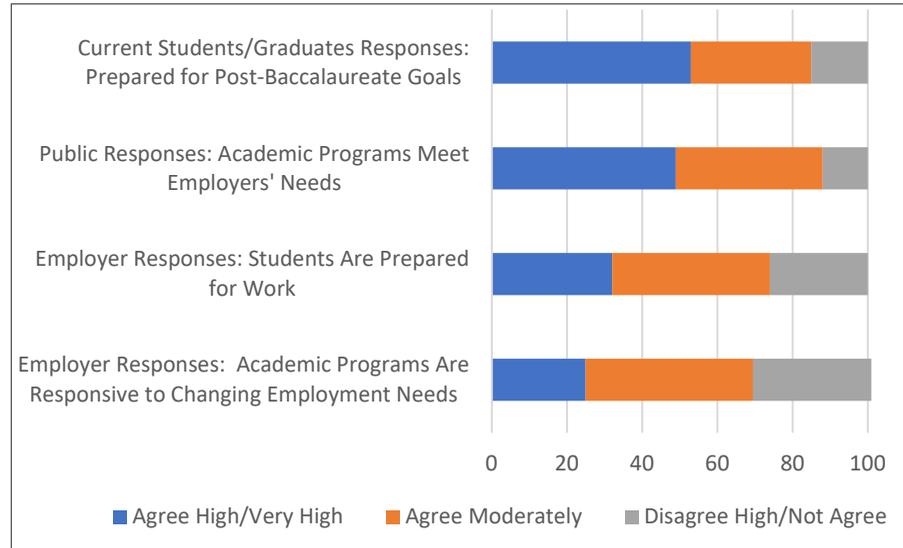
- The vast majority (89%) of the General Public agreed at a moderate or higher level that Tulsa-area programs were of interest to college-bound high school students and adults.
- A significant but slightly smaller proportion of Prospective Students and their families (78%) agreed that they were at least moderately satisfied with the selection of degree programs (and nearly 40% of prospective students agreed highly or very highly).
- The preparation pipeline (high school to post-baccalaureate degrees) is also perceived to be strong in the Tulsa region.
- 75% of Current Students and Graduates agreed at a moderate or higher level that they were well prepared for college by Tulsa-area high schools (Over 41% felt highly or very highly prepared for college). However, among first-generation college students, 30% felt they were slightly or not at all prepared academically when they started college.
- 87% of TCC Transfers felt academically prepared for transfer success (56% felt highly or very highly prepared for transfer success).
- 85% of Current Students and Graduates felt they were at least moderately well prepared for success in reaching their post-baccalaureate goals by their Tulsa college experience (while 53% agreed at a high or very high level that they felt prepared).

The Preparation-Employment Gap:

While the preparation pipeline is considered strong, there is a disconnect between how that preparation is seen by Current Students and Graduates and by the General Public versus how it is seen by Employers. While between 30-40% of respondents agreed at a moderate level that students are prepared for employment, the “Highly/Very Highly Agree” and “Slightly/Not at all Agree” responses tell a compelling difference. Approximately half of the General Public and Current Students and Graduates agree

at a high or very high level that Tulsa-area programs are preparing students to meet their goals and meet employer needs. Employers, however, are split with about 1/3 agreeing strongly, 1/3 agreeing moderately and 1/3 disagreeing about the quality of the preparation and the flexibility of Tulsa-area programs to address changing employer needs.

Figure 7 Perceived Quality of Preparation for Employment



The traditional college experience is generally perceived to include a supportive residence hall experience, a positive social and student life (clubs, sports, etc.), and new opportunities to engage in unique cultural experiences.

- A traditional college experience was not high on the priority list for the majority of students with 47% of Prospective Students and 51% of Current Students and Graduates indicating that it was slightly or not at all important when selecting a college (only 25% of Prospective Students and families and 15% of Current Students and Graduates rated this as highly or very highly important in selecting a college).
- There is also general approval of the student life/social experiences available to students in the Tulsa region, with Prospective Students (71%) and Current Students and Graduates (66%) indicating that they are at least moderately satisfied. However, about one-third (28-34%) of these groups were not satisfied.
- While the traditional college experience is low in importance, appropriate housing is more important; 41% of Prospective Students and 54% of Current Students and Graduates are slightly or not at all satisfied with housing availability in Tulsa area schools. Very few of these respondents were highly or very highly satisfied (18-21%) with housing.

