Oklahoma State Regents for Higher Education
New State Regents' Orientation

Regent Dennis Casey
Regent Jack Sherry

October 8, 2020 at 9:00 a.m.
Zoom Videoconference

AGENDA

9:00 a.m.　　**1. State System Overview –** Chancellor Glen D. Johnson and Kylie Smith
- History of Coordination with State System Colleges and Universities – page 4
- State System Overview – page 13
- Task Force on the Future of Higher Education
  - Executive Summary – page 42
  - Recommendations – page 49
  - Scorecard – 60
  - Extensions of Voluntary Governing Board Merger/Partnership Deadline – page 61
- Huron Fiscal Viability Reports and System Innovations Committee – page 69
- Impact of COVID-19 on Colleges and Universities
  - Campus Responses to COVID-19 - https://okhighered.org/state-system/corona/docs/campus-covid19-responses.pdf
  - COVID-19 Campus Resources - https://okhighered.org/state-system/corona/
  - State System COVID-19 FAQs - https://okhighered.org/state-system/corona/docs/osshe-covid19-faq.pdf

9:30 a.m.　　**2. Legislative Relations** – LeeAnna McNally, Vice Chancellor for Governmental Relations
- Federal and State Legislative Update – page 97
- Legislative Network
- Development of Legislative Agenda (2020/2021) – page 112
- Interim Study Overview – page 114

9:45 a.m.　　**3. OneNet** – Von Royal, Executive Director of OneNet and Higher Education Chief Information Officer, and Tony Hutchison, Senior Vice Chancellor for Strategic Planning, Analysis, Workforce and Economic Development
- Oklahoma State Regents for Higher Education CIO
- Overview of OneNet – page 128

10:00 a.m.　　**BREAK**

10:05 a.m.   **4. Budget and Fiscal –** Chancellor Glen D. Johnson and Sheri Mauck, Interim Vice Chancellor for Budget and Finance
- Development of Annual Systemwide Budget Request to Governor and State Legislature – page 139, page 140
- Endowed Chairs Program – page 145
- Performance Funding Formula – page 146
- *Additional Fiscal Information (Available on request)*
    - E&G Budget Summary and Analysis – Supplement
    - Tuition and Fees – Supplement
    - Student Cost Survey – Supplement
    - Financial-Business Handbook (Redbook) – Supplement
    - Annual Campus Master Plan – Supplement

10:20 a.m.   **5. Oklahoma College Assistance Program (OCAP) –** Melissa Neal, Executive Director of OCAP, and Sheri Mauck, Interim Vice Chancellor for Budget and Finance
- Financial Literacy and Student Debt Information – page 160
- College Access Initiative

10:35 a.m.   **6. Strategic Planning and Analysis –** Tony Hutchison, Senior Vice Chancellor for Strategic Planning, Analysis, Workforce and Economic Development
- Complete College America – page 171
- Remediation – page 191
- Oklahoma Works
- Employment Outcomes – page 194
- Data Dashboard and SAS Implementation

10:50 a.m.   **7. Legal Issues Overview** – Bob Anthony, General Counsel
- Overview of Legal Issues in Higher Education
- Open Meetings/Open Records
- Two-Year Institution Legal Services

11:05 a.m.   **8. Grants and Scholarships**– Bryce Fair, Associate Vice Chancellor for Scholarships and Grants
- Oklahoma's Promise
    a. Program Overview – page 199
    b. OK Promise Graduate Earnings – page 207
    c. OK Promise Year End Report – page 208
    d. OK Promise Funding Estimate – page 234
- Other Scholarships and Financial Aid Programs – page 247
- Oklahoma College Savings Plan – page 249

11:20 p.m.   **9. Academic Affairs –** Dr. Debbie Blanke, Senior Vice Chancellor for Academic and Student Affairs

- Academic Overview – page 254
- Teacher Education
- Student Affairs
- Course Equivalency Project
- Summer Academies
- Concurrent Enrollment
- Reach Higher/Adult Promise
- Math Initiative
- Online education Task Force
- Workforce Development

11:40 p.m.   **Questions**

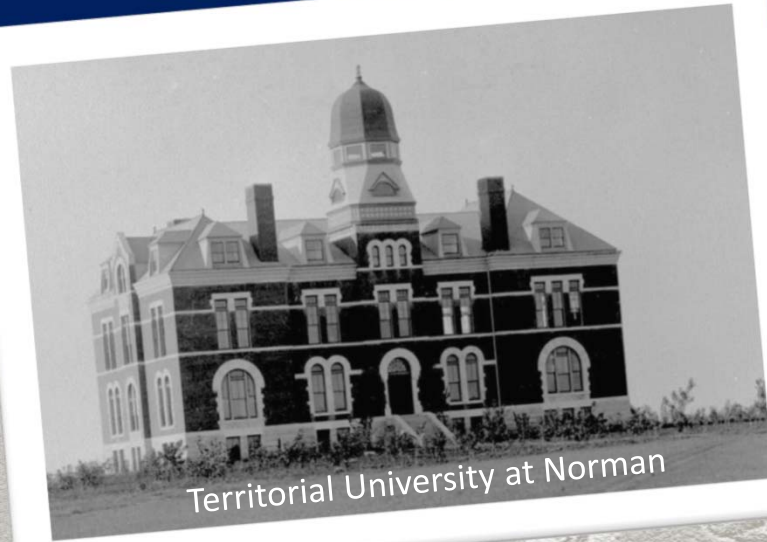12:00 p.m.   **Adjournment**

Oklahoma State System of Higher Education

New Regent Orientation
Chancellor Glen D. Johnson
October 8, 2020

2019 Public Agenda

✓ **Increase the number of college graduates**

✓ **Enhance access and improve the quality of public higher education**

✓ **Better prepare students to meet the challenge of a global economy**

2

5

Higher Education Prior to 1941

Territorial University at Norman

Oklahoma A&M College at Stillwater

Oklahoma Normal School for Teachers in Edmond

The first Oklahoma territorial legislature passed legislation creating three institutions of higher education in 1890 in order to fulfill a requirement of the Organic Act of Congress establishing the territory.

Congress required the Oklahoma territory to establish a liberal arts and professional education, agriculture and mechanical arts education and teacher training.

3

Higher Education Prior to 1941

Governor Lee Cruce

Governor William J. Holloway

Governor William H. Murray

Governor E.W. Marland

- During the 1920's there were fifty-three different presidents presiding over eighteen public institutions, an average of one new president every three years. In the 1930's fifty more presidents rotated through the system.

- These changes not only affected personnel, but accreditation as well.

- In 1931, eleven Oklahoma colleges and universities were accredited by the north Central Association of Colleges and Schools, but in 1936 only 3 institutions were still accredited.

4

Higher Education Prior to 1941
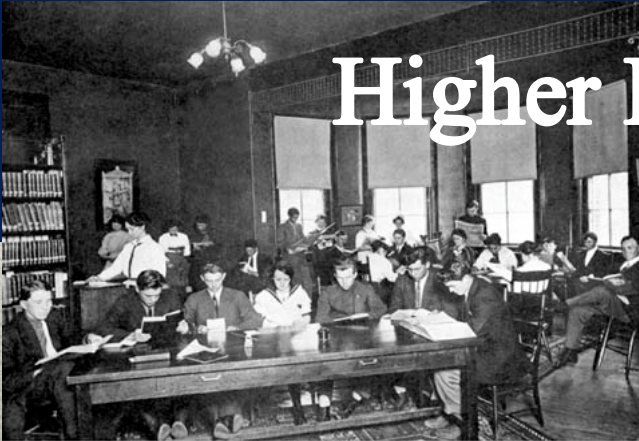
Northeastern State Normal School Library, 1913
[currently President's Conference Room, Seminary Hall]
from 1913 TSA-LA-GI, Northeastern State University Archives

Industrial Institute & College, Chickasha, Okla.

University of Oklahoma
Oklahoma Agricultural and Mechanical College
Oklahoma Normal School for Teachers - Edmond
Colored Agricultural and Normal University
Normal School for Teachers – Alva
Normal School for Teachers at Weatherford
Oklahoma University Preparatory at Tonkawa
Industrial Institute
College for Girls
School of Mines and Metallurgy
Connors State School of Agriculture
Murray State School of Agriculture
Cameron State School of Agriculture
Haskell State School of Agriculture
Connell State School of Agriculture
Panhandle State School of Agriculture
Northeastern Normal School at Tahlequah
East Central Normal School at Ada
Southeastern Normal School at Durant
Eastern Oklahoma University Preparatory School at Claremore
Miami School of Mines
Altus Public District Junior College

5

Higher Education Prior to 1941

The first published study of the problem of a lack of coordination of higher education in Oklahoma was the doctoral dissertation of Dr. Henry G. Bennett in 1926.

He recommended that a central coordinating board be established and a state system formed.

Dr. Henry G. Bennett
President, Oklahoma Agricultural and Mechanical College, 1928-1951

Higher Education Prior to 1941

Here Are the New Co-ordinating Regents

1941 — THE TULSA TRIBUNE

—Tribune Staff Photo

Eight of the nine members of the new co-ordinating board of regents for state supported institutions of higher learning were present when the board held its organization meeting in the blue room at the capitol Monday. Seated, left to right, are: Herbert Branan, Muskogee attorney assigned by Governor Phillips to assist the board; John Rogers, Tulsa attorney, secretary; Ben F. Saye, Duncan attorney, assistant secretary; Wharton Mathies, Clayton banker; Miss Vera Donham, stenographer; John H. Kane, retired Bartlesville oil man, chairman; W. E. Harvey, Oklahoma City, rancher; Dial Currin, Shawnee banker; J. E. Peery, Minco superintendent of schools; and Clee O. Doggett, Cherokee publisher. Only absent member was Frank Buttram, Oklahoma City oil man, who was elected vice chairman.

In 1939, Gov. Leon C. "Red" Phillips named members to a coordinating board.

The board recommended that a constitutional board be established, and the 1941 Oklahoma Legislature proposed Article XIII-A of the Oklahoma Constitution.

7

Orientation Agenda

Legislative Relations

OneNet

Oklahoma College Assistance Program

Strategic Planning & Analysis

Budget & Fiscal

Grants & Scholarships

Academic Affairs

8

State System Issues

Task Force on the Future of Higher Education

Fiscal Viability Reviews & System Innovations Committee

COVID-19

9

Oklahoma State Regents for Higher Education

**2020 Regents Education Program –
Overview of Oklahoma's State System of Higher Education**

**Chancellor Glen D. Johnson
October 5, 2020**

1

The State System

- According to the Oklahoma Constitution, Article XIII-A, all institutions of higher education shall be integral parts of a unified system to be known as the State System of Higher Education.

- The Oklahoma State System of Higher Education is the State's legal structure for providing public education at the collegiate level.

- The State Regents is the Coordinating Board for the State System.

- Fall 2020 Preliminary Enrollment – 162,271 Students.

The State System

- **25 Colleges and Universities**
  - **2 Research Universities**
  - **10 Regional Universities**
  - **1 Public Liberal Arts University**
  - **12 Community Colleges**
  - **11 Constituent Agencies**
  - **2 Higher Education Centers**

3

The State Regents

- Established in 1941 by an amendment to the constitution, Article XIII-A.
- Consists of 9 members
- Appointed by the Governor
- Confirmed by the Senate
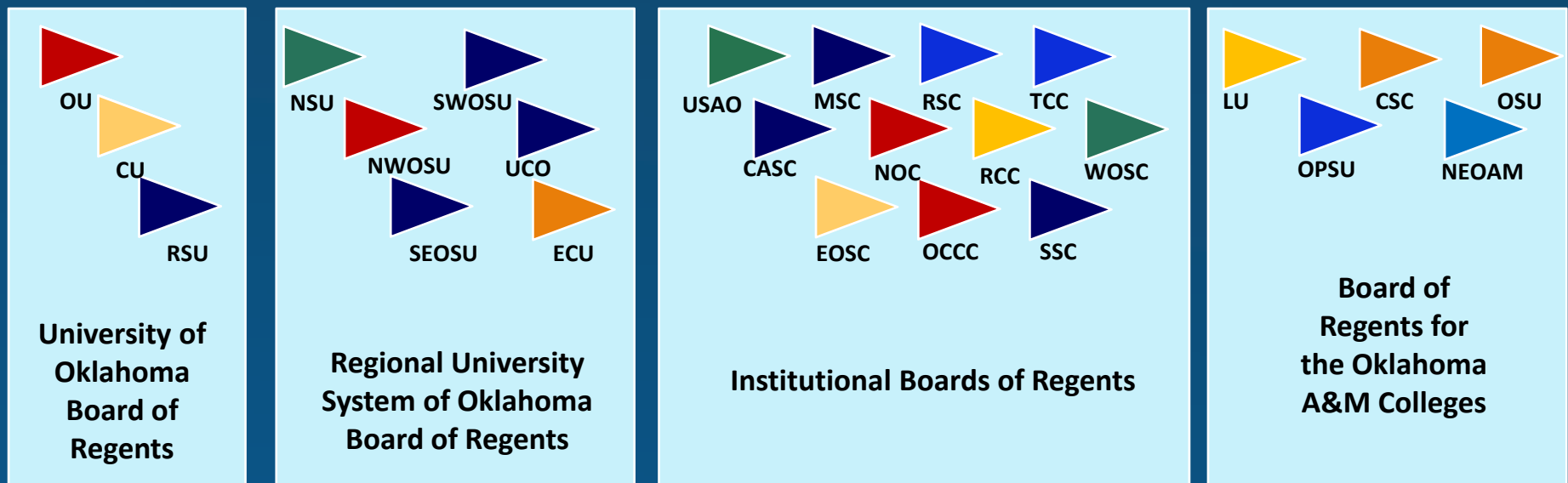- Appointed to 9 year terms

4
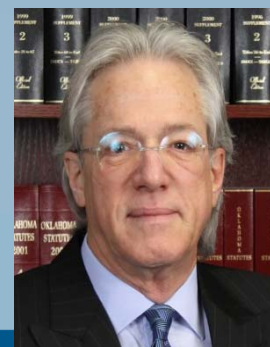
Constitutional Coordinating Board

Duties and Responsibilities

1. Determine functions and courses of study.
2. Prescribe standards of education.
3. Grant degrees and other forms of academic recognition.
4. Recommend to State Legislature budget allocation.
5. Allocate funds appropriated by State Legislature.
6. Tuition setting authority.
7. Allocate revolving funds.
8. Determine student fees.
9. Administer Student Scholarships.
10. OneNet.
11. Oklahoma College Assistance Program.
12. Regents Education Program.

5

Governing Boards

University of Oklahoma Board of Regents
OU, CU, RSU

Regional University System of Oklahoma Board of Regents
NSU, SWOSU, NWOSU, UCO, SEOSU, ECU

Institutional Boards of Regents
USAO, MSC, RSC, TCC, CASC, NOC, RCC, WOSC, EOSC, OCCC, SSC

Board of Regents for the Oklahoma A&M Colleges
LU, CSC, OSU, OPSU, NEOAM

1. Determines management policy.
2. Employing personnel, fixing salaries and assigning duties.
3. Contracting for other services needed.
4. Having custody of records.
5. Acquiring and holding title to property.
6. General academic policy and administration.
7. Student life.
8. Budget administration.
9. Planning and construction of buildings
10. Purchasing
11. Auxiliary activities, budgeting and administration

6

Boards of Trustees

University Center of Southern Oklahoma - Ardmore

- Murray State College
- Southeastern Oklahoma State University
- Langston University

University Center at Ponca City

- Northern Oklahoma College
- Northwestern Oklahoma State University
- Oklahoma State University

7

Advisory Councils and Boards

- **Council of Presidents**
- **Communicators Council**
- **Council on Information Technology**
- **Council on Instruction**
- **Council on Student Affairs**
- **Economic Development Council**
- **Faculty Advisory Council**
- **Student Advisory Board**

8

Student Scholarships/ Financial Assistance Programs

1. Oklahoma's Promise

2. Oklahoma Tuition Aid Grant Program

3. Regional University Baccalaureate Scholarship

4. Academic Scholars Program

5. Teacher Shortage Employment Incentive Program (TSEIP)

6. Brad Henry International Scholars Program

7. Chancellor Hans Brisch Scholarship Program

8. Future Teachers Scholarship Program

9. Oklahoma College Assistance Program

10. Oklahoma Tuition Equalization Grant Program

9

Student Programs

Concurrent Enrollment

Cooperative Agreements

Course Equivalency Project

GEAR UP

Oklahoma Campus Compact

Reach Higher –Adult Degree Completion

10

Other Programs

Campus Safety and Security (CSS) Task Force

Online Education Task Force

Endowed Chairs Program

EPSCoR Matching Fund Program

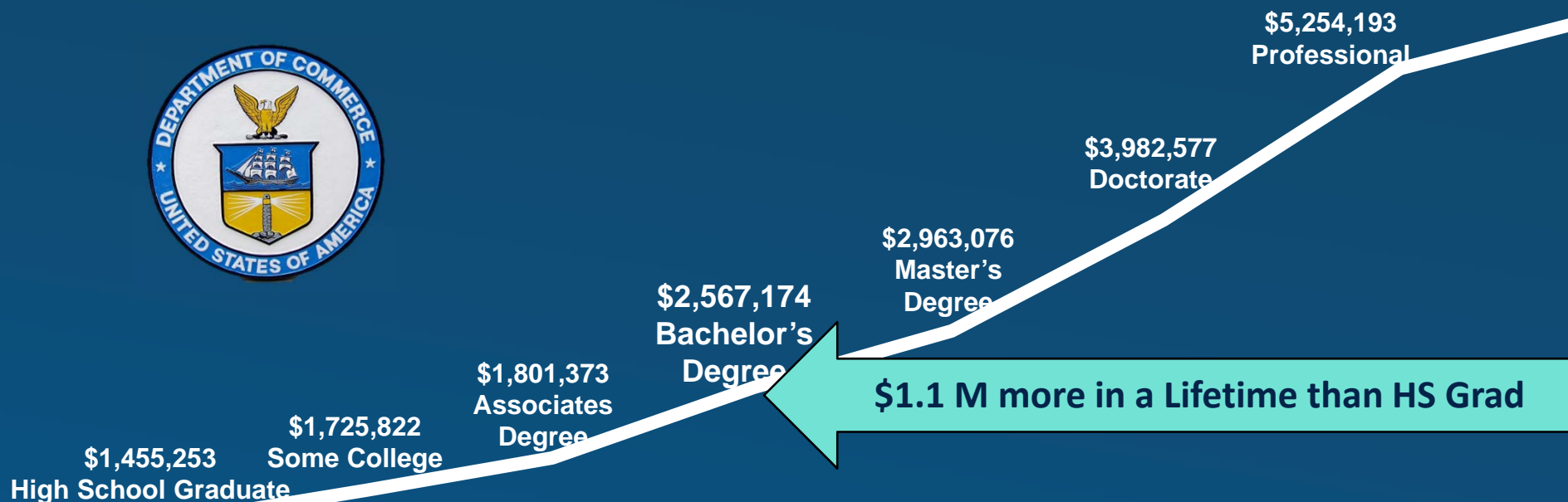Master Lease Purchase Program

OneNet

11

State *Per Capita* Personal Income v. Share of Adult Population with Bachelor's Degree or Higher

The overwhelming majority of states that have a high percentage of their citizens with a college degree have a higher *per capita* income.

Examples:
District of Columbia
Connecticut
Massachusetts
New Jersey
Maryland
New Hampshire
Virginia
New York
Washington
Colorado

12

Source: The Chronicle of Higher Education

$5,254,193
Professional

$3,982,577
Doctorate

$2,963,076
Master's Degree

$2,567,174
Bachelor's Degree

$1,801,373
Associates Degree

$1,725,822
Some College

$1,455,253
High School Graduate

$1.1 M more in a Lifetime than HS Grad

Lifetime Earnings!

Source: U.S. Department of Commerce Economics and Statistics Administration – U.S. Census Bureau

13

VALUE OF HIGHER EDUCATION

Economic Benefits

Public Benefits

✓ **Increased Tax Revenues**
✓ **Greater Productivity**
✓ **Increased Consumption**
✓ **Increased Workforce Flexibility**
✓ **Decreased Reliance on Government Financial Support**

Private Benefits

✓ **Higher Salaries and Benefits**
✓ **Employment**
✓ **Higher Savings Levels**
✓ **Improved Working Conditions**
✓ **Personal/Professional Mobility**

Social Benefits

Public Benefits

✓ **Reduced Crime Rates**
✓ **Increased Charitable Giving/Community Service**
✓ **Increased Civic Engagement**

Private Benefits

✓ **Improved Health/Life Expectancy**
✓ **Improved Quality of Life for Children**
✓ **Better Consumer Decision Making**
✓ **More Hobbies/Leisure Activities**

SOURCE: The Institute for Higher Education Policy, "Reaping the Benefits: Driving the Public and Private Value of Going to College"   14

Percent of Oklahoma Residents Who Graduate with a Bachelor's Degree Remain In the State and are Employed In the State One Year After Graduation

87.9% Remain in the State

Source: Data from 2019 Employment Outcomes Report, OSRHE

15

Link Academic Programs to the Needs of Business

- **Healthcare, Allied Health and Nursing**
- **Engineering**
- **Business**
- **Technologies**
- **Telecommunications**
- **Data Science and Analytics**

16

GEORGETOWN UNIVERSITY
Center on Education and the Workforce
JOBS. SKILLS. EQUITY.

67% of all jobs created in Oklahoma in 2020 will require some college, a long-term certificate or a college degree.

37% of all jobs created in Oklahoma in 2020 will require an associate's degree, bachelor's degree or higher.

Source: United States Bureau of Labor Statistics and the Georgetown Center for Education and Workforce Development

17

Nationally, one-third (33.1 percent) of adults 25 years of age or older have a bachelor's degree or more.

Colorado
42.7%

Kansas
34.0%

Missouri
30.2%

compared to
Oklahoma
at 26.2 percent.

New
Mexico
27.7%

Arkansas
23.3%

Texas
30.8%

18

Source: Bureau of the Census 2019

COMPLETE COLLEGE AMERICA
The Oklahoma Plan

2017-2018

Source: Oklahoma State Regents
for Higher Education

10,200
6-year Goal

11,740
6-year Actual

19

31

COVID-19 AND CAMPUS REOPENINGS

Campus Reopening

- Most campuses are open with a mixture of course formats (face-to-face, hybrid, online).
- Reduced classroom sizes to promote social distancing
- Revisions to academic calendars to transfer courses completely online following Thanksgiving break
- Mask requirements on campus
- Access to COVID-19 testing sites
- Designated locations for quarantine/isolation of COVID-19 positive individuals or possible exposures
- Partnerships with local/county health departments to conduct contract tracing and monitor community spread

20

IMPACT OF COVID-19 ON CAMPUSES

COVID-19 has had a significant negative financial impact on higher education institutions.

- Lost revenues from decreasing housing capacity in residential facilities on campuses to promote social distancing

- Costs associated with making environmental adjustments to campus to mitigate the spread of COVID-19 (e.g. touchless water fountains or sinks, installation of plexiglass barriers, sanitizing stations, changes to ventilation systems, etc.)

- Reduced revenues from cancellation of campus facility rentals, events and athletics.

- Costs of providing masks for faculty, staff, students and visitors

- Additional expenses incurred in transitioning to online education
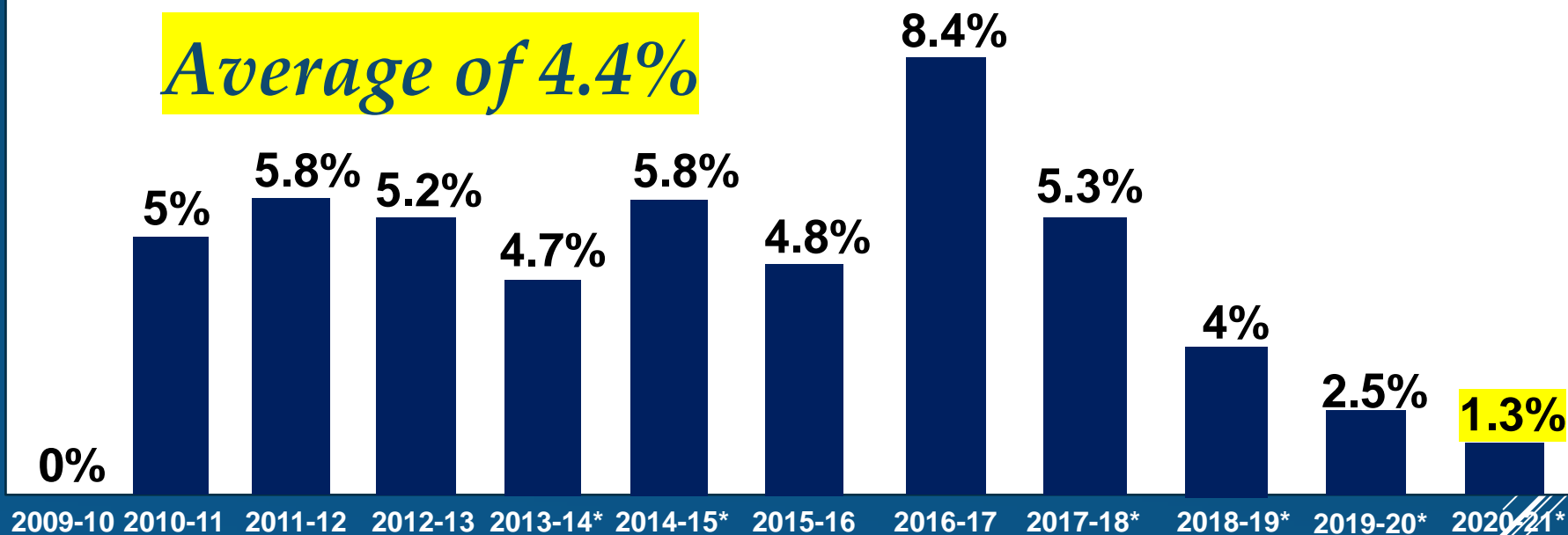
21

COLLEGE AFFORDABILITY

Tuition and Mandatory Fee Increases from 2009 – 2020

Average of 4.4%

Year	Increase
2009-10	0%
2010-11	5%
2011-12	5.8%
2012-13	5.2%
2013-14*	4.7%
2014-15*	5.8%
2015-16	4.8%
2016-17	8.4%
2017-18*	5.3%
2018-19*	4%
2019-20*	2.5%
2020-21*	1.3%

Institutions with no tuition increases:

*2013-14 - OU and OSU.

*2014-15 - OSU and WOSC.

*2017-18 OPSU and USAO.

*2018-19 OU, SEOSU, EOSC, and MSC

*2019-20 OU, OSU, CU, SEOSU, CASC, EOSC, MSC, OCCC, WOSC

*2020-21 OU, OSU, ECU, NSU, RSU, SEOSU, CU, USAO, CASC, NEOA&M, OCCC, RCC, SCC, TCC

22

COLLEGE AFFORDABILITY

In 2018, 53 percent of Oklahoma graduates, graduated without any student loan debt.

**2018 Average Student Debt
$29,200 -National
$25,221 –Oklahoma
(Public and Private)
$20,746 – Oklahoma State System
(Public Only)**

Top 10 states with the lowest student debt:
Utah
New Mexico
California
Nevada
Washington
Hawaii
Florida
Wyoming
Colorado
Oklahoma

Source: Project on Student Debt, Fall 2019; four-year public and private non-profit schools
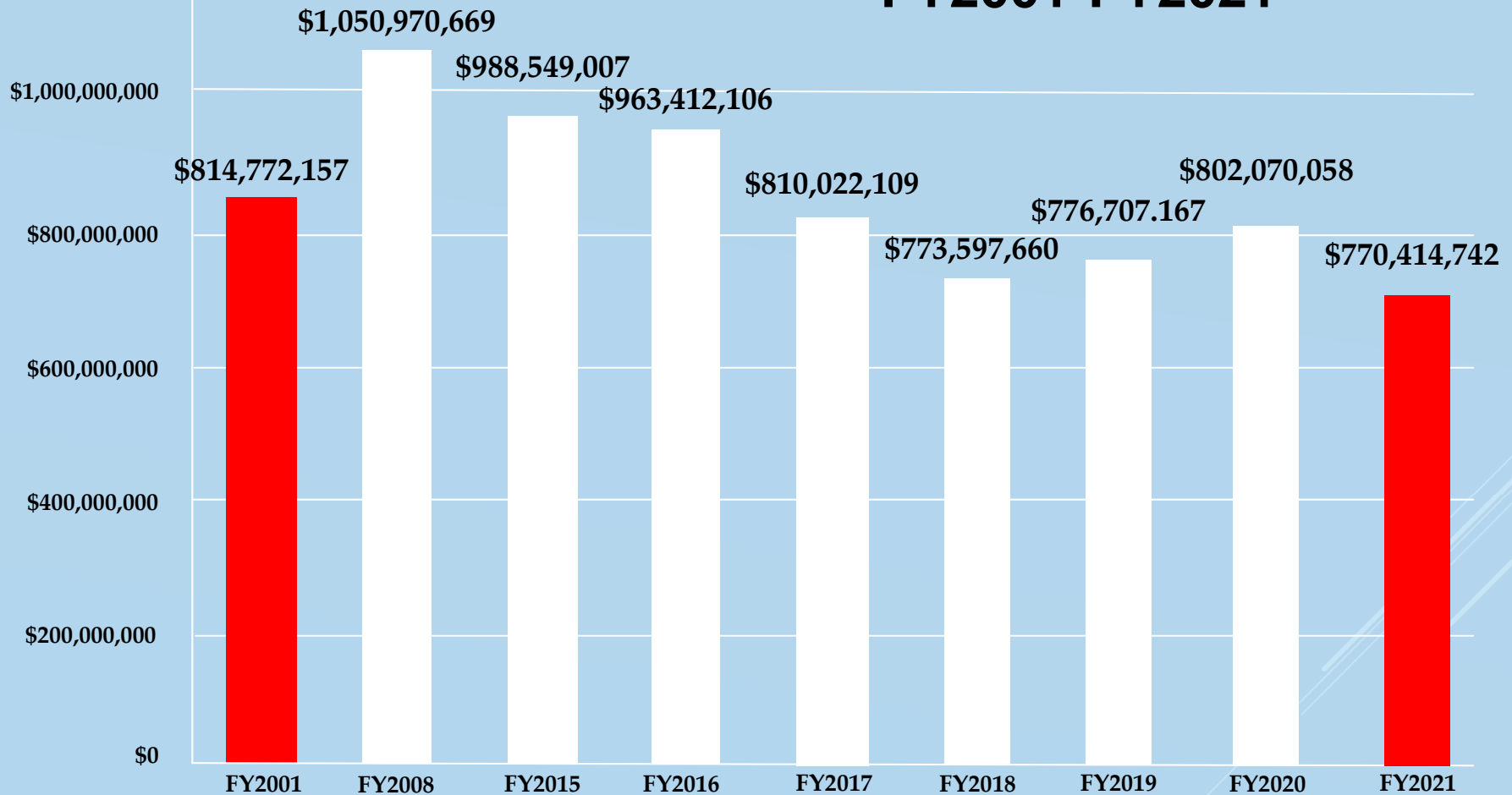
23

- **Oklahoma is 12th lowest for tuition and fees**

- **Oklahoma is 13th lowest for student debt at graduation**

OKLAHOMA

24

State Appropriations
FY2001-FY2021

Source: Oklahoma State Regents for Higher Education

Higher Education's Percent of Oklahoma Total State Appropriations

- FY80: 18.6%
- FY90: 15.8%
- FY00: 15.6%
- FY10: 15.9%
- FY13: 14.8%
- FY14: 14.6%
- FY15: 14.5%
- FY16: 14.4%
- FY17: 12.9%
- FY18: 12.4%
- FY19: 11.3%
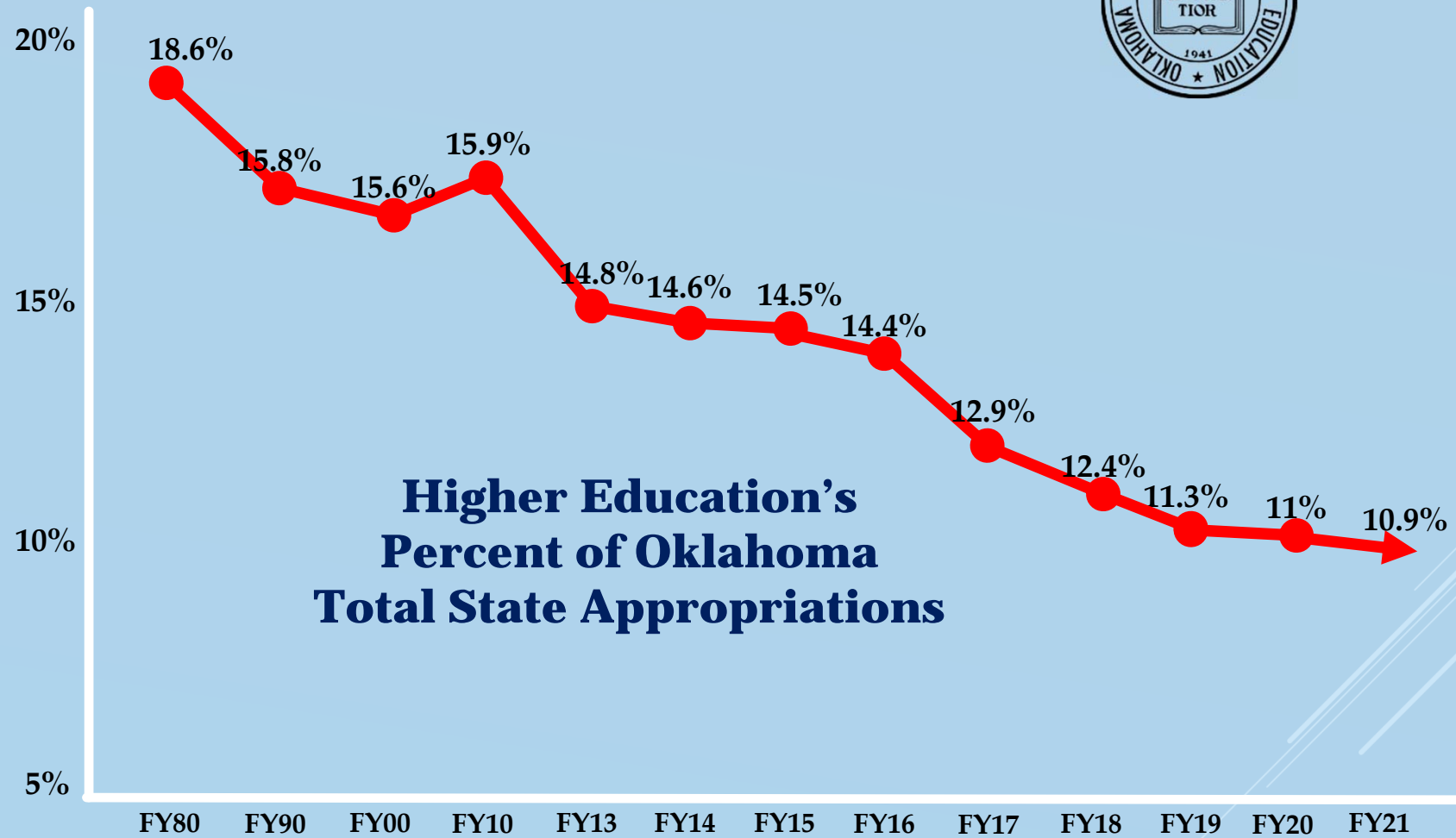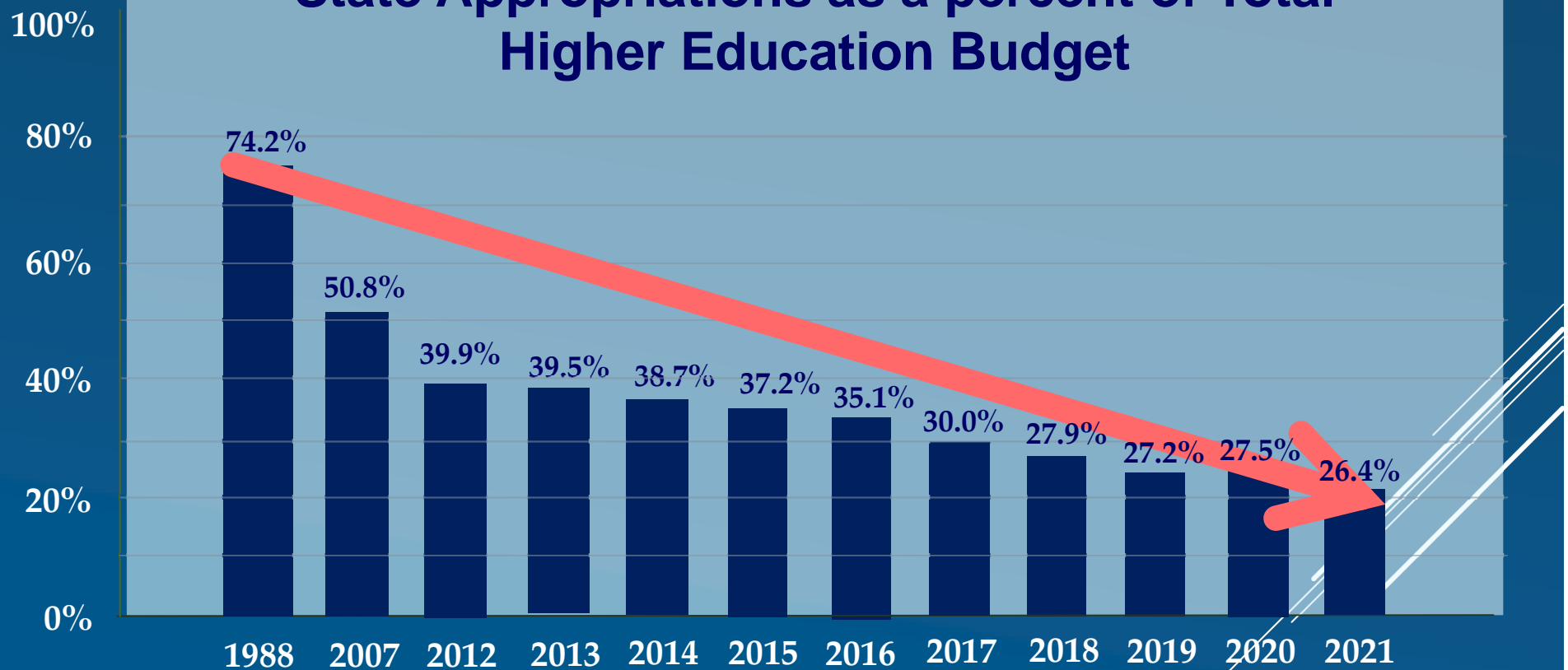- FY20: 11%
- FY21: 10.9%

Source: Oklahoma State Regents for Higher Education

26

State Appropriations as a percent of Total Higher Education Budget

Source: Oklahoma State Regents for Higher Education

27

Economic Impact

- Oklahoma's higher education system supported $8.21 billion in total economic output in FY2016.

- For every dollar of revenue from state appropriations the State System of Higher Education generated $9.40 in economic output.

THE ECONOMIC ROLE OF OKLAHOMA'S PUBLIC COLLEGES AND UNIVERSITIES

JANUARY 2019

REGIONTRACK
Regional Economic Forecasting and Analysis

Prepared for
STATE CHAMBER RESEARCH FOUNDATION

PO Box 53217, Oklahoma City, Oklahoma 73152-3217 | 405.235.3669 | www.okresearchfoundation.org

28

Oklahoma State Regents for Higher Education

**2020 Regents Education Program –
Overview of Oklahoma's State System of Higher Education**

Chancellor Glen D. Johnson
October 5, 2020

29

Executive Summary

Given the changing landscape of higher education, the Oklahoma State Regents for Higher Education (OSRHE) established the Task Force on the Future of Higher Education in March 2017 to conduct a systematic review of higher education; examine existing initiatives and best practices; and report findings and recommendations on strategies that best support improving quality, access, affordability, and efficiency in the Oklahoma state system of higher education. The Task Force was comprised of a broad and diverse group of stakeholders from across the state, including State Regents, private citizens, representatives from Oklahoma's public colleges and universities, and the designees of Governor Mary Fallin, Speaker of the Oklahoma House of Representatives Charles McCall, and Oklahoma State Senate President Pro Tempore Mike Schulz. Citizen members of the Task Force were well-respected Oklahomans who come from a variety of professional and educational backgrounds and represented different geographic regions within the state.

The Task Force convened in May 2017 to begin discussion on the development of recommendations that best position Oklahoma's state system of higher education to meet the future challenges of maintaining accessibility and affordability without compromising educational quality. The work of the Task Force was primarily conducted through four subcommittees – College Degree Completion and Workforce Development Initiatives; Academic Program Innovations and Online Education; System Structure; and Fiscal Solutions, Efficiencies, Affordability, and Technology. Members were assigned to one of these four subcommittees, which met regularly from June through November 2017. During subcommittee meetings, members studied best practices across the nation and in Oklahoma and discussed how to develop recommendations that could be successfully implemented in Oklahoma. Subcommittee progress reports were provided during meetings of the full Task Force on September 6, 2017 and October 18, 2017.

While each subcommittee had a specific focus, certain common themes emerged from the work of the subcommittees. These included:

- The power of predictive analytics.
- Development of microcredentials to meet workforce needs in real time.
- Increased financial support from the Legislature for the concurrent enrollment program to advance degree completion efforts.
- Dedicated focus on adult student programs, scholarships, and credit for prior learning.
- Scaling delivery of online education.
- Consolidation of administrative structures and functions.
- Reemployment of cost savings to support the mission of the institution.

After six months of study and deliberations, the Task Force voted to approve all subcommittee recommendations at its meeting on December 6, 2017. The following report summarizes the work of the State Regents Task Force on the Future of Higher Education and provides the context and basis for development of each recommendation approved by the Task Force.

Introduction

Oklahoma's future economic growth and prosperity greatly depends on a well-educated workforce. Although Oklahoma has a relatively low unemployment rate, the state's actual workforce participation rate is among the lowest in the country and per capita personal income for Oklahomans is among the bottom ten states, despite the fact Oklahoma has the highest certificate production in the country. The Georgetown Center for Education and the Workforce reports that by 2020, 67 percent of job vacancies in Oklahoma – or 418,000 jobs – will require a college degree or additional postsecondary education and training. Thirty-seven percent of all Oklahoma jobs will require an associate degree, bachelor's degree, or higher. Recognizing the need to bridge the skills gap between our current workforce and projected workforce needs, the State Regents have partnered with Governor Mary Fallin through the Complete College America and Oklahoma Works initiatives to increase the number of degrees and certificates awarded in Oklahoma by 67 percent by the year 2023.

The Oklahoma state system of higher education has made significant progress toward meeting Oklahoma's workforce needs. In the first four years of the Complete College America (CCA) initiative, the number of degrees and certificates earned in Oklahoma has increased by 8,462, surpassing the state benchmark of 6,800. While we have made substantial gains and exceeded these early benchmarks, we acknowledge the growing challenges we face in maintaining this significant momentum. Other CCA states have increased their investment in degree completion initiatives, while Oklahoma has repeatedly surpassed our goals on either flat or reduced budgets. It should be noted that data from the State Higher Education Executive Officers association (SHEEO) show Oklahoma ranks last among the 33 participating CCA states in state funding support since the initiative began in 2011.

At the same time that Oklahoma requires additional college degree holders to meet current and future workforce needs, total enrollment at our public colleges and universities has been cyclical over the last decade, first increasing to a historic high by 2011 due to the 2008 economic recession and then gradually declining as the effects of the economic recovery took hold. It is important to note that this trend has not been experienced uniformly at all state system institutions, with enrollment at the two research institutions (University of Oklahoma and Oklahoma State University) increasing 6.3 percent during this time period while enrollment at two-year community colleges and four-year regional universities has declined by 5.9 percent and 5.5. percent, respectively. Despite overall declines in enrollment and a lower than average college-going rate, there exists potential for significant increased student demand in access to postsecondary education in the coming years, with the number of high school graduates in Oklahoma having increased 4.2 percent.

In addition to the changing student demographics of our colleges and universities, our state system colleges and universities have experienced significant cuts in state appropriations, declining approximately 22 percent over the last three years. For FY2017, the Oklahoma state system of higher education received $805.5 million in state appropriations, representing a $157.5

million, or 16.4 percent, decrease from the FY2016 appropriation. In FY2018, the appropriation to the state system of higher education was $773.6 million, representing a 6.1 percent decrease. According to the most recent *Grapevine* report on state fiscal support for higher education from Illinois State University, Oklahoma ranks last of the 50 states with the largest percentage reduction change in state support for higher education from FY2012 to FY2017. Significant restoration of these budget cuts is needed to rebuild state system capacity but may not be possible in the future.

The negative impacts of the budget cuts experienced by Oklahoma public colleges and universities have included reductions in degree and course offerings; implementation of furlough days; reduction in faculty and staff positions through both attrition and early retirement programs; fewer and reduced scholarship awards; and reductions in professional development and travel. These negative impacts, if not reversed, are likely to lead to negative outcomes for students' persistence and timely degree completion.

Despite significant budget cuts and these negative impacts, our colleges and universities are making every effort to deliver a high-quality education to Oklahoma students at a very affordable cost. The U.S. Chamber of Commerce Foundation ranks Oklahoma higher education as fifth most affordable in the nation, and the National Center for Education Statistics reports that the average student cost at a four-year public institution in Oklahoma is fourth-lowest in the nation. Most recently, *U.S. News and World Report* issued its "Best States 2017" rankings in late February 2017 based on data compiled by McKinsey & Company's Leading States Index, which listed Oklahoma as sixth-lowest in the nation for tuition and fees and seventh-lowest for student debt at graduation.

About the Task Force

Background

The Oklahoma State System of Higher Education was created in 1941 by a vote of the people that amended the state's constitution to provide for such a system. The State Regents serve a variety of roles, including prescribing academic standards of higher education, determining functions and courses of study at state colleges and universities, and granting degrees. The State Regents approve allocations for each public college and university, as well as tuition and fees within the limits set by the Oklahoma Legislature, and manage numerous scholarships and special programs.