While neither prospective nor current Tulsa students/graduates rate a “traditional college experience” as high on their priorities for selecting a college, both groups are at least moderately satisfied with their student life/social experiences. The one exception would appear to be housing/residential life, with generally lower satisfaction regarding housing availability.

The Academic Support Experience:

- The majority of Current Students and Graduates were at least moderately satisfied with the support they received as Tulsa-area students in the areas of orientation (73%), academic advising (71%), and tutoring (82%).
- The vast majority (84%) of Respondents who Transferred were at least moderately satisfied with their transfer experience, but the experience was not uniformly positive:
 - 75% understood the importance of academic advising in guiding their choices and understood the pathways they would have to follow to complete their degrees.
 - 73% understood moderately well how their credits would transfer; however, nearly one-third (32%) of TCC Transfer Students had to retake at least one course.
 - Over 40% understood little or not at all about the impact of transferring on their financial aid.

Students feel they are well supported academically, and those who pursue transfer have a good understanding from their advisors about what they need to do to complete their degrees (with relatively small “loss” of credit through retaking courses). However, students are less well-guided about the impact of transferring on their financial aid.

Overall, respondents reported a favorable view of Tulsa-area higher education institutions, especially in terms of satisfaction among students with the quality and selection of academic programs and the extent to which these programs are enabling them to achieve their goals and become prepared to enter the workplace; however, there is room for improvement in employers’ perceived quality of programs preparing graduates for the workplace. The survey results also suggest room for improvement in terms of ensuring access for low-income and first-generation college students, and at the high school level improving the level of guidance that students receive so they can properly understand the academic programs offered in the region. Without a doubt, enhancing coordination among Tulsa-area higher education institutions can lead to improved experiences as students weigh their options, navigate program pathways, and successfully transfer, graduate, and enter the workforce.

IV. The Recommendations of the Tulsa Higher Education Task Force

The Tulsa Higher Education Task Force recommends establishing The Tulsa Higher Education Consortium to facilitate collaboration among higher education institutions and community stakeholders in the Tulsa region.

Mission

The Mission of the Tulsa Higher Education Consortium is to advance student learning, improve student success and degree completion, achieve equity in outcomes, and meet workforce needs by working collaboratively to increase higher education opportunities in the region.

Core Values

- **Successful Learning is Essential:** Member institutions recognize that nothing is more important than the development of student knowledge, skills, attitudes, and behaviors throughout an educational experience.
- **All About End Goals:** Member institutions encourage students to set ambitious academic and career goals and, in partnership, provide pathways to facilitate the achievement of those goals.
- **For All Students:** Member institutions are committed to identifying and sharing resources and strategies that ensure equity in outcomes for all students.
- **Focused on the Student Experience:** Member institutions engage faculty and staff to create a supportive learning culture that prioritizes students' sense of belonging, respects student voices, and builds community.
- **Working Together to Make It Happen:** Member institutions serve the Tulsa region with a commitment to collaboration, communication, continuous improvement, shared responsibility in decision-making, and creation of new opportunities for higher education in the region.

Strategic Priorities

To achieve its mission, The Tulsa Higher Education Consortium should pursue the following strategic priorities:

1. Advance and enhance student learning through institutional collaboration.
2. Increase credential and degree completion, particularly at the bachelor's-degree level.
3. Achieve equity in degree and credential attainment for underrepresented and underserved populations.
4. Create a seamless academic and student experience for those pursuing degrees and credentials in the Tulsa region.
5. Contribute to the development of a highly trained regional workforce through employer partnerships and enhanced educational opportunities.
6. Work collaboratively to provide professional development opportunities that support the strategic goals of the consortium.

Opportunities and Initiatives to Improve the Student Experience

The Tulsa Higher Education Task Force undertook an extensive assessment of student needs, priorities, and communication preferences in relation to transfer between higher education institutions. Based on this review, the Task Force identified many opportunities for process and practice alignment, service improvement, and exploratory learning that students have indicated they need to be successful.

The Tulsa Higher Education Consortium will build on these findings to improve the experience of students in the region while serving as a unifying and coordinating entity for all member institutions. In this role, the consortium will facilitate deeper institutional collaboration and spearhead innovation in higher education for the region. The consortium will be instrumental in communication about Tulsa area higher education outcomes, opportunities, and economic impact.