Additionally, the State Regents operate OneNet, the state's advanced data network for education and government. The State Regents also manage the Oklahoma College Assistance Program, which provides important college access, borrower education and default prevention programs and services that support students and the financial aid community.

Although the State Regents are the coordinating board of control for all institutions in the Oklahoma state system of higher education, 17 governing boards of regents and boards of trustees are responsible for the operation and management of each state system institution and higher education program.

One of the major responsibilities of the Oklahoma State Regents for Higher Education is to establish goals for the future and to engage in strategic planning activities designed to help our colleges and universities achieve those goals. Planning is implicit in the responsibilities of a coordinating board, and throughout its history, the State Regents have participated in several systematic planning efforts through the use of citizen committees, including *Planning for the 70s, Planning for the 80s,* and *The Citizens' Commission on the Future of Oklahoma Higher Education* in the late 1990s*.*

Analysis

Given the changing landscape of higher education, in March 2017, the Oklahoma State Regents for Higher Education tasked Chancellor Glen D. Johnson with the formation of a citizens' Task Force on the Future of Higher Education to undertake an extensive planning initiative that would position the Oklahoma state system of higher education to better meet current and future challenges. The efforts of the Task Force would emphasize the state system's focus on modernization, efficiencies, and innovation.

Starting in May of 2017, the Task Force on the Future of Higher Education began a systematic and thorough review of the current status of higher education in Oklahoma; examining existing initiatives and best practices; and reporting findings and recommendations on strategies that best support improving quality, access, affordability, and efficiency in the Oklahoma state system of higher education.

Task Force Priorities

The work of the Task Force was conducted through four subcommittees, focusing on the following priorities:

- College degree completion and workforce development initiatives;
- Academic program innovations and online education;
- System structure; and
- Fiscal solutions, efficiencies, affordability, and technology.

Task Force Membership

The Task Force was comprised of the State Regents, private citizens, college and university representatives, and the designees of Governor Mary Fallin, Speaker of the Oklahoma House of Representatives Charles McCall, and Oklahoma Senate President Pro Tempore Mike Schulz. Citizen members of the Task Force were well-respected Oklahomans who come from a variety of professional and educational backgrounds and represent different geographic regions within the state.

Dr. William Kirwan, Chancellor Emeritus of the University System of Maryland, served as lead advisor to the Task Force. Dr. Kirwan is a senior fellow at the Association of Governing Boards of Universities and Colleges (AGB) and has served as chair of the National Research Council Board of

Higher Education and Workforce and co-chair of the Knight Commission on Intercollegiate Athletics. He previously served as president of The Ohio State University and the University of Maryland and was a board member of the Maryland Chamber of Commerce, Economic Alliance of Greater Baltimore, and Business-Higher Education Forum, among other organizations. An international speaker and respected author on several key higher education issues, including access, affordability, innovation, economic development and academic transformation, Dr. Kirwan holds baccalaureate, master's and doctoral degrees in mathematics.

Dr. Sally Mason and Ken Knueven also served as AGB consultants to the Task Force. Dr. Mason served as the 20th president of the University of Iowa from 2007 through 2015. In 2015, she retired as president emerita after a long and distinguished academic career. From 2006-2012, Dr. Mason was appointed by the President of the United States to three terms on the National Medal of Science Award Selection Committee. She currently sits on the National Academies of Science and Engineering Committee on Higher Education and Workforce. Dr. Mason is a senior fellow and executive consultant for AGB, AGB Institutional Strategies and AGB Search.

Mr. Ken Knueven has been instrumental in the development, growth and leadership of innovative organizations for over twenty-five years. He has extensive experience with Fortune 500 companies as well as the public, higher education, and nonprofit sectors. Mr. Knueven spent almost eight years at Microsoft Public Sector, where he successfully led Microsoft's U.S. Education and Government businesses creating market changing solutions and offerings.

The following individuals served on the State Regents' Task Force on the Future of Higher Education:

State Regents (ex-officio, non-voting members)

- State Regent John Massey
- State Regent Ron White
- State Regent Jay Helm
- State Regent Jeff Hickman
- State Regent Ann Holloway
- State Regent Andy Lester
- State Regent Jody Parker
- State Regent Toney Stricklin
- State Regent Mike Turpen
- Chancellor Glen D. Johnson

Citizens

- Dr. Ann Ackerman, Oklahoma City
- Regent Phil B. Albert, Claremore
- Governor Bill Anoatubby, Ada
- Regent Calvin J. Anthony, Stillwater

- Chief Bill John Baker, Tahlequah
- Chief Gary Batton, Durant
- Bruce T. Benbrook, Woodward
- Regent Bill W. Burgess, Lawton
- John Carey, Durant
- Regent Lake Carpenter, Leedey
- Michael A. Cawley, Ardmore
- Regent Samuel Combs III, Tulsa
- Leonard Court, Oklahoma City
- Regent Rick Davis, Guthrie
- Lee R. Denney, Cushing
- Regent Jeffrey T. Dunn, Tulsa
- John Ford, Bartlesville
- Robert Gardner, Tulsa
- Steve Jordan, Ardmore
- Karen Keith, Tulsa
- Edward F. Keller, Tulsa
- Lieutenant General Lee K. Levy II, Commander, Air Force Sustainment Center, Air Force Materiel Command, Tinker Air Force Base
- Dan Little, Madill
- Bert H. Mackie, Enid
- Dr. Thomas K. McKeon, Tulsa
- Catherine O'Connor, Oklahoma City
- Fred Morgan, Oklahoma City
- Dr. Terry Mosley, Lone Wolf
- Dennis Neill, Tulsa
- Michael S. Neal, Tulsa
- Tyler Norvell, Oklahoma City
- Dr. Marion Paden, Oklahoma City
- Regent Gary D. Parker, Muskogee
- Ken Parker, Norman
- Carl R. Renfro, Ponca City
- Dee Replogle, Oklahoma City
- Robert J. Ross, Oklahoma City
- Regent Richard Ruhl, Kingfisher
- Claudia San Pedro, Oklahoma City
- Dr. Dennis Shockley, Oklahoma City
- Steven W. Taylor, McAlester
- Sean Trauschke, Oklahoma City
- Avilla Williams, Edmond
- Roy H. Williams, Oklahoma City

A G B I n s t i t u t i o n a l S t r a t e g i e s

47

State System Colleges/Universities

- President Don Betz, University of Central Oklahoma
- President Randy Beutler, Southwestern Oklahoma State University
- President David L. Boren, University of Oklahoma
- President Sean Burrage, Southeastern Oklahoma State University
- President Cheryl Evans, Northern Oklahoma College
- President Tim Faltyn, Oklahoma Panhandle State University
- President Leigh B. Goodson, Tulsa Community College
- President V. Burns Hargis, Oklahoma State University
- President John M. McArthur, Cameron University
- Dr. Jason Sanders, University of Oklahoma Health Sciences Center
- Dr. Kayse Shrum, Oklahoma State University Center for Health Sciences
- President Jerry L. Steward, Oklahoma City Community College

Designees

- Natalie Shirley, Secretary of Education and Workforce Development (Designee for Governor Mary Fallin)
- Representative Jadine Nollan, Oklahoma House of Representatives (Designee for Speaker Charles McCall)
- Jeff Greenlee, President, NBC Oklahoma (Designee for Senate President Pro Tempore Mike Schulz)

Complete bios for Task Force members are included in Appendix A.

A G B   I n s t i t u t i o n a l   S t r a t e g i e s

48

STATE REGENTS' TASK FORCE ON THE FUTURE OF HIGHER EDUCATION

College Degree Completion and Workforce Development Initiatives Subcommittee

RECOMMENDATIONS

A. **Data Analytics**

Data or predictive analytics is beginning to emerge as a very promising and powerful tool in higher education. The State Regents should provide opportunities for institutions to learn more about the appropriate use of data analytics and they should facilitate and encourage a statewide implementation plan that accelerates the adoption of best practices in data analytics to enhance student experience and success through the use of predictive tools.

1. The State Regents should include funding for the implementation of predictive analytics on a system-wide basis in its annual funding request to the Legislature. The funding request should include a timeframe for implementation, the expected return on investment, and a plan for reporting results on the benefits gained from implementing the use of data analytics system-wide.

2. The State Regents should direct institutions to develop comprehensive plans on the use of data analytics to streamline administrative processes, generate revenue through increased enrollment and improved retention rates, and improve student success through enhanced proactive advisement and individualized support services.
   a. Information regarding the use of data analytics will be embedded in the annual academic plan that is submitted to the State Regents.

3. The State Regents should empower and provide a charge to the Councils on Information Technology, Instruction and Student Affairs to recommend specific implementation strategies that would maximize the effectiveness of data analytics on a statewide basis.

4. The State Regents should facilitate the development of a consortium of institutions with like missions to use data analytics to solve institutional problems.

1

5. The State Regents should continue to work with the Oklahoma State Department of Education to develop a robust, comprehensive data pipeline. The ability to link student level K-12 and postsecondary data would greatly enhance the ability to determine factors that predict student success.

B. **Workforce Development**

In 2014, only 40.1 percent of Oklahoma's workforce had a degree, certificate or high quality credential. Projections show that 70 percent of Oklahoma's jobs will require some education or training beyond high school by 2025. To address this skills gap, Governor Fallin has developed the Launch Oklahoma initiative, setting an ambitious goal of having 70 percent of Oklahoma's adult workforce having attained a college degree, certificate or other high quality, recognized credential by 2025. The State Regents should develop strategies that quickly address workforce needs and promote degree and certificate completion in high-demand occupations.

1. The State Regents should work with the Council of Presidents and chambers of commerce to develop a statewide strategy to engage business and industry in actively working with Oklahoma colleges and universities better align academic programs to meet current and projected workforce needs.

2. The State Regents should require that any new degree program request 1) provides evidence that the program will produce graduates related to the 100 critical occupations identified by the Governor's Oklahoma Works and Launch Oklahoma initiatives; or 2) provides evidence that the program will produce graduates related to one of the five key wealth generating ecosystems (aerospace and defense, energy, agriculture and biosciences, information and financial services, transportation and logistics).

3. The State Regents should develop policies and procedures to accelerate time to approve new workforce-oriented programs needed by business, including microcredentials.
   a. Microcredentials should be developed in partnership with business.
   b. Microcredentials should be designed to be stackable.

4. Institutions should promote partnerships with business to offer internship and apprenticeship opportunities to students.

5. The State Regents should continue to fund and promote adult degree completion strategies through the Reach Higher program and the Adult Promise grant from the Lumina Foundation.

6. The State Regents should develop enhanced marketing strategies for OKCollegeStart.org as a resource for traditional and adult students' college preparation, college degree planning, college financial planning, career development, and other services.

C. **Degree Completion**

In 2009, Oklahoma joined the Complete College America (CCA) consortium of states, making increasing college degree completion a top state priority. The State Regents should encourage and support a statewide approach that would accelerate and scale the implementation of data-proven completion strategies to achieve Oklahoma's college degree completion goal of increasing the number of degrees and certificates earned by 67 percent by 2023.

1. The State Regents should develop and present to the Governor and State Legislature a budget request that fully funds Oklahoma's college completion efforts.

2. The State Regents should endorse and support the full implementation of Oklahoma's statewide Guided Pathways plan as developed by the Oklahoma State Team for Complete College America. The following areas will be emphasized:
   a. Implementation of meta-majors statewide
   b. Development of student on-boarding that provides informed choice for degree programs prior to enrolling (career opportunities and outcomes)
   c. Develop term-by-term on-time degree maps
   d. Provide critical course path guarantee
   e. Implement proactive advising protocols that track student progression and provide alerts
   f. Communicate results and outcomes about the above strategies/policies

3. The State Regents should work with institutions to facilitate and implement reverse transfer agreements between community colleges and four-year institutions.

4. Institutions should continue to scale and strengthen co-requisite remedial education offerings.

5. The State Regents should work with institutions and appropriate councils to expand opportunities for students to earn college credit through competency based, prior learning assessments.

6. The State Regents should make the Course Equivalency Project more accessible and user friendly.

7. The State Regents should continue to work with colleges and universities through the work of the Math Success Group to develop multiple math pathways.

D. **Concurrent Enrollment**

Concurrent enrollment has proven to be a highly effective tool in developing a high school to college bridge that accelerates time to degree for students, improves student matriculation, and strengthens high school and college relations. The State Regents should support strategies that ensure the integrity and expansion of concurrent enrollment opportunities for Oklahoma students and families.

1. The State Regents should continue to request full funding of the concurrent enrollment tuition waiver program for high school seniors by the Legislature.
   a. The total estimated cost for FY18 is $10.6 million, while the program is currently funded at only $2.8 million (26.8% of program cost).

2. The State Regents and the Legislature should expand the concurrent enrollment tuition waiver program to high school juniors, contingent upon additional funding from the Legislature.
   a. Develop metrics to document the success of concurrent enrollment and its return on investment for the State and provide this to the Governor and Legislature.

3. The State Regents should initiate a study of alternative funding models for the concurrent enrollment tuition waiver program.

E. **Scholarships and Financial Aid**
College is an increasingly important investment for students and their families, and Oklahoma is among the most affordable states for college. Oklahoma has the 10th-lowest student debt level in the nation, and nearly half of all Oklahoma graduates leave college with no loan debt. The State Regents currently provide a number of resources that help students and their families plan for and manage the cost of earning a college degree. Recognizing the important role that financial aid plays in promoting college access and completion, the State Regents should develop strategies that facilitate easier access to financial aid and scholarship information and opportunities for students.

1. The State Regents should coordinate the creation of a statewide financial aid/scholarship matching tool for students to identify potential financial aid/scholarship opportunities, with the goal of maximizing the disbursement of available scholarship funds to students each year.

2. The State Regents should strongly encourage colleges and universities to develop partnerships with local communities and businesses to provide scholarships for adult degree completion through the Reach Higher initiative and include state matching funds for these scholarships in the annual system-wide budget request.

3. The State Regents should encourage institutions to create and/or expand a seed fund to provide emergency aid for students in need to prevent dropout.

4. The State Regents should initiate a study to determine the capacity of institutions to increase fundraising efforts for need-based financial aid.
   a. Institutions should place greater emphasis on need-based financial aid in fundraising.

5. The State Regents should initiate a study to examine the role of unmet financial need for students nearing the end of their college career.

6. The State Regents should initiate a study to determine the impact of microcredential and competency-based education programs on financial aid eligibility.

F. **Adult Degree Completion**
Oklahoma currently has over 70,000 adult citizens that have earned on average more than 72 college hours without earning a college degree. The State Regents should explore and support strategies that would maximize adult degree completion in Oklahoma.

1. The State Regents should continue to support adult degree completion through the Reacher Higher initiatives, which includes the Adult Promise grant from the Lumina Foundation.

2. The State Regents should work with institutions to develop a system-wide strategy for identification and outreach to students who have dropped-out but have a significant number of college credit hours.

4

3. Institutions should partner with local businesses to develop programs that provide scholarships or tuition reimbursement to encourage employee degree completion or skill acquisition that meets business needs.

4. The State Regents should expand online education opportunities for adult students as recommended by the Academic Program Innovations and Online Education Subcommittee.

5. The State Regents should explore the development of potential models for competency-based degrees in conjunction with recommendations from the Academic Program Innovations and Online Education Subcommittee.

G. <u>Military-Connected Students</u>
Each year, thousands of veterans take courses at Oklahoma colleges and universities. With the revamped GI Bill, veteran enrollment numbers have increased dramatically. One of the State Regents' top priorities is to provide support for our veterans and to address the unique issues they face in returning to our colleges and universities after military service.

1. The State Regents and institutions should develop a statewide outreach strategy for assisting military-connected students and their families earn a college degree.

2. To facilitate degree completion for veteran students, the State Regents should develop a matrix of course equivalencies for students with military service experience.

Academic Program Innovations and
Online Education Subcommittee

RECOMMENDATIONS

A. <u>Academic Programs</u>

1. The State Regents should provide leadership and resources to accelerate the development and expansion of joint degree programs and statewide seamless transfer articulation agreements between and among institutions.

2. The State Regents should provide a statewide framework for institutions to develop microdegrees/ microcredentials to meet workforce demand in real time.

   a. Workforce focused microcredentials should be offered primarily through online delivery channels.

   b. Open/flexible course and program start dates should be explored to allow for rapid completion of credential at low costs.

   c. Microcredentials should be based on centers of existing expertise and excellence from state institutions.

   d. Microcredentials will be developed, as appropriate, in coordination with the career technology centers and local industry to maximize career opportunities, limit course duplication, and enhance cost efficiencies.

   e. The State Regents should consider the development of a centralized platform to manage microcredentials.

3. The State Regents should develop a system-wide strategy for building state-of-the-art data analytics capacity at all state system institutions and secure the resources necessary for its implementation so that colleges and universities can make systematic and data-informed decisions on improving student success, enrollment growth, financial sustainability, and institutional advancement.

4. The State Regents should collaborate with the Council on Instruction, the Council on Student Affairs, and the Economic Development Council to advance the development and assessment of 21st century workforce-ready skills. This strategic system-wide effort would support the development of "out-of-classroom" skills, such as critical thinking, leadership, teamwork, and civic engagement. To the extent possible, secondary schools should be included to create a seamless transition of these skills from high school to postsecondary education. In addition, this strategic initiative should provide a mechanism for students to communicate these workforce-ready skills to employers.

5. The State Regents, in collaboration with the Council of Presidents and the Council on Instruction, should research the design and implementation of competency-based education within the State System of Higher Education.

   a. The State Regents should undertake a comprehensive study of existing competency-based education programs, such as the University of Wisconsin model, and the potential implications for Title IV funding.

6

b. The State Regents should define and implement incentives, as funding allows, to identify and support select programs and institutions for competency-based education expansion.

c. Ideal programs would likely be workforce-focused and provide a pathway for career advancement for students.

d. A program of this nature may include collaborations between higher education institutions and be delivered primarily through online channels. In addition, collaborations with technology centers should be explored as appropriate.

6. The State Regents should coordinate the establishment of an organization with the mission of identifying, creating, growing, and sharing emerging academic innovations. This structure would mitigate risk for state institutions, while allowing institutional leaders to benefit from the latest thinking, research, and academic innovation options available for adoption. Such a structure could be a collaborative effort of the Council on Instruction, Council on Student Affairs, and the Council for Online Learning Excellence.

7. The State Regents should support the continued expansion of the concurrent enrollment waiver program by developing a three-year plan to:

    a. Secure resources to fully fund existing concurrent enrollment activities.

    b. Review data from concurrent pilot programs around the state to find best practices in student success in these programs and collaborate with the Council on Instruction to revise State Regents policies to incorporate successful strategies for statewide implementation.

    c. Provide data to the State Legislature regarding the success of the current program and the revised program to ensure continuation of a fully funded program for all concurrent students statewide.

8. The State Regents should continue collaboration with the Oklahoma Department of Career and Technology Education for traditional students and returning adults to provide the most appropriate pathway for career growth and cost effective credential completion.

    The State Regents should develop a system-wide strategy for institutions to provide both academic and non-academic supports to students. This strategy should:

    a. Recognize the changing demographics of traditional and adult students, and direct resources to programs that serve these students' needs, encouraging flexible policy and procedures to be developed in collaboration with the Council on Instruction and the Council on Student Affairs.

    b. Assist institutions in creating public-private partnerships to address non-academic needs of adult students. Examples include programs to eliminate stresses for returning adults by providing financial supports, textbook assistance, comprehensive and personalized advising, and career development services.

    c. Assist institutions in demonstrating the value in creating public-private partnerships to address academic needs of adult students by providing cohort programs, small classes, accelerated course offerings, online course offerings, etc. to facilitate better learning outcomes for returning adults.

    d. Provide research related to outcomes from these supports found in other states as emerging programs and the demonstrated return on investment.

B. Online Education

1. The State Regents should request funding from the Legislature and private sources to devote resources to expand the effective use of Open Educational Resources (OER) to reduce textbook costs and improve student success.

2. The State Regents should invest in and promote statewide professional development for faculty and staff to improve online instruction and student success.

3. The State Regents should work with participating institutions to develop common online platforms and facilitate user groups for existing platforms. Adopting a common online platform should be a long-term goal.

4. The State Regents should request funding from the Legislature to develop a systemwide delivery model for online education, with the goals of increasing access, value, quality, and growing a highly educated workforce and citizenry.

System Structure Subcommittee

RECOMMENDATIONS

1. The State Regents and Chancellor should encourage governing boards to explore more cooperation on academic programs and administration in order to better streamline initiatives across the system and to ensure best practices are scaled across multiple institutions.

   a. It should be acknowledged that the recommendation to reduce the number of governing boards will not result in significant savings in and of itself. The potential for combining similar institutions under the same governing board presents the opportunity for more easily streamlining the administration, HR, payroll, finance, and IT functions of these institutions, which is anticipated to result in cost savings and better, more efficient business processes.

2. The Legislature should create and fund a seed fund to provide financial incentives to encourage voluntary mergers of institutions. Institutional mergers should be undertaken with the following objectives: improve student success; maintain access; and maximize cost savings.

3. The State Regents and Chancellor should encourage and facilitate discussions on voluntary mergers or the implementation of partnerships between institutions.

4. The State Regents and Chancellor should encourage and facilitate the development of service centers serving multiple institutions regionally.

5. Governing boards with authority for a single institution should be given a period until June 30, 2019, to enter into voluntary mergers/partnerships with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents. After June 30, 2019, the State Regents will recommend that remaining institutions be governed by or merged with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents, with the exception of any two-year community college that is a land-grant institution (Northern Oklahoma College) or receives local ad valorem funding (Oklahoma City Community College, Rose State College, and Tulsa Community College), which would retain their own respective governing boards. Two-year community colleges or governing boards with a single institution should be governed by or merged with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents. Following the merger, regents and trustees currently serving on the governing boards for single institutions will be converted to advisory board positions with gubernatorial appointments.

6. Encourage collaboration and formation of partnerships between large urban two-year institutions, such as Oklahoma City Community College, Rose State College and OSU-OKC.*

   > *Tulsa Community College is exempted due to its statutory responsibility to provide the lower division coursework for the Tulsa regional area.

Fiscal Solutions, Efficiencies, Affordability and Technology Subcommittee

RECOMMENDATIONS

1. The State Regents and Chancellor should facilitate the establishment of multi-institutional partnerships to scale-up back office function consolidation in administrative function areas (for example: IT, human resources, purchasing, finance and accounting, and academic learning management systems (LMS), etc.).

2. Any cost savings achieved through implementation of efficiencies should be reinvested in initiatives related to enrollment, retention, student success, faculty quality, etc. that result in improving degree completion outcomes and generating increased revenue.

3. The State Regents should require that every institution utilize a predictive analytics data program to aid in enrollment strategies and improve student retention and graduation rates. Information regarding the use of predictive analytics should be embedded in the institution's annual academic plan that is submitted to the State Regents.

   a. Institutions are strongly encouraged to participate in a contract for predictive analytics through the State Regents or initiate their own contract.

4. The State Regents should implement a financial fiscal review and long-term (at least every five years) viability assessment of each institution to be conducted on a rotating basis with at least five institutions assessed every year.

   a. As part of the financial review and viability assessment, institutions would be required to submit partnership plans identifying current and potential strategic partnerships with other institutions, governmental agencies, nonprofit organizations, private sector businesses, etc., that promote continued institutional viability.

5. Governing boards should undertake a review of their respective institutions to determine if branch campuses/campus sites function as cost centers, are self-sustaining, or contribute to the financial stability of the institution.

6. The State Regents should eliminate line-item allocation funding for special programs and branch campuses.

   a. Consolidating institutional allocations would incentivize governing boards to consolidate purchasing contracts and improve back-office and administrative efficiencies and provide governing boards more flexibility in setting their institutional priorities.

7. The Oklahoma State Regents for Higher Education and the Oklahoma Department of Career and Technology Education should establish a working group to inventory existing partnerships between higher education and CareerTech and to study the development of new strategic partnerships, including academic agreements, administration agreements, and the joint use of facilities.

8. The State Regents' Council on Information Technology will lead an initiative to coordinate the purchase of common computer-related applications and technology across the higher education system. Leveraging the purchasing power of several institutions allows OSRHE to procure IT materials and services at a lower cost, providing for an increased level of efficiencies, cost savings and an overall improved academic experience. In addition, increased buying power will allow smaller institutions to invest in technologies they may have been previously unable to afford, ensuring all students, faculty and staff across our higher education system have access to the same technologies.

9. State system colleges and universities should support the State Regents and Chancellor in striving to maintain OneNet under the State Regents to ensure that all higher education institutions and other OneNet clients benefit from the cost savings provided through OneNet contracts and services.

   a. OneNet should explore revenue enhancements and/or other strategies designed to further improve economic development, job creation, and quality of life, with a particular emphasis on benefitting rural communities.

THE TASK FORCE ON THE FUTURE OF HIGHER EDUCATION
IMPLEMENTATION SCORECARD

The Task Force on the Future of Higher Education

Task Force Progress – Winter 2020

RECOMMENDATION	LEGISLATION REQUIRED?	EXPLORATION	IMPLEMENTATION	COMPLETED	OUTCOMES
Predictive Analytics Predictive analytics is beginning to emerge as a promising and powerful tool in higher education. Predictive analytics enables institution, as well as the State Regents, to evaluated the effectiveness of student success programs, improve student retention, and better target student recruitment.	Yes – Budget Request		✓		• At their meeting on December 5, 2019, the State Regents voted to approved the purchase of the SAS platform to begin the implement of predictive analytics on a system-wide basis. • The State Regents included predictive analytics in their funding request for FY21.
Concurrent Enrollment Concurrent enrollment has proven to be a highly effective tool in developing a high school-to-college bridge that accelerates time to degree for students, improves student matriculation, and strengthens college readiness. The State Regents should support strategies that ensure the expansion of concurrent enrollment opportunities for Oklahoma students and families.	Yes – Budget Request			✓	• Additional $7.5 million appropriated for concurrent enrollment in FY19. • Additional $3.3 million appropriated for concurrent enrollment in FY20. • Funding reimbursement to colleges and universities for high school seniors is now 100 percent. • State Regents have expanded concurrent enrollment tuition waivers to high school juniors.
Open Educational Resources The College Board estimates that the average undergraduate student spends approximately $1,200 on textbooks annually. Reducing the costs of textbooks through the adoption of Open Educational Resources (OER) is one way to improve college affordability for students. OER are free accessible and openly licensed digital media that can be used for teaching, learning assessment and research purposes.	No		✓		• The Online Consortium of Oklahoma (OCO) has created a working group consisting of higher education institutions across the state to develop and review Open Educational Resources that could provide high quality content while lowering costs to students.

Fiscal Viability Review and Assessments
The State Regents should implement a financial fiscal review and long-term viability assessment of each institution. Long-term viability assessments require institutions to not only look at their current financial status but also strategically assess their capability to address fundamental changes facing higher education.
Assessments consider the following metrics:
• Trends in enrollment, tuition rates, tuition discounting and financial aid, net revenue from tuition.
• Institutional resource allocation, budgeting, spending, and cash flow.
• Endowment assets, payouts, restrictions, and liquidity.
• Institutional debt and strategic use of debt.
• Goals and execution of fundraising strategies.
• Institutional credit rating.
	No		✓		• The State Regents have contracted with Huron consulting to conduct long-term fiscal viability reviews and assessments.
					• The viability of the following institutions have been assessed to date:
					  ▫ Redlands Community College
					  ▫ Eastern Oklahoma State College
					  ▫ Carl Albert State College
					  ▫ Oklahoma State University
					  ▫ Tulsa Community College
					  ▫ East Central University
					  ▫ Murray State College
					  ▫ Western Oklahoma State College
					  ▫ Seminole State College
					  ▫ University of Science and Arts of Oklahoma
					  ▫ Northwestern Oklahoma State University

Assisting Veteran Students The State Regents and institutions should develop a statewide outreach strategy for assisting military -connect students and their families earn a college degree.	No		✓		• The State Regents' Reach Higher staff have made significant outreach to the Oklahoma Department of Veterans Affairs, and specifically with Secretary of Veterans Affairs Ben Robinson. • We have made a commitment to have Reach Higher staff member dedicate up to 2 hours per week to attend TAPs (transition) sessions at installations when we are invited. Thus far, our staff has presented information on college completion at TAPs meetings at Altus Air Force Base and Fort Sill Army Base.

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AGENDA ITEM #24:

> **Task Force on the Future of Higher Education: Modernization, Efficiencies, and Innovations.**

SUBJECT: Extension of Voluntary Governing Board Merger/Partnership Deadline until June 30, 2021.

RECOMMENDATION:

> **Based on the fiscal viability reviews of all 25 colleges and universities in the Oklahoma state system of higher education conducted by Huron Consulting, it is recommended that the State Regents extend the voluntary governing board merger/partnership deadline until June 30, 2021, to allow the State Regents time to fully evaluate the reports for each institution so that recommendations for mergers will be based on a thorough and comprehensive analysis of unique institutional strengths, challenges, and operational contexts.**

BACKGROUND:

Given the changing landscape of higher education, at their meeting on Thursday, March 23, 2017, the State Regents approved the formation of a citizens' Task Force on the Future of Higher Education to undertake an extensive planning initiative that will position the Oklahoma state system of higher education to better meet current and future challenges. The efforts of the Task Force emphasized the state system's focus on modernization, efficiencies, and innovation.

The State Regents accepted membership for the Task Force on the Future of Higher Education at their meeting on Thursday, April 20, 2017. The Task Force was comprised of the State Regents, private citizens, college and university representatives, and the designees of Governor Mary Fallin, Speaker of the Oklahoma House of Representatives Charles McCall, and Senate President Pro Tempore Mike Schulz. Citizen members of the Task Force were well-respected Oklahomans who come from a variety of professional and educational backgrounds and represent different geographic regions within the state.

Dr. William E. "Brit" Kirwan, Chancellor Emeritus of the University System of Maryland, served as lead advisor to the task force. Dr. Kirwan is a senior fellow at the Association of Governing Boards of Universities and Colleges (AGB) and previously served as president of The Ohio State University and the University of Maryland. Dr. Sally Mason, President Emerita of the University of Iowa, and Mr. Ken Knueven also served as AGB consultants to the Task Force.

The Task Force convened in May 2017 to begin developing recommendations that would best position Oklahoma's state system of higher education to meet the future challenges of maintaining accessibility and affordability without compromising educational quality.

The work of the Task Force was primarily conducted through four subcommittees:

- College Degree Completion and Workforce Development Initiatives;
- Academic Program Innovations and Online Education;
- System Structure; and
- Fiscal Solutions, Efficiencies, Affordability, and Technology.

Members were assigned to one of these four subcommittees, which met regularly from June through November 2017. During subcommittee meetings, members studied best practices across the nation and in Oklahoma and discussed how to develop recommendations that could be successfully implemented in Oklahoma. Subcommittee progress reports were provided during meetings of the full Task Force on September 6, 2017 and October 18, 2017.

While each subcommittee had a specific focus, certain common themes emerged from the work of the subcommittees. These included:

- The power of predictive analytics.
- Development of microcredentials to meet workforce needs in real time.
- Increased financial support from the Legislature for the concurrent enrollment program to advance degree completion efforts.
- Dedicated focus on adult student programs, scholarships, and credit for prior learning.
- Scaling delivery of online education.
- Consolidation of administrative structures and functions.
- Reemployment of cost savings to support the mission of the institution.

After months of study and deliberations, the Task Force unanimously voted to approve all subcommittee recommendations and the full report at its meeting on January 31, 2018. At their meeting on February 1, 2018, the Oklahoma State Regents for Higher Education unanimously accepted the Task Force on the Future of Higher Education's *Report on the Future of Higher Education,* which outlines the Task Force's assessment process and recommendations to strengthen Oklahoma public higher education.

POLICY ISSUES:

The System Structure Subcommittee of the State Regents' Task Force on the Future of Higher Education reviewed institutional governance models, missions, and geographic service regions. System Structure Subcommittee recommendations focused on streamlining academics, student services, and administration through the consolidation of certain institutional governing boards. Specifically, the System Structure Subcommittee made the following recommendation:

> Governing boards with authority for a single institution should be given a period until June 30, 2019, to enter into voluntary mergers/partnerships with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University

System of Oklahoma Board of Regents. After June 30, 2019, the State Regents will recommend that remaining institutions be governed by or merged with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents, with the exception of any two-year community college that is a land-grant institution (Northern Oklahoma College) or receives local ad valorem funding (Oklahoma City Community College, Rose State College, and Tulsa Community College), which would retain their own respective governing boards. Two-year community colleges or governing boards with a single institution should be governed by or merged with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents. Following the merger, regents and trustees currently serving on the governing boards for single institutions will be converted to advisory board positions with gubernatorial appointments.

ANALYSIS:

While several discussions have been ongoing between institutions regarding the merger/partnership of governing boards, it must be acknowledged that such a significant change in higher education governance should not be undertaken lightly.

Accordingly, at their meeting on June 26, 2019, the State Regents extended the voluntary merger period until June 30, 2020, to provide time for Huron Consulting to complete the fiscal reviews and long-term viability assessments of all 25 state system colleges and universities. These reviews resulted from the recommendations of the State Regents' Task Force on the Future of Higher Education.

In the *OSRHE Comprehensive System Report: Financial Fiscal Review and Long-term Viability Assessment Discussion Document* presented at the May 28, 2020, State Regents meeting, Huron Consulting concluded that in order to minimize the burden of future revenue declines, institutions will need to significantly cut expenditures, dip into reserves, or begin consideration of the following strategies:

- mergers and/or closures;
- reduction/realignment of academic programming;
- reorientation of programs towards job markets;
- mission right-sizing;
- administrative cost reduction strategies; and
- space utilization analyses.

This summary report and accompanying detailed reports on each institution provide important information for the State Regents to utilize in making comprehensive and strategic recommendations regarding future mergers within Oklahoma's state system of higher education.

Given the amount of data provided by Huron Consulting, a considerable amount of time will be required from the State Regents and staff to analyze the financial positions of each institution, solicit input from key stakeholders, and form final recommendations for institutional mergers/partnerships. Additionally, this process must take into account the significant financial

strain that the COVID-19 pandemic has placed on Oklahoma's public colleges and universities, which was not reflected in the original reports prepared by Huron Consulting due to the timing of the pandemic. The production of updated supplemental reports providing this information may be required.

Accordingly, it is recommended that the deadline for governing boards with authority for a single institution to enter into voluntary mergers/partnerships with the University of Oklahoma Board of Regents, the Oklahoma A&M Board of Regents, or the Regional University System of Oklahoma Board of Regents be extended until June 30, 2021, to allow the State Regents sufficient time to analyze the data produced by Huron Consulting and develop a long-term strategy for the structure of Oklahoma's higher education system.

AGENDA ITEM # :

Functions of Public Institutions in the State System.

SUBJECT: Extension of the Moratorium on Consideration of Function Change/Expansion Requests and Mission Expansion Requests from Public Institutions in the State System.

RECOMMENDATION:

> **It is recommended that the State Regents extend the moratorium on consideration of any requests for function change/expansion and mission expansion through June 30, 2021, unless action is taken to further extend the moratorium's duration.**

BACKGROUND:

The Oklahoma Constitution (Article XIII-A) directs the Oklahoma State Regents for Higher Education (State Regents) to determine the functions and courses of study in the Oklahoma State System of Higher Education (State System). The *Functions of Public Institutions* policy was adopted in February 1970.

Institutions must make requests to the State Regents for approval of any function change from the stated functions in policy for each institution. Function change requests can alter the level of instruction and academic programs offered by institutions, as well as the associated costs for such instruction and related expenses. In addition, institutions must make requests to the State Regents for approval of any mission expansion from their current degree program inventory. Mission expansion requests can expand the level of instruction and academic programs offered by institutions, such as adding graduate programs to institutions only offering undergraduate programs, or adding associate degrees to institutions historically offering only baccalaureate degree programs, as well as additional associated costs for such mission expansion. In both scenarios, institutions are also required to fully explore collaborative opportunities with institutions already holding the requisite functions and missions in their service area.

Historically, certain regional universities, including Cameron University, Langston University, Oklahoma Panhandle State University, and Rogers State University, have an approved two-year function. Subsequently, function statements for branch campuses have been added, and, over time, institutional function changes were approved including: Rogers State University (previously Rogers State College – Master of Business Administration); Langston University (Doctor of Physical Therapy); Northeastern State University (Doctor of Optometry); Northwestern Oklahoma State University (Doctor of Nurse Practice); Southwestern Oklahoma State University (Doctor of Pharmacy and two-year function following closing of Sayre Community College); University of Central Oklahoma (limited Associate in Applied Science degrees); and the addition of language setting a special statewide liberal arts and sciences function for the University of Science and Arts of Oklahoma.

Oklahoma State University–Oklahoma City (OSU-OKC) and Oklahoma State University Institute of Technology (OSUIT) in Okmulgee are constituent agencies by policy (not community colleges) with authorization by state statute and the State Regents to carry out certain programs and projects under the administrative jurisdiction of Oklahoma State University. In 2004, the State Regents approved a function change for OSUIT to offer three specific bachelor of technology (BT) degrees (BT in Information Technologies (094), BT in Instrumentation Engineering Technology (095), and BT in Civil Engineering

Technology (096). In 2006, the State Regents adopted a new policy format and incorporated the institutional and branch campus functions into the *Functions of Public Institutions* policy. Also in 2006, the State Regents approved a function change for OSU-OKC to offer one BT degree (BT in Emergency Responder Administration (102).

In March 2010, the State Regents imposed a "moratorium" on actions regarding function change requests pending a policy review. In the 2010-2011 academic year, a study and review of the *Functions of Public Institutions* policy and the *Academic Program Approval* policy was conducted and revealed several issues that relate directly to the function policy and other related policies addressing academic degrees, assessment, and remediation. Significant discussions and analyses occurred concerning the role of joint degrees, the importance of economic development needs, the role of certificate programs, the differentiation of applied baccalaureate degrees from traditional degrees, the differentiation of Associate in Applied Science degrees from Associate in Arts/Associate in Science degrees, and concerns for institutional capacity and quality assurance. This process resulted in policy revisions that were approved by the State Regents at their meeting on June 21, 2012, which are currently found in the Chapter 3 of the State Regents Policy and Procedures Manual.

On March 23, 2017, given the changing landscape of higher education, the State Regents tasked Chancellor Glen D. Johnson with the formation of a citizens' Task Force on the Future of Higher Education (Task Force) to undertake an extensive planning initiative to position the State System to better meet current and future challenges. The efforts of the Task Force emphasized the State System's focus on modernization, efficiencies, and innovation, and conducted a systematic and thorough review of the current status of higher education in Oklahoma. The 68-member Task Force examined existing initiatives and best practices, and reported findings and recommendations on strategies that would best support improving quality, access, affordability, and efficiency in the State System.

The work of the Task Force was conducted primarily through four subcommittees, focusing on the following priorities:
- College degree completion and workforce development initiatives;
- Academic program innovations and online education;
- System structure; and
- Fiscal solutions, efficiencies, affordability, and technology.

The Task Force unanimously approved its final *Report on the Future of Higher Education* at its meeting on January 31, 2018, and the State Regents subsequently accepted the Task Force report and recommendations at their meeting on February 1, 2018. Among these recommendations, the Academic Program Innovations and Online Education Subcommittee's first recommendation was "accelerate the development and expansion of joint degree programs and statewide seamless transfer articulation agreements between and among institutions." Additionally, the report stated that "where opportunities for developing joint degrees exist, they should be developed to enhance affordability for students and reduce unnecessary duplication of resources needed to deliver especially high-cost degrees." These recommendations were consistent with the *3.4 Academic Program Approval* policy which specifically states that "Alternative forms of delivery, including but not limited to consortial, dual, or joint degrees, are encouraged."

At the May 25, 2018 meeting, the State Regents approved the recommendation to defer consideration of any requests for function change/expansion or mission expansion through June 30, 2019 unless action is taken to extend the moratorium. In addition to establishing the moratorium, the State Regents' Chair created a subcommittee of the State Regents' Academic Affairs Committee to review and analyze national trends, best practices, and the recommendations of the State Regents' Task Force on the Future of Higher Education. The State Regents' Function Change and Mission Expansion Subcommittee was comprised of presidents, chief academic officers, and State Regents, along with facilitation from Dr. Brit Kirwan, Consultant with Association of Governing Boards (AGB) and Chancellor Emeritus of the University

System of Maryland and past President of Ohio State University. After a series of subcommittee meetings during the Fall 2018 semester, the subcommittee had its final meeting on January 17, 2019. At this meeting, the subcommittee unanimously approved revisions to the State Regents' *Functions of Public Institutions* policy, with comments from the consultant and members indicating that the revisions provided transparency in the process, flexibility for institutions and the State Regents, while ensuring rigorous review and accountability.

At the June 27, 2019 meeting, the State Regents approved a recommendation to defer consideration of any requests for function change/expansion or mission expansion through June 30, 2020 unless action was taken to extend the moratorium. As the State System emerged from a systemic review by the Task Force on the Future of Higher Education in Oklahoma, coupled with the work of the subcommittee of the State Regents Academic Affairs Committee with revisions to the *Functions of Public Institutions* policy, it was determined to be prudent to take time to review these and related issues in context and make strategic decisions moving forward. Several of the recommendations included in the Task Force on the Future of Higher Education's final report focus on the value and efficiency of academic credentials offered by institutions, the charge to develop joint degree offerings, and the structure of the State System that will offer these credentials. The Task Force report also recommended governing board mergers/consolidations to encourage increased institutional collaboration in various areas, including degree offerings as well as attention to fiscal viability of institutions.

Due to discussions regarding voluntary governing board mergers/consolidations at the time, and the potential impacts on degree offerings, the State Regents approved extending the moratorium and deferring consideration of any requests for function change/expansion and mission expansion through June 30, 2020 to coincide with time allowed for fiscal reviews and long-term viability assessments on each institution.

POLICY ISSUES:

This recommendation is consistent with State Regents' policy and actions.

ANALYSIS:

Through a tumultuous time, the 2019-2020 academic year provided robust opportunities to consider the structure of the State System, a review of the fiscal viability of each institution in depth, discussions on academic innovations, and the State System response to a pandemic. All of these discussions will be instructive in future decisions regarding functions and missions of institutions.

Since the June 27, 2019 State Regents action to extend the moratorium, there have been ongoing discussions regarding voluntary governing board mergers and consolidations, with legislation to enable such changes viable in the 2020 Legislative Session. To date, no voluntary agreements have been solidified and the legislation did not move through the process during the session.

In the *OSRHE Comprehensive System Report: Financial Fiscal Review and Long-term Viability Assessment Discussion Document* presented at the May 28, 2020 State Regents meeting, Huron Consulting Group Inc. and Affiliates concluded that in order to minimize the burden of revenue declines for FY2021, institutions will need to significantly cut expenditures, dip into reserves, or begin consideration of the following strategies: mergers and/or closures; reduction/realignment of academic programming; reorientation of programs towards job markets; mission right-sizing; administrative cost reduction strategies; and space utilization analyses. This summary report and accompanying detailed reports on each institution provide important information to inform future decisions, recognizing that these data reflect a "pre-COVID-19" world that may be radically changed by the virus and pandemic.

Over the past year, focus for Academic Affairs staff has been on academic innovation in light of the rapid expansion of online learning, collaborative and alternative credentialing opportunities, and recognition of learning attained outside the traditional classroom. State Regents' policy revisions were approved on June 21, 2012 in the *Academic Program Approval* policy to provide language to define and encourage consortial, dual, or joint degree programs across State System institutions. To date, no institution has leveraged this opportunity. In addition, online degree offerings have grown at every institution, with most institutions offering at least one fully online degree program. As online offerings expand access to degree programs across the state, the result is declining demand for multiple institutions to offer duplicate degrees programs that are available online at other State System institutions. At the same time, institutions are exploring creative ways to increase completion through math pathways, transfer articulation, online learning innovations, and expanded services to support student success. These efforts are validated by another conclusion found in the fiscal viability reports emphasizing the efficacy and return on investment of retaining current students to completion, rather than a singular focus on new student recruitment.

Finally, the 2019 novel coronavirus disease (COVID-19) outbreak thrust all institutions into both comprehensive online learning and severe financial constraints. As institutions rapidly upscaled online offerings as a means to complete the Spring 2020 semester and protect students from losing educational progress, these same institutions incurred massive financial costs with simultaneous loss of revenue. The financial viability assessments were concerning for institutional stability after four years (FY15-FY18) of successive cuts to state appropriations for Oklahoma higher education in excess of $219,000,000. Existing financial constraints will be compounded by the impacts of COVID-19 on enrollment and auxiliary services on every campus in the State System.

Based on these unrealized opportunities of joint, dual and consortial degree opportunities, the extension of time for voluntary governing board mergers, increasing online offerings that expand existing degree program offerings, and the uncertain financial future of the institutions, the state, and students, it is prudent to allow more time for institutions to explore multiple options available within their current function and mission parameters. Therefore, it is recommended that the State Regents extend the moratorium on consideration of any requests for function change/expansion and mission expansion through June 30, 2021, unless action is taken to further extend the moratorium's duration.

OSRHE Comprehensive System Report: Presidents' Council

Financial Fiscal Review and Long-term Viability Assessment Discussion Document

June 3rd, 2020

Agenda

What's So?
- Huron data compilation through audited financial statements and institutional interviews
- Overall CFI score comparison among system institutions
- Institutional risk factors

So What?
- Identification of high-level systemwide financial trend and themes
- Analysis and data trends within each identified theme
- Further points of exploration among at-risk institutions

What's Next?
- Current responses to the COVID-19 health crisis
- Resource optimization within the Oklahoma system
- Illustrative revenue forecasting
- Future cost-reduction capabilities by institutional type

70

What's So?