To achieve its stated mission and strategic priorities, the Tulsa Higher Education Consortium will pursue the opportunities to improve the student experiences listed below and coordinate the following foundational initiatives and actions.

See the Task Force’s document detailing the recommended Mission, Core Values, Strategic Priorities, and Opportunities and Initiatives to Improve the Student Experience in Appendix H.

Strategic Priority: Advance and enhance student learning through institutional collaboration.

- Opportunities to Improve the Student Experience:**
Academic Experience
- Facilitate collaborative access to academic support services
 - Encourage member institutions to adopt best practices in curriculum design and delivery
 - Support recruitment and hiring of transfer student-friendly faculty

- Consortium Actions**
1. Develop and coordinate subject-matter-based groups of faculty and staff across all member institutions and facilitate purposeful collaboration. Key areas of coordination will include:
 - Process and practice alignment
 - Curricular collaboration and development
 - Career exploration and preparation
 - Advising and student support

[Priority Level: HIGH | Timeline: Begin in Year 1]
 2. Establish and support high-impact learning opportunities that enhance student learning across and among member institutions. Key opportunities will include:
 - Cross-institutional curricular and co-curricular partnerships
 - Cultural exploration and community engagement
 - Service-learning opportunities
 - Speakers and student events
 - Undergraduate research

[Priority Level: HIGH | Timeline: Begin by Year 2]

Strategic Priority: Increase credential and degree completion, particularly at the bachelor's-degree level.

Opportunities to Improve the Student Experience:

Financial Aid, Cost, and Student Debt

- Support cost-containment strategies, shared tuition structures among member institutions
- Develop aid opportunities for transferring students
- Pursue aid counseling, financial planning, debt management opportunities
- Create coaching opportunities and transparent communications regarding cost, options, and aid availability or limitations across institutions
- Synchronize scholarship and aid deadlines between institutions
- Serve as a clearinghouse to provide scholarship aid and grant information, and campus process navigation information

Communication and Service Provision

- Encourage promotion of various campus resources and services to students
- Support for dedicated transfer coordinators at each institution

Consortium Actions

1. Seek to expand scholarship and financial support for bachelor's-degree-seeking students in the Tulsa region through grants, fundraising, and community partnerships

[Priority Level: HIGH | Timeline: Begin by Year 2]

2. Create and maintain a formal agreement on university transfer to sustain the foundational work completed during the Tulsa Transfer Project. This agreement will establish common processes, procedures, and expectations of all member institutions. Agreement components will include:
 - Collaborative student advising and support
 - Early exposure to career and bachelor's-degree pathways
 - Creation, maintenance, and communication of formal degree pathways from TCC to all bachelor's degrees in the Tulsa region at member institutions
 - Data exchange
 - Prioritization of timely completion of an associate and bachelor's degree
 - Reverse transfer

[Priority Level: HIGH | Timeline: Begin in Year 1]

Strategic Priority: Achieve equity in degree and credential attainment for underrepresented and underserved populations.

Opportunities to Improve the Student Experience:

Communication and Service Provision

- Encourage additional supports and services for adult and/or working students
- Recruitment and marketing collaborations targeted at underserved student populations
- Coordinated outreach to Tulsa area Oklahoma Promise & Tulsa Achieves recipients

Campus Life and Personal Needs

- Recognize member institutions' focus on diversity/equity/cultural considerations
- Assist institutions to address the broad array of student differences

Consortium Actions

1. Collate and maintain data on equity in higher education outcomes in the Tulsa region, including program enrollment, retention and progression, credential attainment, and employment and wages. Establish baseline equity indicators, and set Consortium goals linked to specific actions for improvement

[Priority Level: HIGH | Timeline: Begin in Year 1]

2. Build and expand community partnerships and programs that provide encouragement, preparation, and financial support for students from underrepresented and underserved populations to pursue a bachelor's degree or higher credential in the Tulsa region.

[Priority Level: HIGH | Timeline: Begin by Year 2]

Strategic Priority: Create a seamless academic and student experience for those pursuing degrees and credentials in the Tulsa region.