71

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Making the Whole Greater Than the Sum of its Parts

The Oklahoma State Regents for Higher Education ("OSRHE") established the Task Force on the Future of Higher Education, which engaged Huron to complete a financial fiscal review and long-term viability assessment focusing on the following objectives: financial landscape assessment, examination of strategic plans, development of short-term plans regarding short-term financial issues, and an evaluation of the institution's capability to address future changes to the higher education model.

Students

Institutions
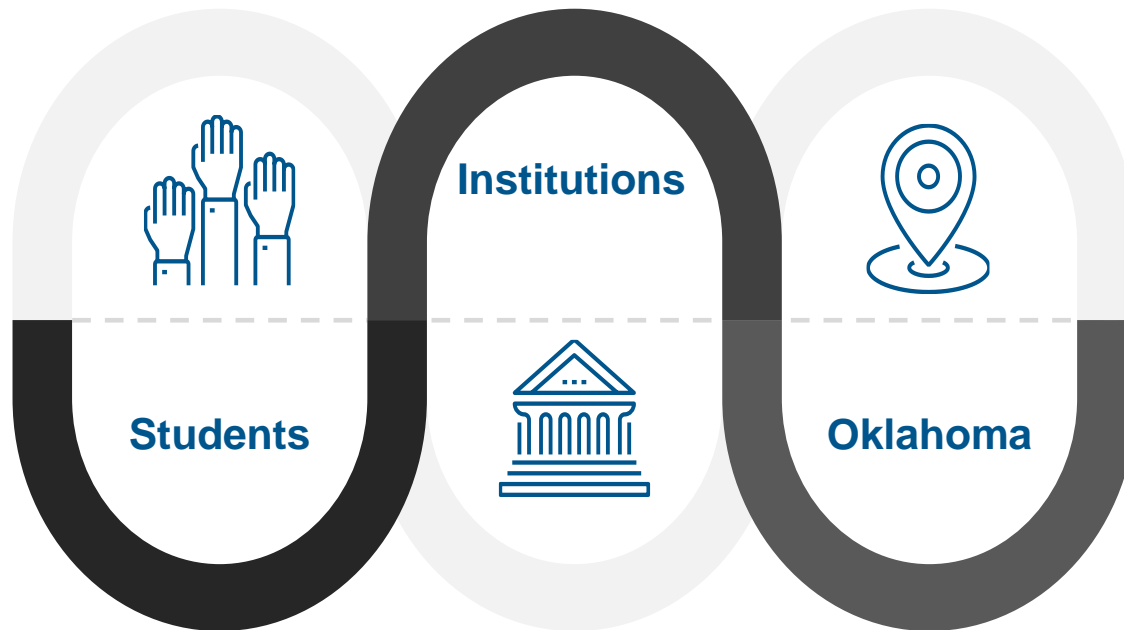
Oklahoma

The greater purpose of the system-wide review is to help identify how to make students, institutions, and the state of Oklahoma successful.

72

Activities to Date

Activities for each of the system's institutions followed the below process, including interviews with 135 individuals and the development of 25 financial models and subsequent reports.

1. Development of an internal Huron financial model to create key analyses and to inform institutional trends. Utilized select internal materials and audited financial statements.

2. Huron conducted interviews with key stakeholders in order to better understand the current state at each institution. Individual interviews were geared towards contextualizing enrollment and financial data to generate a holistic narrative for Huron's reports.

3. Based on the financial model and interviews, Huron generated a robust report broken out into financial, enrollment, and capital trends. These were then circulated to leadership for approval and presentation to the Board of Regents.

4. For each cohort (4-5 institutions), Huron presented key findings and conclusions from each of the institutions. Additionally, institutional leadership had the opportunity to attend the presentations and add further narrative towards their individual report and its findings.

Huron's 25 reports will allow the Board of Regents to analyze a standardized set of data to accurately compare the financial health of its 25 member institutions.

73

Huron's Understanding: Key Drivers

Over the historical period analyzed – FY14 through FY18 – three main key drivers were identified that are related to the decrease in state appropriation funding across the Oklahoma system.

KEY DRIVERS

While several themes and topics emerged through leadership conversations across the Oklahoma system, most can be condensed into three key drivers that are the basis for institutional decision-making.

01 Short-term takes priority
Diminished capacity to carry out strategic plan priorities

02 Increasing financial burden on students
High reliance on tuition & fee increases and private giving

03 Doing more with less
Decrease in compensation expenses leads to role dilution

The financial position of each institution has been shaped by these key drivers; the COVID-19 pandemic will have the greatest near-term impact on the institutions' finances.

74

FY19 CFI Scores Including Foundation

School Type	FY19 CFI Average	Average Change
Two-Year Community Colleges	2.69	1.19
Regional/Liberal Arts Universities	2.52	-0.26
Research University	2.39	-0.81

Note: Averages exclude MSC

Institution	FY19	Change
MSC	7.14	5.44
OCCC	5.10	0.10
TCC	4.76	4.07
CASC	4.22	1.45
WOSC	3.84	1.01
LU	3.31	0.96
USAO	3.09	-0.66
SEOSU	3.08	2.22
SWOSU	2.85	-1.22
CU	2.53	1.47
NSU	2.52	-0.02
OSU	2.47	-1.15
RSC	2.25	1.27
OU	2.23	-0.47
RCC	2.20	0.18
SSC	2.08	3.19
EOSC	2.00	1.64
NWOSU	1.99	-0.80
UCO	1.79	-2.83
OPSU	1.68	-1.40
RSU	1.60	0.58
NOC	1.55	-0.71
ECU	1.50	-1.18
CSC	0.91	1.08
NEO	0.72	-0.23

Inclusion of MSC's charitable trust within expendable reserves contributes to its relatively high total CFI score in comparison to other institutions

Target

Threshold

The system-wide average CFI score with the Foundation included is 2.70, indicating that institutions are turning the corner from evaluating their operations for institutional effectiveness, to the implementation of initiatives that promote financial sustainability.

75

FY19 Primary Reserve Ratio

The primary reserve ratio represents available expendable resources relative to total operating expenditures. A ratio below 0.4 indicates that the institution could have difficulty meeting existing obligations and may need to pursue additional support if revenues fluctuate or unexpected losses occur.

Institution	FY19	Change
MSC	2.86	2.12
CASC	0.85	0.27
OSU	0.76	0.05
USAO	0.74	-0.08
OCCC	0.66	0.46
LU	0.65	-0.01
RSC	0.61	0.18
WOSC	0.55	-0.08
SWOSU	0.53	0.05
NSU	0.53	-0.11
OPSU	0.53	0.09
CU	0.50	0.19
TCC	0.48	0.21
UCO	0.43	-0.23
OU	0.39	-0.06
SEOSU	0.39	0.18
RCC	0.38	0.30
NOC	0.36	-0.18
ECU	0.35	-0.09
RSU	0.35	-0.03
NEO	0.35	0.11
NWOSU	0.27	-0.07
EOSC	0.26	-0.02
SSC	0.18	0.15
CSC	0.17	-0.14

School Type	FY19 Average	Average Change
Two-Year Community Colleges	0.44	0.11
Regional/Liberal Arts Universities	0.48	-0.01
Research University	0.58	0.00

Note: Averages exclude MSC

Inclusion of MSC's charitable trust within expendable reserves contributes to its relatively high primary reserve ratio in comparison to other institutions

Target

14 institutions have primary reserve ratios above the target of 0.4, indicating that they have significant expendable resources that can be tapped to support operating expenses in FY21.

76

FY19 Viability Ratio

The viability ratio measures an institution's ability to settle its long-term debt solely using reserves, should it come due as of the balance sheet end date. It also serves as an indicator of the institution's credit worthiness. Minimum financial health for the ratio is 1.25, meaning that the institution's reserves exceed long-term liabilities by 25%.

Inclusion of MSC's charitable trust within expendable reserves contributes to its relatively high viability ratio in comparison to other institutions

School Type	FY19 Average	Average Change
Two-Year Community Colleges	1.13	0.48
Regional/Liberal Arts Universities	1.19	0.30
Research University	0.68	-0.10

Note: Averages exclude MSC
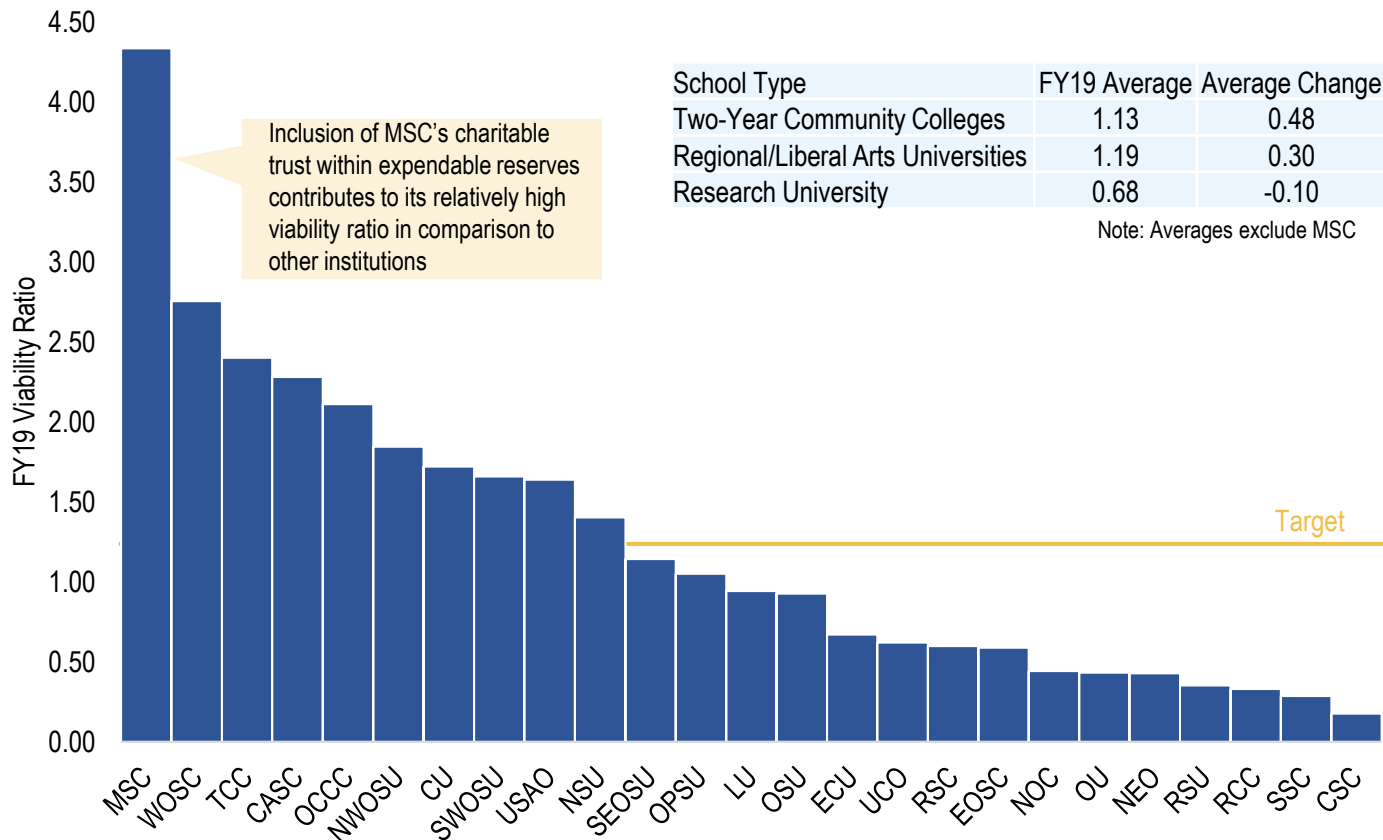
Institution	FY19	Change
MSC	4.43	3.46
WOSC	2.76	0.87
TCC	2.40	1.32
CASC	2.28	1.15
OCCC	2.11	1.64
NWOSU	1.85	0.47
CU	1.72	0.93
SWOSU	1.66	0.56
USAO	1.64	0.64
NSU	1.40	0.28
SEOSU	1.14	0.81
OPSU	1.05	0.36
LU	0.94	0.30
OSU	0.93	-0.13
ECU	0.67	-0.46
UCO	0.62	-0.56
RSC	0.60	-0.08
EOSC	0.59	0.20
NOC	0.44	-0.32
OU	0.43	-0.07
NEO	0.43	0.06
RSU	0.35	-0.01
RCC	0.33	0.25
SSC	0.29	0.26
CSC	0.18	-0.07

17 institutions have improved their viability ratios as institutions have sought to shore up financial stability and reduce leverage in the face of recent state funding reductions.

77

FY19 Net Operating Revenue Ratio

The net operating revenue ratio indicates whether an institution can cover its operating expenses with its operating revenues, which are adjusted to include nonoperating items such as state appropriations and private giving.

School Type	FY19 Average	Average Change
Two-Year Community Colleges	-0.01	0.07
Regional/Liberal Arts Universities	-0.03	-0.03
Research University	-0.01	-0.02

Institution	FY19	Change
OCCC	0.10	0.06
TCC	0.03	0.09
LU	0.03	0.07
OU	0.03	0.02
RSC	0.01	0.09
SEOSU	0.01	0.04
RCC	0.01	0.01
RSU	0.00	0.06
CSC	0.00	0.14
USAO	-0.01	-0.01
SWOSU	-0.01	-0.09
UCO	-0.01	-0.10
EOSC	-0.01	0.10
SSC	-0.01	0.16
NSU	-0.02	0.00
MSC	-0.02	0.21
ECU	-0.03	-0.03
WOSC	-0.03	0.10
CASC	-0.04	-0.02
CU	-0.04	0.01
OSU	-0.05	-0.06
NOC	-0.08	0.00
NWOSU	-0.08	-0.02
NEO	-0.09	-0.07
OPSU	-0.17	-0.31

Reductions in state funding have manifested themselves most materially in net operating revenue ratios, as 16 institutions currently maintain negative margins, after inclusion of select nonoperating revenue items.

78

FY19 Return on Net Position Ratio

The return on net position ratio describes the change in net position generated by an institution with its available resource base with a recommended minimum threshold of 6.0%. All income, including support restricted for capital investments, is considered in the ratio.

School Type	FY19 Average	Average Change
Two-Year Community Colleges	0.06	0.07
Regional/Liberal Arts Universities	0.02	-0.02
Research University	0.03	-0.06
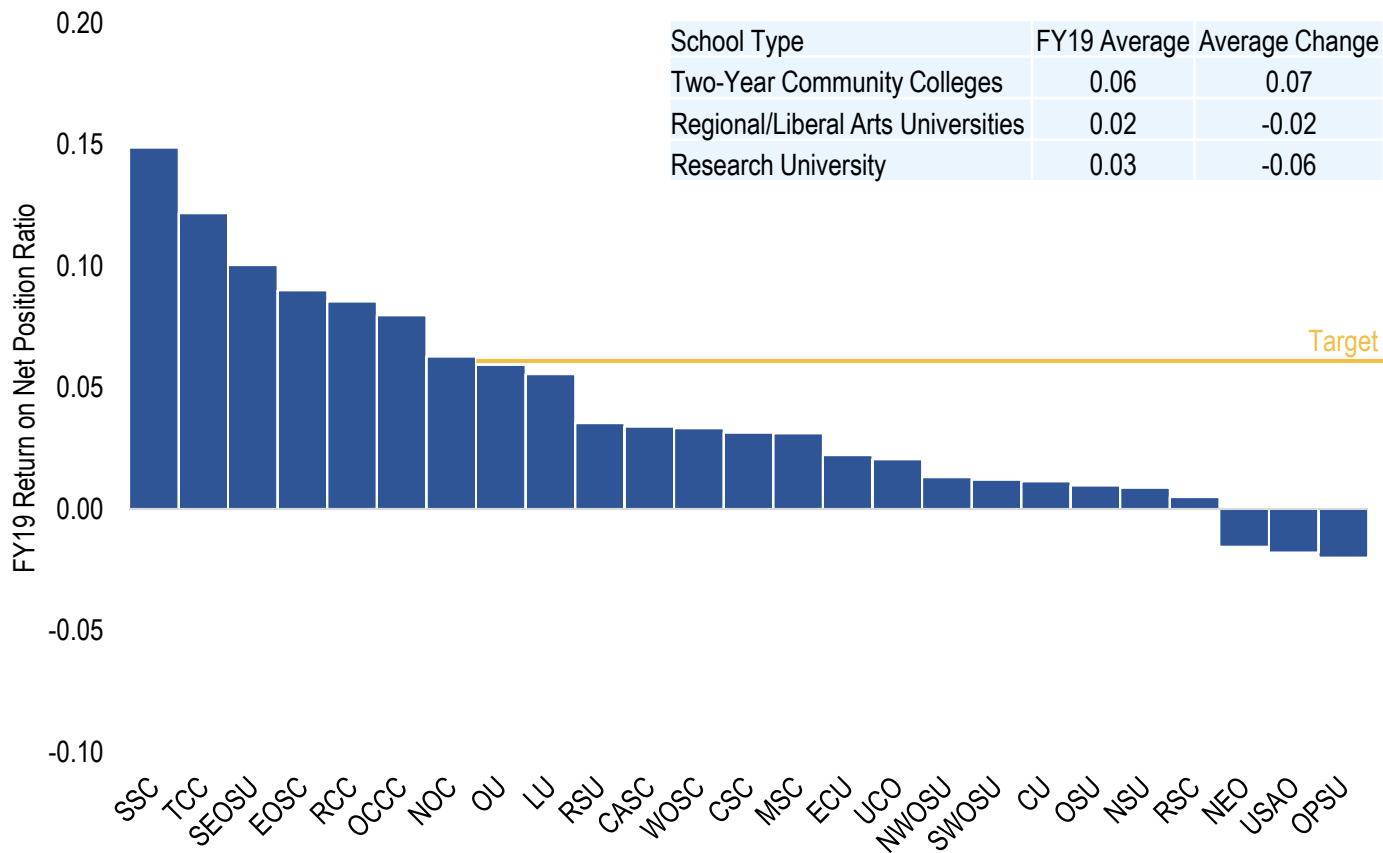
Institution	FY19	Change
SSC	0.15	0.41
TCC	0.12	0.17
SEOSU	0.10	0.12
EOSC	0.09	0.12
RCC	0.09	-0.09
OCCC	0.08	0.03
NOC	0.06	0.00
OU	0.06	-0.05
LU	0.06	0.02
RSU	0.04	0.05
CASC	0.03	0.00
WOSC	0.03	0.03
CSC	0.03	0.13
MSC	0.03	0.09
ECU	0.02	-0.03
UCO	0.02	-0.11
NWOSU	0.01	-0.10
SWOSU	0.01	-0.11
CU	0.01	0.01
OSU	0.01	-0.07
NSU	0.01	0.00
RSC	0.00	0.04
NEO	-0.02	-0.03
USAO	-0.02	-0.06
OPSU	-0.02	-0.05

Institutional results improve after the inclusion of other nonoperating revenue sources, such as capital support and on-behalf debt payments; only three institutions experienced negative bottom-line changes in FY19.

79

Institutional Risk Factors

Huron identified preliminary risk factor indicators, including significant historical operating expense reductions and an increasing debt burden[1], to calculate an overall score for each institution. Institutions meeting multiple risk factors below will have limited financial flexibility in coming fiscal years.

Institutions that have already cut expenditures significantly have less capacity to respond to revenue shortfalls in the absence of significant reductions in force and/or extended furloughs	Increasing debt burdens will constrain liquidity through higher principal and interest payments

Established Risk Factors

Expendable Reserve Metric	**Operating Performance Metric**	**Net Position Metric**	**Debt Leverage Metric**
Identified Risk Factor: Below-target Primary Reserve Ratio & operating expenditure reductions greater than the average of 5.8%	**Identified Risk Factor:** Below target Net Operating Revenue ratio & operating expenditure reductions greater than the average of 5.8%	**Identified Risk Factor** Below target Return on Net Position ratio & operating expenditure reductions greater than the average of 5.8%	**Identified Risk Factor:** Below-target viability ratio & increasing debt balance
Number of institutions at risk: *4 Institutions*	**Number of institutions at risk:** *9 Institutions*	**Number of institutions at risk:** *8 Institutions*	**Number of institutions at risk:** *8 Institutions*

7 of 10 institutions meeting at least two risk factors are community colleges[2], suggesting two-year institutions may be the most susceptible to future financial distress given state budget cuts in coming fiscal years.

80

1. FY14-FY19 financial results
2. All are institutions that do not receive community support through ad valorem or other forms of property tax revenues

So What?

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CFI Change Over Time, FY14-19

Bubble size depicts the FY19 CFI score with Foundation included, while the color indicates the change in the CFI score over the historical period analyzed.
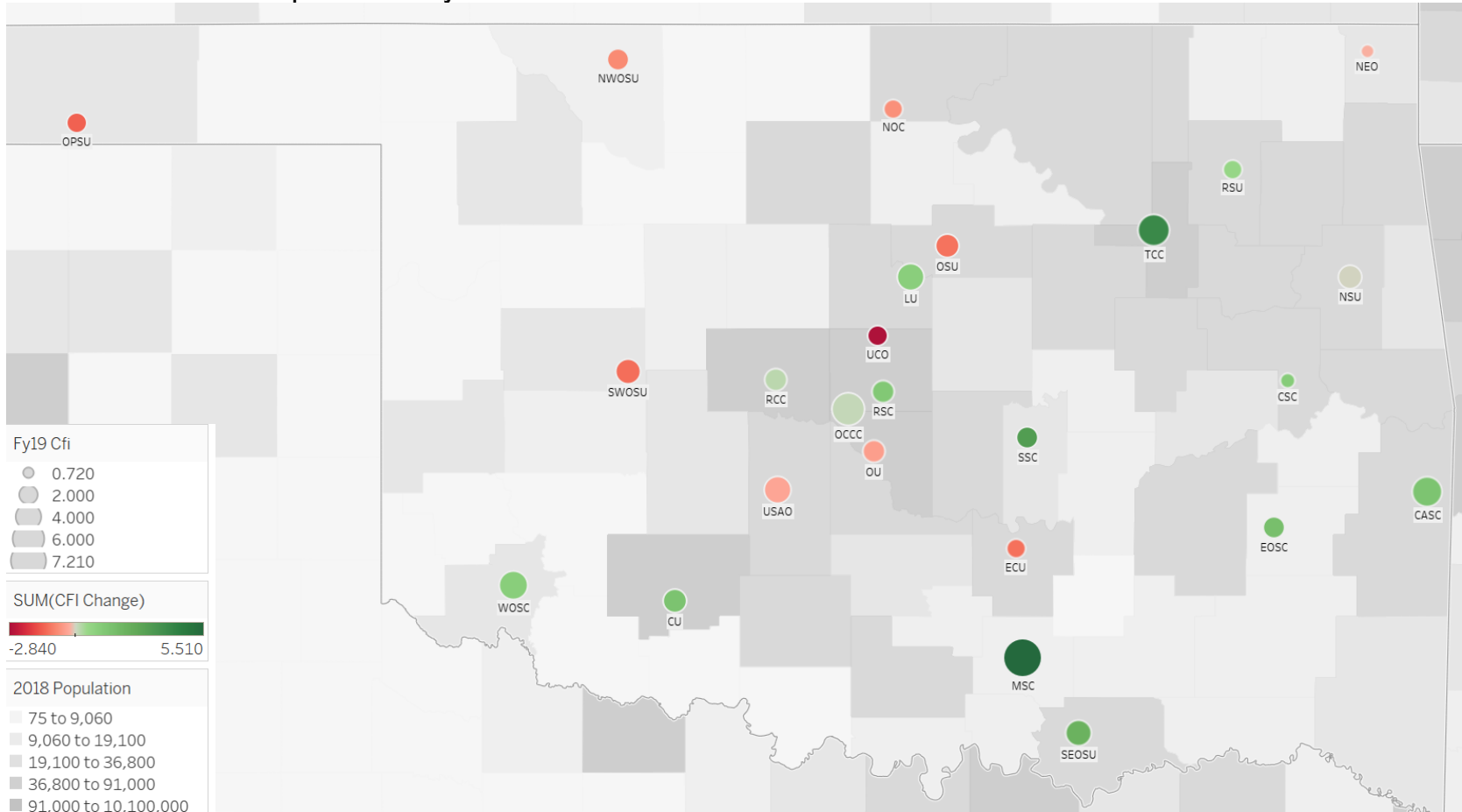
Based on the change in CFI score over time (color of the dots), it is evident that there is a larger decrease in CFI score in the Northwest quadrant of the state which is also the least densely populated region of Oklahoma.

82

Tuition and Fee Price Impacts and Enrollment Changes

Two-year community colleges have experienced the largest declines in enrollment across the system, despite their relative affordability and similar pricing increases to other four-year institutions.
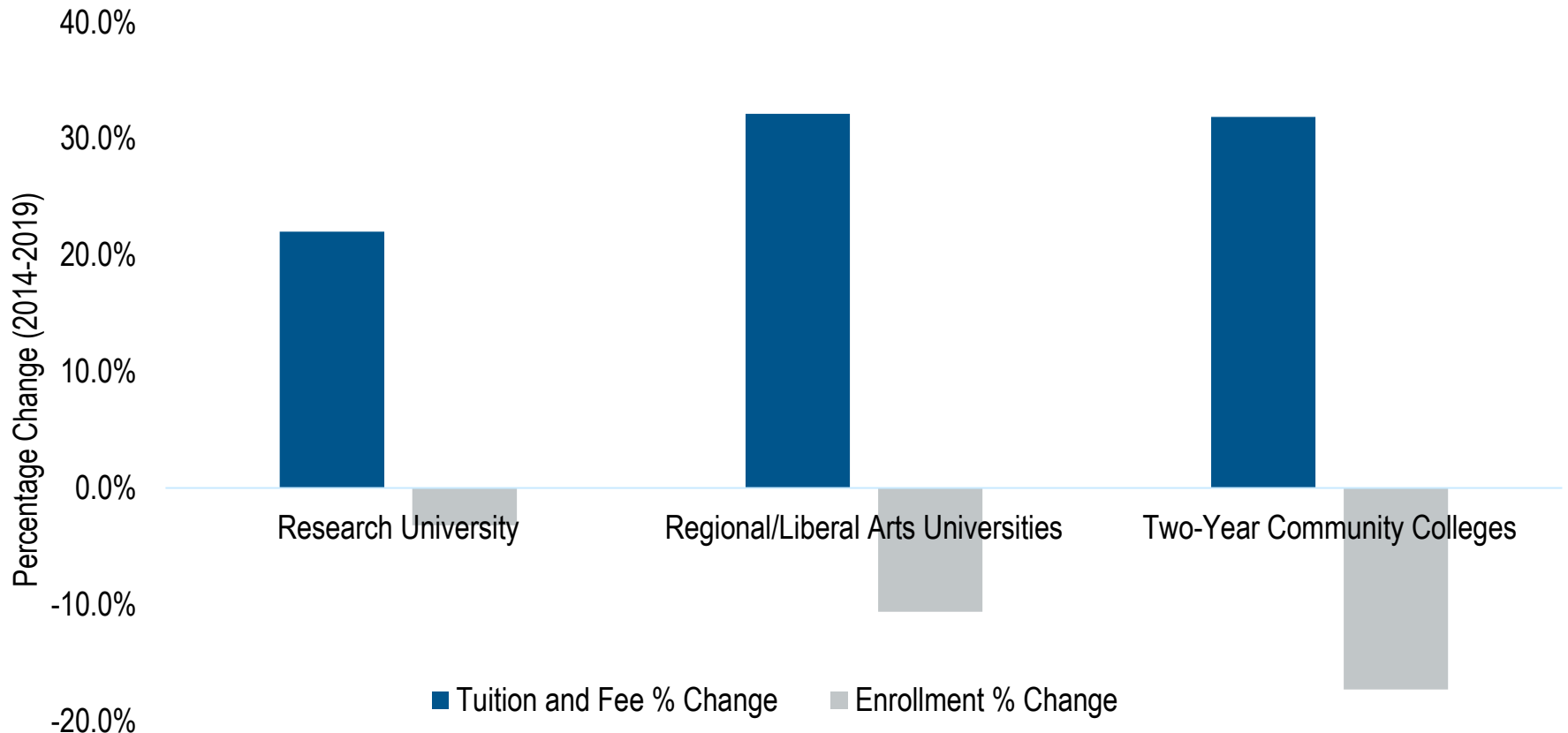
In addition to health and social distancing concerns that could push enrollment declines by 15-20% in Fall 2020, increasing scrutiny on the value of distance education may also limit growth in online programs.

83

Basis Point Change in EBIDA Margins, FY14-19

Reductions in state appropriations have constrained growth in EBIDA margins for four-year institutions during the past three fiscal years, though significant cost reductions at many two-years have allowed for large improvements despite revenue challenges.

Legend:
- Community Colleges
- Regional Universities
- Research Universities

Univ. Median, 1.25

CC Median, 5.59

X-axis labels: RSU, LU, OU, OSU, SEOSU, NSU, CU, ECU, NWOSU, USAO, UCO, OPSU, SWOSU, CSC, MSC, RSC, OCCC, TCC, EOSC, RCC, WOSC, SSC, NOC, NEO, CASC
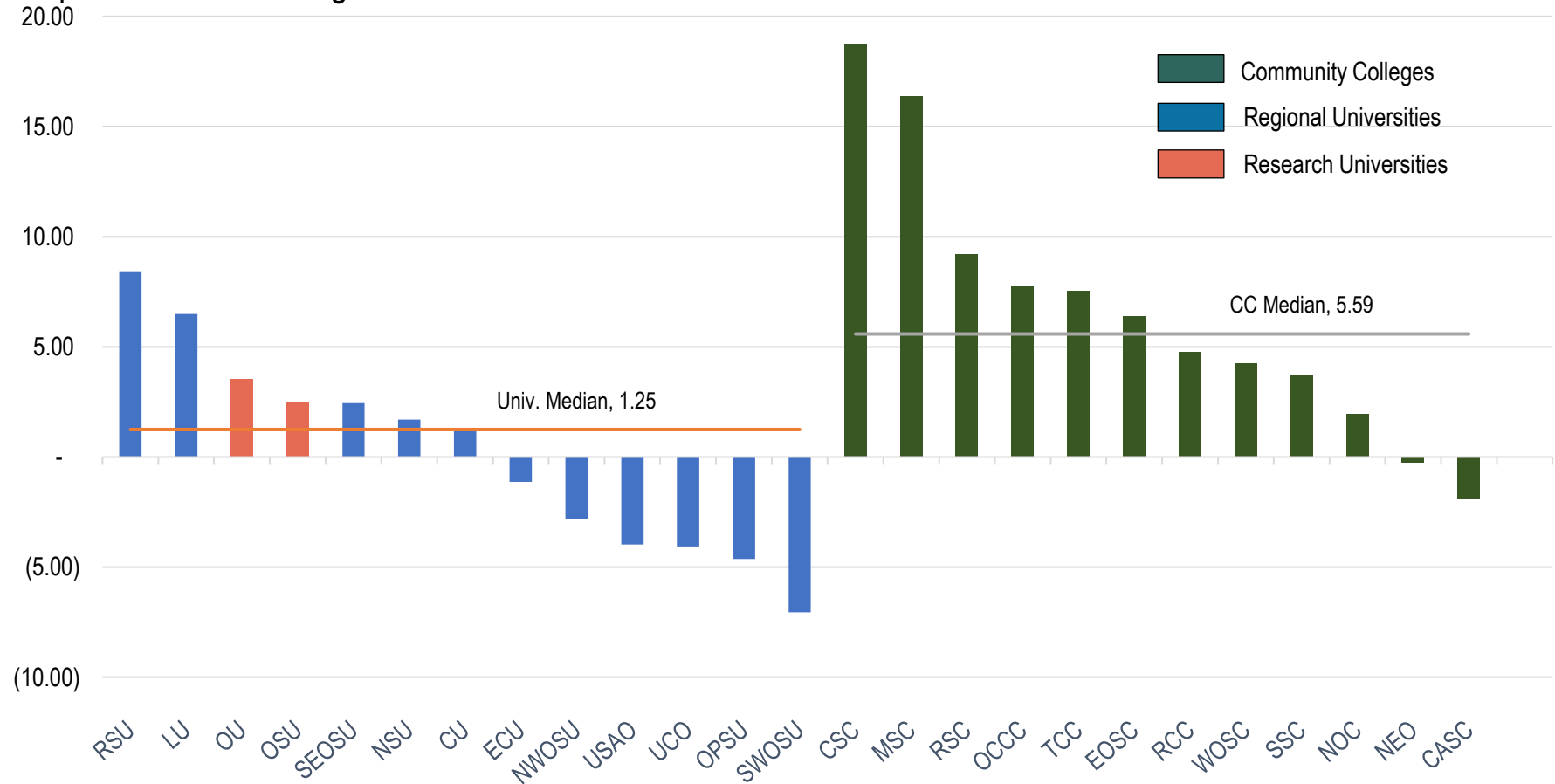
In the face of enrollment declines across the state, reversing EBIDA declines at many four-year institutions will be key to meeting debt service requirements and addressing capital asset needs.

84

Unrestricted Days Cash and Equivalents on Hand[1], FY19

System institutions show a wide distribution in days cash on hand, led by community colleges, with clusters of institutions on both ends of the spectrum.

Institution	Days
CASC	200.0
RSC	198.9
OCCC	183.7
WOSC	169.0
ECU	140.5
SWOSU	136.8
RCC	134.3
MSC	129.8
NSU	128.4
LU	107.8
TCC	107.6
USAO	103.8
SEOSU	99.8
RSU	96.1
NOC	95.1
UCO	89.9
CU	75.7
NWOSU	74.7
OU	56.4
NEO	54.7
CSC	36.9
EOSC	34.5
OSU	34.1
OPSU	29.8
SSC	24.3

Legend:
- Community Colleges
- Regional Universities
- Flagship Universities
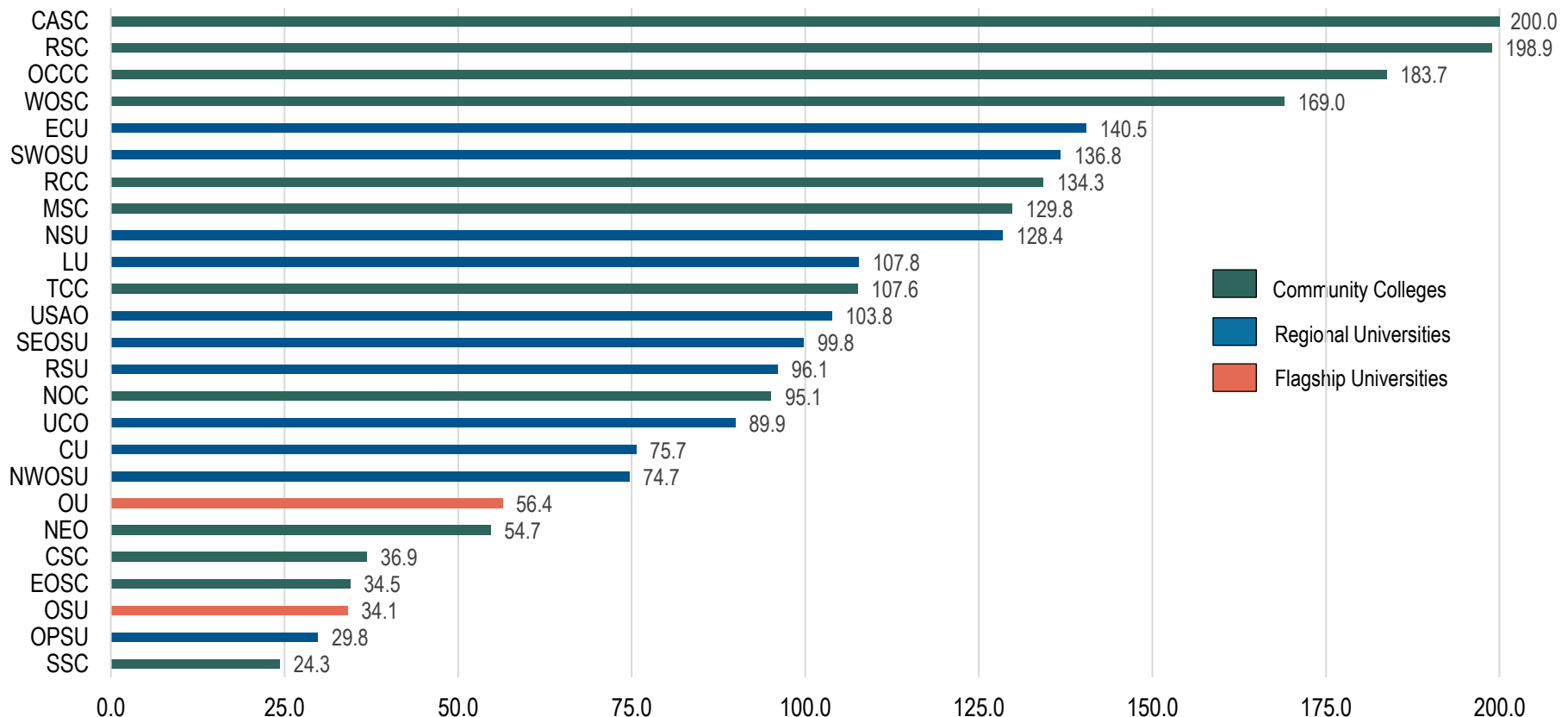
Maintaining adequate liquidity should be a priority for institutions as unrestricted cash and investment resources can be utilized to 'bridge the gap' and meet operating expenses in the near-term.

85

1. Total includes current unrestricted cash and cash equivalents, which includes funds within the State Treasurer's Cash Management Program and 'OK Invest'. Other investments excluded from analysis.

Change in Days Cash and Equivalents[1] on Hand, FY14-19

Statewide trends suggest that institutions with improving operating results have been more successful in improving their days cash on hand ratio, while others have struggled to grow unrestricted cash and investments.

Institution	Value
RCC	126.6
OCCC	109.9
SEOSU	85.4
CASC	84.9
RSC	66.5
CU	34.9
SWOSU	32.7
ECU	28.5
TCC	22.7
NWOSU	16.5
SSC	11.6
LU	5.5
USAO	(5.9)
NSU	(7.3)
OSU	(7.6)
RSU	(19.1)
WOSC	(21.8)
NEO	(26.2)
OU	(29.8)
EOSC	(34.3)
OPSU	(42.5)
CSC	(44.4)
MSC	(49.2)
UCO	(57.8)
NOC	(73.9)

Legend:
- Community Colleges
- Regional Universities
- Flagship Universities
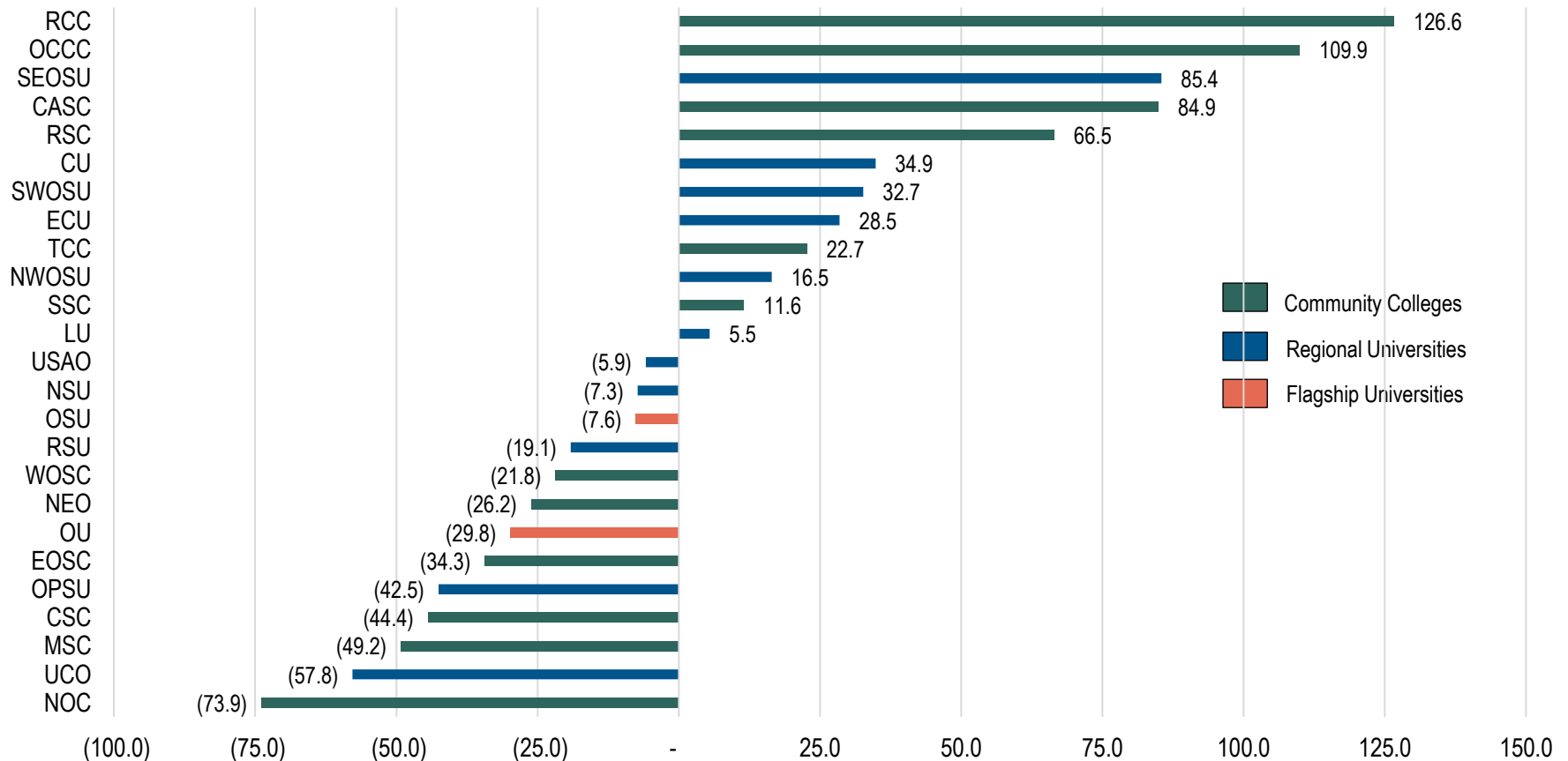
During a period of declining state funding and total enrollment declines across the state, maintaining liquidity to hedge against future financial shocks will continue to be increasingly important.

86

18

1. Total includes current unrestricted cash and cash equivalents, which includes funds within the State Treasurer's Cash Management Program and 'OK Invest'. Other investments excluded from analysis.

What's Next?

87

HURON

KEY PERFORMANCE INDICATOR DEVELOPMENT

The development of standardized and widely agreed-upon financial and nonfinancial metrics, to be used to assess institutional health, is an important next step to allow the Regents greater insight into institutional performance.

	Leading Indicators *Hold predictive value, and often include input measures*	Lagging Indicators *Reflect past activity, but provide a clearer connection to outcomes and performance*
Nonfinancial	- New student and transfer applications - Admission and yield rates 1st Year and 2nd Year retention rates	- Graduation rates - Change in employee FTE and headcount by major classification - Change in student enrollment and credit hours delivered
Financial	- Line of credit availability - Tuition and housing deposits - Prior Year Unrestricted Net Assets / Budget - Deferred maintenance estimates - Scholarship/institutional aid budgets	- CFI Score and component ratios - Primary Reserve Ratio - Viability Ratio - Change in Net Position Ratio - Net Operating Revenue Ratio - Sponsored research and F&A Recovery - Debt service coverage ratio - Days cash on hand and quick or current ratio - Adjusted operating margin - Income and balance sheet-specific measures, including: - Student receivables written off - Investments and endowment balances and returns - Revenue contribution/dependency measures

KPIs may be measured at a point in time or in the context of broader trends. Defining specific KPIs and their related inputs and identifying an efficient method for aggregating quarterly or monthly data (where appropriate) can help OSRHE improve oversight of financial conditions.