Opportunities to Improve the Student Experience:

Academic Advising

- Facilitate the creation and maintenance of accurate, updated Degree Plans / Maps among member institutions
- Increase the availability of, accessibility to, and consistency of advisors and advisement
- Provide greater collaborative career exploration and personal development opportunities
- Create a culture of expectations toward 4-year degree attainment
- Support cross-institutional collaboration between advisors among member institutions
- Explore shared technology resources that track and support student career lifecycles

Admission and Enrollment Processes

- Support transferability of credit hours and more liberal credit acceptance policies
- Encourage alignment of course schedules and cross-institutional course availability
- Establish dual or shared admission decisions and on-boarding processes
- Facilitate streamlined and similar admission processes among institutions
- Consider use of shared systems to expedite and standardize transcript evaluations
- Encourage the development of consistent enrollment processes among institutions

Communication and Service Provision

- Explore alignment of student-friendly operational service hours
- Facilitate collaborative service sharing or partnerships between institutions
- Establish visible university transfer web presence

Campus Life and Personal Needs

- Encourage collaborative campus facility and auxiliary agreements to meet student needs - particularly in areas of food, housing, parking, mental and physical health
- Encourage early college, new/transfer orientation, and other onboarding processes
- Support expansion of student engagement activities and opportunities
 - Campus activities, community outreach, family-friendly events, academically-focused activities; joint-institutional projects

Other Student-Experience Opportunities for the Consortium

- Collaborative recruitment initiatives across institutions
- Curricular mapping between higher education and high schools to better align curriculum and reduce remediation needs
- Leverage of ICAP to facilitate college-going enrollment pipeline development

Consortium Actions

1. Promote student-centered practices, partnerships, and activities that develop a sense of belonging and connection across member institutions and that foster a unique Tulsa undergraduate experience

[Priority Level: HIGH | Timeline: Begin by Year 1]

2. Facilitate joint acquisition of resources for member institutions when appropriate to advance the goals of the Consortium

[Priority Level: MEDIUM | Timeline: Dependent Upon Needs]

Strategic Priority: Contribute to the development of a highly trained regional workforce through employer partnerships and enhanced educational opportunities.

Opportunities to Improve the Student Experience:

Academic Experience

- Support establishment of mentoring programs across institutions
- Assist in establishing student internships and externships in the greater Tulsa region

Consortium Actions

1. Serve as a leading voice for higher education in the region with industry and workforce partners. Support and enhance workforce activities at member institutions through coordination of activities that contribute to economic development and student learning. Focus areas could include:
 - Developing job placement opportunities for graduates of member institutions
 - Establishing partnerships that provide student work-experience and internships
 - Increasing opportunities for employer tuition assistance
 - Working with regional employers to ensure essential skill and credential needs are met

[Priority Level: HIGH | Timeline: Begin in Year 1]

Strategic Priority: Work collaboratively to provide professional development opportunities that support the strategic goals of the Consortium.

Opportunities to Improve the Student Experience:

Academic Experience

- Encourage best practices for student access and communication with faculty

Consortium Actions

1. Offer ongoing professional development opportunities that align with the needs of member institutions and that support achievement of the strategic priorities of the Consortium.

[Priority Level: MEDIUM | Timeline: Begin by Year 2]

Strategy for Data Collection and Reporting on Regional Key Performance Indicators

Improved, collaborative, ongoing data collection, analysis, and reporting were determined to be desired long-term outcomes for the future Consortium. The Task Force charged the Data, Program Inventory, & Workforce sub-committee with establishing the principles, practices, and standards for sharing, analyzing, and reporting relevant transfer student data and information to and from each participating higher education institution in the Consortium.

Policies and Procedures

The preliminary framework to ensure the proposed formalized structure includes policies and procedures to effectively and efficiently manage data collection, storage, and security. Included in the formalized Policies and Procedures are the following components:

1. Data Governance Structure
2. Data Governance Roles
3. Description of the database and statistical analysis software
4. Role of the Outcomes Measurement Committee in the proposed Consortium structure
5. Submitting data for the database
6. Analyzing data
7. Sharing and distributing results
8. Data classification and handling standards
9. Definitions

Key Performance Indicators (KPIs)

In keeping with the original measurable goals of the Tulsa Transfer Project and the strategic priorities for the proposed Consortium, the Task Force recommends the following preliminary KPIs to be measured, reported, reviewed, and updated on an annual basis.