88

Key Performance Indicator Samples

Improved KPIs can support cluster analysis to help identify the institutions facing the greatest risks associated with debt management, cash flow, enrollment, and other challenges relative to the system.
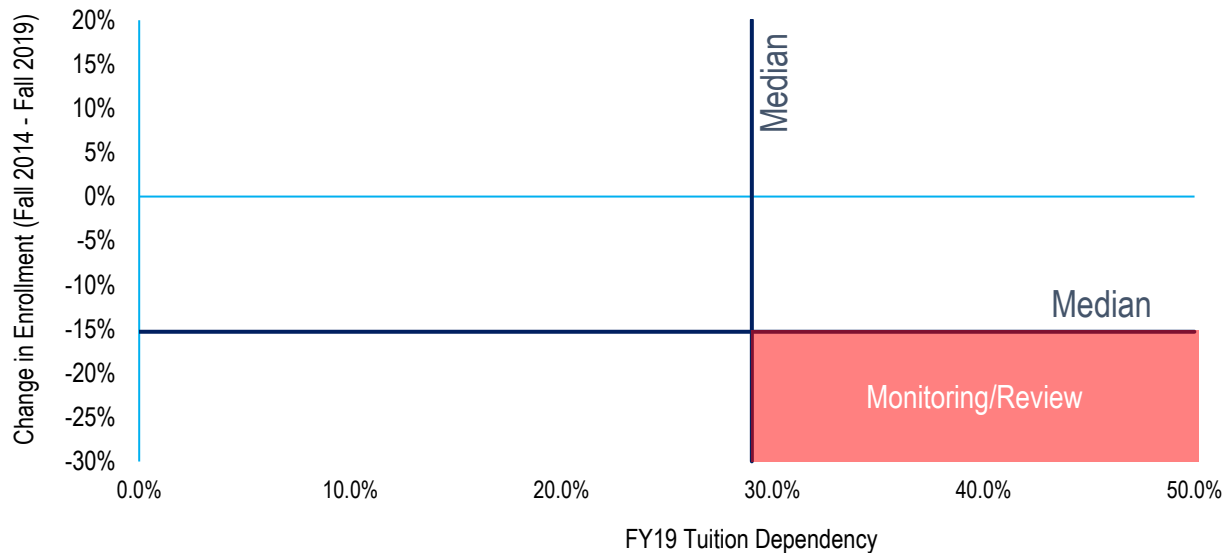
Illustrative Cluster Analysis: Enrollment & Tuition Dependency

- Institutions in the bottom right quadrant would fall above the median FY19 tuition dependency rate and below the median decline in enrollment
- These institutions face the greatest relative risk for tuition revenue declines
- OSRHE actions could include review of and support for enrollment and pricing strategies

Illustrative Cluster Analysis: Viability Ratio

- Institutions in the bottom left quadrant would fall below the median FY19 Viability Ratio and experienced a decline in VR between FY14 and FY19
- These institutions face the greatest relative risk for covering debt service
- OSRHE actions could include review of debt portfolio and plans for debt management
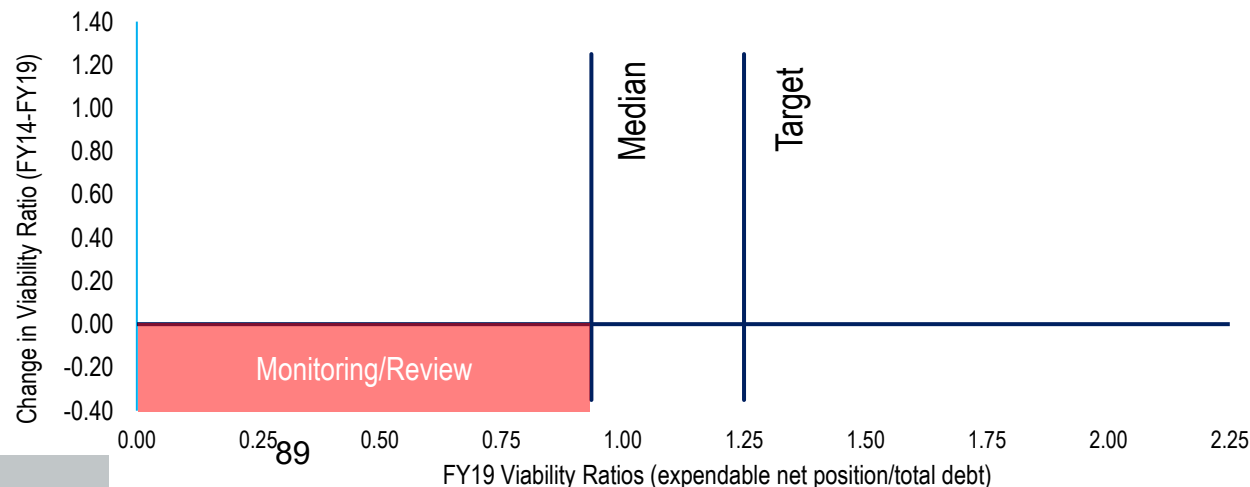
COVID-19 Pathway to Transformation

Huron is tracking upwards of 150 institutions across the country to understand how the industry is responding to this unprecedented time in history. Three phases have been identified below and vary in terms of how much leadership effort is required.

TRIAGE

STABILIZE

TRANSFORM

LEADERSHIP EFFORT

TRANSFORMATION

TRIAGE

STABILIZATION

TIME

90
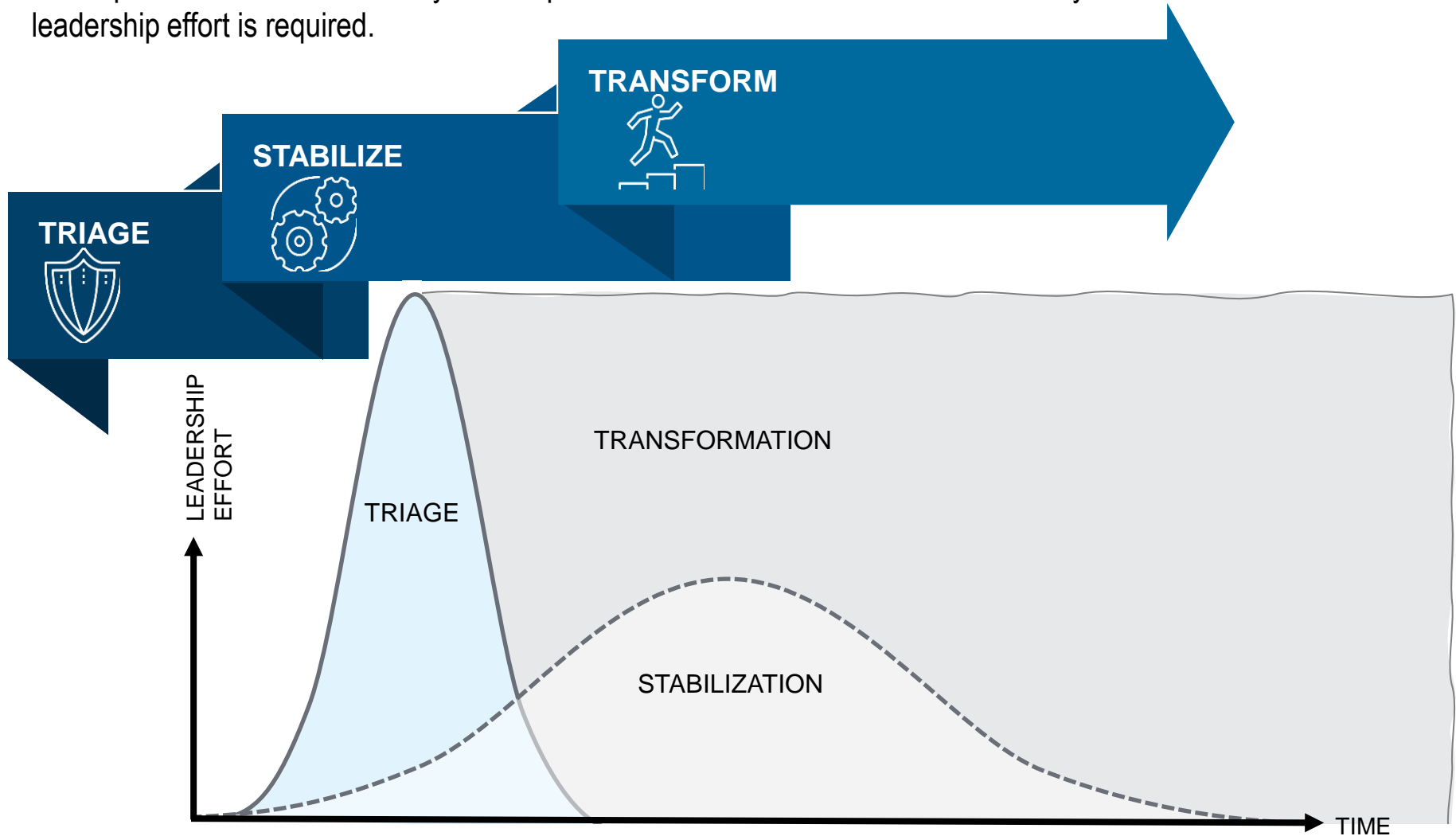
Crisis Response Pillars

COVID-19 has impacted all areas of the higher education landscape. Below are four crisis response pillars that Huron has identified as integral to the stabilization of institutions and will require thoughtful consideration as a plan for the Oklahoma system is being developed.

CRISIS RESPONSE PILLARS

PEOPLE	MISSION	OPERATIONS	ENVIRONMENT
Students	Teaching	Campus Operations	Partnerships
Faculty	Research	Finance	Local Community
Staff	Service	Strategic Planning	Alumni

PEOPLE	MISSION	OPERATIONS	ENVIRONMENT
Enrollment	Training	Operating and Balance Sheet Planning	Partnerships
Retention	Faculty Engagement	Technology	Community Response
Graduation	Remote learning	Sensitivity Analysis	Alumni Engagement
Support Services	infrastructure	Scenario Testing	Campus Access
Remote Teaching	Research Policy	Cash Management	
Remote Working	Right-Sizing	Auxiliaries	
Communications	Service Delivery	Endowments	

91

Identified Next Steps

Beyond the analysis conducted across the Oklahoma system, Huron has identified four opportunities for system-level reforms that will help drive efficiency and effectiveness across the state keeping the current nationwide crisis top of mind.

Coordinated Strategic Planning
Intentional, coordinated strategic planning inclusive of partnering financial plans.

Maximizing Economies of Scale
Varying levels of integration to increase efficiency and reduce costs.

STRATEGY

EXPENDITURE

REVENUE DRIVERS

Net Pricing Strategy
Guidance and support for optimizing financial aid to improve yield and enrollment.

State Appropriation Allocation Formula
Analysis and repositioning of how state funding is allocated to reflect a performance-based model.

92
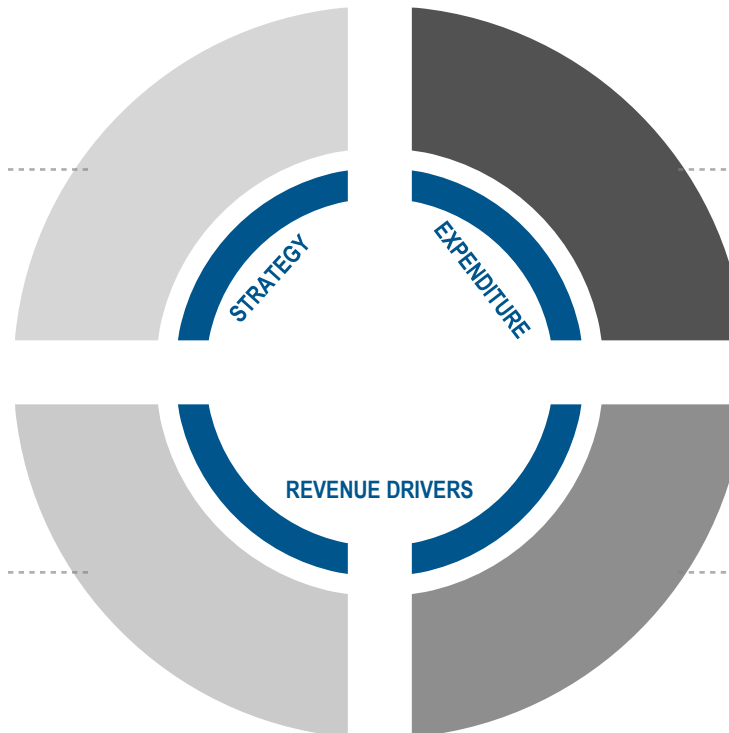
State Appropriation Decline Projection

The state legislature has finalized a 3.95% cut for FY21, with the potential for additional mid-year cuts based upon uncertainty in oil and gas revenues.

93

25
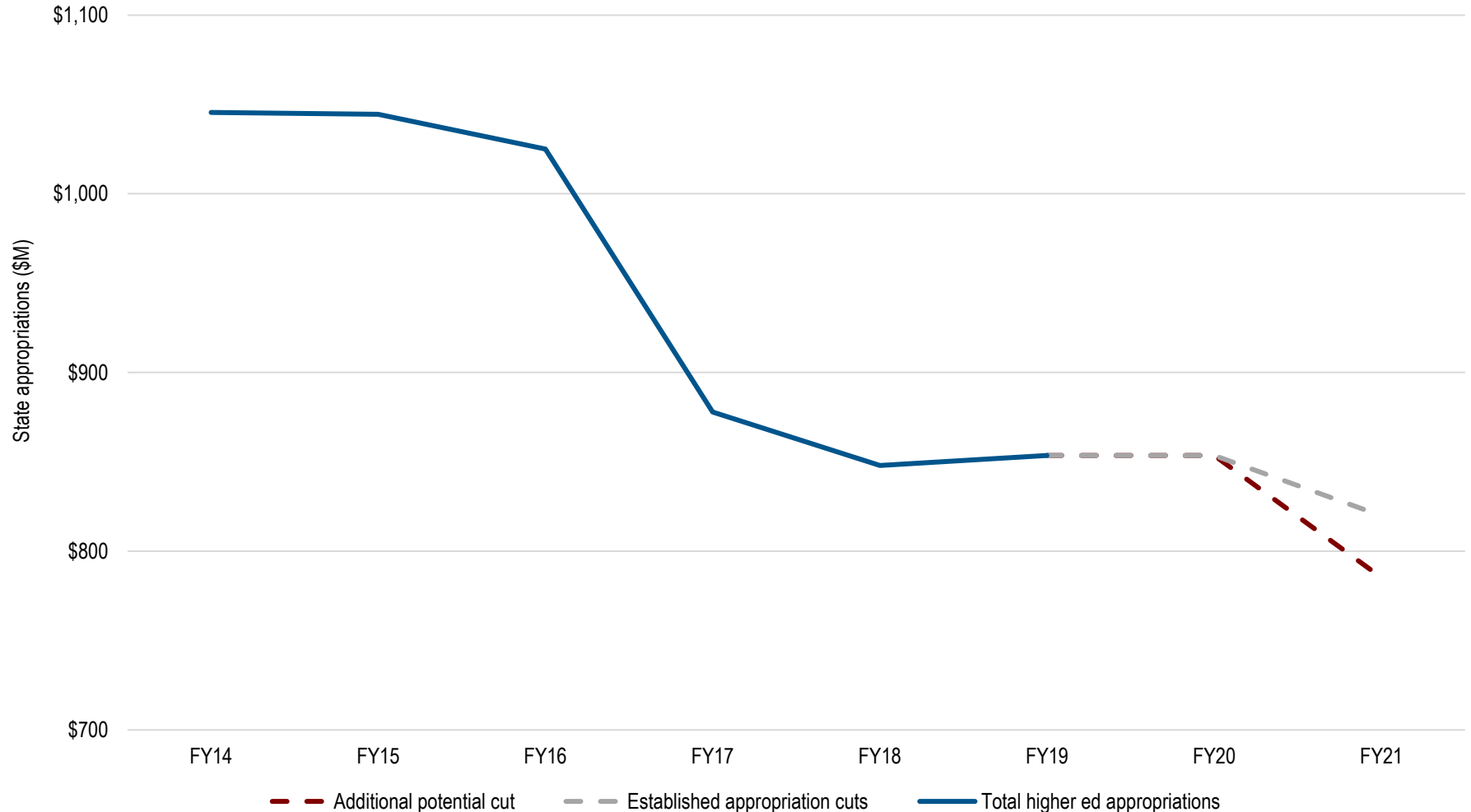
State of Oklahoma Tax Revenue

Oklahoma state tax revenue is highly correlated with changes in average oil prices, as positive changes in previous year crude oil pricing have generally coincided with materially increasing state tax collections. Negative changes in FY20 and FY21 will lead to revenue challenges for the state.

94

*2021 estimates consider average oil price through May 6th, 2020
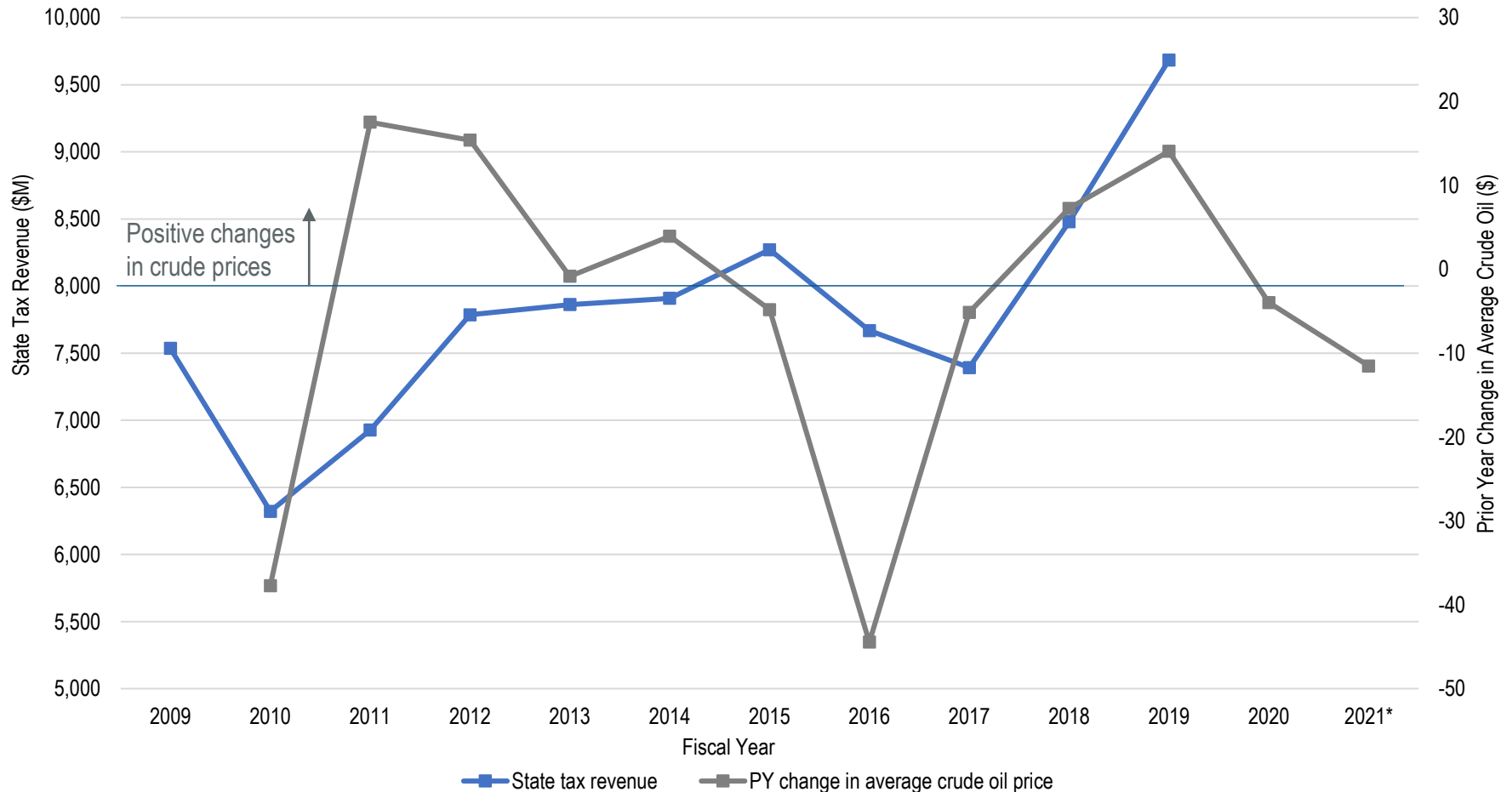
Illustrative Forecasting Model: Two-Year Institution

Scenario 1: Expected nationwide decline in enrollment[1]

Scenario 1 chart values: 24,198,342 (FY18); 22,266,454 (FY21); 23,101,194 (FY22)

Legend:
- Grants and Contracts
- State Educational Approp
- Auxiliary Enterprises
- Student Tuition and Fees
- Other Revenues
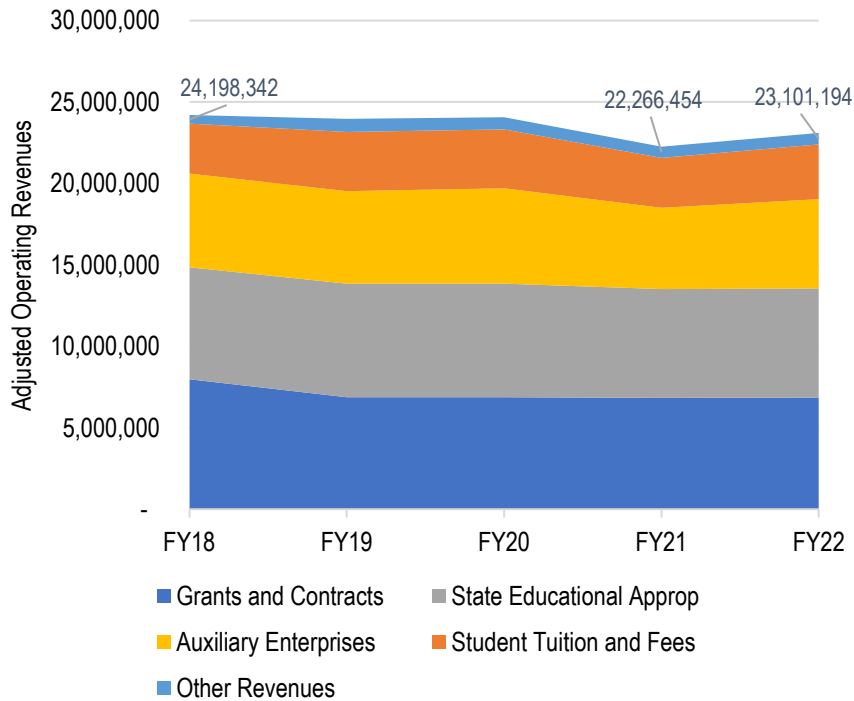
Key assumptions:
- **Enrollment declines of 15%** in Fall of 2020 followed by rebounds in Fall 2021
- Flat tuition rates
- Anticipated state appropriation cuts of 3.95% in FY21

Scenario 2: Steeper declines in enrollment and continued depression of oil revenues

Scenario 2 chart values: 24,198,342 (FY18); 20,950,440 (FY21); 21,688,949 (FY22)

Legend:
- Grants and Contracts
- Student Tuition and Fees
- State Educational Approp
- Auxiliary Enterprises
- Other Revenues
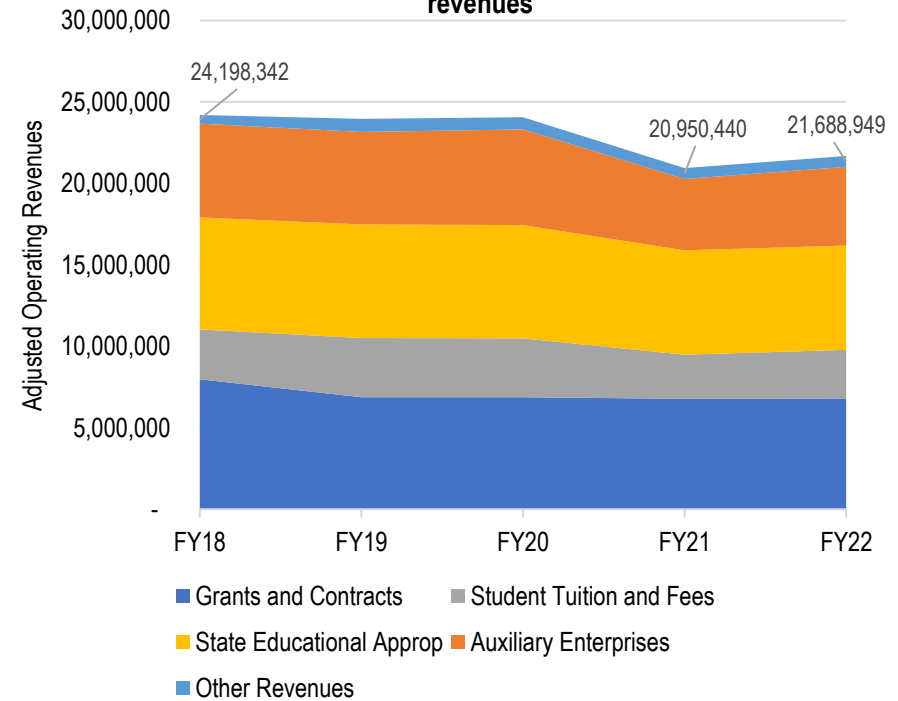
Key assumptions:
- **Enrollment declines of 25%** in Fall of 2020 followed by rebounds in Fall 2021
- Flat tuition rates
- Additional mid-year state appropriation cuts of 4.0%

While state appropriations are expected to decline at similar rates to forecasted state budget cuts, enrollment challenges could result in more significant reductions in auxiliary and net tuition revenue.

95

1. American Council for higher education conservative estimates

Future Expense Reduction Capacity

Operating expense changes in the past five years have varied significantly across institutional types. Community colleges have cut expenses at the highest rate, constraining opportunities for further material reductions and potentially creating the need for significant actions.

Community Colleges
Annual Average Operating Expenditure Percent Change from FY14-19:

-1.7%

Regional Universities
Annual Average Operating Expenditure Percent Change from FY14-19:

-0.5%

Flagship Universities
Annual Average Operating Expenditure Percent Change from FY14-19:

1.4%

Potential revenue shortfalls for institutions may range from:

7% to 13% for FY2021

In order to minimize the burden of these declines, institutions will need to significantly cut expenditures, dip into reserves, or begin consideration of the following strategies:

Mergers and/or closures
Reduction / realignment of academic programming
Reorientation of programs towards job markets
Mission right-sizing
Administrative cost reductions strategies
Space utilization analysis

96

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION

Memo

To:	**State Regents**
From:	Chancellor Glen D. Johnson
Date:	Friday, May 22, 2020
Subject:	Legislative Update – May 22, 2020

The update below reflects the current status of major legislation concerning Higher Education during the week of May 18, 2020 – May 22, 2020.

If you have any questions, please contact LeeAnna McNally, Vice Chancellor for Governmental Relations, at lmcnally@osrhe.edu or (405) 225-9424.

Legislative Report
May 22, 2020

Budget Bills

Senate Bill 1921 (Senator Roger Thompson and Representative Kevin Wallace) Transfers $243,668,709 from the Rainy Day Fund to the State Board of Education for the financial support of public schools.
> **Update:** Assigned to JCAB. Passed House JCAB 29-0 on Monday, May 4. Passed Senate JCAB 21-0 on Monday, May 4. Passed off the Senate Floor 45-2 on Tuesday, May 5. Engrossed to House. Passed off the House floor 95-0 on Thursday, May 7. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 13.

Senate Bill 1922 (Senator Roger Thompson and Representative Kevin Wallace) Appropriates a total of $7,589,496,474 to state agencies receiving FY21 appropriations and supplemental appropriations. Includes the State System of Higher Education's FY21 appropriation of $770,414,742, which represents a 3.95% decrease from the FY20 budget.
> **Update:** Assigned to JCAB. Passed House JCAB 23-6 on Monday, May 4. Passed Senate JCAB 16-5 on Monday, May 4. Passed off the Senate Floor 36-11 on Tuesday, May 5. Engrossed to House. Passed off the House Floor 77-23 on Thursday, May 7. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Wednesday, May 13. Veto overridden by the Senate 35-11 on Wednesday, May 13. Veto overridden by the House 79-20 on Wednesday, May 13.

1

Senate Bill 1925 (Senator Roger Thompson and Representative Kevin Wallace) Modifies FY2020 budget limits for the State Board of Education. It increases total funds available by $72.6 million, including a $60.0 million increase in federal funding.

> **Update**: Passed out of House JCAB 22-0 on Monday, May 11. Passed out of Senate JCAB 19-0 on Monday, May 11. Passed off the Senate Floor 42-1 on Tuesday, May 12. Passed off the House Floor 97-0 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Senate Bill 1939 (Senator Roger Thompson and Representative Kevin Wallace) Establishes FY2021 budget limits for the Oklahoma Tourism and Recreation Department.

> **Update**: Passed out of House JCAB 22-0 on Monday, May 11. Passed out of Senate JCAB 19-0 on Monday, May 11. Passed off the Senate Floor 41-3 on Monday, May 11. Passed off the House Floor 75-21 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Senate Bill 1940 (Senator Roger Thompson and Representative Kevin Wallace) Requires the Department of Commerce to use not less than $1.0 million appropriated to the agency in SB1922, the general appropriations bills, for the statewide branding initiative. The bill establishes budgeting and expenditure procedures.

> **Update**: Passed out of House JCAB 20-2 on Monday, May 11. Passed out of Senate JCAB 19-0 on Monday, May 11. Passed off the Senate Floor 41-3 on Tuesday, May 12. Engrossed to the House. Passed off the House Floor 75-21 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Senate Bill 1944 (Senator Roger Thompson and Representative Kevin Wallace) Directs the Director of the Office of Management and Enterprise Services (OMES) to publish daily reports of all expenditures of funds from the federal Coronavirus Aid, Relief and Economic Security (CARES) Act on the Oklahoma Checkbook website. Deposits to the fund have totaled $1,259,072,820. Funds are to be expended based on the provisions of HR 748 (U.S. Congress).

> **Update:** Assigned to JCAB. Passed House JCAB 29-0 on Monday, May 4. Passed Senate JCAB 21-0 on Monday, May 4. Passed off the Senate Floor 47-0 on Tuesday, May 5. Engrossed to House. Passed off the House Floor 96-4 on Thursday, May 7. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 12.

House Bill 2741 (Representative Kevin Wallace and Senator Roger Thompson) Modifies the apportionment schedules of the sales, use, individual income, and corporate income taxes for fiscal years 2021 and 2022 by reducing the percentage apportioned to the Oklahoma Teachers Retirement Dedicated Revenue Revolving Fund and directing a portion of each source to the Education Reform Revolving ("HB 1017") Fund.

> **Update:** Assigned to JCAB. Passed House JCAB 23-6 on Monday, May 4. Passed Senate JCAB 16-5 on Monday, May 4. Passed off the House Floor 79-21 on Tuesday, May 5. Engrossed to Senate. Passed off the Senate Floor 28-19 on Thursday, May 7. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Wednesday, May 13. Veto overridden by the House 94-4 on Wednesday, May 13. Veto overridden by the Senate 34-12 on Wednesday, May 13.

2

House Bill 2742 (Representative Kevin Wallace and Senator Roger Thompson) Modifies the apportionment schedules of the insurance premium tax for fiscal years 2021 and 2022 by reducing the percentage apportioned to the Oklahoma Firefighters Retirement, Police Pension and Law Enforcement Employees Retirement Systems and directing a portion of each source to the Education Reform Revolving ("HB 1017") Fund.

> **Update:** Assigned to JCAB. Passed House JCAB 23-6 on Monday, May 4. Passed Senate JCAB 16-5 on Monday, May 4. Passed off the House Floor 78-22 on Tuesday, May 5. Engrossed to Senate. Passed of the Senate Floor 28-19 on Thursday, May 7. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Wednesday, May 13. Veto overridden by the House 95-5 on Wednesday, May 13. Veto overridden by the Senate 34-12 on Wednesday, May 13.

House Bill 2743 (Representative Kevin Wallace and Senator Roger Thompson) Modifies the FY21 amount accruing to the Rebuilding Oklahoma Access and Driver Safety (ROADS) Fund by $180,000,000 and directs the funds to be deposited into the Education Reform Revolving ("HB 1017") Fund.

> **Update:** Assigned to JCAB. Passed House JCAB 25-4 on Monday, May 4. Passed Senate JCAB 20-0 on Monday, May 4. Passed off the House Floor 89-10 on Tuesday, May 5. Engrossed to Senate. Passed off the Senate Floor 43-4 on Thursday, May 7. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Wednesday, May 13. Veto overridden by the House 97-3 on Wednesday, May 13. Veto overridden by the Senate 44-2 on Wednesday, May 13.

House Bill 4153 (Representative Kevin Wallace and Senator Roger Thompson) Establishes FY2021 budget limits for the State Board of Education.

> **Update**: Passed out of House JCAB 20-11 on Monday, May 11. Passed out of Senate JCAB 14-5 on Monday, May 11. Passed off the House Floor 93-5 on Tuesday, May 12. Passed off the Senate Floor 35-10 on Thursday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Special Session

House Concurrent Resolution 1001 (Speaker Charles McCall and Senate President Pro Tempore Greg Treat) Affirms Governor's declaration of a health care emergency and powers given to the Governor for 30 days.

> **Update** Passed off the House Floor 99-1 on Monday, April 6. Passed off the Senate Floor 39-1 on Monday, March 6. Filed with Secretary of State.

House Concurrent Resolution 1002 (Representative Jon Echols and Senator Kim David) Allows special session to adjourn for longer than 3 days.

> **Update**: Approved by unanimous consent on Monday, April 6, 2020. Passed off the Senate Floor 40-0 on Monday, March 6. Filed with Secretary of State.

Senate Concurrent Resolution 1 (President Pro Tempore Greg Treat and Speaker Charles McCall) A Concurrent Resolution relating to the Catastrophic Health Emergency Powers Act

3

and Amended Executive Order No. 2020-12 filed May 1, 2020. Requires the Governor to make certain reporting requirements to the Speaker of the House and President Pro Tempore of the Senate within two days of exercising powers granted in Executive Order No. 2020-12.

> **Update**: Passed off the Senate Floor 43-4 on Tuesday, May 5. Passed off the House Floor 73-24 on Tuesday, May 5. Filed with Secretary of State.

COVID-19

Senate Bill 300 (Senator Julie Daniels and Representative Terry O'Donnell) Creates the COVID-19 Public Health Emergency Limited Liability Act. The measure provides that a health care facility or health care provider is immune from civil liability for any loss or harm to a person with a suspected or confirmed diagnosis of COVID-19 caused by an act or omission occurred during the arranging for or providing of services for the treatment of the person impacted by the decisions, activities or staffing of, or the availability or capacity of space or equipment by, the facility or provider in response to or as a result of the COVID-19 public health emergency; and the act or omission by the facility or provider that occurs during the COVID-19 public health emergency, if the act or omission was not the result of gross negligence or willful or wanton misconduct

> **Update**: Amended by Floor Substitute. Passed off the House Floor 95-2 on Monday, May 4. Passed off the Senate Floor 43-4 on Wednesday, May 6. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 12.

Senate Bill 661 (Senator Brent Howard and Speaker Charles McCall) Allows teleconference meetings for all public body meetings until November 15, 2020 or until the Governor declares the state of emergency to be terminated, whichever occurs first (amended by Floor substitute).

> **Update:** Rules suspended to direct to calendar and amended through Floor substitute. Passed off the House Floor as amended 69-2 on Tuesday, March 17. Passed off the Senate Floor 40-0 on Tuesday, March 17. Signed by Governor Stitt on Wednesday, March 18.

Senate Bill 1946 (Senate President Pro Tempore Greg Treat and Speaker Charles McCall) Exempts a person or agent of the person who conducts business in Oklahoma from civil liability in a civil action claiming an injury from exposure or potential exposure to COVID-19 if the act or omission alleged to violate a duty of care of the person or agent was in compliance or consistent with federal or state regulations.

> **Update**: Direct to Calendar. Passed off the Senate Floor 34-11 on Monday, May 12. Engrossed to the House. Passed off the House Floor 76-20 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Senate Bill 1947 (Senate President Pro Tempore Greg Treat and Speaker Charles McCall) Creates the COVID19 Product Protection Act. The measure establishes immunity from civil liability from actions resulting in a personal injury, death or property damage caused by a product provided by a person or entity that designs, manufactures, labels, sells, distributes, or donates a qualified product during and in response to the COVID-19 public health emergency

4

that is utilized by a government entity, health care facility, health care provider, first responder, or essential business.

> **Update**: Amended by Floor Substitute. Passed off the Senate Floor 33-11 on Tuesday, May 12. Direct to calendar, Passed off the House Floor 82-15 on Thursday, May 14. House amendments adopted, passed off the Senate floor 33-11 on Friday, May 15. Sent to Governor Stitt for Consideration. Signed by Governor Stitt on Thursday, May 22.

Senate Concurrent Resolution 8 (Senator Kim David and Representative Jon Echols) The resolution removes the April 23rd deadline for bills and joint resolutions to be heard on the Floor of the opposite chamber.

> **Update**: Direct to calendar. Adopted by unanimous consent on Monday, March 16. Engrossed to the House. Passed off the House Floor 77-2 on Tuesday, March 17. Filed with Secretary of State.

Senate Resolution 17 (Senator Kim David) Authorizes the President Pro Tempore of the Senate to place any bill or joint resolution on General Order on the same day a committee report is filed or is referred directly to the calendar. The President may also allow an amendment to be heard on the same day it is filed, authorize the consideration of a measure on the same day it is placed on General Order provided Second Reading has previously occurred on a separate legislative day, and waive distribution requirements provided electronic copies are made available. The provisions of this resolution shall remain in effect until the expiration of the Governor's Health Emergency Declaration.

> **Update**: Adopted by the Senate 40-0 on Monday, April 6. Enrolled. Filed with Secretary of State.

Senate Concurrent Resolution 10 (Senator Kim David and Representative Jon Echols) Amends LOFT rules to require them to submit an annual work plan to the LOFT Oversight Committee for approval. No member of the Legislature shall be authorized to use LOFT resources to conduct investigations, evaluations or audits except as otherwise approved by the LOFT Oversight Committee or allowed by law. The LOFT Oversight Committee shall also conduct an annual evaluation of the Office's Executive Director and recommend his or her retention or removal to the President Pro Tempore of the Senate and Speaker of the House.

> **Update**: Adopted by the Senate 40-0 on Monday, April 6. Engrossed to the House. Passed off the House Floor 97-2 on Monday, May 4. Filed with Secretary of State.

Senate Bill 199 (Senator Roger Thompson and Representative Kevin Wallace) The measure appropriates $302,339,481 from the Constitutional Reserve ("Rainy Day") Fund to the General Revenue Fund for the fiscal year ending June 30, 2020. (Amended Carryover)

> **Update**: Amended, Passed off House Floor 100-0 on Monday, April 6. Passed off the Senate Floor 39-1 on Monday, April 6. Sent to the Governor. Effective absent signature.

Senate Bill 617 (Senator Gary Stanislawski and Representative Kyle Hilbert) The measure provides the conditions and procedures for withdrawal of funds from the Revenue Stabilization Fund (RSF) for the fiscal year ending June 30, 2020 to offset reductions to agencies in the General Revenue Fund and certain common education funds. The Director of OMES may withdraw amounts up to one half of the highest balance during FY20.

5

Update: Amended. Passed off the House Floor 100-0 on Monday, April 6. Passed off the Senate Floor 39-1 on Monday, April 6. Sent to the Governor. Signed by Governor Stitt on Thursday, April 9, 2020.

Senate Bill 1053 (Senator Roger Thompson and Representative Kevin Wallace)
Appropriates from the Constitutional Reserve Fund of the State Treasury the sum of $201,559,654.00 to the Revenue Stabilization Fund (Amended by Committee Substitute)
> **Update**: Amended by committee substitute. Passed off the House Floor 100-0 on Monday, April 6. Passed off the Senate Floor 39-1 on Monday, April 6. Sent to Governor. Signed by Governor Stitt on Thursday, April 9, 2020.

Agency Administration

House Bill 2823 (Representative Tom Gann and Senator Dave Rader) Omnibus sunset extension bill.
> **Update:** Amended by Floor Substitute. Passed off the Senate Floor 44-1 on Tuesday, May 12. Senate amendments adopted and passed off the House Floor 77-11 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

House Bill 3068 (Representative Lundy Kiger and Senator Dewayne Pemberton) Changes the penalty for state employee's punishment for being in violation of state income taxes to wage garnishment instead of termination of employment.
> **Update**: Assigned to the House Appropriations and Budget General Government Subcommittee. Passed the House Appropriations and Budget General Government Subcommittee 8-0 on Monday, February 10. Passed House Appropriations and Budget Committee 23-0, with title stricken on Tuesday, February 25. Passed off the House Floor 92-0 on Tuesday, March 3. Engrossed to the Senate. Engrossed to the Senate. Assigned to the Senate Finance Committee. Passed off the Senate Floor 45-0 on Monday, May 11. Senate amendments adopted and passed off the House Floor 99-0 on Thursday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 20.

House Bill 3613 (Representative Terry O'Donnell and Senator Kim David) Creates the Personal Privacy Protection Act. It defines terms used therein. It prohibits a public agency from: requiring any individual to provide the public agency with personal affiliation information or otherwise compel the release of personal affiliation information and requiring any entity organized under Section 501(c) of the Internal Revenue Code to provide the state agency or political subdivision with personal affiliation information or otherwise compel the release of personal affiliation information. Makes personal affiliation information exempt from the Oklahoma Open Records Act.
> **Update**: Passed the House Government Efficiency Committee 10-0 on Wednesday, February 19. Passed off the House Floor 77-13 on Thursday, March 5. Engrossed to the Senate. Assigned to Senate General Government Committee. Passed off the Senate Floor 43-2 on Tuesday, May 12. Sent to Governor Stitt for consideration. Signed by Governor Stitt Tuesday, May 19.

6

House Bill 3819 (Speaker Charles McCall and Senate President Pro Tempore Greg Treat)
Requires any contract or agreement made by any state agency to be open for inspection to any member of the Legislature. It prohibits any state agency to prohibit any person or entity from communicating with any member of the Legislature.
> **Update**: Assigned to the House Government Efficiency Committee. Reassigned to House Rules Committee. Passed the House Rules Committee 8-0 on Tuesday, February 11. Passed off the House Floor 94-1 on Tuesday, March 3. Engrossed to the Senate. Assigned to the Senate Rules Committee. Passed off Senate Floor 44-0 on Tuesday, May 12. Sent to Governor Stitt for consideration. Vetoed. Veto overridden by House 94-3 on Friday, May 22. Veto overridden by Senate 45-0 on Friday, May 22.

House Bill 4025 (Speaker Charles McCall and Senate President Pro Tempore Greg Treat)
Requires each agency or institution of the state to regularly transmit to the Legislative Office of Fiscal Transparency raw datasets as requested by the Legislative Office of Fiscal Transparency for the purpose of creating a data clearinghouse to aid in the work of the Legislative Office of Fiscal Transparency. It requires the Legislative Office of Fiscal Transparency to adopt policies and procedures pursuant to which a state agency must be required to comply with the provisions therein, including the format in which the data is transmitted, how the data is organized and such other matters as the Office prescribes.
> **Update**: Passed the House Rules Committee 8-0 on Tuesday, February 11. Passed off the House Floor 93-0 on Tuesday, March 3. Engrossed to the Senate. Assigned to the Senate Appropriations Committee. Passed off the Senate Floor 45-0 on Tuesday, May 12. Sent to Governor Stitt for consideration. Signed by Governor Stitt onTuesday, May 19.

House Bill 4139 (Representative Kevin Wallace and Senator Roger Thompson) Transfers, effective Jan. 1, 2021, title, ownership and possession of the Robert S. Kerr and J. Howard Edmondson State Office Buildings and all real estate and structures, parking and other improvements attached thereto, located at 440 and 444 S. Houston Street in Tulsa County, to the Board of Regents for the Oklahoma Agricultural and Mechanical Colleges,
> **Update:** Passed out of House JCAB 27-1 on Tuesday, May 12. Passed out of Senate JCAB 20-0 on Tuesday, May 12. Direct to Calendar. Passed off House Floor 97-1 on Wednesday, May 13. Passed off Senate Floor 84-3 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

House Bill 4159 (Representative Kevin Wallace and Senator Roger Thompson) Provides for funds appropriated to the Oklahoma Department of Agriculture, Food, and Forestry in Enrolled Senate Bill No. 1922 of the 2nd Session of the 57th Oklahoma Legislature, the sum of two million eight hundred eighty thousand dollars ($2,880,000.00) shall, under the direction of the Commissioner of Agriculture, be allocated to extension offices and research centers that are affiliated with the Oklahoma State University Agricultural Extension Service and Experiment Stations
> **Update:** Passed House JCAB 28-0 on Tuesday, May 12. Passed Senate JCAB 20-0 on Tuesday, May 12. Direct to Calendar. Passed off the House Floor 98-0 on Wednesday, May 13. Sent to Governor Stitt for consideration. Signed by Governor Stitt Thursday, May 21.

Budget and Taxation

House Bill 2749 (Representative Kevin Wallace and Senator Roger Thompson) Caps state matching funds for the Endowed Chairs program at no more than $671.2 million, effectively sunsetting the program.

> **Update**: Passed Senate JCAB 20-0 on Wednesday, May 6. Passed House JCAB 27-1 on Wednesday, May 6. Engrossed to House. Passed off the House Floor 96-4 on Thursday, May 7. Engrossed to Senate. Passed off the Senate Floor 43-0 Tuesday, May 12. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Monday, May 18. Veto overridden by the House 94-3 on Friday, May 22. Veto overridden by the Senate 44-1 on Friday, May 22,

House Bill 2750 (Representative Kevin Wallace and Senator Roger Thompson) Authorizes increasing the bonding amount for the Endowed Chairs program to cover the state matching backlog of $161 million but does not provide funding for the debt service obligations under a new bond issuance.

> **Update:** Passed Senate JCAB 20-0 on Wednesday, May 6. Passed House JCAB 24-1 on Wednesday, May 6. Engrossed to House. Passed off the House floor 96-4 on Thursday, May 7. Engrossed to Senate. Passed off the Senate Floor 42-1 Tuesday, May 12. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt on Monday, May 18. Veto overridden by the House 92-6 on Friday, May 22. Veto overridden by the Senate 44-1 on Friday, May 22,

Charter Schools

House Bill 3369 (Representative Jon Echols and Senator Kim David) Prohibits a sponsor of a charter school from retaining any additional State Aid Allocation or charging the charter school any additional fee above the amounts allowed therein unless the additional fees are for additional services rendered. It requires the charter school sponsor to provide to the State Department of Education financial records documenting any state funds retained by the sponsor for administrative services rendered for the previous year.

> **Update**: Passed the House Appropriations and Budget Committee 22-3 with title stricken on Wednesday, February 19. Passed off the House Floor 82-15 on Wednesday, March 11. Engrossed to the Senate. Assigned to Senate Education Committee then to Senate Appropriations Committee. Passed off the Senate Floor 38-7 on Tuesday, May 12. Senate amendments adopted. Passed off the House Floor 84-5 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Common Education

House Bill 3398 (Representative Jadine Nollan and Senator Dewayne Pemberton) Requires any person employed by an Oklahoma school district prior to the effective date of this act who does not have an Oklahoma criminal history record check from the Oklahoma State Bureau of Investigation as well as a national criminal history record check on file with his or her employing district as required have until July 1, 2022, to complete the criminal history record checks. It exempts any person eligible to retire from the Teachers' Retirement System of Oklahoma.

> **Update**: Passed the House Common Education Committee 16-0 on Tuesday, February 18. Passed off the House Floor 91-0 on Wednesday, March 4. Engrossed to the Senate.

Assigned to the Senate Education Committee. Direct to Calendar. Passed off the House Floor 98-0 on Wednesday, May 13. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 19.