- **Transfer rate of TCC students to four-year institutions**
 - Co-enrollment
 - Swirling
 - Reverse transfer
 - Concurrent credits
 - Prior Learning Assessment credits
 - Industry credits
 - Military credits
 - Number of transfer students
 - Possible in the future OCR; statistical baseline of OSU-Tulsa, LU-Tulsa, OSU-Stillwater transfer patterns

- Transfer into programs that the Tulsa Regional Chamber of Commerce classifies as high need (e.g., STEM, Health Care, etc.)
- **Percent and/or number of transfer credits accepted towards majors at the receiving universities**
 - Average hours at graduation of fall-to-fall cohort comparison to transfer-in cohort
 - Average hours of transfer-in credit hours unassigned to degree plan
- **Rate of bachelor's degree completion**
 - TCC transfer 4-year degree completion
 - Tulsa metropolitan statistical area (MSA) 4-year degree completion
 - Employment outcomes from Oklahoma Employment Security Commission (from OSRHE for graduates inside the state). Salaries/wages by discipline
 - Unemployment rate and educational attainment by county
 - Outcomes disaggregated by demographic characteristics
 - Number of graduates retained in the Tulsa MSA

Integrating Workforce Needs

The Task Force recommends that the Tulsa Higher Education Consortium collaborate with the Tulsa Regional Chamber of Commerce and regional business and industry to develop a framework for a coordinated approach to assessing regional workforce needs.

Formalized Data Strategy

Participating institutions will be responsible for submitting raw data and/or analyzed data, depending on the needs of the Consortium and the key performance indicators (KPIs) selected. The Gardner Institute will provide support by being responsible for reviewing submitted datasets for compliance and consistency through 12/1/2022. Thereafter, the Outcomes Measurement Committee of the Consortium will be responsible unless policy otherwise dictates.

Outcomes Measurement Committee

The proposed Outcomes Measurement Committee of the Consortium will have responsibility for the collection and analysis of data from participating institutions and communication of results to appropriate stakeholders. The Committee will hold periodic teleconferences to discuss issues relating to Consortium data and regional KPIs. Outcomes of these meetings will be reported to the Consortium Leadership. Consortium Institutional Research professionals and Presidents will receive timely aggregated results and annual reports, and data and outcomes will be used to populate the Consortium dashboard.

See the Task Force's recommended Strategy for Data Collection and Reporting on Regional Key Performance Indicators in Appendix I.