House Bill 3400 (Representative Rhonda Baker and Senator Gary Stanislawski) Requires all public high schools, beginning with the 2024-2025 school year, to make a minimum of four Advanced Placement courses available to students. It provides options for access. It requires the State Department of Education to provide information to all local boards of education, to be distributed to their students and parents, on available opportunities and the enrollment process for students to take Advanced Placement courses. It requires the Department to retain records of which options local boards of education selected for their students and make the information available on the Department's website.

> **Update**: Passed the House Common Education Committee as amended by committee substitute 15-0 on Tuesday, February 25. Passed of the House Floor 81-7 on Monday, March 9. Engrossed to the Senate. Assigned to Senate Education Committee then to Senate Appropriations Committee. Passed off the Senate Floor 43-2 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Healthcare

Senate Bill 801 (Senator Paul Rosino and Representative Marcus McEntire) Modifies the authority of Certified Registered Nurse Anesthetists to administer anesthesia in collaboration with a medical doctor, osteopathic physician, pediatric physician or dentist as opposed to under their supervision. It removes the requirement for a nurse to administer the drug under conditions in which timely, onsite consultation with a physician is possible

> **Update**: Carryover bill. Direct to Calendar. Passed off the House Floor 100-0 on Monday, May 4. Sent to Governor Stitt for Consideration. Signed by Governor Stitt on Thursday, May 7.

Senate Bill 1276 (Senator Roger Thompson and Representative Kevin Wallace) Increases from not less than 50 percent to not less than 75 percent of the subsidy for residency programs provided by the Physician Manpower Training Commission be used in the training of primary health care and family practice physicians for the rural and medically underserved areas of the state.

> **Update**: Passed the Senate Health and Human Services Committee 9-0 on Monday, February 10. Passed the Senate Appropriations Committee 20-0 with title stricken on Wednesday, February 12. Passed off the Senate Floor 44-1 with title restored on Monday, March 2. Engrossed to the House. Assigned to the House Appropriations and Budget Committee. Direct to Calendar. Passed off the House floor 86-0 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 19.

Senate Bill 1290 (Senator Darrell Weaver and Representative Cynthia Roe) Modifies the definition of Medical Care Provider as it relates to assault and batters to include: laboratory technicians, radiologic technologists, physical therapists, physician assistants, chaplains,

volunteers, pharmacists, nursing students, medical students and any other employees of a healthcare facility.

> Update: Passed the Senate Public Safety Committee 11-1 on Monday, February 10. Passed the Senate Appropriations Committee 20-0 with title stricken on Wednesday, February 12. Passed off the Senate Floor 43-4 with title restored on Thursday, March 5. Engrossed to the House. Assigned to the House Appropriations and Budget Health Subcommittee. Direct to Calendar. Passed off the House Floor 74-26 on Wednesday, May 13. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 19.

Higher Education

House Joint Resolution 1026 (Representative Tommy Hardin) Proposes a vote of the people on a constitutional amendment that would repeal the requirement that appropriations made by the Legislature for all State Regents of Higher Education institutions be made in consolidated form without reference to any particular institution. It would also eliminate the requirement that the Board of Regents allocate to each institution according to its needs and functions.

> Update. Assigned to House Rules Committee. Failed to meet deadline.

Senate Bill 1835 (Senator Kay Floyd and Representative Mike Osburn) Requires continued education credits for licensed behavioral practitioners earned from courses on empirically validated procedures be taught by instructors certified by the Chair of the Department of Psychology of the University of Central Oklahoma, rather than the North American Association of Masters in Psychology, its designees or successors.

> Update: Passed Senate Health and Human Services Committee 12-0 on Monday, February 24. Emergency added. Passed off Senate Floor 46-0 on Thursday, March 5. Engrossed to the House. Assigned to the House Appropriations and Budget Non-Appropriated Agencies Subcommittee. Direct to Calendar. Passed off the House Floor 97-0 on Monday, May 11. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Monday, May 18.

House Bill 3223 (Representative Jon Echols and Senator Darrell Weaver) Allows school, colleges and designated people to retain tissue from bodies distributed to them and to donate the tissue to a person or entity with the purpose of training a dog to search for human remains.

> Update: Passed the House Public Safety Committee 12-0 on Thursday, February 13. Passed off the House Floor 96-1 on Wednesday, March 11. Engrossed to the Senate. Assigned to Senate Health and Human Services Committee. Passed off the Senate Floor 45-0 on Tuesday, May 12. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 19.

Industrial Hemp

Senate Bill 1528 (Senator Lonnie Paxton and Representative Dell Kerbs) Amends the Oklahoma Industrial Hemp Program. It removes language that requires approval by the U.S.

Department of Agriculture for the Oklahoma Industrial Hemp Program to engage in the growth, cultivation, handling or processing of industrial hemp.

>**Update**: Passed the Senate Agriculture and Wildlife Committee 11-0 with title stricken on Monday, February 17. Passed off the Senate Floor 42-0 on Tuesday, March 10. Engrossed to the House. Direct to Calendar. Passed off the House Floor 99-0 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

Senate Bill 1783 (Senator Lonnie Paxton and Representative Dell Kerbs) Modifies the definition of industrial hemp as used in the Uniform Controlled Dangerous Substances Act. It requires industrial hemp to be grown pursuant to the Oklahoma Industrial Hemp Program and allows it to be shipped intrastate and interstate.

>**Update**: Passed the Senate Agriculture and Wildlife Committee 11-0 on Monday, February 17. Passed off the Senate Floor 46-0 on Monday, March 9. Engrossed to the House. Assigned to the House Agriculture and Rural Development Committee. Direct to Calendar. Passed off the House Floor 100-0 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Wednesday, May 20.

OneNet/Information Technology

House Bill 4018 (Speaker Charles McCall and Senator James Leewright) Creates the Rural Broadband Expansion Council, which is directed to conduct a study of rural broadband access in Oklahoma. The study will divide the state into separate geographic areas based on existing broadband capability, cost of service, estimated costs for improving access, likelihood of changes in access in the future, and other information as deemed relevant by the council. The council is further directed to use the geographic areas it establishes to develop policy recommendations conducive to establishing or improving rural broadband access.

>**Update**: Passed House Rules Committee 7-0 with emergency added on Tuesday, February 25. Passed off the House Floor 94-2 on Wednesday, March 11. Engrossed to the Senate. Assigned to Senate Business, Commerce and Tourism Committee. Passed off the Senate Floor 45-0 on Tuesday May 12. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt. Veto overridden by the House 90-6 on Friday, May 22. Veto overridden by the Senate 43-1 on Friday, May 22.

Senate Bill 1002 (Senator James Leewright and Speaker Charles McCall) Expands the Rural Broadband Expansion Council by two members, from 12 to 14. The Speaker of the House and President Pro Tempore of the Senate would each gain one new appointment

>**Update**: Direct to calendar. Passed off the House Floor 86-0 on Thursday, May 14. House amendments adopted. Passed off the Senate Floor 45-0 on Friday, May 15. Sent to Governor Stitt for consideration. Vetoed by Governor Stitt. Veto overridden by the Senate 44-1 on Friday, May 22. Veto overridden by the House 91-7 on Friday, May 22.

Public Safety/Campus Safety/Weapons

11

Senate Bill 1081 (Senator Nathan Dahm and Representative Jay Steagall) Creates an Anti-Red flag Act to preemptively void any federal Red Flag law that would seek to limit gun ownership.

> **Update**: Passed Senate Judiciary Committee 8-2 as amended by committee substitute on Tuesday, February 25. Passed off the Senate Floor 34-9 on Thursday, March 12. Engrossed to the House. Direct to Calendar. Passed off the House Floor 77-14 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Tuesday, May 19.

Quartz Mountain

House Bill 2753 (Representative Kevin Wallace and Senator Roger Thompson) The measure transfers the Quartz Mountain Arts and Conference Center and Nature Park from the board of trustees for the facility to the Oklahoma Tourism and Recreation Department ("Tourism"), effective October 1, 2020. The budget of the facility of approximately $1,060,000 will be divided between the trustees (until the effective date) and Tourism. Tourism received funding of $794,126 for the balance of FY-21.

> **Update:** Passed House JCAB 26-0 Tuesday, May 12. Passed Senate JCAB 20-0 on Tuesday May 12. Passed off the House Floor 95-0 on Wednesday, May 13. Direct to calendar. Passed off the Senate Floor 43-1 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

House Bill 4141 (Representative Kevin Wallace and Senator Dave Rader) The measure appropriates to the Oklahoma Tourism and Recreation Department (OTRD) from any monies not otherwise appropriated from the Oklahoma Tourism Capital Improvement Revolving Fund (267 Fund) the sum of Five Hundred Eight Thousand Thirty-one Dollars ($508,031.00) or so much as may be necessary to implement the provisions of Enrolled House Bill No. 2753 of the 2nd Session of the 57th Oklahoma Legislature, for the transfer and rehabilitation of the Quartz Mountain Arts and Conference Center and Nature Park to the agency. The OTRD will transfer the funds ($508,031) to the State Regents to cover all outstanding debt service obligations for Quartz Mountain prior to October 1, 2020.

> **Update:** Passed House JCAB 26-0 Tuesday, May 12. Passed Senate JCAB 20-0 on Tuesday May 12. Passed off the House Floor 98-0 on Wednesday, May 13. Direct to calendar. Passed off the Senate Floor 41-2 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Special Education

Senate Bill 1436 (Senator Gary Stanislawski and Representative Nicole Miller) Creates a comprehensive special education subject area certification. The bill requires the State Board of Education to issue a two-year provisional certificate in the area of severe-profound disabilities to any individual who has obtained a standard certificate in the area of mild-moderate disabilities; been recommended for a certificate in the area of severe-profound disabilities by a school district

board of education; and submitted an application and payment of the required certification fee.
>   **Update**: Assigned to Senate Education Committee and then to the Senate Appropriations Committee. Laid over in the Senate Education Committee on Tuesday, February 18. Passed Senate Appropriations 16-0, with title stricken on Wednesday, February 26. Passed off the Senate Floor 43-0 on Tuesday, March 10. Engrossed to the House. Direct to Calendar. Passed off the House Floor 87-1 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Teacher Certification/Education

Senate Bill 1115 (Senator Ron Sharp and Representative Danny Sterling) Allows an employing board of education to renew an emergency or provisional certificate.
>   **Update:** Passed Senate Education Committee 11-3 with title stricken on Tuesday, February 25. Passed off the Senate Floor 36-11 on Tuesday, March 10. Engrossed to the House. Direct to Calendar. Passed off the House Floor 87-3 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Senate Bill 1125 (Senator Adam Pugh and Speaker Charles McCall) Allows out-of-state teaching certificates to qualify a person for an Oklahoma teaching certificate. These certified teachers do not have to take competency exam.
>   **Update**: Passed the Senate Education Committee 14-0 on Tuesday, February 11. Passed off the Senate Floor 46-0 on Wednesday, March 11. Engrossed to the House. Direct to Calendar. Passed off the House Floor 98-0 on Monday, May 11. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Monday, May 18.

House Bill 3142 (Representative Melissa Provenzano and Senator Dewayne Pemberton) Exempts those with a master's degree in education from having to complete an education administration program as part of the requirements for a school principal position.
>   **Update**: Passed the House Common Education Committee 14-0 on Tuesday, February 11. Passed off the House Floor 97-0 on Monday, March 2. Engrossed to the Senate. Assigned to the Senate Education Committee. Passed off the Senate Floor 46-0 on Thursday, May 14. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Retirement Systems

House Bill 3330 (Representative David Perryman and Senator Lonnie Paxton) Requires that if an injury to a member of a public retirement system results from a violent act as defined therein while in the performance of their duties as a police officer, the State Board will make a determination that the member has sustained a one-hundred-percent disability and shall make the benefit award in accordance with that standard.
>   **Update**: Passed the House Banking, Financial Services, and Pensions Committee 10-1 on Wednesday, February 19. Passed off the House Floor 94-0 on Thursday, March 5. Engrossed to the Senate. Assigned to Senate Retirement and Insurance Committee.

13

Passed off the Senate Floor 44-0 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

House Bill 3350 (Representative Avery Frix and Senator Dewayne Pemberton) Authorizes a cost of living adjustment (COLA) between two and four percent for retirees of the following pension systems: Teachers' Retirement System of Oklahoma; Oklahoma Public Employees Retirement System; Oklahoma Firefighters Pension and Retirement System; Oklahoma Police Pension and Retirement System; Oklahoma Law Enforcement Retirement System; and Uniform Retirement System for Justices and Judges.

> **Update:** Passed House Rules Committee as amended by committee substitute 8-0 on Thursday, February 27. Rules suspended to direct to the calendar. Passed off the House Floor 99-0 on Tuesday, March 10. Engrossed to the Senate. Assigned to Senate Retirement and Insurance Committee. Direct to calendar. Passed off the Senate Floor 41-5 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Workforce Development

Senate Bill 1075 (Senator Roger Thompson, Representative Kevin Wallace) Permits any establishment participating in the Quality Jobs Program that does not meet the statutory quarterly payroll requirements during the time period which begins on April 1, 2020, and ends on June 30, 2021, to continue to receive incentive payments and to be exempt from the prescribed limitations. (Carryover Bill)

> **Update**: Passed Senate JCAB 20-0 on Tuesday, May 12. Passed House JCAB 28-0 on Tuesday, May 12. Direct to Calendar. Passed off Senate floor 43-2 on Wednesday, May 13. Passed off the House Floor 84-3 on Friday, May 15. Sent to Governor Stitt for consideration. Signed by Governor Stitt on Thursday, May 21.

Thank you.

Glen

Glen D. Johnson
Chancellor
Oklahoma State Regents for Higher Education
655 Research Parkway, Suite 200
Oklahoma City, Oklahoma 73104
405.225.9122
gjohnson@osrhe.edu
follow us on Twitter @okhighered

14

15

2020 LEGISLATIVE AGENDA
OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION
Improving our future by degrees

FY 2021 BUDGET NEED

FY 2020 Appropriation **$802,070,058**

FY 2021 Budget Need:

1. STEM Workforce Development Initiatives **$50,200,000**
   - a. STEM and engineering workforce needs — $30,000,000
   - b. Nursing workforce needs — $12,000,000
   - c. Double the number of physician residency slots — $8,200,000
     per year for 10-year period

2. Operational Cost Increases **$50,000,000**
   - a. 3.5% faculty pay increases - Phase II — $20,200,000
   - b. Systemwide mandatory cost increases — $25,500,000
   - c. Restoration of scholarship programs — $2,200,000
     National Guard Waiver & Teacher Shortage Employment Incentive Program
   - d. Strategic Innovations — $2,100,000

3. Deferred maintenance for campus infrastructure (Section 13 Offset) - Phase II **$5,800,000**

4. Concurrent enrollment program: full funding for high school juniors **$7,000,000**

5. Endowed Chair State Matching Funds Bond Authorization and Debt Service **$12,000,000**
   $160.9 million state match backlog

FY 2021 Total Budget Need **$927,070,058**
- **$ Difference from FY 2020 State Appropriations** — **$125,000,000**
- **% Difference from FY 2020 State Appropriations** — **15.6%**

FACULTY SALARIES

The most recent national rankings from the Southern Regional Education Board list Oklahoma as 45th in the average faculty salary and show that average faculty salaries in Oklahoma's colleges and universities are more than 15% below other states. Additional funding for faculty salary increases is critical to our public institutions' efforts to competitively retain and recruit quality faculty in nursing, business, education, sciences, engineering and other high demand programs that are essential to meet Oklahoma's workforce needs.

STEM & WORKFORCE

Degree and certificate production in critical STEM disciplines has increased 53% over the last eight years. Workforce development initiatives focus on continued growth in the number of science, technology, engineering and nursing degrees conferred, as well as doubling the number of physician residency slots available in our state over the next 10 years.

RESTORE HISTORIC BUDGET CUTS

State support for Oklahoma's higher education system was cut more than $274 million (26%) from the start of the recession through FY18.

Appropriation
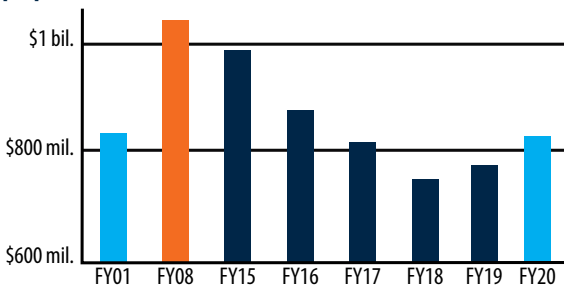
Oklahoma is one of only six states where per-student higher education funding fell by more than 30% from 2008 to 2018, after adjusting for inflation. We must continue restoring state funding for public higher education to meet Oklahoma's current and future workforce needs.

ENDOWED CHAIRS

The endowed chairs program, which supports faculty chairs, professorships and lectureships to improve the quality of instruction and research, has enabled colleges and universities to attract approximately $671 million in private gifts and develop meaningful public/private partnerships. Research clusters and disciplines include cancer, diabetes, mental health, neonatology, fire protection science, engineering, business, computer science, geophysics, chemistry, and meteorology. Currently, accounts in the backlog for state matching funds total $160.9 million for 18 institutions statewide.

CONCURRENT ENROLLMENT

The concurrent enrollment program strengthens student preparation, reduces family college costs, and decreases the time required to complete a degree.

Legend:
- Current Appropriation
- Total Funding Requirement
- Additional $7 Million Investment Requested

	Current Appropriation	Total Funding Requirement
FY16	$5,409,345	$7,107,446
FY17	$5,198,248	$8,272,114
FY18	$2,820,800	$10,583,014
FY19	$10,216,349	$11,760,637
FY20	$13,500,000	$13,500,000
FY21	$13,500,000	$20,500,000
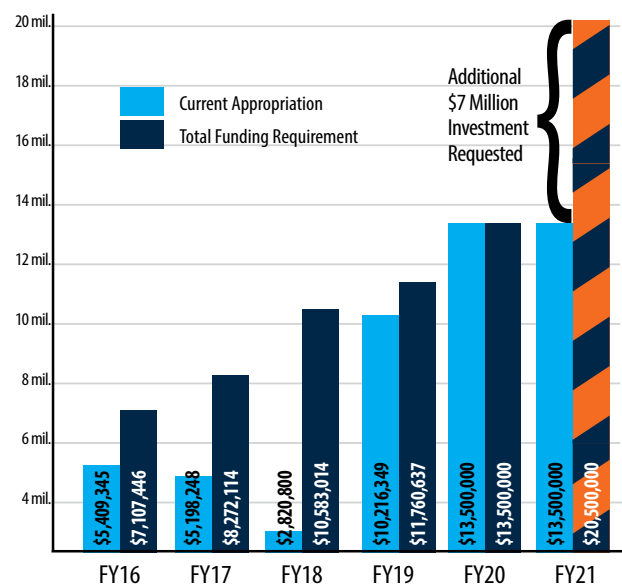
The FY 2019 higher education appropriation of $7.5 million for concurrent enrollment covered approximately 87% of the cost to state system colleges and universities, and FY 2020 funding provided the opportunity to fully fund concurrent enrollment for high school seniors. To fully fund concurrent enrollment for high school juniors would require an additional $7 million investment.

2020 LEGISLATIVE AGENDA

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION

OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION
Improving our future by degrees

TASK FORCE ON THE FUTURE OF HIGHER EDUCATION

The State Regents' Task Force on the Future of Higher Education conducted a comprehensive assessment of Oklahoma public higher education, including academic models, online education, structural reforms, fiscal services, operational efficiencies, workforce development, and information technology. After 10 months of study and deliberations, the Task Force unanimously issued a set of comprehensive cost saving, innovative strategies to increase degree completion in our state.

STUDENTS WHO LEARN HERE EARN HERE

A student with a college degree will earn $1.1 million more in a lifetime than a high school graduate. More than 87% of Oklahoma residents who graduate with a bachelor's degree remain in the state and are employed in the state one year after graduation.

Source: 2019 Employment Outcomes Report

87.3% remain in the state
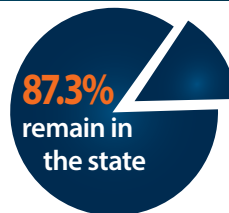
MAINTAIN CURRENT LAW ON WEAPONS ON CAMPUS

Oklahoma higher education supports the second amendment and gun ownership. Under current law, campus presidents have the discretion to grant exceptions to institutional policy when an exception is warranted. The current law is working.

In the past 12 legislative sessions, bills have been introduced or discussed that would allow weapons on campus. Each attempt has been successfully defeated to date, and ensuring similar legislation does not become law will continue to be a state system priority.

OKLAHOMA'S PROMISE

The state system of higher education strongly supports protecting the dedicated funding source for the Oklahoma's Promise scholarship, which provides college funding for approximately 17,000 students and is one of the top five promise scholarship programs in the nation. Nearly 90,000 Oklahoma students have met the eligibility requirements and earned the scholarship since the program's inception.

OKLAHOMA'S
PROMISE
OKLAHOMA HIGHER LEARNING ACCESS PROGRAM

WORKFORCE & ECONOMIC IMPACT OF PUBLIC HIGHER EDUCATION

According to the Georgetown Center for Education and the Workforce, by 2020, 67% of jobs in Oklahoma will require a college degree or additional postsecondary education and training, and 37% will require an associate degree, bachelor's degree or higher. Oklahoma higher education links academic programs directly to employment needs in the state's wealth-generating ecosystems.

Our public higher education system supported **$8.2 billion** in total economic output in FY 2016. For every dollar of state appropriations invested, the state system of higher education generates **$9.40** in economic output.

NATIONALLY RECOGNIZED AFFORDABILITY

U.S. News and World Report ranks Oklahoma tuition and fees as 12th-lowest in the nation and student debt at graduation as 13th-lowest in the nation.

COMPLETE COLLEGE AMERICA

Oklahoma's public and private institutions and career technology centers continue working to reach the state's goal of increasing the number of degrees and certificates earned through our Complete College America initiative. In the first six years of the CCA initiative, the number of degrees and certificates earned in Oklahoma increased by 11,740, surpassing the state's benchmark of 10,200.

Additional degrees and certificates earned:

10,200 6-year goal	**11,740** 6-year results

Other states are investing in degree completion. Data from the State Higher Education Executive Officers association show that Oklahoma ranks last among the 33 participating CCA states in the percentage change in state funding support since the initiative's inception in 2011.

CONTACT

Glen D. Johnson
Chancellor
chancellorjohnson@osrhe.edu

LeeAnna McNally
Vice Chancellor for Governmental Relations
lmcnally@osrhe.edu

Oklahoma State Regents for Higher Education
405.225.9100
www.okhighered.org

2020 House Interim Studies

IS #	Study	Author(s)	Committee	Status
20-001	Delisting and Assignment of Benefits	Avery Frix	Insurance	Approved
20-002	Private property	Grego, Jim	Judiciary	Approved
20-003	Utility installation under ODOT jurisdiction	Grego, Jim		Not Approved
20-004	National Fire Protection Association (NFPA) 54 and 58	Grego, Jim	Public Safety	Approved
20-005	Administrative Rules Process	Tom Gann and Denise Crosswhite-Hader	Admin Rules	Approved as Joint Study w/ Senate
20-006	Law Enforcement Reform	Goodwin, Regina	Public Safety	Approved
20-007	Increase Access to Retirement Saving Tools	McEntire, Marcus	Banking, Pensions, and Retirement	Approved as Joint Study w/ Senate
20-008	A bipartisan examination of state government's role and possible legislative action in regard to improving race relations in Oklahoma.	Representative Osburn, Mike; Representative Nichols, Monroe; Senator Pugh, Adam; Senator Matthews, Kevin	Government Efficiency	Approved
20-009	Long-term care and COVID-19 – current and future needs	West, Tammy	Health and Long-term Care	Approved
20-010	County Funding/County Road Funding	Burns, Ty D.	County and Municipal	Approved
20-011	Stolen Valor	Burns, Ty D.	Appropriations	Approved
20-012	Meat Inspector	Burns, Ty D.		Not Approved
20-013	How Play-based Learning Leads to Better Mental Health and Better Academic Outcomes	Rosecrants, Jacob	Common Education	Approved
20-014	Benefits of violence de-escalation training for teachers: help divert harm while attending to the needs of students in trauma.	Ranson, Trish	Common Education	Approved

IS #	Study	Author(s)	Committee	Status
20-015	Economic Policies in Oklahoma	Virgin, Emily	Appropriations	Approved with IS 20-088
20-016	Elections and Voting in Oklahoma	Virgin, Emily	Judiciary	Approved
20-017	Utilization of Form 613 as the standard disclosure form and established as a confirmed consumer protection document	Miller, Nicole	Health and Long-term Care	Approved
20-018	Medical-Legal Partnership	Bush, Carol	Judiciary	Approved
20-019	Modernization of rules of discovery and freedom of information requests with legal community input.	Luttrell, Ken	Judiciary	Approved
20-020	Bilingual funding, testing, qualifying, school procedures, transparency and accountability.	Dills, Sheila	Common Education	Approved as Joint Study w/ Senate
20-021	Transportation funding in changing virtual environment, funding for schools utilizing city transit systems & 1.5-mile rule for transportation	Dills, Sheila	Common Education	Approved as Joint Study w/ Senate
20-022	The right of therapists to help those with unwanted same sex attractions, and the right of clients to receive this therapy.	Olsen, Jim	Public Health	Approved
20-023	The epidemic of opioid abuse as it pertains to the accessibility of loperamide, an over-the-counter, opioid based antidiarrheal medication.	Munson, Cyndi	Public Health	Approved
20-024	Review of Oklahoma's Law concerning individuals who have been diagnosed with Epilepsy and operate a motor vehicle.	Sterling, Danny	Public Safety	Approved
20-025	The need to expand the scope of physical education in public schools.	Sterling, Danny	Common Education	Approved

IS #	Study	Author(s)	Committee	Status
20-026	Cottage Law Reform	Kerbs, Dell	Agriculture	Approved with IS 20-028
20-027	Rural fire/county emergency management overlap and proper response	Caldwell, Trey	Public Safety	Approved
20-028	Diversifying Consumer Food Availability	Mize, Garry		Combined with IS 20-026
20-029	Examining the eviction rates in the state of Oklahoma, both pre- and post- COVID-19. Exploring solutions that benefit tenant and landlord.	Provenzano, MelissaWaldron, John	Business	Approved
20-030	Data and Privacy Regulations	West, Josh; Walke, Collin	Business	Approved
20-031	Beyond the Box: Equity in Admissions in Oklahoma	Ranson, Trish; Provenzano, Melissa	Higher Education	Approved
20-032	Restorative Justice	West, Tammy	Judiciary	Approved
20-033	Transportation Electrification: Planning Considerations for Oklahoma	Representative Brian Hill	Transportation	Approved
20-034	Tourism in Oklahoma: Efficiency and Growth	Representative Brian Hill	Tourism	Approved
20-035	Law Enforcement Reform	Nichols, Monroe	Public Safety	Approved
20-036	ANTIFA	West, Kevin		Not Approved
20-037	Market Analysis for future COLAs.	Frix, Avery	Banking, Pensions, and Retirement	Approved
20-038	Building Literacy in Oklahoma: Building a Stronger Future and Workforce	Rep. Mike Sanders	Government Efficiency	Approved
20-039	Proposed Interim StudyBuilding Literacy in Oklahoma: Building a Stronger Future and Workforce	Sanders, Mike		Withdrawn
20-040	Creation of a statewide emergency radio system for state, county, local, and tribal authorities	Ford, Ross; May, Stan	Public Safety	Approved

IS #	Study	Author(s)	Committee	Status
20-041	Employment issues related to Covid-19	Bennett, Forrest	Government Efficiency	Approved
20-042	Cosmetology and Barbering License Process	Bennett, Forrest	Government Efficiency	Approved
20-043	Responsibilities and powers of County Commissioners.	West, Kevin	County and Municipal	Approved
20-044	Catastrophic Health Emergency Powers Act	West, Kevin	Government Efficiency	Approved
20-045	Connectivity of broadband in relation to Oklahoma schools/E-rates federal grant	Baker, Rhonda	Common Education	Approved
20-046	Regional states/Oklahoma's educational response/plan to Covid.	Baker, Rhonda	Common Education	Approved
20-047	Hospice care within DOC.	Caldwell, Chad; Roe, Cynthia	Health and Long-term Care	Approved
20-048	Infant/Maternal mortality rates in Oklahoma	Nichols, Monroe		Not Approved
20-049	Absenteeism: How will students and schools be impacted by Covid-19?	Conley, Sherrie	Common Education	Approved
20-050	Teacher's health insurance, retirement, retirement credit and flexible benefits	Hasenbeck, Toni	Appropriations	Approved
20-051	EMS & Ambulance Response Time	Roe, Cynthia	Public Safety	Approved
20-052	Maintenance of right of way to private drives across ODOT boundaries.	Russ, Todd		Not Approved
20-053	To investigate the substantial revenue loss in Oklahoma because of the raised sales tax on automobiles at 1.25%, implemented in 2017.	Russ, Todd	Appropriations	Approved
20-054	Moving payment in the DHS subsidy program for childcare	Russ, Todd	Children, Youth, and Family	Approved
20-055	Complain system for child care centers and homes	Russ, Todd		Not Approved

IS #	Study	Author(s)	Committee	Status
20-056	Damages to personal property caused by searches of incorrect home addresses or vehicles that were performed by law enforcement	Russ, Todd		Not Approved
20-057	Exploration of student and school improvement models and digital improvement platform	McBride, Mark and Hasenbeck, Toni	Appropriations	Approved
20-058	Need for Healthy In and Out of Network Model for Competition	Moore, Lewis		Not Approved
20-059	Options to the high cost of health insurance	Moore, Lewis	Insurance	Approved
20-060	First Responders and Mental Health	Moore, Lewis	Public Health	Approved
20-061	Rural Connectivity & Broadband Expansion	Kiger, Lundy		Not Approved
20-062	Updating school curriculum to reflect the needs of today's society	Kiger, Lundy	Common Education	Approved
20-063	Parking fees for State Parks	Kiger, Lundy	Appropriations	Approved
20-064	Blended and distance learning during the COVID-19 Pandemic	Waldron, John		Not Approved - Duplicate with IS 20-045; 20-046
20-065	New Teacher Recruitment and Training	Waldron, John; Albright, Kelly	Common Education	Approved
20-066	The A-F rubric for school assessment	Waldron, John ; Provenzano, Melissa		Not Approved
20-067	State Investment in entrepreneurship to re-start the state's economy post -COVID	Nichols, Monroe	Business	Approved
20-068	Labor Trafficking's Impact on Oklahoma Families	Fincher, Derrel	Judiciary	Approved
20-069	Public/Private Social Change Partnerships	Nichols, Monroe		Not Approved
20-070	Examine Options for Cities and Town to secure funding to construct/repair/maintain roads &	Boles, Brad; Perryman, David; Roe, Cynthia; Conley, Sherrie	County and Municipal	Approved

IS #	Study	Author(s)	Committee	Status
	bridges that are impacted by the Energy Industry			
20-071	Municipal response during a declared emergency.	Caldwell, Chad	County and Municipal	Approved
20-072	Using mobile technology to provide confidential, real-time crisis/trauma debriefing & counseling services to LEOs from their vehicle, office or home.	Fincher, Derrel	Public Safety	Approved
20-073	Updating portions of States Antiquated Sales Tax Code	Hilbert, Kyle	Appropriations	Approved
20-074	Panademic Preparedness/Healthcare	Roberts, Sean	Public Health	Approved
20-075	Housing Choice Voucher Mobility	Fugate, Andy and Townley, Tammy	Business	Approved
20-076	Eminent Domain, Just Compensation and the Landowners Bill of Rights	Patzkowsky, Kenton	Judiciary	Approved
20-077	The Truth about Electric Cars	Brewer, Denise	Transportation	Approved
20-078	Balancing ACES, behavior and suspension.	Conley, Sherrie	Common Education	Approved
20-079	Poultry Management Guidelines	Kerbs, Dell	Agriculture	Approved
20-080	Examine Oklahoma's Law Enforcement Support Office (LESO) program.	Representative Munson, Cyndi	Public Safety	Approved
20-081	Police protection and officer rights.	Humphrey, Justin	Public Safety	Approved
20-082	Food Deserts	Pittman Ajay		Not Approved
20-083	Infant Mortality	Pittman. Ajay		Not Approved
20-084	Criminal Justice Reform	Pittman, Ajay	Judiciary	Approved
20-085	Police Brutality	Pittman, Ajay		Not Approved - Duplicate with IS 20-035; 20-006

IS #	Study	Author(s)	Committee	Status
20-086	Mental Health	Pittman, Ajay	Public Health	Approved
20-087	A review of the status of human rights protections and tracking, including relevant statutes, enforcement mechanisms, and responsible oversight.	Branham, Chelsey	Judiciary	Approved
20-088	Economic tools that are utilized in the state to stabilize the economy and other potential strategies that may help to provide stability assistance.	Branham, Chelsey		Combined with IS 20-015
20-089	Inspection Fees & Services for Federally Funded Local Government Projects let by ODOT	Sims, Lonnie	County and Municipal	Approved
20-090	Meat Inspector	Cornwell Rusty	Agriculture	Approved
20-091	Oklahoma Medical Marijuana Program	Echols, Jon	Rules	Approved
20-092	Death Penalty Practices and Procedures	McDugle. Kevin	Public Safety	Approved

2020 Interim Studies

**Although these requests for interim studies have been assigned to the following committees, it is at the discretion of each respective chair whether to schedule a study for presentation.

IS-2020-01

Evaluation of Career Tech Training Programs: completion rates, long-term success of students in relevant careers, number of programs training skills to earn a good wage.
Requestor: **Bergstrom**
Presentation & Reports: **Not Available**
Committee: **Education**

IS-2020-02

Oklahoma Forensic Center: Operations, interactions with local law enforcement, frequency and type of incidents, working conditions, and effects on community at large.
Requestor: **Bergstrom**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-03

A study on the state's use of debit cards to deliver state benefits and if it could be accomplished within the state of Oklahoma without having to use a company like Conduet.
Requestor: **Boren**
Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-04

Minority Businesses: to explore ways to incentivize and grow minority businesses in historically disadvantaged locations.
Requestor: **Brooks**
Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-05

To analyze potential improvements, changes, & reforms so the legislature is more involved in the Administrative Rules process.
Requestor: **Dahm/Gann**
Presentation & Reports: **Not Available**
Committee: **Rules**

IS-2020-06

Universal training requirements for police officers
Requestor: **David & Thompson**

Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-07

A study on the value of the Earned Income Tax Credit
Requestor: **Dossett**
Presentation & Reports: **Not Available**
Committee: **Finance**

IS-2020-08

State Fire Marshal's Office: the duties and responsibilities of State Fire Marshal's office and the creation of a state building office for a one-stop place for codes.
Requestor: **Dugger**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

IS-2020-09

Study regarding state employees teleworking, the effects of telework, and access to technology pre- and post- COVID-19.
Requestor: **Floyd**
Presentation & Reports: **Not Available**
Committee: **General Government**

IS-2020-10

Study regarding hotline reporting for various state agencies and advocacy groups in Oklahoma.
Requestor: **Floyd**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-11

An evaluation of the County Improvement for Roads and Bridges Fund
Requestor: **Hall**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

IS-2020-12

A consumer safety inquiry into the sale of padded crib bumpers and risks of suffocation and strangulation.
Requestor: **Hicks**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-13

Examining the diabetes standards of care and needed insurance coverage to prevent negative health outcomes for individuals with diabetes.
Requestor: **Hicks**
Presentation & Reports: **Not Available**
Committee: **Retirement and Insurance**

IS-2020-14

A study on prison housing and health care: county jails and expanded Medicaid
Requestor: **Howard**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

IS-2020-15

DOC Procedures and Practices During a Health Crisis
Requestor: **Jech**
Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-16

A study on transitions for individuals with intellectual or developmental disabilities from public schools to further education, employment, and independent living.
Requestor: **Kirt**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-17

Examining the potential for the Pay for Success (PFS) innovative contracting model to be used in more areas of Oklahoma's social programs to improve outcomes.
Requestor: **Kirt & Thompson**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

IS-2020-18

OESC and Unemployment: How do we learn from the Pandemic and how do we become better prepared?
Requestor: **Leewright**
Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-19

Oklahoma lakes: Need for development, barriers from state and federal levels, and how we might build better partnerships between state, federal, and private sectors
Requestor: **Leewright**

Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-20

Learning challenges in underserved communities: Best practices in assessing learning problems such as children suffering from deafness or dyslexia, which often go undiagnosed.
Requestor: **Matthews**
Presentation & Reports: **Not Available**
Committee: **Education**

IS-2020-21

Officer & Citizen safety options - Ways to address officer safety without utilization of excessive force (Best Practices)
Requestor: **Matthews**
Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-22

Tribal Health and Medicaid Managed Care – how to avoid leaving federal money on the table in managed care contracting.
Requestor: **McCortney**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-23

Medication Assisted Treatment for drug addiction and the role these drugs could play in making Oklahoma a Top Ten State.
Requestor: **McCortney**
Presentation & Reports: **Not Available**
Committee: **Health and Human Services**

IS-2020-24

To study the rules and regulations on beef processing facilities.
Requestor: **Murdock**
Presentation & Reports: **Not Available**
Committee: **Agriculture and Wildlife**

IS-2020-25

Examination of the current statutes regarding surety and financial statements for oil and gas operators as well as disposal well operators in Oklahoma.
Requestor: **Paxton**
Presentation & Reports: **Not Available**
Committee: **Energy**

IS-2020-27

Oklahoma Air Service Development Grant Pilot Program: offer financial assistance by grant to private or public entities for assisting commercial air service development
Requestor: **Rosino**
Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-28

Unmanned aircraft systems (UAS) economic advancement and potential increase for economic development in Oklahoma.
Requestor: **Rosino**
Presentation & Reports: **Not Available**
Committee: **Business, Commerce and Tourism**

IS-2020-29

Roads and Bridges: to determine funding for maintaining and improving city and county roads
Requestor: **Scott**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

IS-2020-30

Discussion of mental health issues that affect firefighters, law enforcement, District Attorney's, DOC workers, etc. to help create a more supportive work environment
Requestor: **Scott**
Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-31

A study of the 2020 reforms to the Open Meetings Act and future opportunities to leverage technologies to better serve Oklahomans.
Requestor: **Treat**
Presentation & Reports: **Not Available**
Committee: **Rules**

IS-2020-32

Law Enforcement Policies: use of force, de-escalation, and real world applications.
Requestor: **Treat**
Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-33

A study exploring current laws regarding grandparents' rights to determine if legislative modifications are necessary.
Requestor: **Weaver**
Presentation & Reports: **Not Available**
Committee: **Judiciary**

IS-2020-34

Temporary Personnel Transfers in State Law Enforcement: The study will explore the idea of allowing temporary duty transfers between state law enforcement.
Requestor: **Weaver**
Presentation & Reports: **Not Available**
Committee: **Public Safety**

IS-2020-35

Study on equality issues relating to racial discrimination and bias, state agencies and employees, communities, organizations and businesses of this state.
Requestor: **Young**
Presentation & Reports: **Not Available**
Committee: **Rules**

IS-2020-36

A study on community racial impact statements, specifically proposed legislation's effects on the incarceration rate of certain demographics and burgeoning DOC population
Requestor: **Young**
Presentation & Reports: **Not Available**
Committee: **Rules**

IS-2020-37

Exploring options for increasing access to retirement savings programs to encourage Oklahomans to secure their financial future.
Requestor: **Montgomery/McEntire**
Presentation & Reports: **Not Available**
Committee: **Retirement and Insurance**

IS-2020-38

Education funding: Bilingual funding, testing, qualifying, school procedures, transparency and accountability.
Requestor: **Newhouse/Dills**

IS-2020-39

Transportation funding in changing virtual environment, funding for schools utilizing city transit systems & 1.5-mile rule for transportation.
Requestor: **Newhouse/Dills**
Presentation & Reports: **Not Available**
Committee: **Appropriations**

v2019

OneNet is a division of the Oklahoma State Regents for Higher Education. As Oklahoma's internet service provider, we are focused on improving broadband availability and driving down costs for broadband and technology resources.

OneNet is Oklahoma's only statewide internet service provider, connecting our customers to each other and the world beyond. We serve universities and colleges, CareerTechs, K-12 schools, libraries, health care providers, research facilities, non-profit organizations and local, state, tribal and federal governments.

We also operate the Oklahoma Community Anchor Network (OCAN), a network spanning 35 counties and more than 1,100 miles of high-speed fiber designed reach to rural Oklahoma communities.

Mission

OneNet's mission is to advance technology across Oklahoma. OneNet enhances economic growth by meeting the mission-critical needs of our state's education, research, healthcare and public service communities.

Vision

OneNet's vision is to remain committed to serving as the leading internet and network service provider for the state of Oklahoma.

OneNet Connects.....

48
Research, Nonprofit, Other Agencies

57
College & University Campuses

284
K-12 School Districts

13
Tribal Agency Sites

55
Career Technology Campuses

76
Libraries

55
Hospitals & Clinics

860
Government Agency Sites

Regional R&E Peer Networks

R&E Network	Constituents	Staff
OneNet	1,500	45
LEARN	640	14
MOREnet	600	86
KanREN	300	17
LONI	100	25
Albuquerque GigaPop	44	7
Front Range GigaPop	32	5
ARE-ON	25	6

OneNet

Advancing Technology Across Oklahoma

Regional R&E Peer Networks

Cybersecurity Services

OCAN Highlights

OKLAHOMA COMMUNITY ANCHOR NETWORK

FIBER MIDDLE-MILE INFRASTRUCTURE HIGH-SPEED 36 ODOT FIELD OFFICES 8 OKLAHOMA HOSPITALS BROADBAND TECHNOLOGY OPPORTUNITIES PROGRAM 4 PUBLIC SAFETY FACILITIES NATIONAL TELECOMMUNICATIONS AND INFORMATION ADMINISTRATION ANCHOR 2 DEPARTMENT OF TECHNOLOGY 13 K-12 10-GIGABIT-PER-SECOND HEALTH NETWORK OFFICES SCHOOLS 25 HIGHER ED FACILITIES ADVANCED 1 NONPROFIT MISSION CAIs 1 PUBLIC LIBRARY 1 TRIBAL EDUCATION CENTER CONNECT

- Network was completed and became operational in 2013.
- Network consists of 1,100+ miles of fiber infrastructure and provides connectivity to Community Anchor Institutions throughout Oklahoma.
- OCAN fiber infrastructure passes through 35 Oklahoma Counties and 17 Tribal Jurisdictions.
- OCAN partners with commercial providers to expand last-mile services to rural communities throughout Oklahoma.
- One key mission of OCAN is to provide critical services to Native American Tribes.

STEM
The Next Generation of
Education Technology

- How students interact with learning material is constantly changing.
- Expansive educational opportunities are made possible with technologies such as:

Virtual Reality	3-D Printing	Augmented Reality	Gamification
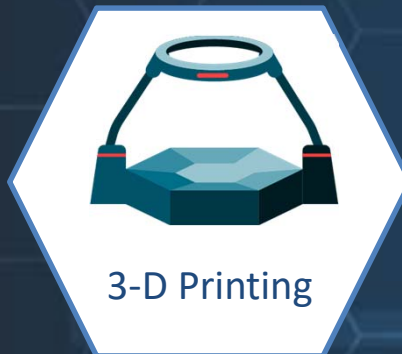
- Integrating these initiatives can increase student engagement, creativity and comprehension.

Native American Engagements

OneNet and the Oklahoma Community Anchor Network (OCAN) seek strategic partnerships with Native American communities to better serve their citizens.

Tribal Partners

- Chickasaw Nation
- Ponca Tribe
- Osage Nation
- Pawnee Nation
- Choctaw Nation
- Cherokee Nation
- Muscogee Creek Nation
- Citizen Pottawatomie Nation

Questions?

Higher Education Briefing
August 20, 2020

Budget Need Preparation

Background and History:

The Oklahoma Constitution Article 13-A §2, state budget law O.S. 62§34.36, and the State Regents' policy, confer the responsibility for the establishment of the System-wide Budget Need Request to the Oklahoma State Regents for presentation and recommendation to the Oklahoma Legislature and the Governor.

Guiding Principles
1. Oklahoma should support the educational programs of institutions in the State System at a level that will provide high-quality educational performance outcomes.
2. To the extent possible, average per student funding should compare to the national peer average per student funding.
3. Institutions should determine budget need based upon the cost of academic programs to include instruction, research, public service, academic support, student services, institutional support, operation and maintenance of the physical plant and scholarships/fellowships to students and program enrollment.

Development of the Budget Needs Request
1. In late August, the OSRHE fiscal staff circulates to our state system institutions a budget needs survey that is completed and returned that quantifies the anticipated needs by institution for the coming fiscal year. The survey covers anticipated mandatory cost increases, as well as any special initiatives that an institution may be planning on their campus.
2. The Budget Needs Survey data is aggregated and combined with system-wide initiatives to develop a consolidated recommendation for State Regents' consideration.
3. A special meeting is held in November to present and approve the System-wide Budget Needs Request that will become the recommendation used with the Legislature and Governor to request any additional state- appropriated funding to support Higher Education in the coming legislative appropriation process.

Communication with Constituents
The Chancellor conducts regional, legislative tours in the late winter/early spring to share the budget need request with local legislators and institutional officials. Typically, an institution will host a session for local legislators to attend that allows for questions and answers on specific initiatives included in the plan and helps build an understanding and generate support for the budget need request.

The Education Committees and/or the Appropriations and Budget Committees of the state legislature normally invite the Chancellor to appear at one or more budget hearings to present the consolidate budget need request at the beginning of the legislative session. Work continues on presenting the proposed request until the appropriation is passed by the Legislature.

Meeting of the
Oklahoma State Regents for Higher Education
November 7, 2019

AGENDA ITEM #4:

E&G Budget Needs for FY2021-FY2023.

SUBJECT: Approval of FY2021- FY2023 appropriations request.