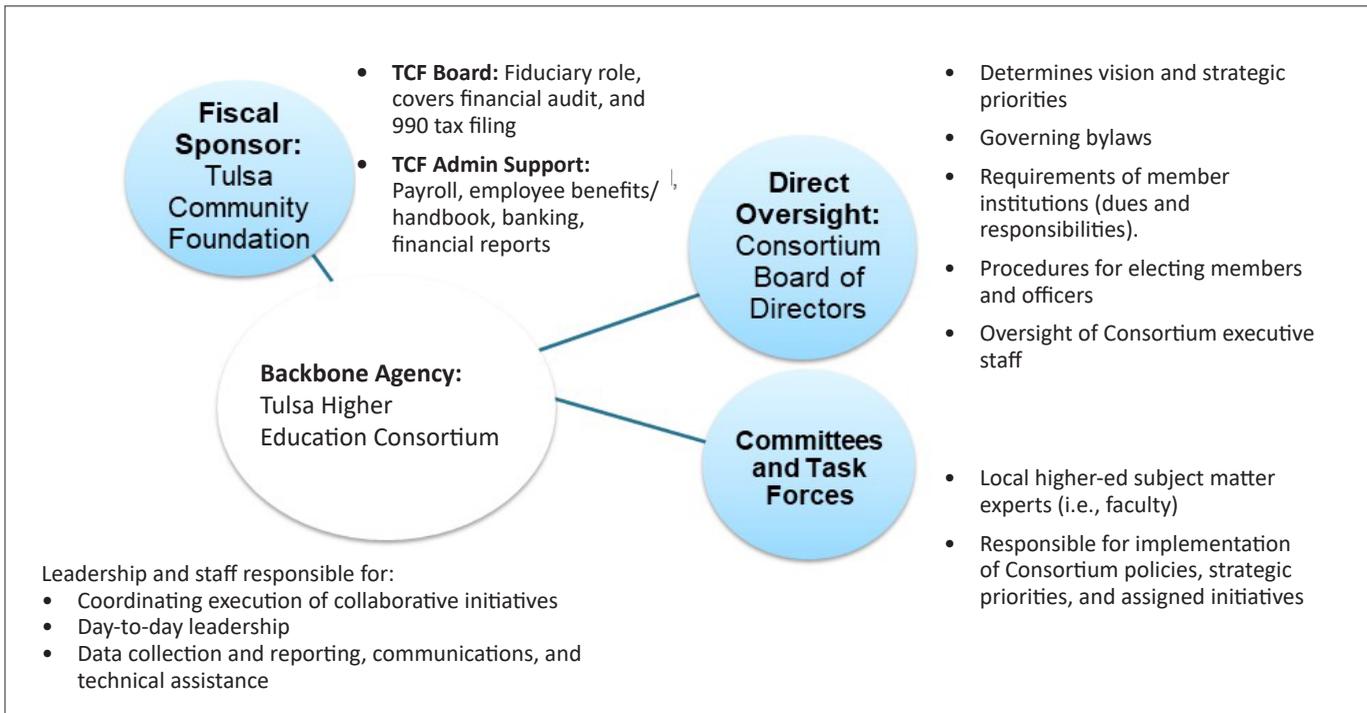
Governance Structure

In order to operationalize the Consortium to pursue the above mission and strategic priorities, the Task Force recommends that the Tulsa Higher Education Consortium initially operate under the umbrella of Tulsa Community Foundation (“TCF”) as fiscal sponsor. Then, after three to five years, once the Consortium has begun implementing programs and initiatives in support of its strategic priorities, the Board may consider a transition to independent 501(c)3 non-profit status.

The Task Force arrived at this recommendation following a detailed review of all possible governing models, which included: Independent 501(c)3 organization, fiscal sponsor, extension of an institution’s Transfer Office, or an extension of an existing non-profit organization. After a thorough review of these models (see Appendix J), the Task Force selected “Fiscal Sponsorship under TCF” as this will strongly position the Consortium to: have neutral oversight, have inclusive participation, be cost-effective, be flexible and responsive, be empowered to ensure effectiveness, become sustainable over a long period of time, and be able to hold members accountable to collective goals and priorities.

Under the fiscal sponsorship of TCF, the overall governing structure of the Consortium can be seen in Figure 8, featuring the TCF Board as the fiduciary board, TCF administrative support to assist with back-office functions such as human resources, audit and tax preparation, and financial reporting, direct oversight via a Consortium Board of Directors governed by Bylaws, Committees and Task Forces to support the Board of Directors, and Consortium Staff to coordinate execution of the mission and related collaborative initiatives.

Figure 8 Detailed Consortium Governing Structure



Governing Bylaws

In order to implement the above governing structure, the Task Force recommends a written set of Governing Bylaws. The purpose of these Bylaws is to articulate the establishment of this new entity and its mission, determine qualifying criteria for members on the Consortium Board of Directors, explain the responsibilities of Consortium Members, establish procedures for appointing Directors, nominating and electing Officers, holding meetings, voting, establishing board committees and task forces, designating a Chief Executive Officer to lead the entity, and articulating a Conflict of Interest policy and procedures.

Of particular note, the Consortium Board of Directors will be comprised of Full Members and Affiliate Members.

Full Members include higher education institutions, will be required to pay annual dues beginning in 2022, and will have two voting positions on the Board of Directors. Founding Full Members include: Tulsa Community College, Langston University, Northeastern State University, Oklahoma State University – Tulsa, Rogers State University, the University of Oklahoma – Tulsa, and the University of Tulsa. Other higher education institutions that meet membership qualifications may apply to become members of the Consortium.

Affiliate members include regional and statewide partners with an interest in advancing higher education in the Tulsa region and will have one voting position on the Board of Directors. Founding Affiliate Members include ImpactTulsa, the Tulsa Regional Chamber of Commerce, Tulsa Community Foundation, the City of Tulsa, the Broken Arrow Chamber of Commerce, the Oklahoma State Regents for Higher Education, and the Charles and Lynn Schusterman Family Foundation. Other Affiliate Members may be invited to apply for membership on the Consortium Board of Directors.

A summary of important components of the Consortium Bylaws can be found in Table 5. The full Bylaws document, recommended by the Task Force, can be found in Appendix K.