RECOMMENDATION:
> **It is recommended that the State Regents approve a request for state appropriations for FY2021 in the amount of $927.1 million, representing an increase of $125 million or 15.6 percent for support of the Oklahoma state system of higher education.**

BACKGROUND:

Pursuant to Article 13-A, §2 and state budget law O.S. 62 §34.36, the State Regents are required to determine a budget needs recommendation for presentation to the Oklahoma Legislature and the Governor. In 2016, the Legislature adopted a change in the law (S.B. 1030) to extend the submission of budget requests from one fiscal year to three fiscal years; thus, this recommendation covers the period of FY2021 through FY2023, using the FY2020 appropriation as the base year.

It is recommended that the State Regents approve a budget request for approximately $927.1 million in total funding for FY2021 operations. This is an increase of approximately $125 million above the current FY2020 level of $802.1 million for operations. The estimated incremental increase for FY2022 is $68 million for a total appropriation of $995.1 million. The estimated incremental increase for FY2023 is $69.7 million for a total appropriation of $1,064.9 million.

ANALYSIS:

The State Regents have a constitutional duty under Article 13-A, §2 of the Oklahoma Constitution and state budget law O.S. 62 §34.36 to determine and recommend to the Oklahoma Legislature and the Governor each year a budget that states the needs of Oklahoma State System of Higher Education. Each year, the state system colleges and universities complete and submit to the State Regents a Budget Needs Survey that outlines each institution's budget needs for the upcoming fiscal year. According to the aggregated Budget Needs Surveys for FY21, state system colleges and universities have requested an additional $506.8 million above the FY20 state appropriation. In prioritizing the needs of the State System as submitted by our colleges and universities, the State Regents have developed an FY21 Budget Need Proposal of $125 million above the current FY20 state appropriation of $802.1 million.

The FY21 Budget Need Proposal is outlined in five separate sections: (1) STEM Workforce Development Initiatives, (2) Operational Cost Increases, (3) Deferred Maintenance, (4) Concurrent Enrollment Program, and (5) Endowed Chairs Matching Funds. The primary focus of the State Regents is to support degree completion initiatives while maintaining current operating budget obligations and to support Oklahoma's colleges and universities in their efforts to ensure students have access to quality higher education opportunities. Further, this funding request is designed to support workforce development as an economic engine to help prosper the State of Oklahoma.

STEM WORKFORCE DEVELOPMENT INITIATIVES: $50.2 million

The Science, Technology, Engineering and Math (STEM) Workforce Development Initiatives in this request are primarily focused on three critical workforce shortage areas: 1.) Engineers, 2.) Nurses, and 3.) Physicians. Working in consultation with the Oklahoma Department of Commerce, the following proposals request the additional funding necessary to boost degree productivity and residency positions in high demand STEM-related fields.

Oklahoma's Engineering Initiative: ($30 million) The goal of this project is to accelerate the growth of highly qualified engineers to support the intellectual capital needs of Oklahoma's industries. It is projected that the demand for qualified engineers in Oklahoma will be a minimum of 3,000 annually for the next nine years. This funding request would support $10 million in targeted Engineering Program funding to both the University of Oklahoma and Oklahoma State University, with an additional $10 million to be utilized on a competitive grant basis for the 23 non-research (regional and two-year) institutions to support specific proposals for STEM–related program development, such as the preparation of students for successful transfer to professional engineering programs; new or developing bachelor-level programs with emphasis on software engineering and engineering technology; bachelor and associate degree programs in computer science, cyber security, mathematics, data analytics, and other STEM fields; programs to recruit, develop and graduate more highly qualified students to teach secondary math and science classes; and programs to support the advisement, mentoring and academic tutoring to increase the success rates of students in Engineering and STEM-related programs with emphasis on multiple campus collaboration.

Oklahoma's Nursing Initiative: ($12 million) This funding request will support the expansion of nursing faculty on our college and university campuses by approximately 48 FTE, increasing the total nursing faculty headcount from 313 to 361. The increase in nursing faculty will allow for approximately 1,200 additional slots for nursing students. Additionally, this funding request will allow for a portion of funds to be designated for nursing faculty salary increases at our colleges and universities, making the average Oklahoma nursing faculty salary (currently $55,701) more competitive with both the national average nursing faculty salary ($81,400) and the average annual Oklahoma nurse practitioner salary ($94,976). Increasing the average Oklahoma nursing faculty salary will allow our nursing programs to attract and retain nursing faculty, which is necessary for increased production of nursing graduates in the state.

Oklahoma's Physicians Initiative: ($8.2 million) This funding request, which will be an annual request, will fund the expansion of physician residency slots at the University of Oklahoma Health Sciences Center and Oklahoma State University Center for Health Sciences. The goal of this initiative is to provide additional physician residency slots in Oklahoma and to help incentivize physicians to continue their post-residency practice within the state. The additional funding will expand the University of Oklahoma Health Sciences Center and the Oklahoma State University Center for Health Sciences residency capacity from 820 to approximately 1,640 in ten years.

OPERATIONAL COST INCREASES: $50.0 million

Instructional Requirements: ($20.2 million) The request of $20.2 million for Instruction will provide institutional funding support for faculty salary increases. This request would provide salary increases for full-time faculty and cover approximately 6,690 full-time-equivalent positions. The targeted increase is 3.5 percent for FY2021. This request will help ensure competitive salaries for post-secondary faculty and help to maintain quality instruction in the classroom.

Mandatory Fixed Cost Increases: ($25.5 million) This request includes $25.5 million in anticipated increases in operating obligations related to employee benefits (health, retirement, etc.), library acquisitions, equipment, and supplies. Also included in this category are risk management costs and utilities for plant operations.

Scholarship Restoration: ($2.2 million) This request includes restoration of funding for two scholarship programs administered through the State Regents: 1.) $1.2 million will be used to restore tuition waivers for National Guard members through the National Guard Tuition Waiver Program, which were cut in previous years due to budget reductions; and 2.) $1.0 million will be used to provide teacher incentive awards through the Teacher Shortage Employment Incentive Program (TSEIP), which was cut in previous years due to budget reductions. These awards support teacher education and Oklahoma K-12 teachers in the critical shortage areas of science and math.

Strategic Innovations: ($2.1 million) The remaining operational request will be used to fund strategic initiatives, such as the following projects and programs: 1.) implementation of a system-wide predictive analytics platform to provide data-informed decisions at state system colleges and universities that promote retention strategies and student success; 2.) expansion of the number of STEM Summer Academies to engage K-12 students in STEM programs with the ultimate goal of increasing interest and enrollment in collegiate degrees in critical STEM shortage areas; and 3.) competitive grants to our institutions for innovative programs and initiatives.

DEFERRED MAINTENANCE and INFRASTRUCTURE: $5.8 million

Deferred Maintenance and Infrastructure: ($5.8 million) The request of $5.8 million is needed for campus infrastructure improvements, laboratory and equipment upgrades, and required deferred maintenance projects to ensure the health and safety of students and faculty as well as the enhancement of the Section 13 Offset Program. Our system institutions are prioritizing deferred maintenance projects and additional funding will allow them to address these needed capital upgrades.

CONCURRENT ENROLLMENT PROGRAM: $7.0 million

Concurrent Enrollment Tuition Waiver Program: ($7.0 million) The Concurrent Enrollment Tuition Waiver Program currently provides tuition waivers to qualified high school students enrolled in college coursework during their senior year. The high school senior concurrent enrollment tuition waivers are currently funded at 100 percent, allowing for the program to be expanded to cover concurrent enrollment tuition waivers for qualified high school juniors for a maximum of nine hours.

The request of $7.0 million will provide the estimated funding needed to support the student participation generated by the addition of high school juniors to the concurrent enrollment tuition waiver program.

ENDOWED CHAIRS STATE MATCHING PROGRAM: $12.0 million (Bond Debt Service)

Endowed Chairs Matching Program: ($12.0 million) Funding of $12 million is requested to support the debt service for a bond issuance to cover the $160.9 million backlog of accounts awaiting state matching funds for the Endowed Chairs program. The current matching backlog includes some gifts given in 2008 and consists of endowment accounts at 18 system institutions. The disciplines represented in these accounts include medical/health fields, business, animal science, computer science, education, geophysics, law, chemistry, meteorology, fire protection science, music, arts and engineering.

The Endowed Chairs Program at the state's research universities, regional universities, and two-year colleges provides support for research activities, faculty recruitment, lecture series, cultural programming, and innovative activities. The benefits of the program include enhancing academic quality for students, the ability for participating colleges and universities to recruit outstanding new faculty, and support of research and economic development for the State.

A summary of the budget need request is provided in the following chart.

Oklahoma State Regents for Higher Education
FY2021 Budget Need

	FY21 OSRHE Budget Need
FY20 Appropriation	**$802,070,058**

FY21 Budget Need

1. STEM Workforce Development Initiatives — $50,200,000
   a. Initiatives to Meet STEM Workforce Needs - $30 million
   b. Initiatives to Meet Nursing Workforce Needs - $12 million
   c. Initiatives to Double Physician Residency Slots - $8.2 million per year for 10-year period

2. Operational Cost Increases* — $50,000,000
   a. 3.5% Faculty Pay Increases, Phase II - $20.2 million
   b. System-Wide Mandatory Cost Increases - $25.5 million
   c. Restoration of Scholarship Programs - $2.2 million
      i. National Guard Tuition Waiver Program
      ii. Teacher Shortage Employment Incentive Program
   d. Strategic Innovations - $2.1 million

3. Deferred Maintenance for Campus Infrastructure (Section 13 Offset), Phase II — $5,800,000

4. Concurrent Enrollment Tuition Waiver Program Expanded to Cover High School Juniors — $7,000,000

5. Endowed Chairs State Matching Funds Bond Authorization and Debt Service — $12,000,000 (Bond Debt Service)
   a. Endowed Chairs State Matching Funds Backlog - $160.9 million

FY21 Total Budget Need	**$927,070,058**
$ Difference from FY20 State Appropriations	$125,000,000
% Difference from FY20 State Appropriations	15.6%

*Six Year Higher Education Base Operational Funding Plan

FY21	$50,000,000
FY22	$44,800,000
FY23	$44,800,000
FY24	$44,800,000
FY25	$44,800,000
FY26	$44,800,000
Six Year Total	$274,000,000

FY22 Total Budget Need Increase - $68 million above the FY21 Total Budget Need ($44.8 million for Six-Year Base Funding Plan)
FY23 Total Budget Need Increase - $69.7 million above the FY22 Total Budget Need ($44.8 million for Six-Year Base Funding Plan)

Oklahoma State Regents for Higher Education
Endowment Program Highlights
As of September 1, 2019

- The endowment program was established to enhance the quality of higher education in Oklahoma by providing state funds as a match for private donations for endowed chairs, distinguished professorships, visiting professorships, artists-in-residence, and lectureships.

- The program has enabled colleges and universities to attract approximately $671 million in private gifts to establish endowed positions and develop meaningful public/private partnerships. To date, the state has matched approximately $510.2 million through direct allocation and bond proceeds. *Currently, there are accounts in the backlog for state matching funds totaling $160.9 million that represent 18 institutions statewide.*

- Funding to support the activity of the chairs, professorships and lectureships comes from earnings from a trust fund. For FY 2019, the State Regents approved $31.5 million as available earnings for colleges and universities to spend on their programs.

- Research clusters are one of the strongest indicators of the endowment program's effectiveness. Pediatric research clusters at the OU Health Sciences Center focus on research in cancer, diabetes, medical genetics, mental health and neonatology. Research findings from these scientists will help Oklahoma children who have serious health conditions. Other accounts awaiting state match throughout the State System include the focus areas of business, animal science, computer science, education, geophysics, law, chemistry, meteorology, fire protection science, music, arts and engineering.

- The Endowment Program at the state's regional universities and two-year colleges provide limited support of faculty salaries, lecture series, cultural programming and innovative activities such as the Ruth Steger Piano Institute and the John Massey Lectureship at Southeastern, the Mosaic Project at OCCC and the Academic Festival at Cameron.

- Significant private partnerships with our institutions have included the Kaiser Family Foundation, Mr. T. Boone Pickens, The Donald W. Reynolds Foundation, Mr. Harold Hamm, Mr. Gene Rainbolt, and Children's' Hospital Foundation, to name only a few. Every private donor has played an important part in supporting higher education and the State of Oklahoma.

- 514 Chairs, 328 Professorship and 166 Lectureships were approved and matched as of June 30, 2019, for a total of 1008 approved accounts at 27 Oklahoma higher education institutions.

- The Endowment Program was established by the State Regents in 1988, and was codified by the Oklahoma Legislature in 1989. In 2008, the statutes were modified to provide a state match of 100% for every private dollar donated up to $250,000, and then $.25 for every privately-donated dollar of $250,001 and up.

- The requirements for endowment accounts are as follows:

  o **Endowed Chairs:** Endowed chair accounts may be established at the research universities with a minimum contribution of $500,000. At other institutions, the minimum contribution is $250,000.

  o **Distinguished Professorships:** Professorships may be established at the research universities with a minimum contribution of $250,000. At other institutions, the minimum contribution is $125,000.

  o **Lectureships and Artists-in-Residence:** Lectureships and artists-in-residence accounts may be established with a minimum contribution of $25,000 at regional universities and two-year colleges.

The benefits of the program include: <u>enhancing academic quality for students; the ability to recruit outstanding new faculty; and to spur research and economic development.</u>

**OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION**

Improving our future by degrees

Performance Funding Formula

1

Funding Formula History

- **In 1988 the Oklahoma State Regents for Higher Education adopted a Standard Cost Funding Formula for allocations made for the operations of all higher education institutions.**

- **In 2006, the Council of Presidents established a funding formula task force to review and make recommended changes as needed.**

- **In 2007, the Council of Presidents unanimously voted to continue with the Standard Cost Funding Formula without any recommended changes.**
  - **The Standard Cost Funding Formula was based on peer parity both within and outside the Oklahoma system. Institutions received "peer factor" multipliers based on how well funded they were compared to their peers.**

2

Funding Formula History cont.

- **In March 2011, the Oklahoma State Regents for Higher Education requested the Council of Presidents to conducted a review of the funding formula for the express purpose of replacing the "peer factor" with a performance factor.**

- **The Council of Presidents formed a Performance Funding Formula Task Force that conducted their work from March 2011 through January 2012. Members of the task force were:**

President Cindy Ross, Chair	President John Hargrave
President Paul Sechrist	President Janet Cunningham
President Burns Hargis	President John Feaver
President David Boren	President Tom McKeon
President Jeff Hale	President Larry Rice
President Brandon Webb	

3

Funding Formula History cont.

- The Task Force made their final recommendations on the new Performance Funding Formula to the Council of Presidents on January 11, 2012. The Council of Presidents voted to adopt the task force recommendations with a vote of 22 to 3 of accepting the recommendations.

- The final recommendations were presented to the Oklahoma State Regents for Higher Education on February 29, 2012.

- The Oklahoma State Regents for Higher Education voted to accept the Performance Funding recommendations on April 19, 2012.

- The Performance Funding Formula was utilized for the first time in the FY'13 allocations to the higher education institutions.

4

Analysis and review conducted by the Performance Funding Formula Task Force

- Review of funding formula studies by SHEEO, AASCU and MGT of America
- Review of funding formula changes in other states:
  - Tennessee
  - Pennsylvania
  - Hawaii
  - Ohio
- Discussion and recognition that the use of peer factors was outdated
- Review of current funding formula:
  - Effect of peer factor on % of new dollars a school receives
  - Effect of peer factor on perceived amount of budget need a school receives
  - Effect on allocation equity among tier institutions and within the system

5

150

Analysis and review of Performance Funding Formula Task Force cont.

- Review of 2011 Legislative Bills
  - Average per student funding
  - Removal of peer factor in determining allocation
  - Removal of hold harmless budget provision
    - Amendment for base funding to equal 85% of budget need
    - Amendment for base funding to equal 75% of budget need (excluding OU and OSU)
- Conducted 20 funding formula scenarios and their fiscal impacts on the institutions
  - Removal of peer factor as a multiplier
  - Incorporating different performance measures
  - Incorporating Complete College America goals
  - Effect on continued use of standardized cost

6

Final Performance Funding Recommendations

- **Goals:**

1. Recognize the higher education needs of the state;
2. Recognize the unique roles and missions of the state;
3. Achieve equity between and among institutions;
4. Provide confidence that the formula accurately represents institutional needs;
5. Reflect actual enrollment changes at institutions;
6. Recognize that there are minimum funding needs of each institution to provide quality services to students;
7. Include an incentive and performance component;
8. Be simple and transparent

7

Final Performance Funding Recommendations cont.

- **Funding Formula changes:**

1. Peer factors based on other states' funding levels will be discontinued;
2. Performance factors will be calculated for the incentive and performance multiplier component;
3. Full credit on performance factors will be given to institutions that are eligible for equity adjustments;
4. Institutions are eligible for equity adjustments if they are below one standard deviation of their tier or system per student FTE average.
5. Each fiscal year, a minimum of ten percent of all new funds for allocation to institutions shall be set aside to go toward equity adjustments;
6. Institutions will not be penalized for deleting or discontinuing programs;
7. Institutional base budgets shall be held harmless as new funds are allocated.

8

Performance Measure Multipliers

	Year 1 (FY'13)	Year 2 (FY'14)	Year 3 (FY'15)	Year 4 (FY'16)	Year 5 (FY'17 and after)
Performance Multipliers					
1. Campus Completion Plan	0.15	0.10	0.05	0.00	0.00
2. 1 Year Retention Rates	0.05	0.05	0.05	0.05	0.05
3. Pell Grant Retention from 1st to 2nd year	0.05	0.05	0.05	0.05	0.05
4. Gateway Course Passage (24 hours)	0.10	0.10	0.10	0.10	0.10
5. Graduation Rates	0.15	0.15	0.20	0.20	0.20
6. CCA Degree Target Completion	0.10	0.15	0.15	0.15	0.15
7. Number of Certificates/Degrees Conferred	0.10	0.10	0.10	0.15	0.15
8. Program Certification	<u>0.05</u>	<u>0.05</u>	<u>0.05</u>	<u>0.05</u>	<u>0.05</u>
Total Performance Factor	0.75	0.75	0.75	0.75	0.75

9

Weight of Performance Measure Multipliers

	Year 1 (FY'13)	Year 2 (FY'14)	Year 3 (FY'15)	Year 4 (FY'16)	Year 5 (FY'17 and after)
Performance Multipliers - Weight %					
1. Campus Completion Plan	20.0%	13.3%	6.7%	0.0%	0.0%
2. 1 Year Retention Rates	6.7%	6.7%	6.7%	6.7%	6.7%
3. Pell Grant Retention from 1st to 2nd year	6.7%	6.7%	6.7%	6.7%	6.7%
4. Gateway Course Passage (24 hours)	13.3%	13.3%	13.3%	13.3%	13.3%
5. Graduation Rates	20.0%	20.0%	26.7%	26.7%	26.7%
6. CCA Degree Target Completion	13.3%	20.0%	20.0%	20.0%	20.0%
7. Number of Certificates/Degrees Conferred	13.3%	13.3%	13.3%	20.0%	20.0%
8. Program Certification	6.7%	6.7%	6.7%	6.7%	6.7%
Total Performance Factor	100.0%	100.0%	100.0%	100.0%	100.0%

10

Performance Funding Formula Allocations

- FY'13
  - Although no additional funds were appropriated for FY'13, the Oklahoma State Regents for Higher Education approved the recommendation to transfer funds from the current Brain Gain allocation to the new formula allocation.
  - $1,871,433 was allocated through the funding formula
  - $207,937 was allocated to eight institutions eligible for equity adjustments
- FY'14
  - $9,000,000 was allocated through the funding formula
  - $1,000,000 was allocated to eight institutions eligible for equity adjustments
- FY'15
  - $1 million reduction in higher education appropriation. No allocation through the funding formula.
- FY'16
  - $24.1 million (-2.44%) reduction in higher education appropriation. No allocation through the funding formula.
- FY'17
  - $154 million (-16%) reduction in higher education appropriation. No allocation through the funding formula.

Performance Funding Formula Allocations

- FY'18
  - $36.4 million (-4.5%) reduction in higher education appropriation. No allocation through the funding formula.

- FY'19
  - $7.8 million (1.02%) increase in higher education appropriation targeted for Concurrent Enrollment Waivers ($7.5 million) and State Pay Increase Plan. No allocation through the funding formula.

- FY'20
  - $25.4 million (3.3%) increase in higher education appropriation. $18.1 million allocation through the funding formula.

- FY'21
  - $31.7 million (-4.0%) reduction in higher education appropriation. No allocation through the funding formula.

12

National Recognition of Oklahoma's Higher Education Performance Funding Formula

- Southern Regional Education Board (SREB) Annual Board Meeting and Legislative Work Conference - Williamsburg, Virginia, June, 2012
- The State Higher Education Executive Officers Association (SHEEO) – Seattle, Washington, July, 2012
    – Complete College America – What is happing in the states?
- American Association of State Colleges and Universities (AASCU) Summer Council– Santa Fe, New Mexico, July 25, 2012
    – State Report
- SHEEO Policy Conference - Chicago, Illinois, August 8-10, 2012
    – Oklahoma's performance metrics and link to funding formula highlighted with Illinois model
- HCM Strategist Lab Session – Chicago, Illinois, September 11, 2012
    – Oklahoma performance funding model as a best practice in conjunction with Tennessee, Indiana, Illinois, Pennsylvania and Ohio
- Letter from Dane Linn , College Board – Letter to Governor Fallin, offering congratulations on developing the first comprehensive performance funding formula in the country.

13

OKLAHOMA STATE REGENTS
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Improving our future by degrees

Performance Funding Formula

14

OCAP

Oklahoma College Assistance Program

![OCAP logo]

Founded in 1965 as the Oklahoma Guaranteed Student Loan Program, we are the state's designated guarantor of FFELP student loans

An operating division of the Oklahoma State Regents for Higher Education (OSRHE), but we are not state appropriated

Our mission is helping Oklahoma's students overcome barriers to higher education

Student-focused Services

College Access

Financial Literacy

Student Loan Management

Comprehensive college access & outreach program

- Students

- Parents

- K-12 staff

- Higher education campuses

- Community partners

- College access professionals

Facebook.com/UCanGo2

163
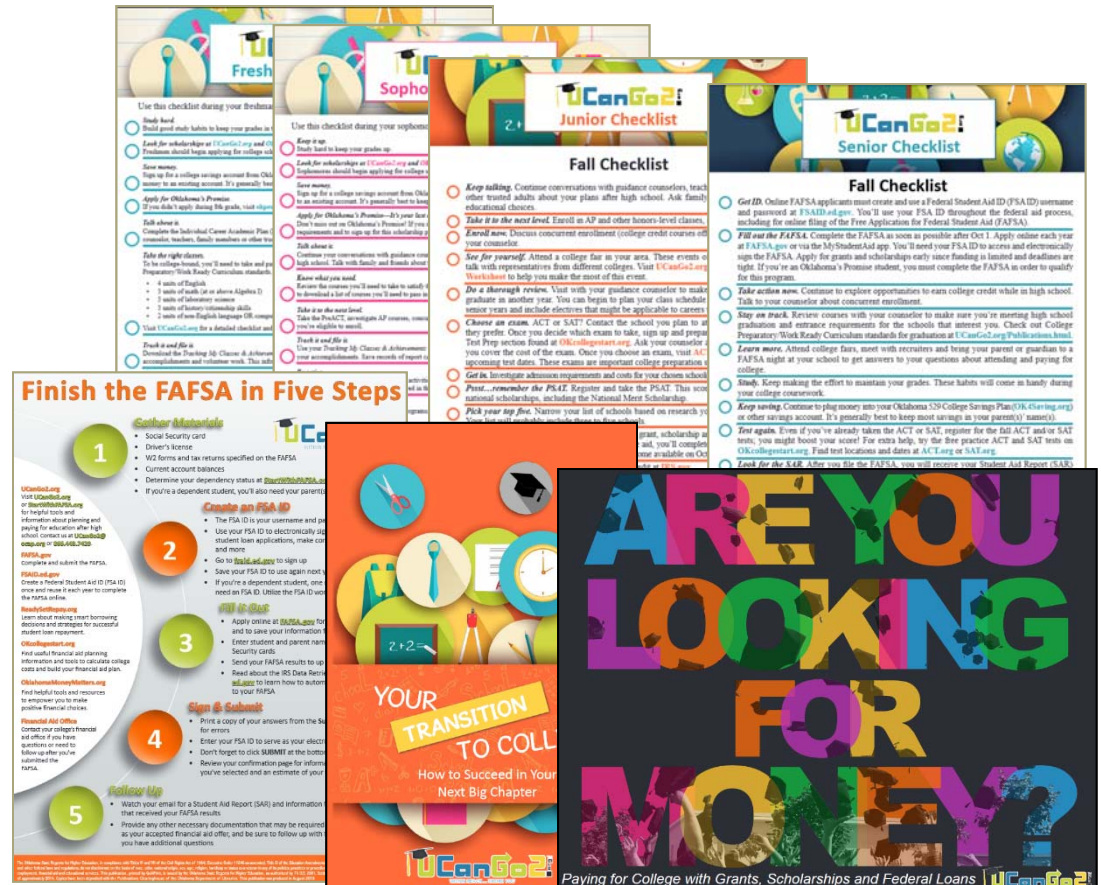
College App Week (CAW)

A national effort to increase the number of first-generation and low-income students who pursue postsecondary education.

Oklahoma College Access Network (OK-CAN)

A centralized hub for collaboration among college access professionals to strengthen efforts and leverage limited resources.

startwithfafsa.org
What you need to know about submitting the Free Application for Federal Student Aid

UCanGo2.org OCAP Oklahoma College Assistance Program OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION Improving our future by degrees

RECENT POSTS

FAFSA Homelessness Status
October 29, 2018

FAFSA Dependency Status
October 22, 2018

IRS Data Retrieval Tool
October 15, 2018

FAFSA Resources
October 8, 2018

FAFSA Now Available
October 1, 2018

CATEGORIES

Apply Online

Award Letters

Deadlines

Dependency Status

FAFSA Errors

Financial need

FSA ID

Grants and scholarships

Homeless Youth

Money Management

APPLY ONLINE, DEPENDENCY STATUS, FINANCIAL NEED, HOMELESS YOUTH, STUDENTS AND PARENTS, TYPES OF FINANCIAL AID

FAFSA HOMELESSNESS STATUS

🕐 OCTOBER 29, 2018

Are there any special instructions for homeless students who are filling out the FAFSA?

While completing your Free Application for Federal Student Aid (FAFSA), you may be asked three different questions about homelessness.

At any time on or after July 1 [in the year prior to the academic year covered by this FAFSA], did an official* determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

*This determination can be given by:

- A high school or school district homeless liaison,

Search ...

OK▸FDP **Oklahoma FAFSA Data Portal**

ucango2.org/fafsaportal.html

Email Us Your FAFSA Question!

UCanGo2@ocap.org

Connect with UCanGo2 on Facebook!

Facebook.com/UCanGo2

Watch OCAP Videos on YouTube!

YouTube.com/OkCollegeAssistance

WATCH OUR FAFSA VIDEOS

165

OKCOLLEGESTART.ORG
CLICK·COMPARE·CHOOSE

Search ＞

G SELECT LANGUAGE ▼

HOME | CAREER PLANNING | HIGH SCHOOL PLANNING | COLLEGE PLANNING | FINANCIAL AID PLANNING | YOUR PORTFOLIO

College Students

CHART YOUR COURSE THROUGH COLLEGE NOW USING FINANCIAL AID & CAREER TOOLS.

SIGN IN

USERNAME:

PASSWORD:

SIGN IN

NEW TO THIS SITE?
CREATE AN ACCOUNT

FORGOT YOUR USERNAME OR PASSWORD?

EDUCATORS SIGN IN HERE

WHO ARE YOU?

> MIDDLE SCHOOL STUDENT
> HIGH SCHOOL STUDENT
> COLLEGE STUDENT
> ADULT LEARNER
> PARENT
> EDUCATOR

QUICK LINKS

FIND WHAT YOU NEED TO PLAN & APPLY TO THE SCHOOLS OF YOUR CHOICE.
> OKLAHOMA'S PROMISE
> STATE SCHOLARSHIP PROGRAMS
> COURSES TO TAKE
> GRADES TO MAKE
> PLANNER TIMELINE
> HIGH SCHOOL PLANNER
> TEST PREP

COLLEGE CURIOUS?

Andres, Cameron Un...

WHAT DO YOU THINK?

WHAT IS THE NO. 1 FEATURE YOU LOOK FOR IN CHOOSING A COLLEGE TO ATTEND?

○ CAMPUS SIZE
○ PROGRAMS OFFERED
○ LOCATION

f Facebook.com/OKcollegestartorg

166

Comprehensive personal finance education program

- Students

- Parents

- Consumers

- K-12 staff

- Higher education campuses

- Community partners

- Employers

Twitter.com/OKMoneyMatters

Facebook.com/OklahomaMoneyMatters

167

NATIONAL AVERAGE AT 4-YEAR PUBLIC & NONPROFIT COLLEGES & UNIVERSITIES

$29,200

Connecticut
$38,669

Utah
$19,728

47% carry student debt

$25,221
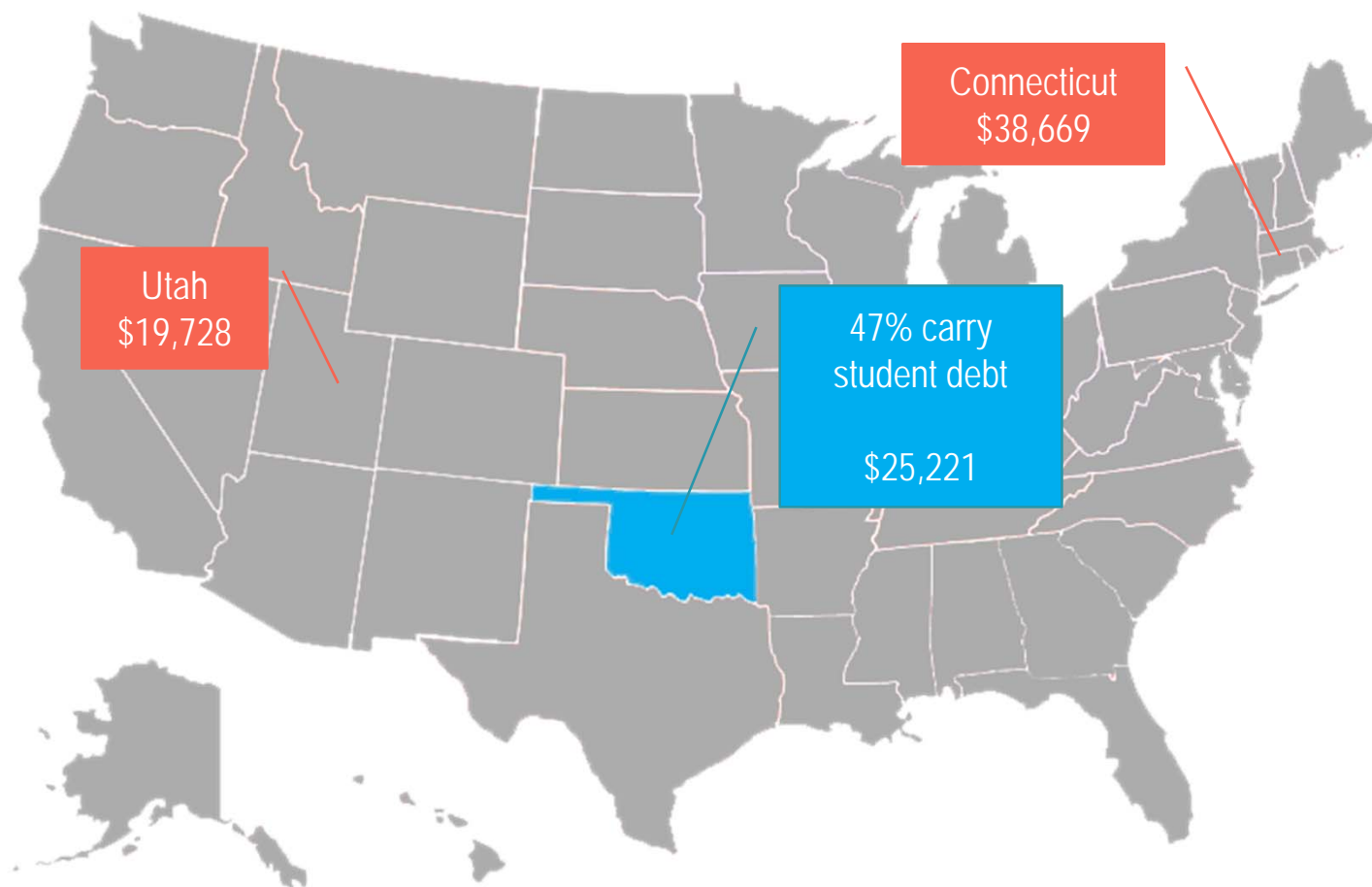
The Institute for College Access & Success: Student Debt and the Class of 2018

Key Messages

- Invest in higher education to improve your future

- Apply for grants and scholarships throughout school

- Find the loan that best meets your needs

- Consider your future starting salary when borrowing

- Limit borrowing, only accept what you need to pay college expenses

- Monitor borrowing each semester

- Calculate your future loan payment

- Pay loan interest while in school

New Regent Briefing

Keys to College Success in Oklahoma: What the Data Shows

August 2020

1

Moving the Needle On Degree Completion:
Complete College America

Academic Readiness,
Reform Remediation
Pathways to Success
Financial Aid
Engagement
Adult Degree Completion

JOB OPENINGS BY OCCUPATION AND EDUCATION LEVEL (IN THOUSANDS)

OCCUPATION	Less than high school	High school diploma	Some college/ no degree	Associate's degree	Bachelor's degree	Master's degree or better
Managerial and Professional Office	3	19	27	10	40	16
STEM	1	2	5	2	9	3
Social Sciences	0	0	0	0	1	1
Community Services and Arts						
Education						1
Healthcare Professional and Technical						
Healthcare Support						
Food and Personal Services						
Sales and Office Support	8	51	57	15	31	5
Blue Collar	24	69	36	10	10	1
TOTAL	**58**	**193**	**170**	**62**	**135**	**51**

67% of all jobs created in Oklahoma by 2020 will require some college, a long-term certificate or a college degree.

37% of all jobs created in Oklahoma by 2020 will require an associate's degree, bachelor's degree or higher.

Source: United States Bureau of Labor Statistics and the Georgetown Center for Education and Workforce Development

3

173

What is Complete College America?

CCA is an alliance of 40 states and territories dedicated to improving college completion success

It is funded by 5 of the largest foundations in the United States: Lumina, Bill and Melinda Gates Foundation, Ford Foundation, Carnegie Foundation and Kellogg Foundation

4

COMPLETE COLLEGE

AMERICA

The Oklahoma Plan

Focus On College Readiness

Transform Remediation

Strengthen Pathways to College Degrees and Certificates

Reward Performance

Increase Adult Degree Completion

Within-the-State, 10-Year Graduation Rates
for Fall, First-Time, Full-Time, Degree-Seeking Students
Who Did Not Take a Remedial Course,
Compared with those who Took a Remedial Course in the First Five Years

DRAFT
September 11, 2014

Avg 19.5% difference

Avg 19.0% difference

Avg 18.1% difference

Research - Non-Remedial Students
Research - Remedial Students
Regional - Non-Remedial Students
Regional - Remedial Students
Community - Non-Remedial Students
Community - Remedial Students
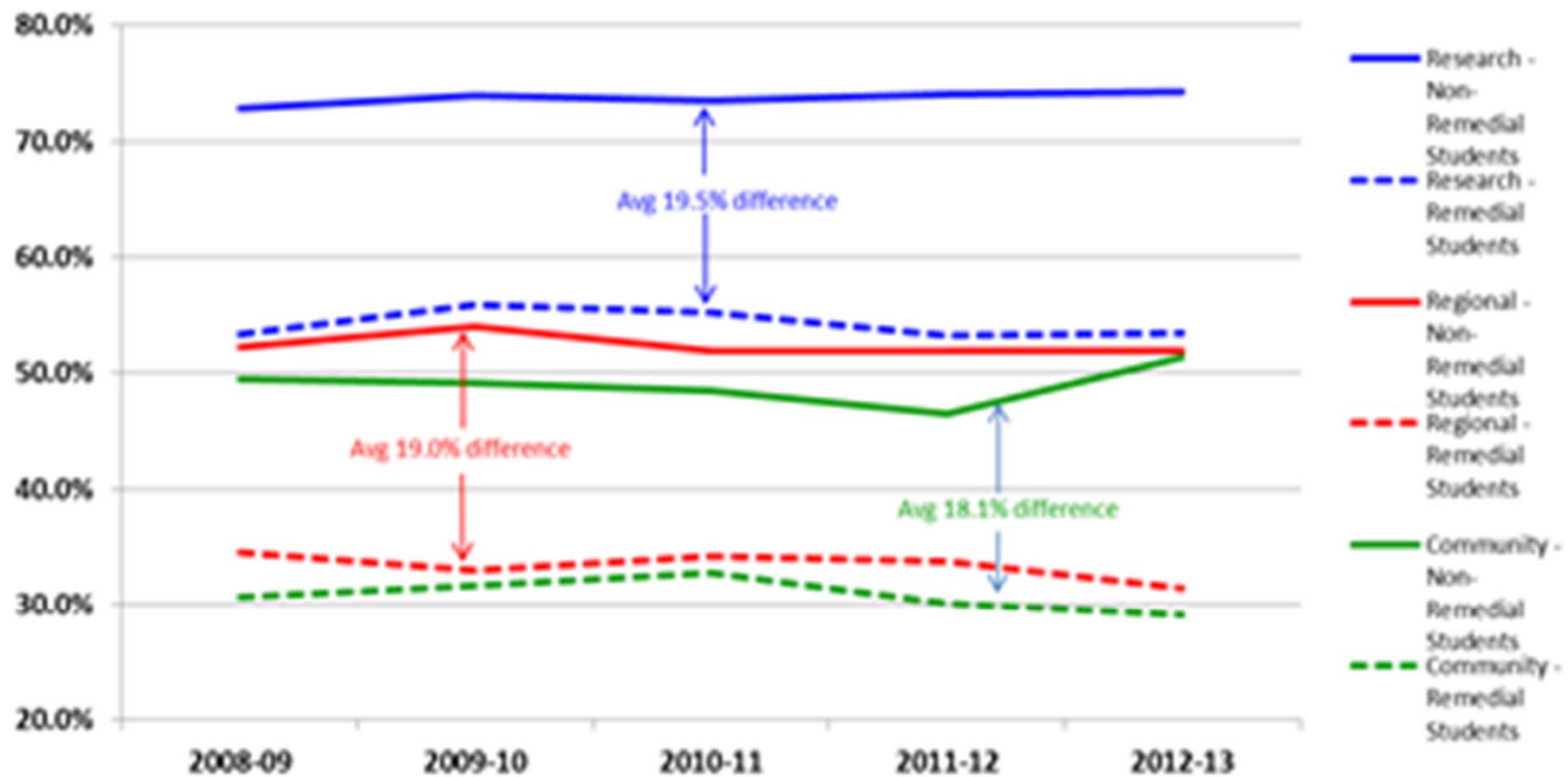
SOURCE: OSRHE UDS (OEIS.STUDENT_RECORD, ODS.STUDENT_DEGREE_AWARDED, ODS2.STUDENT_ENROLLMENT_RECORD_E)

176

Graduation Rates (within the State)
for Fall, First-Time, Full-Time, Degree-Seeking Freshmen Concurrent High School Students vs. Non-Concurrent Students

Research Universities
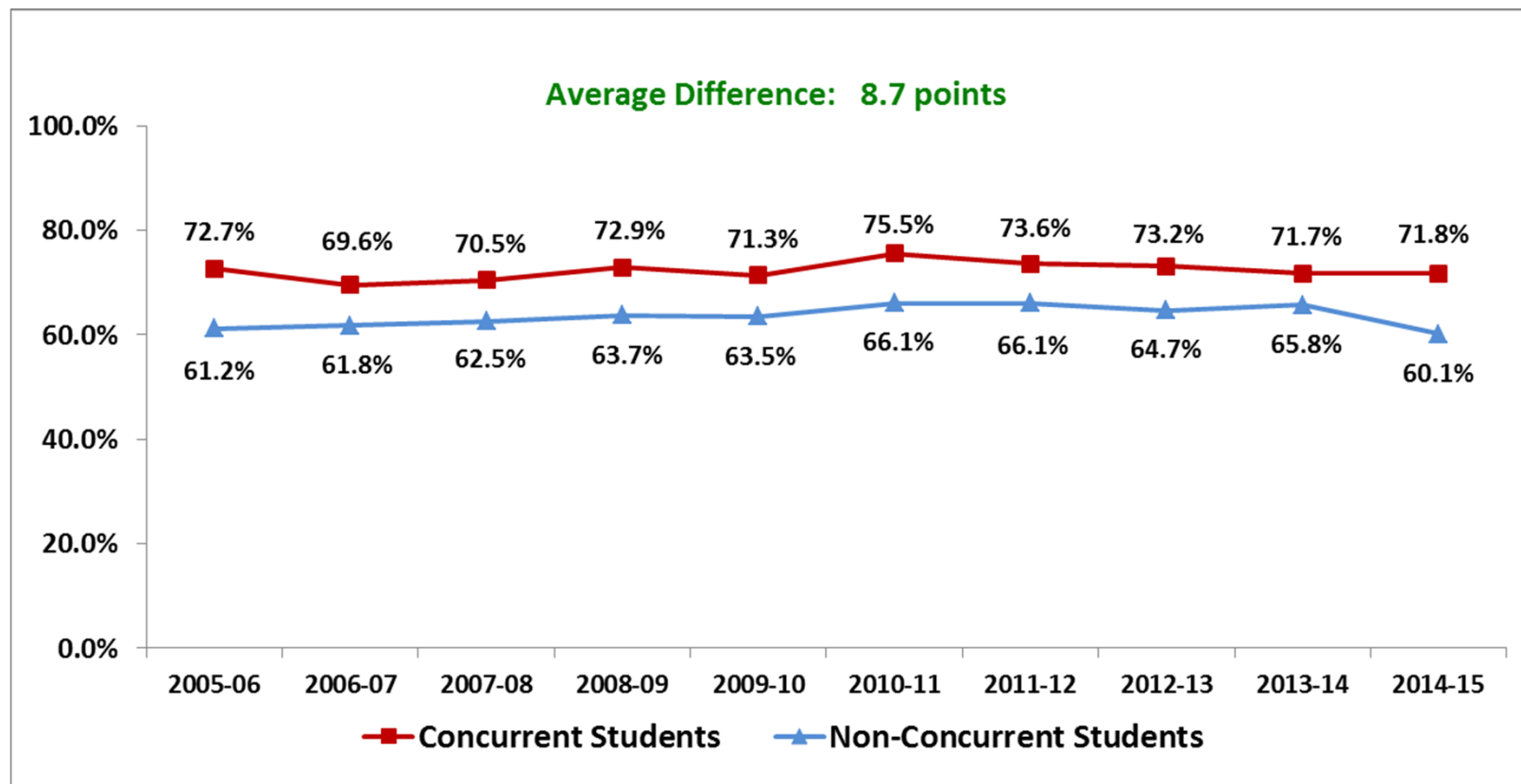
Graduation Rates (within the State)
for Fall, First-Time, Full-Time, Degree-Seeking Freshmen
Concurrent High School Students vs. Non-Concurrent Students

Regional Universities
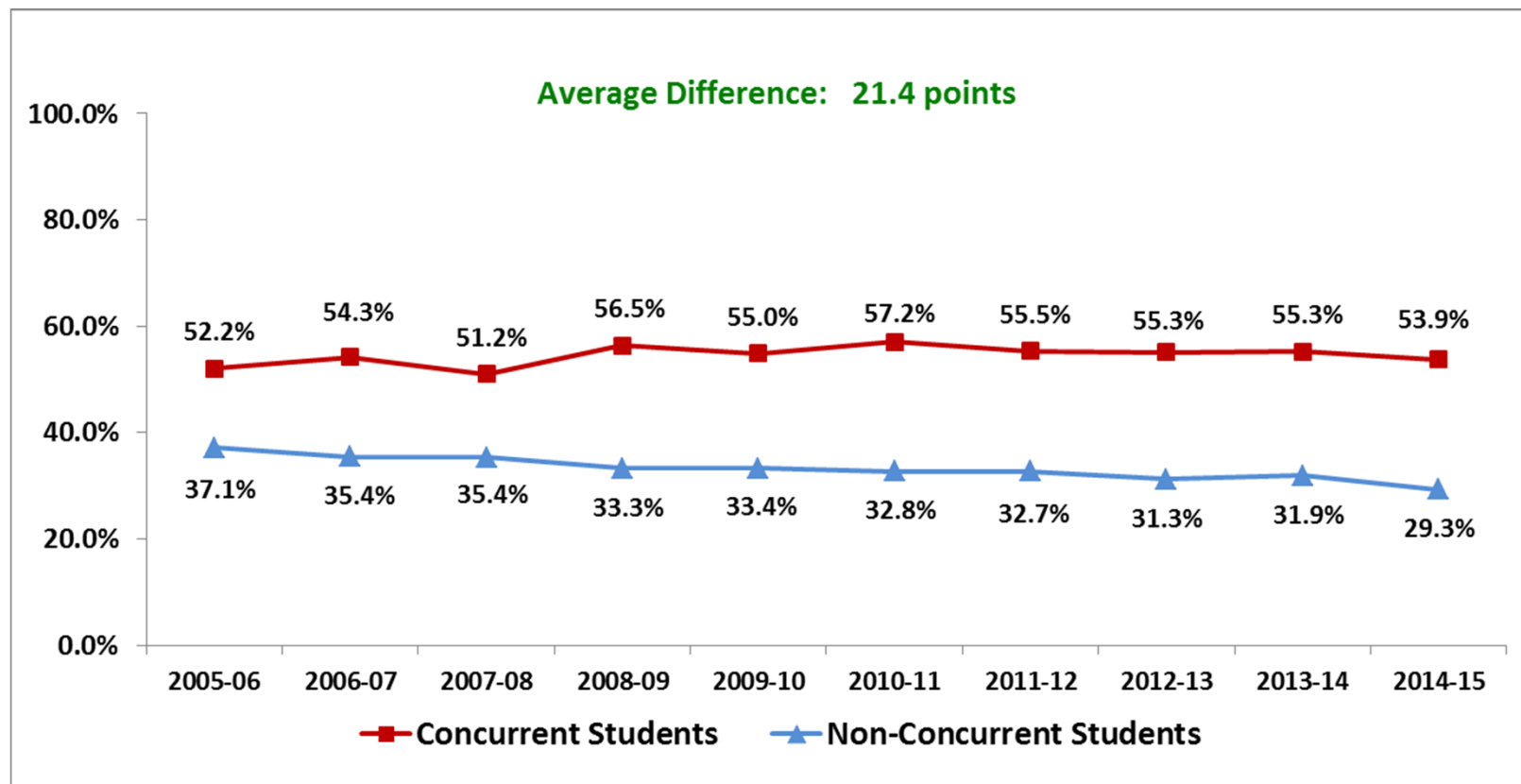
Average Difference: 21.4 points