Table 5 Elements of the Governing Bylaws

<p>Board of Directors</p>	<ul style="list-style-type: none"> • Full Members: Up to two voting members of the Board. (1) President (or designee), and (2) up to one additional President-Appointed member. • Affiliate Members: Up to one voting member, appointed by the President/CEO of the Affiliate Member organization.
<p>Higher-Ed Membership Qualifications</p>	<ul style="list-style-type: none"> • Provide post-secondary education, leading to an associate degree or bachelor’s degree, to students in the Tulsa region, defined as Tulsa County plus all contiguous counties; • Have completed or be in the process of completing a transfer-focused self-study of the institution, leading to the creation of a campus-wide transfer improvement plan; and • Pay annual membership dues to the Consortium, beginning January 1, 2022.
<p>Dues (Full Members only)</p>	<p>Full members (Higher-Ed Members) will pay annual dues beginning in 2022. Dues will be based on a formula approved by the Board of Directors. Composed of two elements: (1) Fixed base rate dues, and (2) variable rate dues based on student enrollment. All higher-education members must pay the dues annually in order to retain their voting positions on the board.</p>
<p>Officers</p>	<p>Four positions: Chair, Vice Chair, Secretary, and Treasurer. Elected by a majority vote for a term of 1 year, and may serve in the same position for up to 3 years.</p>
<p>Standing Committees and Task Forces</p>	<ul style="list-style-type: none"> • Five Standing Committees: Governance, Finance, Strategy Oversight, Outcomes Measurement, and Marketing and Communications. • Task Forces: Support the development and implementation of Board policies and initiatives. Task Force Chairs must be directors, but other Task Force members do not need to be directors.
<p>Staff</p>	<p>Chief Executive Officer. Evaluated annually by the Chair and the Governance Committee. The CEO is responsible for all other staffing decisions of the Consortium.</p>

Executive Leadership and 2021 Budget

To build upon the mission, strategic priorities, year one initiatives, plans for improving the student experience and collecting and reporting on regional higher education key performance indicators, a governance structure, and Bylaws, the Consortium requires executive leadership and a budget for 2021, its first year of operations.

The Task Force recommends that the Consortium should be led by a Chief Executive Officer. This position should be held by a senior-level administrator with experience in higher education, who will be hired, supervised, and evaluated by the Consortium Board of Directors. Appendix L contains the CEO Job Description recommended by the Task Force.

The Task Force also recommends a 2021 Consortium budget to hire staff and operationalize these plans. The total expenses budgeted for 2021 equal \$297,765.00. This includes \$34,640 for Administrative Expenses, \$178,125 for staffing, which includes a CEO, a Director of Strategic Initiatives, and an Office Administrator, and \$85,000 for events, convenings, and initiatives to advance the Consortium's strategic priorities. The 2021 Budget can be found in Appendix M. It is important to note that these expense items are estimates to inform planning; no offers have been made to fill staff positions and no quotes have been requested for specific expenses. In terms of revenue, the Charles and Lynn Schusterman Family Foundation has committed up to \$300,000 in general operating support for 2021 and up to \$250,000 for 2022. This will allow the Consortium to get started with forming its Board, hiring staff, implementing initiatives, and developing a fundraising plan. Additionally, per the Bylaws, Full Members will begin paying annual membership dues on January 1, 2022 to provide an additional source of revenue.

What's Ahead

With the above recommendations, the Tulsa Higher Education Task Force concludes its work to develop a plan for the creation of a formal structure for sustaining collaboration across the seven institutions and key community stakeholder groups. The Task Force puts the recommendations forth for final approval by the Presidents of the seven participating higher education institutions – Tulsa Community College, Langston University, Northeastern State University, Oklahoma State University – Tulsa, Rogers State University, the University of Oklahoma – Tulsa, and the University of Tulsa.

Upon approval by the Presidents, the Task Force's officers and facilitators will lead the following steps to establish and operationalize the Tulsa Higher Education Consortium:

1. Set up the Tulsa Higher Education Consortium as a Designated Fund of Tulsa Community Foundation.
2. Form the Consortium Board of Directors by securing appointments from leadership of Full Member institutions and Affiliate Member organizations.
3. Form the CEO Search Committee.
4. Secure payment for Year One operations from the Charles and Lynn Schusterman Family Foundation.
5. Execute the CEO Search Process and hire a Founding CEO.