Concurrent Students: 52.2%, 54.3%, 51.2%, 56.5%, 55.0%, 57.2%, 55.5%, 55.3%, 55.3%, 53.9%

Non-Concurrent Students: 37.1%, 35.4%, 35.4%, 33.3%, 33.4%, 32.8%, 32.7%, 31.3%, 31.9%, 29.3%

Years: 2005-06, 2006-07, 2007-08, 2008-09, 2009-10, 2010-11, 2011-12, 2012-13, 2013-14, 2014-15

Legend: Concurrent Students, Non-Concurrent Students

Graduation Rates (within the State)
for Fall, First-Time, Full-Time, Degree-Seeking Freshmen
Concurrent High School Students vs. Non-Concurrent Students

Community Colleges
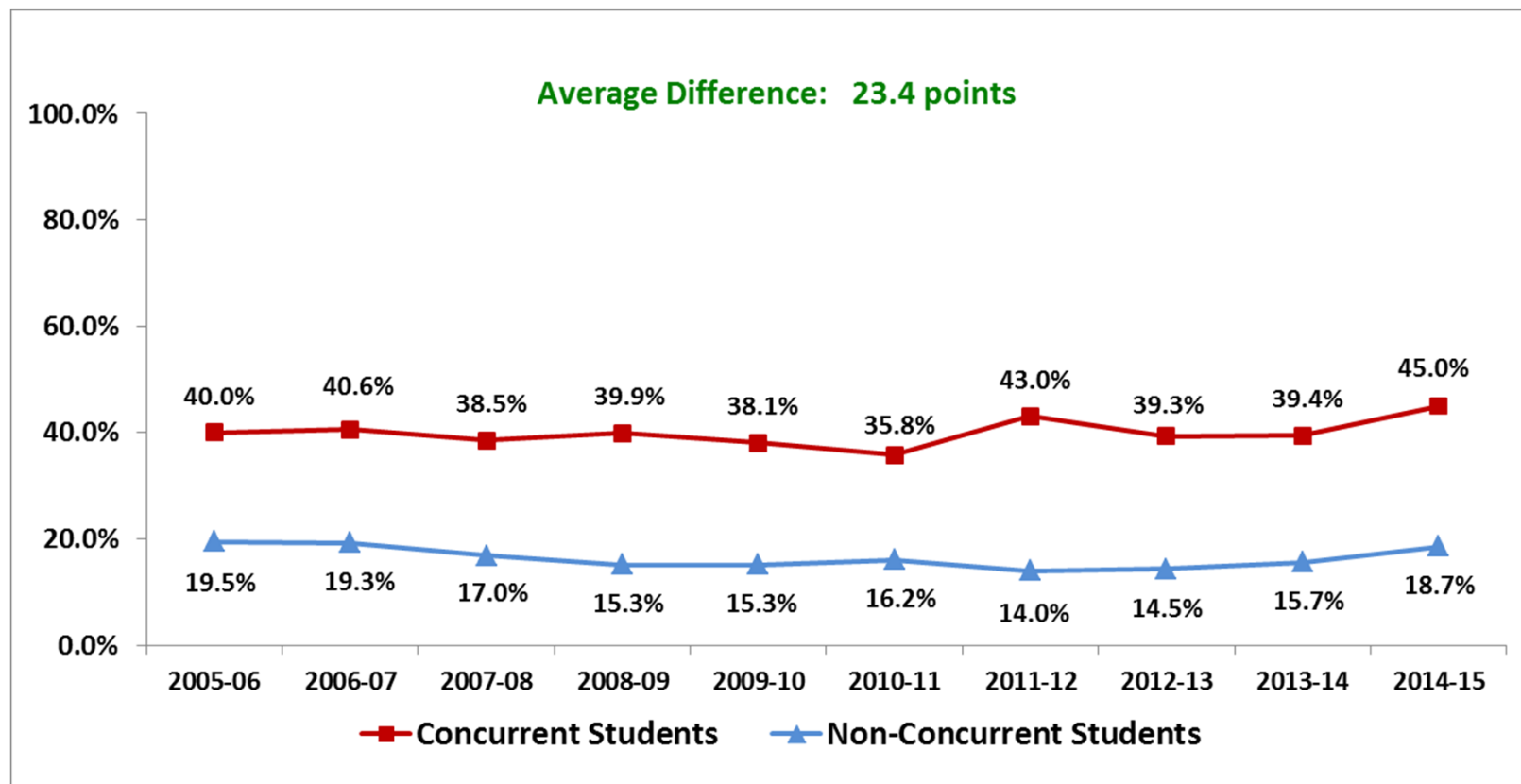
Average Difference: 23.4 points

Concurrent Students: 40.0%, 40.6%, 38.5%, 39.9%, 38.1%, 35.8%, 43.0%, 39.3%, 39.4%, 45.0%

Non-Concurrent Students: 19.5%, 19.3%, 17.0%, 15.3%, 15.3%, 16.2%, 14.0%, 14.5%, 15.7%, 18.7%

Years: 2005-06, 2006-07, 2007-08, 2008-09, 2009-10, 2010-11, 2011-12, 2012-13, 2013-14, 2014-15

Concurrent High School Students
by Race/Ethnicity
1999-2000 through 2017-2018
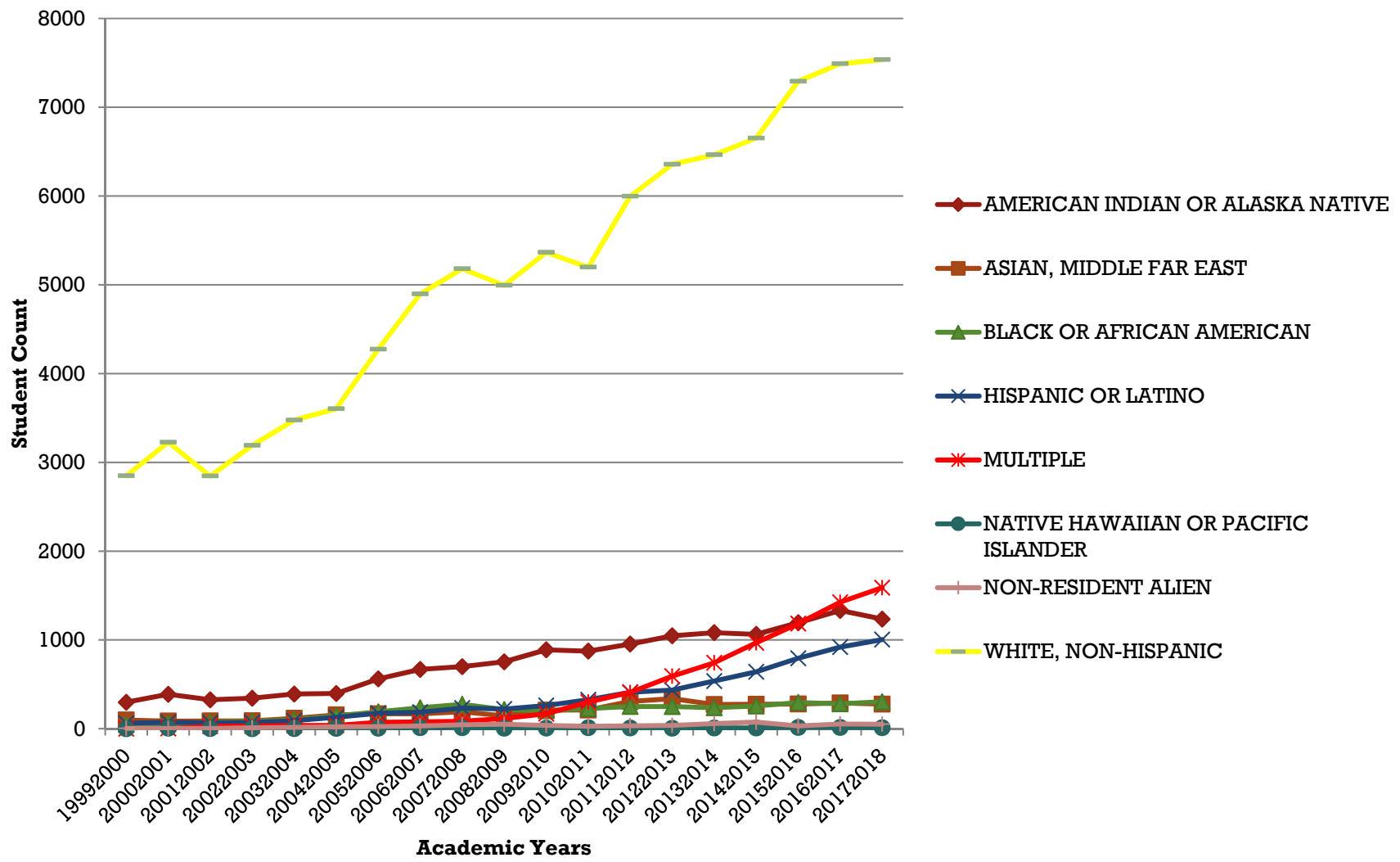
Concurrent High School Students by Race/Ethnicity 1999-2000 through 2017-2018
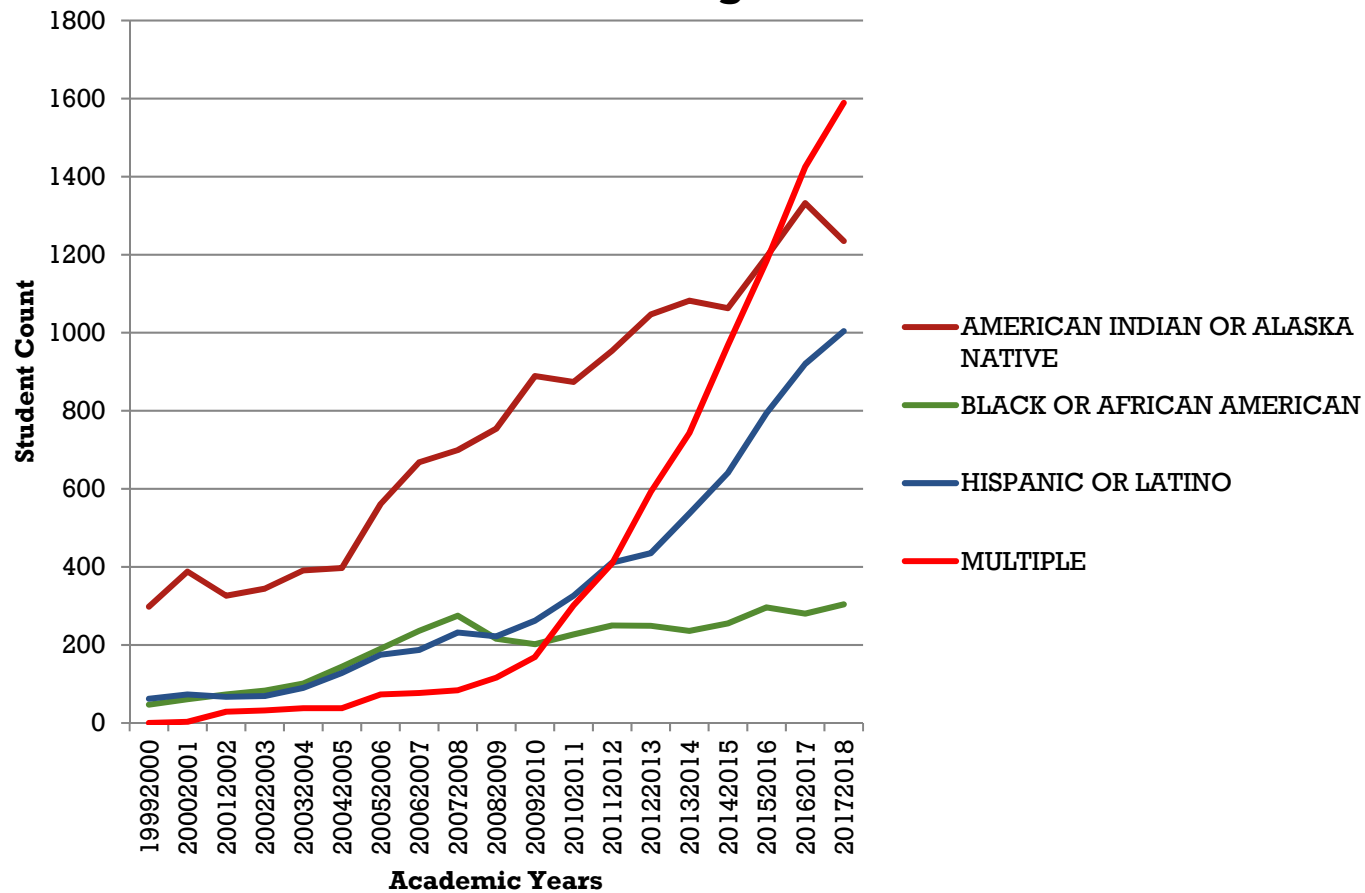
Concurrent High School Students By Gender 1999-2000 through 2017-2018

13

183

Oklahoma State Regents for Higher Education
Oklahoma Graduates Employed in Oklahoma
Average Salaries by Broad Industry View

Employed by Industry (NAICS Broad Classifications)	1 Year After Graduation	2 Year After Graduation	3 Year After Graduation	4 Year After Graduation	5 Year After Graduation
Agriculture, Forestry, & Fishing	$32,034	$32,434	$31,535	$32,627	$40,832
Construction	$38,963	$45,603	$46,754	$52,144	$54,102
Educational Services	$28,118	$30,832	$32,391	$34,362	$36,722
Finance, Insurance, & Real Estate	$34,601	$40,047	$44,538	$47,971	$59,689
Food & Accommodation Services	$14,286	$17,894	$18,579	$20,091	$21,828
Health Care & Social Assistance	$40,878	$43,464	$49,588	$50,519	$54,011
Information, Professional, Scientific, & Technical Services	$34,551	$40,736	$44,072	$47,920	$51,344
Manufacturing	$48,337	$52,782	$56,652	$61,880	$61,193
Mgmt of Companies, Admin, & Support Services	$34,838	$39,739	$41,742	$46,015	$49,289
Mining & Utilities	$67,393	$72,742	$77,526	$80,794	$84,463
Public Administration	$39,777	$42,984	$45,336	$48,003	$49,199
Transportation	$40,148	$46,563	$49,553	$50,561	$58,039
Wholesale & Retail Trade	$26,765	$31,706	$36,963	$40,093	$45,292

Oklahoma State Regents for Higher Education
In-State Graduates
Five-Year Employment Outcomes – Overview

Oklahoma State Regents for Higher Education
In-State *Engineering* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

OKLAHOMA STATE REGENTS
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Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Engineering	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections)

61.84%
$75,704

Employed by Degree Level

Degree	
Bachelor's	348
Master's	90
Associate in Arts & Science	38
Doctorate	
Associate in Applied Science	

Employed by Industry (OSRHE NAICS Classifications)

Manufacturing	126
Information, Professional..	81
Mining & Utilities	72
Unknown	52
Mgmt of Companies, Admi..	35
Wholesale & Retail Trade	29
Transportation	18
Educational Services	17
Construction	16
Public Administration	15
Finance, Insurance, & Real..	8
Food & Accommodation Se..	7
Other Services	
Health Care & Social Assis..	

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
841	692	580	535	483

Employed by Field of Study (2 Digit CIP)

Engineering

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

Manufacturing 126	Mining & Utilities 72	Mgmt of Companies, Admin, & Support	Wholesale & Retail Trade 29
Information, Professional, Scientific, & Technical Services 81	Unknown 52		

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).
Note – Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

Oklahoma State Regents for Higher Education
In-State *Education* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Education	All	All	All	All	Oklahoma Re...	All

Percent Employed in Oklahoma &
Median Annual Earnings*
(based on your filter selections)

85.61%
$33,474

Employed by Degree Level

Degree	
Bachelor's	1,023
Master's	842
Associate in Arts & Science	282
Doctorate	36

Employed by Industry (OSRHE NAICS Classifications)

Educational Services	1,605
Health Care & Social Assis...	107
Public Administration	100
Wholesale & Retail Trade	70
Information, Professional...	50
Unknown	48
Finance, Insurance, & Real...	45
Food & Accommodation Se...	39
Mgmt of Companies, Admi...	34
Manufacturing	21
Mining & Utilities	18
Construction	17
Other Services	17
Transportation	9

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
2,156	2,070	2,107	1,984	2,183

Employed by Field of Study (2 Digit CIP)

Education

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

Educational Services 1,605 | Health Care & Social | Public

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).
Note -- Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

Oklahoma State Regents for Higher Education
In-State *Health Professions* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Health Professions	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections)
83.03%
$55,654

Employed by Degree Level

Degree	
Associate in Applied Science	1,216
Bachelor's	1,064
Master's	439
First Professional	368
Associate in Arts & Science	216
Certificate	164
Doctorate	17

Employed by Industry (OSRHE NAICS Classifications)

Health Care & Social Assis..	2,196
Mgmt of Companies, Admi..	291
Educational Services	254
Public Administration	210
Wholesale & Retail Trade	147
Information, Professional..	112
Unknown	109
Finance, Insurance, & Real..	47
Manufacturing	33
Food & Accommodation Se..	29
Construction	23
Mining & Utilities	12
Transportation	12
Other Services	0

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
4,448	4,081	3,675	3,302	3,484

Employed by Field of Study (2 Digit CIP)

Health Professions

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

Health Care & Social Assistance 2,196
Mgmt of
Public

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).
Note – Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

**Developmental Education Rates by Subject for
Oklahoma Public High School Graduates
Ten Year Trend**

Academic Year	Headcount	Developmental Rates by Subject				Total Developmental Students
		Science	English	Math	Reading	
2009-2010	19,208	1.3%	19.6%	35.3%	6.0%	40.8%
2010-2011	20,500	1.1%	15.4%	31.6%	9.7%	38.0%
2011-2012	19,381	1.5%	18.9%	38.0%	7.1%	42.5%
2012-2013	19,098	1.4%	16.5%	35.3%	9.5%	39.4%
2013-2014	16,624	1.4%	15.9%	35.0%	8.2%	39.1%
2014-2015	16,796	1.1%	15.7%	35.7%	8.3%	40.1%
2015-2016	17,712	0.7%	14.8%	33.6%	9.1%	39.0%
2016-2017	17,557	0.5%	16.2%	34.7%	9.3%	40.5%
2017-2018	17,598	0.5%	17.3%	27.9%	7.4%	37.1%
2018-2019	17,309	0.2%	14.4%	26.4%	6.6%	34.6%

Decreasing Developmental Education Rates for Oklahoma Public School Graduates
10-year trend

Developmental Education Rates by Subject for Oklahoma Public High School Graduates

Decreasing Developmental Education Rates for
Oklahoma Public School Graduates
10-year trend

Developmental Education Rates by Subject for Oklahoma Public High School Graduates

Math Developmental Education Rates for Oklahoma Public High School Graduates

Developmental Education Rates by Subject for Oklahoma Public High School Graduates
Ten Year Trend

Academic Year	Headcount	Developmental Rates by Subject				Total Developmental Students
		Science	English	Math	Reading	
2009-2010	19,208	1.3%	19.6%	35.3%	6.0%	40.8%
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Oklahoma State Regents for Higher Education
Oklahoma Graduates Employed in Oklahoma
Average Salaries by Broad Industry View

Employed by Industry (NAICS Broad Classifications)	1 Year After Graduation	2 Year After Graduation	3 Year After Graduation	4 Year After Graduation	5 Year After Graduation
Agriculture, Forestry, & Fishing	$32,034	$32,434	$31,535	$32,627	**$40,832**
Construction	$38,963	$45,603	$46,754	$52,144	**$54,102**
Educational Services	$28,118	$30,832	$32,391	$34,362	**$36,722**
Finance, Insurance, & Real Estate	$34,601	$40,047	$44,538	$47,971	**$59,689**
Food & Accommodation Services	$14,286	$17,894	$18,579	$20,091	**$21,828**
Health Care & Social Assistance	$40,878	$43,464	$49,588	$50,519	**$54,011**
Information, Professional, Scientific, & Technical Services	$34,551	$40,736	$44,072	$47,920	**$51,344**
Manufacturing	$48,337	$52,782	$56,652	$61,880	**$61,193**
Mgmt of Companies, Admin, & Support Services	$34,838	$39,739	$41,742	$46,015	**$49,289**
Mining & Utilities	$67,393	$72,742	$77,526	$80,794	**$84,463**
Public Administration	$39,777	$42,984	$45,336	$48,003	**$49,199**
Transportation	$40,148	$46,563	$49,553	$50,561	**$58,039**
Wholesale & Retail Trade	$26,765	$31,706	$36,963	$40,093	**$45,292**

Oklahoma State Regents for Higher Education
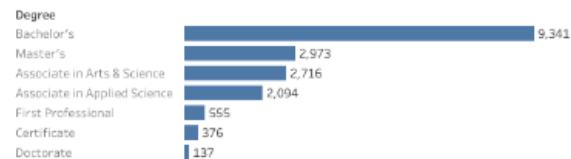## In-State Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION
Improving our future by degrees

Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
All	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections)   77.62% $43,564

Employed by Degree Level
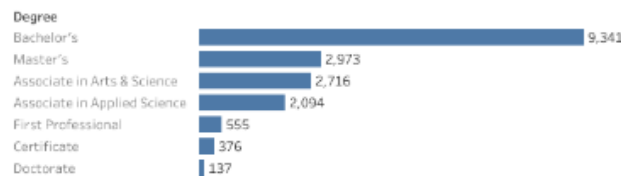
Degree	
Bachelor's	9,341
Master's	2,973
Associate in Arts & Science	2,716
Associate in Applied Science	2,094
First Professional	555
Certificate	376
Doctorate	137

Employed by Industry (OSRHE NAICS Classifications)

Industry	
Health Care & Social Assis..	3,756
Educational Services	3,386
Information, Professional..	1,806
Public Administration	1,656
Wholesale & Retail Trade	1,483
Mgmt of Companies, Admi..	1,187
Finance, Insurance, & Real..	1,028
Unknown	935
Manufacturing	771
Mining & Utilities	732
Food & Accommodation Se..	480
Construction	390
Other Services	282
Transportation	267

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
22,995	20,634	19,428	18,024	18,192

Employed by Field of Study (2 Digit CIP)

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).

Note -- Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

Oklahoma State Regents for Higher Education
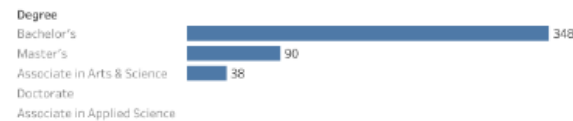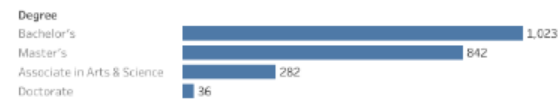## In-State *Engineering* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Engineering	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections)   61.84% $75,704

Employed by Degree Level

Degree	
Bachelor's	348
Master's	90
Associate in Arts & Science	38
Doctorate	
Associate in Applied Science	

Employed by Industry (OSRHE NAICS Classifications)

Manufacturing	126
Information, Professional..	81
Mining & Utilities	72
Unknown	52
Mgmt of Companies, Admi..	35
Wholesale & Retail Trade	29
Transportation	18
Educational Services	17
Construction	16
Public Administration	15
Finance, Insurance, & Real..	8
Food & Accommodation Se..	7
Other Services	
Health Care & Social Assis..	

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
841	692	580	535	483

Employed by Field of Study (2 Digit CIP)

Engineering

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

| Manufacturing 126 | Mining & Utilities 72 | Mgmt of Companies, Admin, & Support | Wholesale & Retail Trade 29 |
| Information, Professional, Scientific, & Technical Services 81 | Unknown 52 | | |

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).

Note – Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

Oklahoma State Regents for Higher Education
In-State *Education* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14
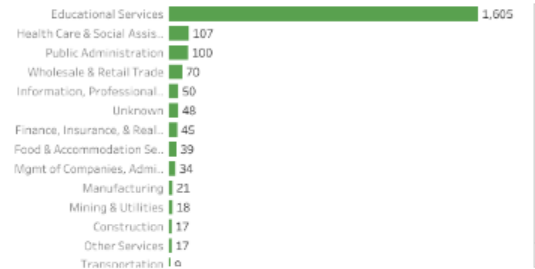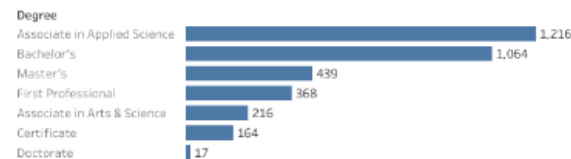
OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION
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Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Education	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections)   **85.61%**   **$33,474**

Employed by Degree Level

Degree
- Bachelor's — 1,023
- Master's — 842
- Associate in Arts & Science — 282
- Doctorate — 36

Employed by Industry (OSRHE NAICS Classifications)

- Educational Services — 1,605
- Health Care & Social Assis.. — 107
- Public Administration — 100
- Wholesale & Retail Trade — 70
- Information, Professional.. — 50
- Unknown — 48
- Finance, Insurance, & Real.. — 45
- Food & Accommodation Se.. — 39
- Mgmt of Companies, Admi.. — 34
- Manufacturing — 21
- Mining & Utilities — 18
- Construction — 17
- Other Services — 17
- Transportation — 9

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
2,156	2,070	2,107	1,984	2,183

Employed by Field of Study (2 Digit CIP)

Education

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

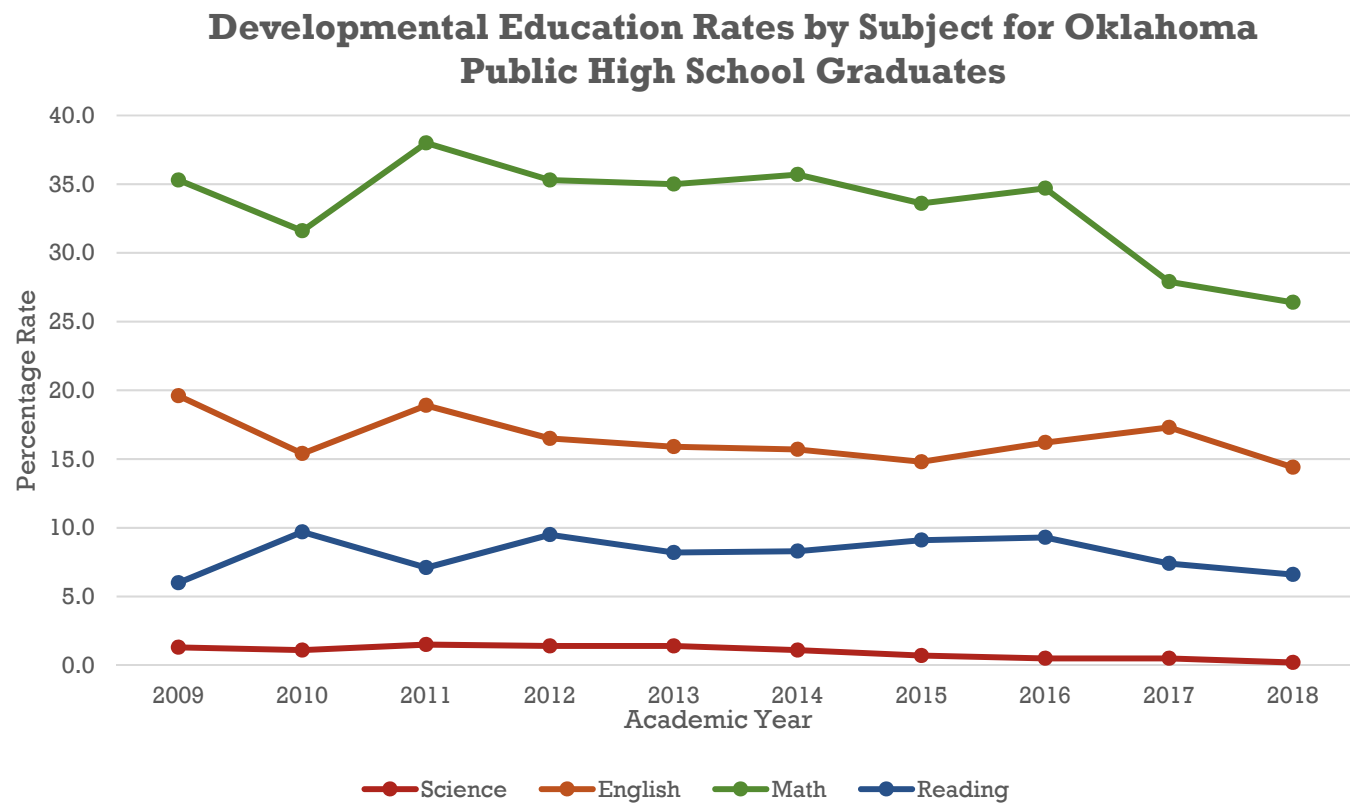Educational Services 1,605 | Health Care & Social | Public

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).
Note – Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

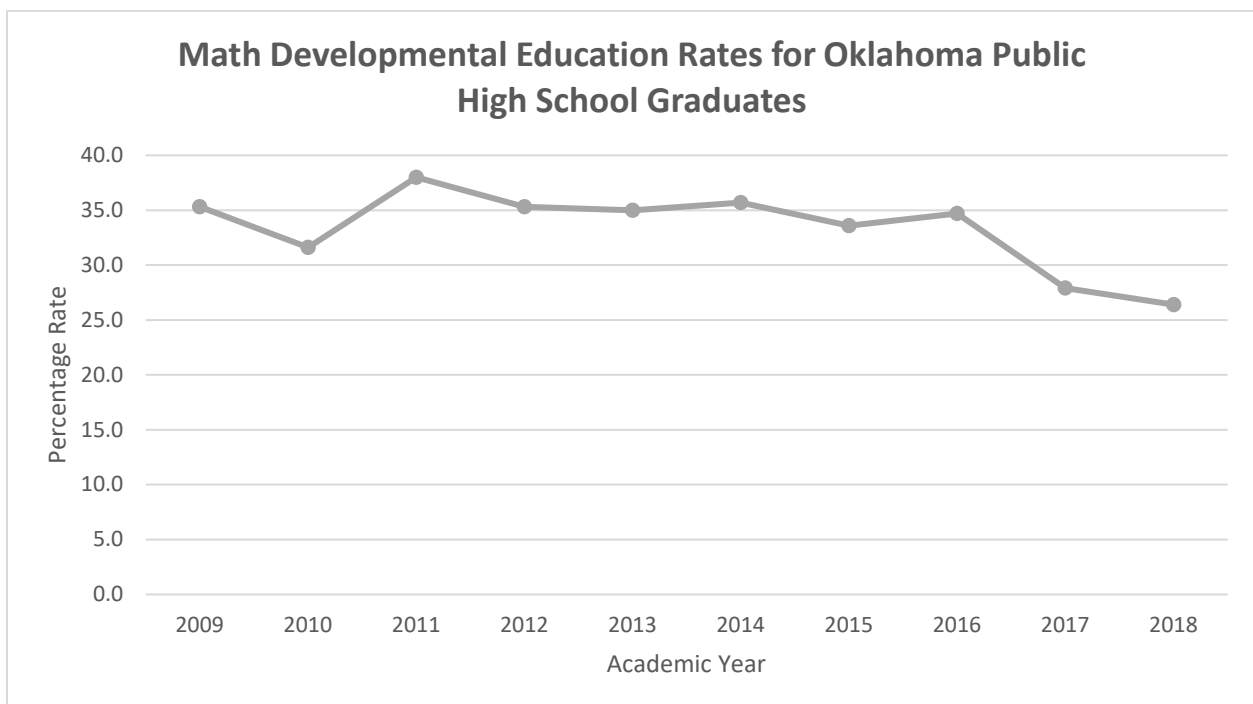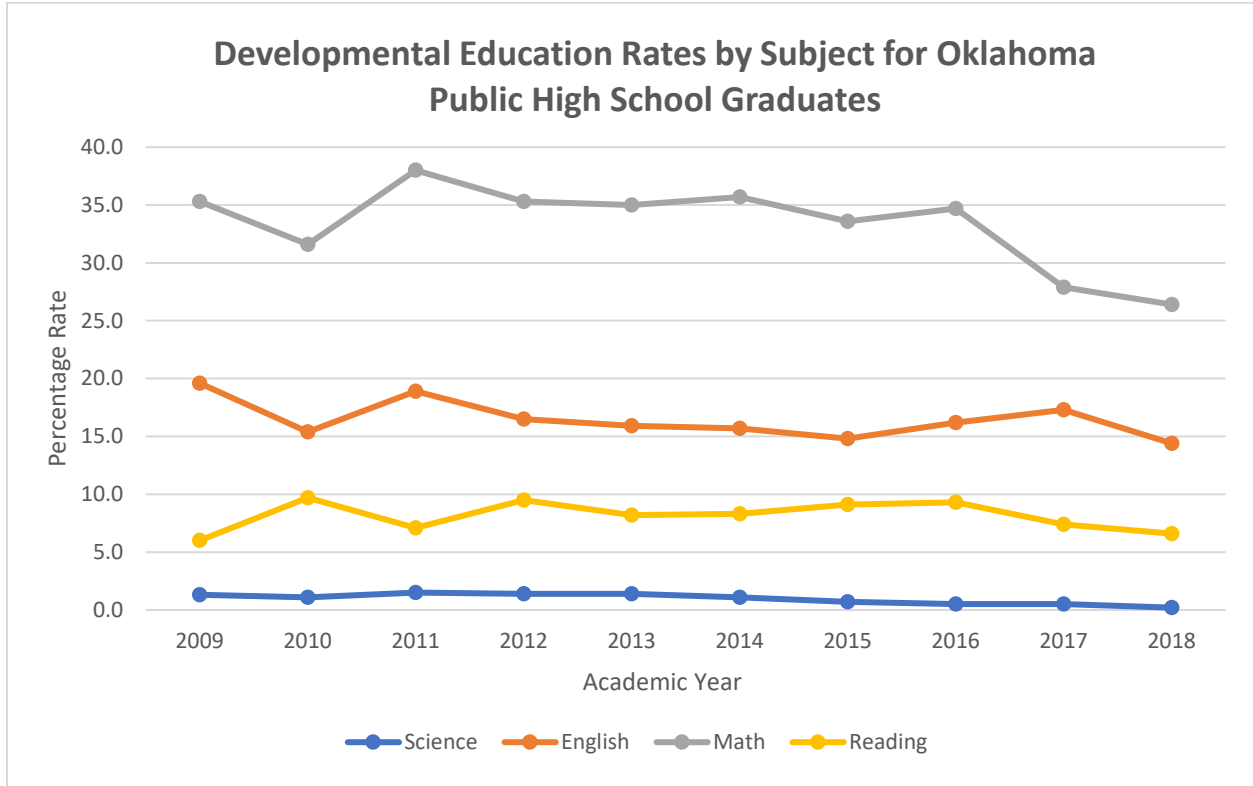OSRHE Employment Outcomes Data, February 2020

Oklahoma State Regents for Higher Education
In-State *Health Professions* Graduates
Five-Year Employment Outcomes – Overview

Statewide Employment and Median Annual Earnings by Degree Level, Field of Study, and Industry One-Five Years After Graduation for All State System Graduates 2017-18 through 2013-14

OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION
Improving our future by degrees

Field of Study (2 Digit CIP)	Institution	STEM	Service Area	Region	Resident	Public Inst.
Health Professions	All	All	All	All	Oklahoma Re..	All

Percent Employed in Oklahoma & Median Annual Earnings* (based on your filter selections) **83.03%** **$55,654**

Employed by Degree Level

Degree	
Associate in Applied Science	1,216
Bachelor's	1,064
Master's	439
First Professional	368
Associate in Arts & Science	216
Certificate	164
Doctorate	17

Employed by Industry (OSRHE NAICS Classifications)

Health Care & Social Assis..	2,196
Mgmt of Companies, Admi..	291
Educational Services	254
Public Administration	210
Wholesale & Retail Trade	147
Information, Professional..	112
Unknown	109
Finance, Insurance, & Real..	47
Manufacturing	33
Food & Accommodation Se..	29
Construction	23
Mining & Utilities	12
Transportation	12
Other Services	0

Employed (Years After Graduation)

One Year After	Two Years After	Three Years After	Four Years After	Five Years After
4,448	4,081	3,675	3,302	3,484

Employed by Field of Study (2 Digit CIP)

Health Professions

Industry Detail
(Breaks out into 6 Digit NAICS once option is selected in table above)

Health Care & Social Assistance 2,196	Mgmt of	Public

*-Median earnings information based on annualized data from second quarter 2018 through second quarter 2019 for the entire graduate range from the Oklahoma Employment Security Commission (OESC).
Note – Records found by tax with no industry or earnings information have been counted as employed, but excluded from the earnings calculation and from being categorized in the industry table.

OSRHE Employment Outcomes Data, February 2020

New Regent Orientation
October 8, 2020

Oklahoma's Promise

About the Program:

What is the purpose of the program?
Oklahoma's Promise was created by the Oklahoma Legislature in 1992 so that a "broader range of the general student population of this state will be prepared for success in postsecondary endeavors" (Title 70, Section 2602). The program is designed to encourage more Oklahoma students with limited financial resources to aspire for college, prepare themselves academically in high school, and ultimately earn college degrees. The program plays a critical part in the State Regents' goal of increasing the proportion of adults in Oklahoma that complete college degrees.

How does the program work?
The Oklahoma's Promise program offers the opportunity for Oklahoma students to earn an award to cover college tuition. Students must enroll during the 8th, 9th or 10th grade and their family income cannot exceed $55,000 at the time of enrollment [the income limit was $24,000 from 1992-93 to 1998-99; $32,000 in 1999-00; $50,000 from 2000-01 to 2016-17; $55,000 from 2017-18 to 2020-21 and is scheduled to increase to $60,000 beginning in 2021-22]. To earn the award, students must complete a 17-unit college preparatory core curriculum with at least a 2.5 GPA, and achieve an overall GPA of at least 2.5. In addition, students must attend school regularly, stay out of serious trouble, and avoid drugs and alcohol. The student's family income must also not exceed $100,000 when the student enters college.

How much is the award?
If students complete the program requirements, they qualify for a scholarship equal to resident tuition at a public college. While the award is significant, it is not a "full ride" or equivalent to "free college." The award does not cover any fees, books or course materials, or room and board. Tuition is usually about 25 percent-30 percent of a student's total college costs. The average award in 2018-19 was about $4,300.

How well are Oklahoma's Promise students performing?
Considering many different measures of performance, Oklahoma's Promise students continue to perform well compared to their peers. For example, Oklahoma's Promise students
- have higher than average high school GPA's
- perform well on the ACT test compared to their economic peers
- have higher college-going rates than average
- need less remediation in college than average
- have higher college GPA's as freshmen than average
- enroll full-time in college at higher rates than average
- have higher persistence and degree-completion rates in college than non-Oklahoma's Promise students

1

How many Oklahoma's Promise college graduates stay in Oklahoma?
Recent data shows that Oklahoma's Promise graduates stay in Oklahoma at rates higher than all Oklahoma resident graduates as a whole. For example, after one year 89 percent of Oklahoma' Promise graduates remained in Oklahoma compared to 88 percent of all resident graduates. After two years, the rate was 87 percent compared to 84 percent; and after three years, the rate was 84 percent to 81 percent.

How is the program funded?
In 2007, the Governor and the Oklahoma Legislature created a unique funding process for Oklahoma's Promise to ensure that the program remains fully funded each year. Funds are set aside by the state Board of Equalization prior to the beginning of the legislative session. The amount is based on estimates provided to the Board by the Oklahoma State Regents by November 1 of each year.

Oklahoma's Promise Cost Projections
The variables that impact the projected cost of the program include the enrollment rates of 8th-10th grade students, rates at which students complete the high school requirements, persistence/retention rates of students in college and the rate of annual tuition increases.

The State Regents approved the following cost projections for fiscal years 2013-2020:

> FY2013 - $63.0 million for an estimated 20,100 recipients.
> FY2014 - $62.7 million for an estimated 19,300 recipients.
> FY2015 - $61.0 million for an estimated 18,300 recipients.
> FY2016 - $61.7 million for an estimated 17,550 recipients.
> FY2017 - $67.8 million for an estimated 18,000 recipients.
> FY2018 - $74.3 million for an estimated 18,000 recipients.
> FY2019 - $76.8 million for an estimated 17,900 recipients.
> FY2020 - $77.3 million for an estimated 17,100 recipients.
> FY2021 - $72.4 million for an estimated 16,000 recipients.

Background and History:

1996 – Oklahoma's Promise (originally called OHLAP for the Oklahoma Higher Learning Access Program), students graduating from high school in 1996 were the first students to receive the scholarship. A total of 636 students completed the program requirements in high school and were eligible for the scholarship in 1996-97. Of these, 470 or 74 percent actually received scholarships in 1996-97. Within three years a total of 520 or 82% had received the scholarship.

2007 - Program Passes $100 Million Milestone: At the end of the 2006-07 school year, the Oklahoma's Promise scholarship program passed the $100 million mark for the total amount of scholarships paid to students since the first awards were made in 1996. In the eleven years between 1996 and 2007, nearly 22,000 students received $102 million. **Legislature Makes Significant Changes**: During the 2007 legislative session, the Oklahoma Legislature made several important changes to the program that were implemented over the next several years. The changes included:

2

- A dedicated source of funding beginning in 2008-09.
- A second family income check requirement that was to be applied to students who began college in 2009-10 and thereafter.
- A new unique minimum college GPA requirement that was to be applied to students beginning college in 2009-10 and thereafter.
- A new college conduct requirement that became effective January 1, 2008.
- A new requirement that students be U.S. citizens or lawfully present in the United States to receive the scholarship in college. Students enrolling in the program in 2007-08 and thereafter were subject to this new requirement.
- Eligibility for homeschool students to participate in the program.

2008 Legislative Changes: The 2008 Oklahoma Legislature approved several changes to the program including the following:
- Delayed implementation of a new second income limit for one year until 2010-11. For first time award recipients in 2010-11, the income of the student's parents could not exceed $100,000 at the time the student began college.
- Delayed the new college GPA requirements for one year and slightly modified the requirements. Based on the new law, students receiving the award for the first time in 2010-11 were subject to a minimum college GPA of 2.0 for courses taken through the sophomore year and a minimum 2.5 GPA for courses taken during the junior year and thereafter.
- Expanded income eligibility for certain students adopted from permanent state custody or other specified custody circumstances.
- Increased the flexibility for students in the military to begin using the program award after high school graduation.
- The Legislature also created a task force to examine the program's income requirements and college award-retention requirements to make recommendations to the Legislature for consideration in 2009.

2009 Legislative Changes: The 2009 Oklahoma Legislature approved two changes to the program:
- The Legislature delayed implementation of a new second income limit until from 2010-11 to 2012-13. For first time award recipients in 2012-13, the income of the student's parents could not exceed $100,000 at the time the student started college. This second income limit was in addition to the $50,000 limit applied at the time the student enrolled in the program in the 8th, 9th, or 10th grade. The two-year delay ensured that the new second income limit did not apply to any students for whom it was not a requirement at the time the student enrolled in the program.
- The Legislature also clarified that the amount of the Oklahoma's Promise award that a student would receive at a four-year state college or university would be based on the "nonguaranteed" tuition rate. In fall 2008, four-year state colleges and universities began offering "guaranteed" tuition rates that remain unchanged for four years if the student met certain conditions. However, the price of the "guaranteed" tuition rate for a freshman student was up to 15 percent higher than the "nonguaranteed" tuition rate. Oklahoma's Promise students could choose to participate in the "guaranteed" tuition rate but were responsible for paying the difference in cost out of their own pocket.

3

2010 Oklahoma's Promise Program. In 2010 the Oklahoma's Promise Program reported that over 19,400 college students received awards at a cost of $53.2 million. Since the program's inception in 1992, nearly 39,000 students had received awards totaling $247 million.

2011 Legislative Changes. In 2011-12, the State Regents adopted several rule changes as prescribed by the Legislature to address the following issues:

- Second Family Income Check When Oklahoma's Promise Students Begin College
  Beginning with the 2012 high school graduating class, Oklahoma's Promise students became subject to a second family income check at the time the student started college. If the student's family income exceeded $100,000 at that time, the student would permanently lose their eligibility for the Oklahoma's Promise award. Data from 2009 Oklahoma's Promise college freshmen indicated that about 2 percent of the freshmen students might lose their eligibility for the award due to this provision.

  a. SB 610 changed and simplified the definition of the income that was counted toward the $100,000 limit to "federal adjusted gross income." Previously, the law had defined income as all "taxable and nontaxable" income. This change significantly reduced the complexity of implementing the second income check. However, this definition change applied only to the second income check at the time the student began college. The definition of income for the $50,000 family income limit when the student initially applied for Oklahoma's Promise in the 8th, 9th, or 10th grade was not changed and remained defined as all "taxable and nontaxable" income.

  b. APA rule amendments clarified that income information submitted by students and their parents through the Free Application for Federal Student Aid (FAFSA) would be used to determine compliance with the new second income check.