V. Conclusion and Acknowledgements

The Tulsa Higher Education Task Force is grateful for the support of the Presidents of the seven participating higher education institutions: Dr. Leigh Goodson, Dr. Kent Smith, Dr. Steve Turner, Dr. Pamela Fry, Dr. Larry Rice, Dr. John Schumann, and Janet Levit. The Task Force also appreciates the support of the leaders of supporting organizations: Carlisha Williams Bradley of ImpactTulsa, the Mayor G.T. Bynum of the City of Tulsa, Mike Neal of the Tulsa Regional Chamber of Commerce, Jennifer Conway of the Broken Arrow Chamber of Commerce, Phil Lakin of the Tulsa Community Foundation, and Chancellor Glen Johnson of the Oklahoma State Regents for Higher Education.

The Task Force recognizes the prevailing commitment of its 29 members listed in Appendix C, as well as its facilitators over the course of this planning effort: The John N. Gardner Institute for Excellence in Undergraduate Education, represented by Dr. John Gardner, Dr. Betsy Griffin, Dr. Monica Flippin-Wynn, Dr. Vicki McGillin, and Dr. Betsy Barefoot; ImpactTulsa represented by Dr. Laura Latta and Jessica Smith, and the Charles and Lynn Schusterman Family Foundation represented by Michael DuPont.

Finally, the Task Force recognizes and appreciates those who shared their time and knowledge through panel discussions and resource-sharing over the course of this effort, including Dr. Larry Dotolo of the Virginia Tidewater Consortium, Dr. Christine Hubbard of the North Texas Community College Consortium, Claire Ramsbottom of Colleges of the Fenway and the Association for Collaborative Leadership, Dr. Cassie Barlow of the Southwestern Ohio Council for Higher Education, Ruth Dalrymple and Angela Guadian-Mendez of the Alamo Colleges South & Central Texas Transfer Compact, Diane Dimitroff of the Lehigh Valley Association of Independent Colleges, and leadership from the Oklahoma State Regents for Higher Education, Chancellor Glen Johnson, Dr. Debbie Blanke, Tony Hutchison, and Bob Anthony.



VI. Appendices

- A. Presidents Charge ([link](#))
- B. Presidents Input ([link](#))
- C. List of Task Force members ([link](#))
- D. Gardner Institute Primer on Consortia ([link](#))
- E. Overview of Consortium Models ([link](#))
- F. Gardner Institute Framework for Building Consortial Collaboration ([link](#))
- G. Themes from Panels with Consortium Leaders ([link](#))
- H. Mission, Core Values, Strategic Priorities, and Initiatives and Opportunities to Improve the Student Experience ([link](#))
- I. Strategy for Data Collection and Reporting ([link](#))
- J. Governance Structure Evaluation Process and Recommendation ([link](#))
- K. Consortium Bylaws ([link](#))
- L. CEO Job Description ([link](#))
- M. Consortium 2021 Budget ([link](#))

¹ U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table EDU685218.

² U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table EDU685218.

³ Shapiro, D., Dundar, A., Huie, F., Wakhungu, P.K., Yuan, X., Nathan, A. & Hwang, Y. (2017, September). Tracking Transfer: Measures of Effectiveness in Helping Community College Students to Complete Bachelor's Degrees (Signature Report No. 13). Herndon, VA: National Student Clearinghouse Research Center.

⁴ Tulsa Community College, Foundations of Excellence – Transfer Students, Final Report and Recommendations, 2019.

⁵ Tulsa Community College, Foundations of Excellence – Transfer Students, Final Report and Recommendations, 2019.

⁶ U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table B14004. Credit to Indian Nations Council of Governments, Mapping and GS Services Department, <https://storymaps.arcgis.com/stories/a992b5945cd344c68c16daebb6eb4075>.

⁷ Oklahoma State Regents for Higher Education UDS datasets, as of 5-4-20 ([link](#)).

⁸ National Student Clearinghouse, accessed by Tulsa Public Schools 6-year attainment of 2014 entering cohort.

⁹ Tulsa Regional College Transfer Report, 2019 ([link](#)).

¹⁰ Tulsa Regional College Transfer Report, 2019 ([link](#)).

¹¹ U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table EDU685218.

¹² U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table C15002B. Credit to Indian Nations Council of Governments, Mapping and GS Services Department, <https://storymaps.arcgis.com/stories/a992b5945cd344c68c16daebb6eb4075>.

¹³ U.S. Census Bureau; American Community Survey, 2018 American Community Survey 5-Year Estimates, Table C15002B. Credit to Indian Nations Council of Governments, Mapping and GS Services Department, <https://storymaps.arcgis.com/stories/a992b5945cd344c68c16daebb6eb4075>.

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