- New College Grade Point Average (GPA) Requirements
  a. Oklahoma's Promise students starting college in Fall 2012 and each year thereafter were subject to new statutory GPA standards that required the student to "achieve a minimum cumulative grade point average of 2.0 on a 4.0 scale or its equivalent for courses taken through the student's sophomore year and achieve a minimum grade point average of 2.5 on a 4.0 scale or its equivalent for courses taken during the student's junior year and thereafter" (Title 70, Section 2603 of the Oklahoma Statutes).

  b. The rule revisions reflected an amendment in SB 610 to delay the implementation of new college GPA requirements so that they would apply to students entering college in 2012 and thereafter. This statutory change was requested by the State Regents so that the requirements would not be applied to students/parents for whom it was not a condition at the time the student enrolled in the program in the 8th, 9th, or 10th grade.

  c. Students who did not have at least a 2.0 cumulative GPA upon the completion of 60 earned semester credit hours would permanently lose their eligibility for the Oklahoma's Promise award. 2009-2010 data indicated that possibly 10 percent of Oklahoma's Promise college sophomores might be disqualified.

4

d. Students were also required to achieve at least a 2.5 cumulative GPA calculated only on courses taken after the completion of 60 earned semester credit hours. If the student's GPA for these courses dropped below 2.5, the student would lose eligibility for the award until they raised their GPA to 2.5. Data compiled from 2009-2010 Oklahoma's Promise award recipients indicated that possibly 18 percent of college juniors in the program might be disqualified.

- Federal "Satisfactory Academic Progress" (SAP) Standards
  a. HB 1421 required that, beginning in 2012-2013, all Oklahoma's Promise college students (not just entering freshmen) meet the "satisfactory academic progress" (SAP) standards required for the retention of federal student financial aid. Federal SAP policy contained both GPA requirements and minimum standards for completing courses in which the student enrolled. This requirement was in addition to the statutory GPA requirement discussed above and applied to all Oklahoma's Promise award recipients whether or not they were also receiving federal student financial aid. Any Oklahoma's Promise student who was ineligible to receive federal financial aid for failure to meet institutional SAP requirements was also be ineligible to receive the Oklahoma's Promise award.

  b. If the student regained their eligibility for federal student aid, the student could also regain their eligibility for the Oklahoma's Promise award. A survey of Oklahoma colleges and universities in early 2011 indicated that possibly 3 percent of Oklahoma's Promise students might be disqualified for failure to meet the SAP standards.

- "Heroes Promise" legislation
  a. HB 1343 created a new unique category of participation in the Oklahoma Higher Learning Access Program for children of military personnel killed in the line of duty after January 1, 2000. The legislation established unique provisions for these students, including the following:

     - Allowed an eligible student up to age 21 to enroll in the program and begin receiving the benefit in college.
     - Exempted eligible students from the program's family income limits, both at the time of application and at the time the student began college.
     - Exempted eligible students from the high school curricular and conduct standards.

  b. While the legislation did not actually contain the name "Heroes Promise," the author of the bill used the name in a subsequent press release and the name was used in related articles published in the state's major newspapers. The name "Heroes Promise" was also used in the text of the related APA rules adopted by the State Regents.

5

2011 Oklahoma's Promise Program High School Enrollment:
The 2011 Oklahoma's Promise high school graduating class was the first class in fifteen years to have fewer students enrolled in the program than the previous class. The enrollment of 10,251 in the class of 2011 was 68 or 0.7 percent less than the class of 2010. The 2011 class enrollment equated to about 23 percent of their high school sophomore enrollment of approximately 44,000 in 2008-2009.

Estimated Eligible Population
The $50,000 family income limit for program applicants had remained unchanged since 2000. United States census data indicated that the potential pool of eligible students in Oklahoma shrank considerably between 2000 and 2010. The percentage of Oklahoma families with incomes under $50,000 decreased from 61 percent in 2000 to 48 percent in 2010.

Assuming that about 48 percent of Oklahoma students lived in families with incomes of less than $50,000, roughly half of financially-eligible students were being enrolled in Oklahoma's Promise.

Number of Students Completing the Program's High School Requirements:
The number of students completing the program's high school requirements in 2011 decreased slightly from 2010. A total of 6,647 students from the 2011 graduating class qualified for the scholarship compared to 6,782 from the 2010 class, a decrease of 135 or 2 percent.

Projected College Enrollments:
The number of college students projected to receive the award was leveling off. For the first time in the history of the program, the number of award recipients in 2012-2013 was projected to be slightly less than the previous year. Factors reducing the number of future recipients included:

- The leveling off of enrollment of students in the 8th, 9th, and 10th grade. Without an adjustment in the $50,000 family income limit for applicants, the potential pool of eligible students would likely continue to shrink over time;
- A new second income limit beginning with 2012 high school graduates;
- New "satisfactory academic progress" standards for all Oklahoma's Promise award recipients beginning in 2012-2013; and
- New statutory college GPA requirements that went into effect for Oklahoma's Promise students entering college in Fall 2012.

Oklahoma's Promise Cost Projections:
For FY2013, the State Regents approved a funding estimate of $63 million, a slight decrease of $200,000 from the $63.2 million initially approved for FY2012.

2012 Oklahoma's Promise Program High School Enrollment. In 2012, the Oklahoma's Promise program celebrated its 20th year of serving students across Oklahoma. The 2012 Oklahoma's Promise high school graduating class enrolled 10,635 students, an increase of 383 or 4 percent from the class of 2011. The 2012 class enrollment equated to about 24 percent of its high school sophomore enrollment of approximately 44,600 in 2009-2010.

<u>Estimated Eligible Population</u>
The percentage of Oklahoma families with incomes under $50,000 decreased from 61 percent in 2000 to 46 percent in 2011. Assuming that about 46 percent of Oklahoma students live in families with incomes of less than $50,000, roughly half of financially-eligible students were being enrolled in Oklahoma's Promise.

<u>Number of Students Completing the Program's High School Requirements</u>
The number of students completing the program's high school requirements in 2012 increased slightly from the previous year. A total of 6,878 students from the 2012 graduating class completed the program's high school requirements compared to 6,647 from the 2011 class, an increase of 231 or 3 percent.

<u>Projected College Enrollments</u>
For the first time in the history of the program, the number of award recipients in 2011-2012 was less than the prior year. In 2012-2013, the number of recipients was projected to be almost 400 or 2 percent less than 2011-2012. A further drop of another 350 recipients was projected for 2013-2014.

2015 Legislative Changes. SB 137 (Sen. Corey Brooks / Rep. Lee Denney) authorized the exclusion of social security benefits due to death or disability of the parent and nontaxable military benefits from counting toward the $50,000 income limit.

2017 Legislative Changes:

SB 529 (Sen. Smalley / Rep. Henke) – made the following significant changes to the Oklahoma's Promise program:

- <u>The family income limit at the time of application in the 8th-10th grade was increased to $55,000 AGI; later to $60,000</u>: The previous $50,000 limit had not been adjusted since 2000. The increase to $55,000 (based on Adjusted Gross Income – AGI – rather than the previous definition of "total taxable and nontaxable income") was effective for 8th-10th grade students applying in 2017-18 and thereafter. The bill further adjusted the income limit to $60,000 beginning in 2021-22.

- <u>The second income limit would be checked each year in college beginning in 2018-19</u>: Previously, the second income limit at $100,000 was checked only one time when the student started college. Under the new change, for any year the student's family income was above $100,000, the student would not be eligible for the award that year. The change would apply to <u>all</u> OKPromise college students beginning in 2018-19, not just incoming freshmen.

- <u>Elimination of payment for noncredit remedial courses in college beginning in 2018-19</u>: Many colleges were already in the process of reforming remediation to reduce or eliminate the use of noncredit courses. In addition, many high school seniors were expected to have

access to College Career Math Ready courses to help address math remediation needs while the students are still in high school.

- More postsecondary career technology certificate programs were authorized: Previously, only courses at career technology centers that qualified for college credit through a cooperative agreement with a state college were eligible to be paid for by the scholarship. With the change, all career technology center programs that are eligible to participate in federal financial aid programs would be eligible for use of the OKPromise scholarship. This change was consistent with the use of other state and federal financial aid (federal Pell grants, Oklahoma Tuition Aid Grant – OTAG, etc). The change was effective July 1, 2017.

- Cap on the number of credit hours paid in college: The bill required the State Regents to set a limit on the number of credit hours for which the scholarship will pay in college. The State Regents set the limit through the administrative procedures process during 2017-18 and the limit went into effect in 2018-19. The State Regents set a general limit of 129 credit hours with exceptions for degree programs that require more than 129 credit hours. The new limit applied to high school graduates of 2018 and thereafter.

- Scholarship academic retention requirements: To maximize degree-completion in college, the scholarship retention/GPA requirements were aligned with college academic retention and degree-completion standards. The unique statutory college GPA requirement was repealed. This change was effective July 1, 2017.

Figure 36
% Graduates Earning OK Promise
2017 Graduates

Cimarron 18.5%	
Texas 11.0%	
Beaver 6.5%	
Harper 23.3%	
Woods 7.2%	
Alfalfa 15.4%	
Grant 14.9%	
Kay 10.0%	
Osage 13.9%	
Washington 13.3%	
Nowata 12.7%	
Craig 18.5%	
Ottawa 11.2%	
Woodward 8.1%	
Major 10.6%	
Garfield 11.2%	
Noble 11.4%	
Pawnee 17.1%	
Rogers 12.7%	
Mayes 13.4%	
Delaware 16.6%	
Ellis 16.3%	
Dewey 20.5%	
Blaine 17.4%	
Kingfisher 19.2%	
Logan 11.6%	
Payne 10.8%	
Creek 13.3%	
Tulsa 8.5%	
Wagoner 10.2%	
Cherokee 20.6%	
Adair 21.0%	
Roger Mills 13.4%	
Custer 17.1%	
Canadian 9.4%	
Oklahoma 14.7%	
Lincoln 13.8%	
Okmulgee 22.1%	
Muskogee 14.1%	
Sequoyah 18.6%	
Beckham 11.0%	
Washita 17.6%	
Caddo 16.2%	
Cleveland 11.3%	
Pottawatomie 12.9%	
Okfuskee 25.8%	
McIntosh 16.5%	
Haskell 17.1%	
Greer 20.0%	
Kiowa 17.4%	
Grady 12.1%	
McClain 16.3%	
Seminole 18.4%	
Hughes 21.0%	
Pittsburg 17.4%	
Latimer 22.9%	
Le Flore 17.2%	
Harmon NA	
Jackson 12.1%	
Comanche 10.4%	
Garvin 17.7%	
Pontotoc 14.0%	
Coal 20.8%	
Pushmataha 26.5%	
Tillman 20.9%	
Cotton 21.4%	
Stephens 14.6%	
Murray 15.9%	
Johnston 15.2%	
Atoka 31.9%	
Jefferson 22.2%	
Carter 11.7%	
Love 18.8%	
Marshall 19.0%	
Bryan 20.2%	
Choctaw 18.8%	
McCurtain 21.1%	

6.5%
12.1%
16.3%
18.9%
31.9%
State Average: 13.3%

Source: Oklahoma State Regents for Higher Education, Oklahoma State Department of Education

Office of Educational Quality and Accountability – Profiles 2017 State Report – Page 32

OKLAHOMA'S
PROMISE
OKLAHOMA HIGHER LEARNING ACCESS PROGRAM

2018-19 Year End Report

HIGHLIGHTS:

- For the seventh year in a row, the percentage of high school students enrolled in Oklahoma's Promise who complete the program's high school requirements increased, rising from 65% in 2012 to nearly 75% in 2019, the highest level in the history of the program.

- Due in large part to legislative reforms passed in 2017, the number of scholarship recipients and the amount of scholarship expenditures decreased significantly from 2017-18 to 2018-19. The number of recipients declined by about 1,400 or 8% while scholarship expenditures dropped by almost $4 million or 5%. The primary reforms that became effective in 2018-19 included elimination of award payments for non-credit remedial courses and checking of the $100,000 second income limit each year the student is in college.

Recent History of Program Scholarship Expenditures

Year	Cost (in $millions)	Scholarship Recipients
2012-13 actual	$60.8	19,637
2013-14 actual	$61.2	18,924
2014-15 actual	$63.9	18,895
2015-16 actual	$65.0	18,224
2016-17 actual	$68.3	17,749
2017-18 actual	$72.2	17,359
2018-19 actual	$68.4	15,935

Date Issued: 2/27/2020

REPORT CONTENTS   Page

Oklahoma's Promise High School Enrollment (as of 1/14/2020):

High School Graduation Year	Students Enrolled in OKPromise		Students Completing OKPromise	% of Students Completing OKPromise
1996	1,610		636	39.5%
1997	492		257	52.2%
1998	650		370	56.9%
1999	1,057		631	59.7%
2000	1,362		828	60.8%
2001	1,442		884	61.3%
2002	2,418	+	1,624	67.2%
2003	5,882	^	4,216	71.7%
2004	7,187		5,051	70.3%
2005	7,753		5,365	69.2%
2006	8,179		5,673	69.4%
2007	9,527		6,322	66.4%
2008	9,854		6,576	66.7%
2009	9,894		6,470	65.4%
2010	10,315		6,782	65.7%
2011	10,252		6,647	64.8%
2012	10,635		6,878	64.7%
2013	9,987		6,530	65.4%
2014	9,640		6,398	66.4%
2015	8,946		6,145	68.7%
2016	8,529		6,075	71.2%
2017	8,324		5,978	71.8%
2018	8,190		6,054	73.9%
2019	7,962		5,945	74.7%
2020	8,017	#@		
2021	7,439	#		
2022	4,232	*		
2023	2,144	*		
2024	513	*		
Total Enrollment	182,432			

+   During the 1999-2000 school year when the seniors of 2002 were 10th graders, the income limit was increased from $24,000 to $32,000.

^   During the 2000-2001 school year when the seniors of 2003 were 10th graders, the income limit was increased from $32,000 to $50,000.

@   During the 2017-2018 school year when the seniors of 2020 were 10th graders, the income limit was increased from $50,000 to $55,000 AGI.

\#   The enrollment for 2020 & 2021 may increase as some pending incomplete applications are processed.

*   The class of 2022 (10th grade), 2023 (9th grade) and 2024 (8th grade) are still open to enrollment in the 2019-2020 school year.

3

OKPromise High School Enrollment
(By High School Graduation Year)

Year	Enrollment
2009	9,894
2010	10,315
2011	10,252
2012	10,635
2013	9,987
2014	9,640
2015	8,946
2016	8,529
2017	8,324
2018	8,190
2019	7,962
2020	8,500 (Projected)

$50,000 Limit

$55,000 Limit

As of 1/14/2020

High School Requirement Completion Rates
(by grad year)

Year	Completion Rate
2009	65.4%
2010	65.7%
2011	64.8%
2012	64.7%
2013	65.4%
2014	66.4%
2015	68.7%
2016	71.2%
2017	71.8%
2018	73.9%
2019	74.7%
2020	75.0% (Projected)

As of 1/14/2020

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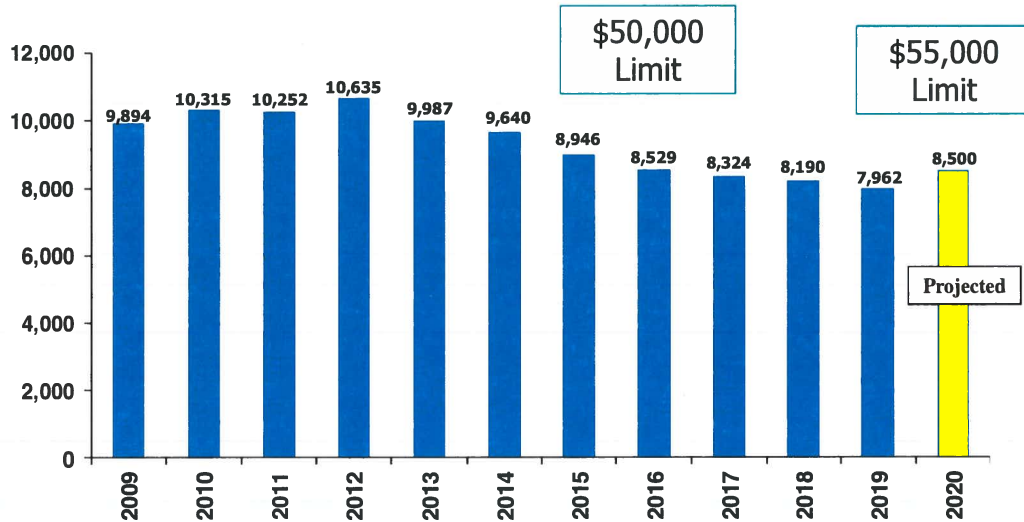
High School Students Completing OKPromise Requirements

(by Grad Year)
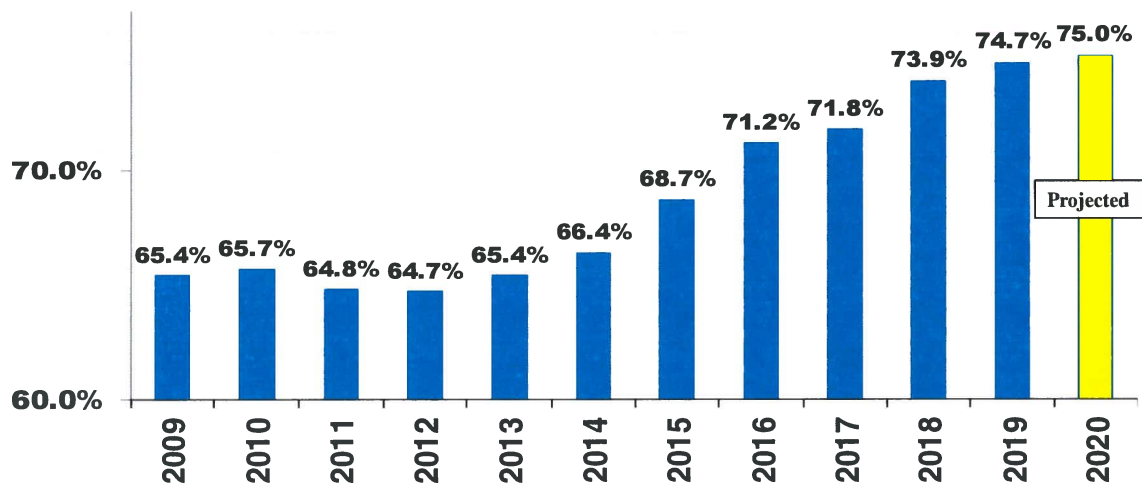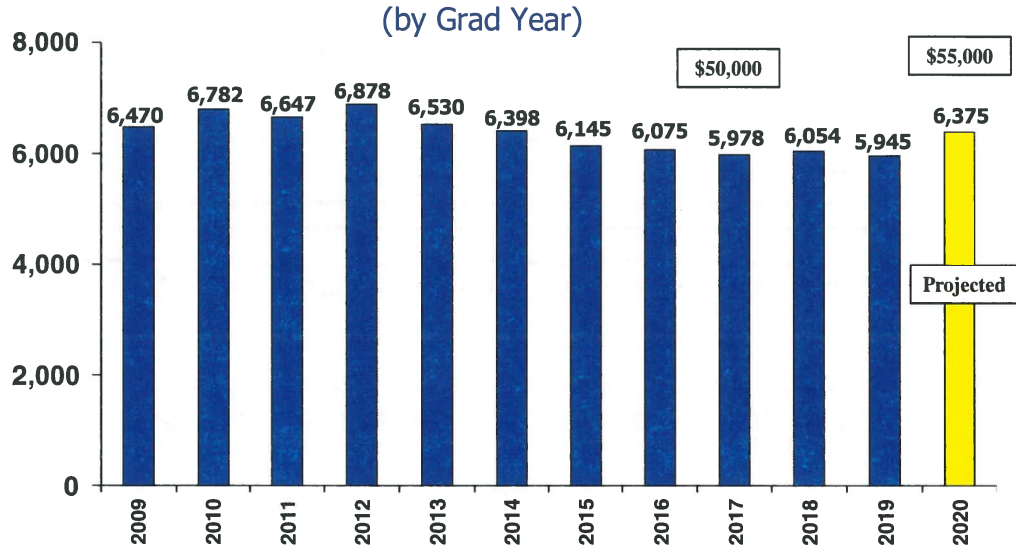
As of 1/14/2020

Geographic Distribution Trends
OKPromise High School Grads, 2011-2019
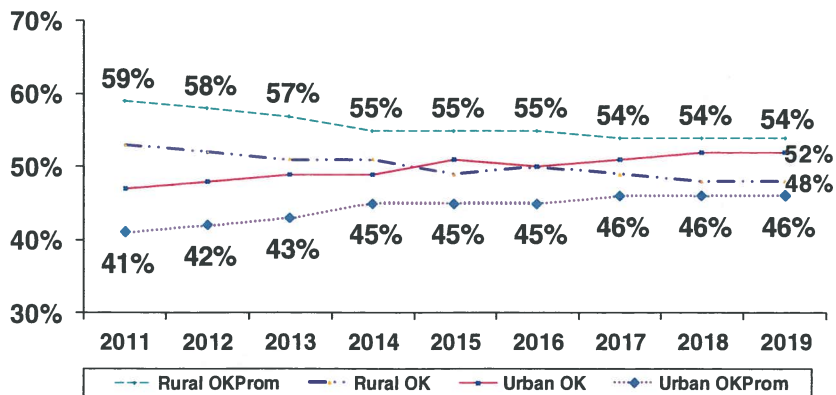
"Urban" is defined as the 5 most populous counties – Oklahoma, Tulsa, Cleveland Canadian, and Comanche.

Gender Trends
OKPromise High School Grads, 2010-2019

OK H.S. Seniors: 50% Female, 50% Male

Female

| 60% | 60% | 58% | 60% | 59% | 60% | 60% | 59% | 59% | 59% |

| 40% | 40% | 42% | 40% | 41% | 40% | 40% | 41% | 41% | 41% |

Male

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

····· Female — · Male
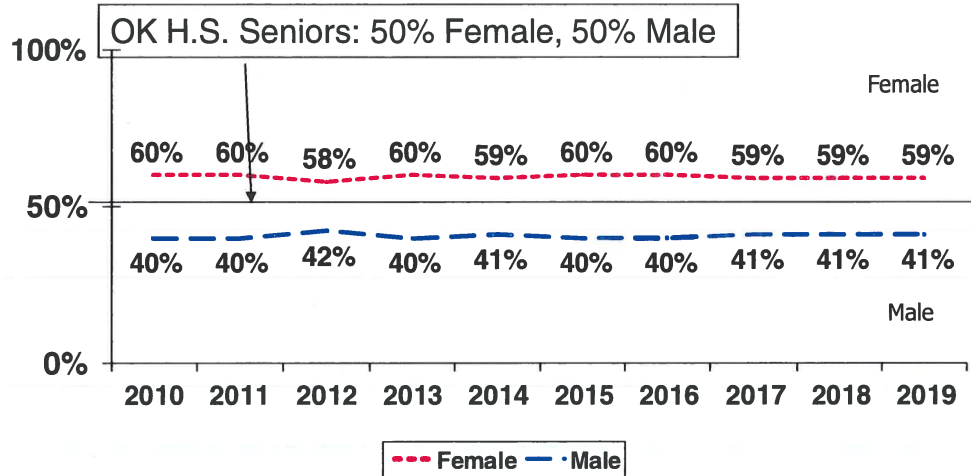
Ethnicity – 2019 HS Completers

Ethnicity	OKPromise	All HS Seniors
White	41%	52%
Amer. Ind.	14%	15%
Black	9%	9%
Hispanic	15%	14%
Asian	4%	2%
Multi-racial	7%	7%
Other/n/a	10%	1%

■ OKPromise ▦ All HS Seniors

High School GPA's

OKPromise Overall GPA

3.39 3.37 3.38 3.40 3.41 3.41 3.43 3.44 3.45 3.45

OKPromise Core GPA

3.27 3.26 3.28 3.30 3.31 3.31 3.33 3.34 3.34 3.34

All OK Seniors Overall GPA

3.00 3.01 3.02 3.05 3.07 3.07 3.08 3.10 3.10

'10 '11 '12 '13 '14 '15 '16 '17 '18 '19

— OKPromise-Overall   ····· OKPromise-Core   –·– All OK Seniors

2019 ACT Composite Scores

20.1   19.1

■ OKPromise   ■ Non-OKPromise
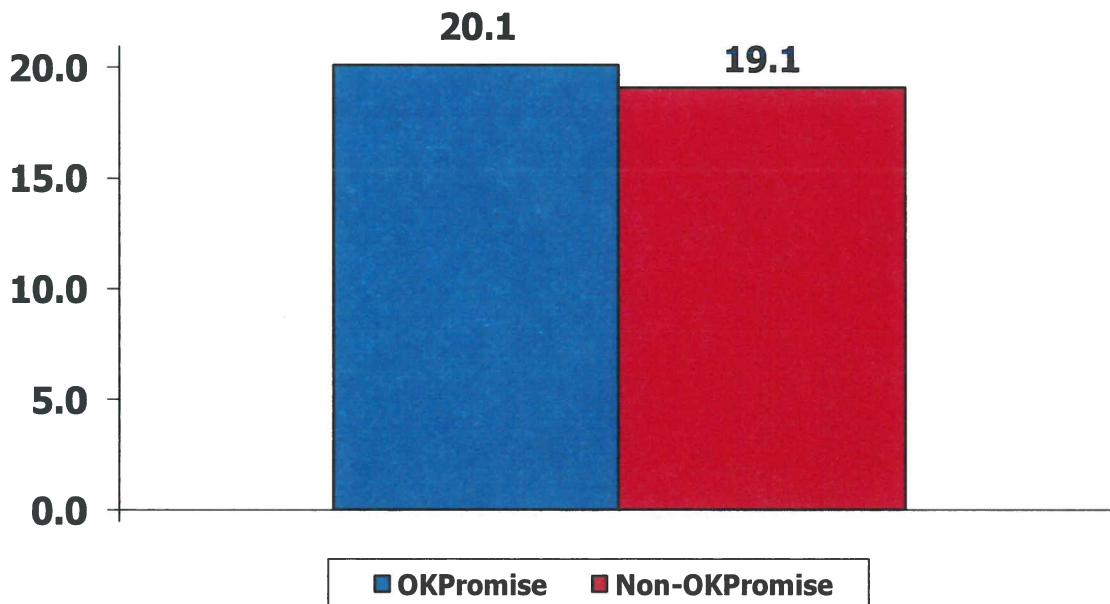
College-Going Rates
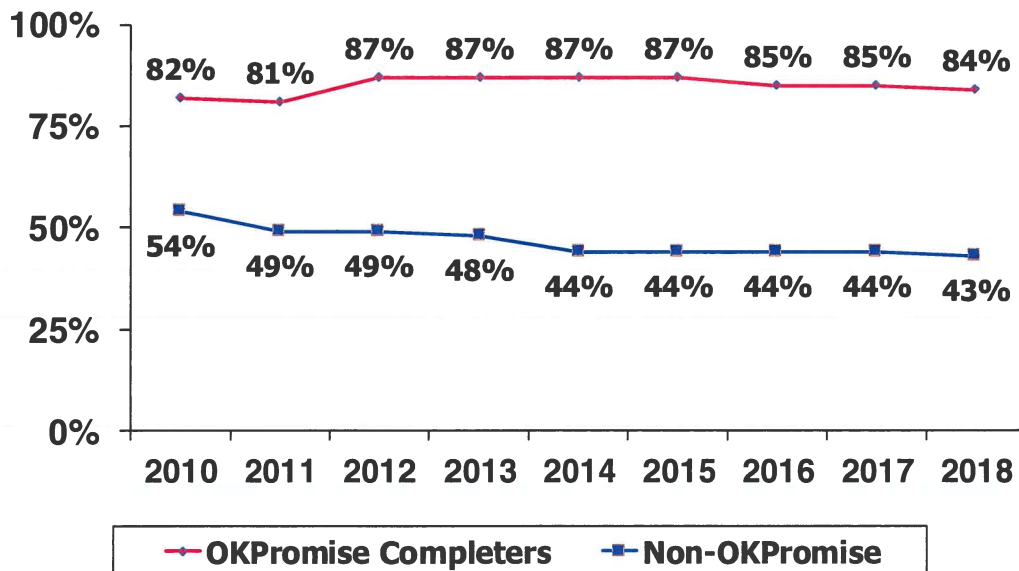
College Remediation Rates
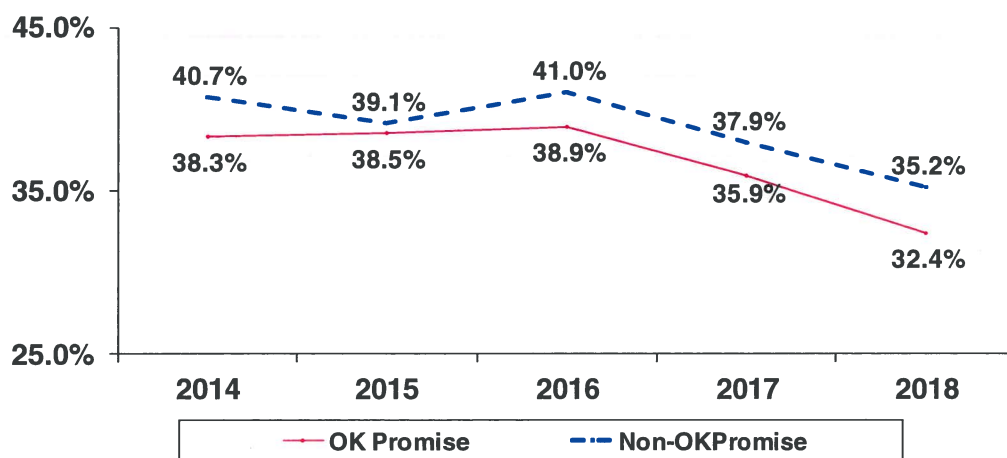
% of OKPromise Recipients Eligible for Federal Pell Grants
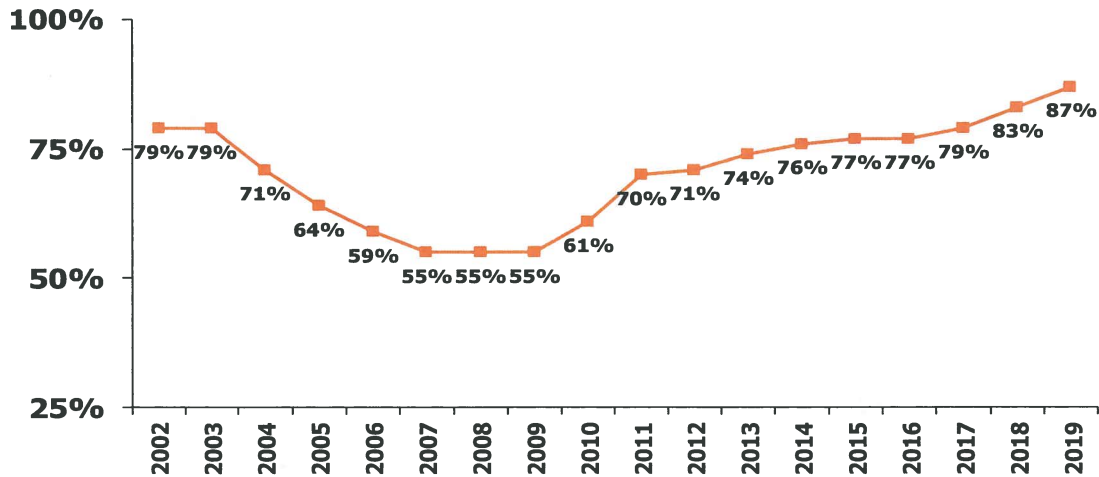
College Freshman – GPA of at least 2.0
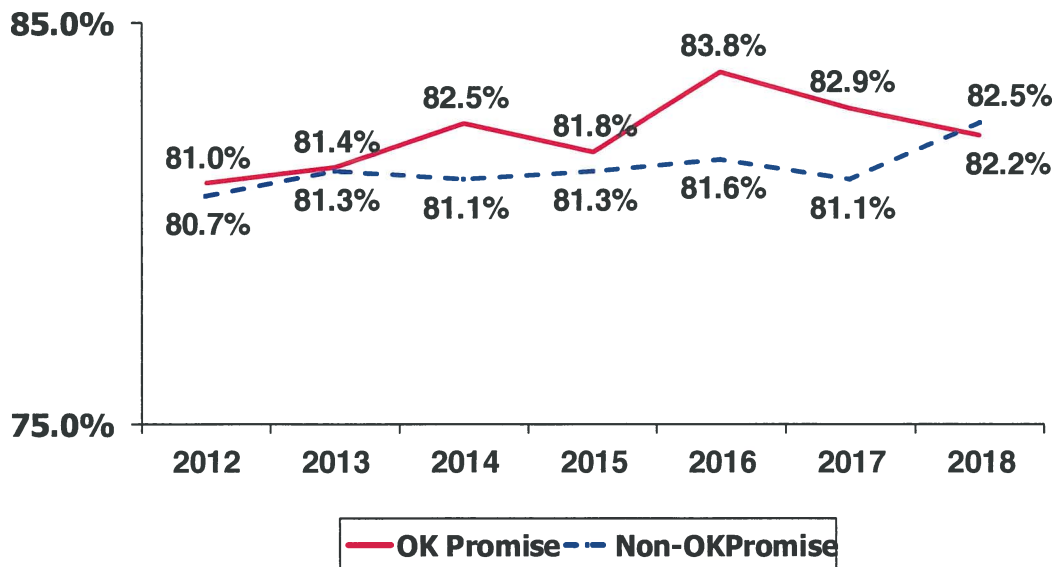
Percentages calculated based on students with GPA reported to UDS.

College Freshman to Sophomore Persistence Rates

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
OKPromise	84%	82%	83%	81%	81%	82%	81%	82%	81%	80%
Non-OKPromise Students	74%	71%	71%	70%	71%	72%	74%	74%	74%	72%

―― OKPromise ―・― Non-OKPromise Students
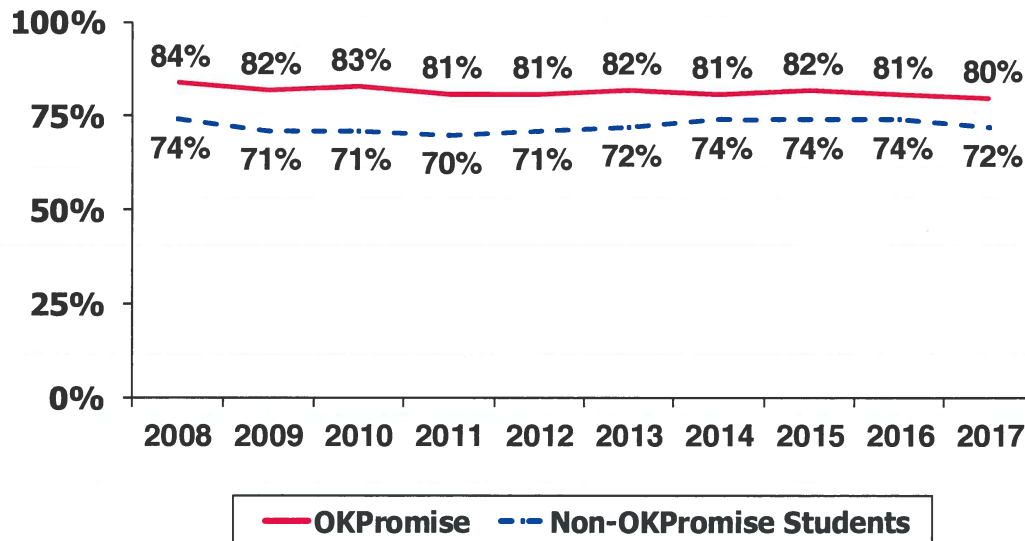
Full-Time College Enrollment

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
OK-Promise	95%	94%	94%	94%	94%	93%	93%
Non-OKPromise	86%	85%	87%	88%	87%	85%	85%

―― OK-Promise ―・― Non-OKPromise
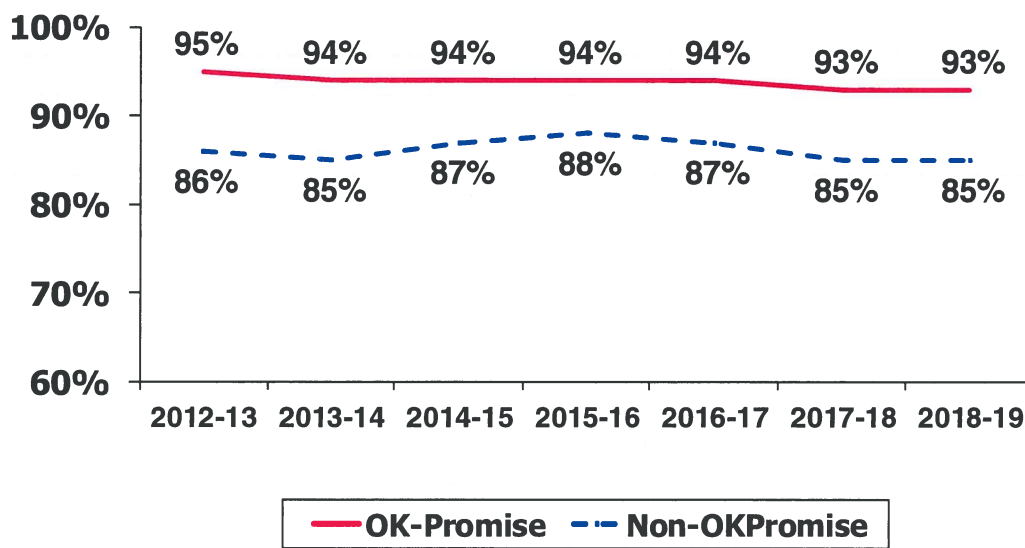
First-time entering students enrolled full-time in fall or spring semester

Degree Completion Rates
(Degrees earned through 2018-19)

	5-Yr (2014 fresh)	6-Yr (2013 fresh)	7-Yr (2012 fresh)	8-Yr (2011 fresh)	9-Yr (2010 fresh)	10-Yr (2009 fresh)
OKPromise	43%	48%	50%	50%	52%	52%
Non-OKPromise Students	38%	41%	43%	43%	43%	42%

Legend: ——— OKPromise — ·— Non-OKPromise Students
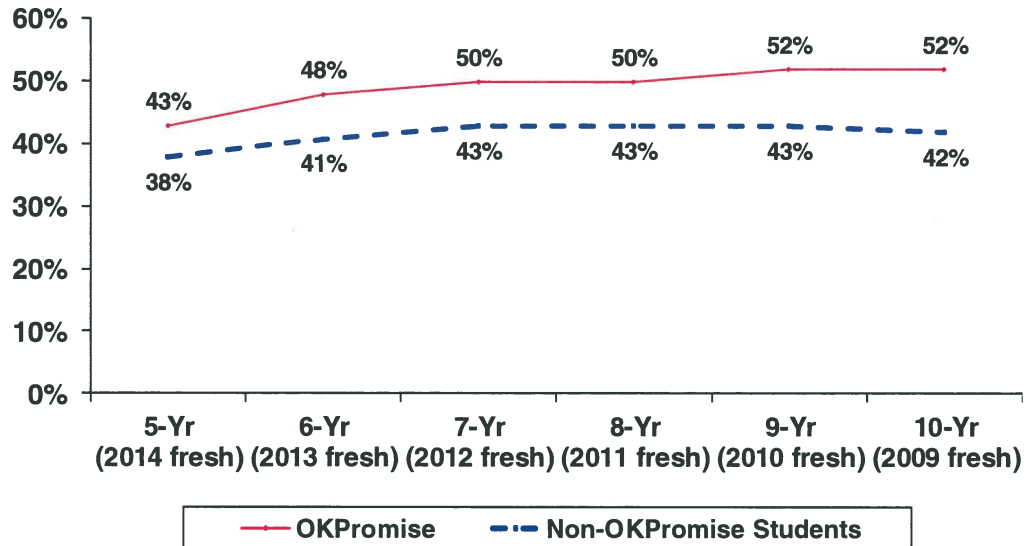
Employment of OKPromise Graduates
(Employed in Oklahoma between April 2018 and June 2019)

	2013-14	2014-15	2015-16	2016-17	2017-18
All OKPromise Graduates	81.9%	81.0%	83.5%	86.7%	89.2%
All Oklahoma Resident Graduates	77.6%	78.7%	81.3%	84.2%	87.9%

Legend: ——— All OKPromise Graduates — — All Oklahoma Resident Graduates
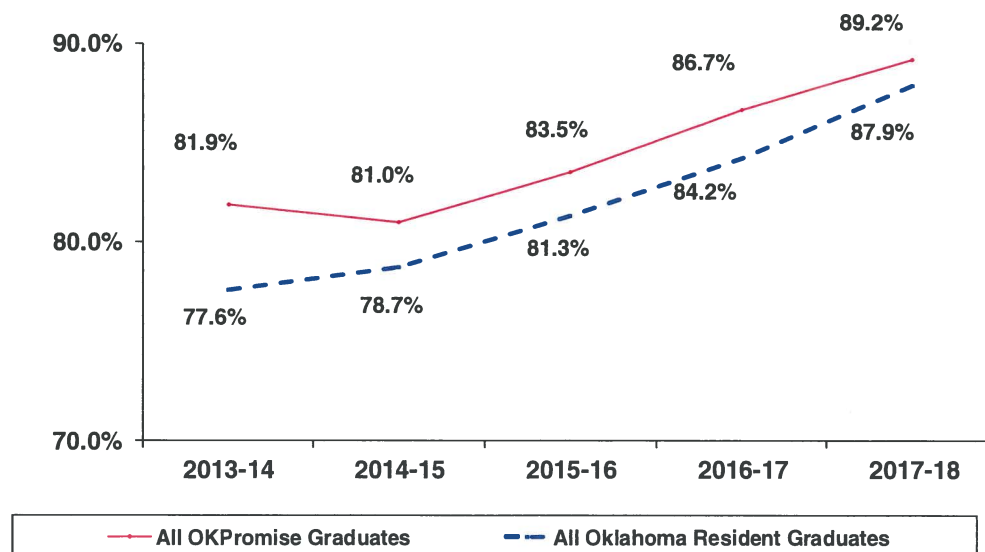
Where Do Oklahoma's Promise Students Attend College?

	09-10	10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19
Regional	36%	36%	36%	36%	35%	35%	35%	35%	35%	36%
Two-Year	33%		33%		33%	33%		33%	31%	29%
Research	24%	24%	34%	33%	33%	33%	32%	26%	27%	28%
			25%	26%	25%	26%	26%	26%		
Private	5%	6%	5%	6%	6%	6%	6%	6%	6%	6%
Career Tech	1%									1%
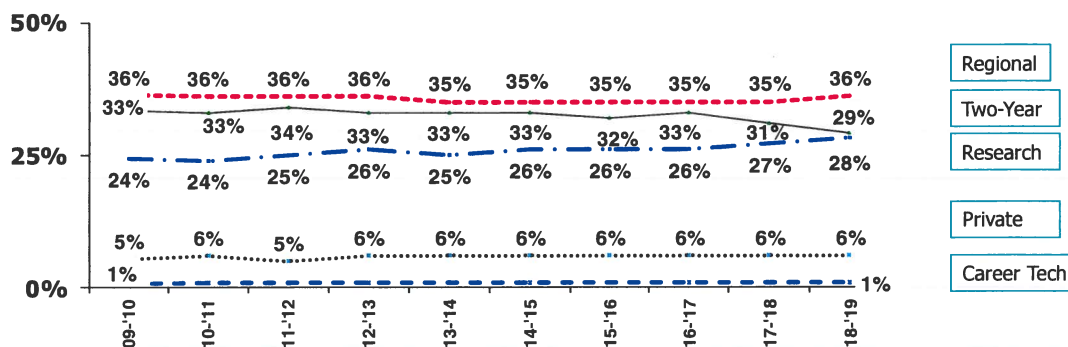
Average Annual Scholarship by Tier

	14-15	15-16	16-17	17-18	18-19
Regional U.	$3,741	$4,036	$4,469	$4,827	$5,024
Research U.	$3,976	$4,095	$4,395	$4,673	$4,757
2-Yr Coll	$1,652	$1,727	$1,842	$2,028	$2,139

Scholarship Recipients

10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19	19-20	20-21
20,085	20,031	19,637	18,924	18,895	18,224	17,749	17,359	15,935	15,700	15,900

Projected
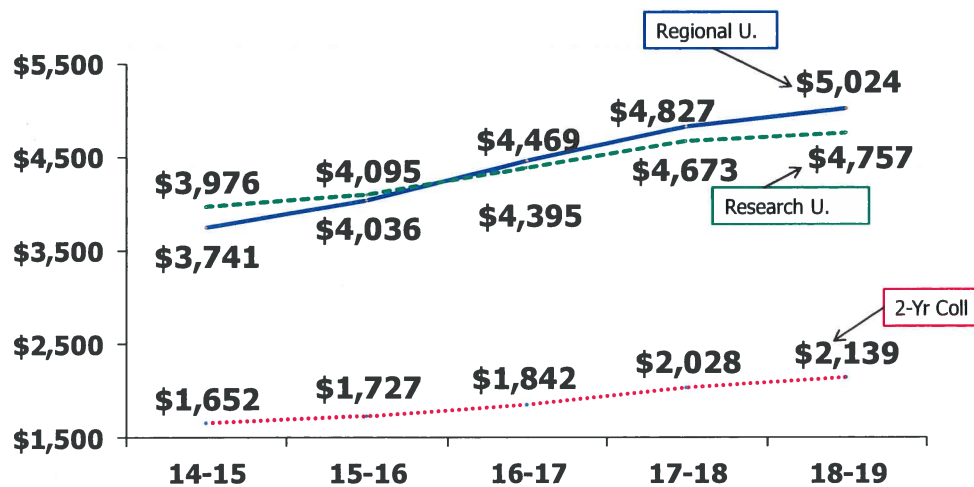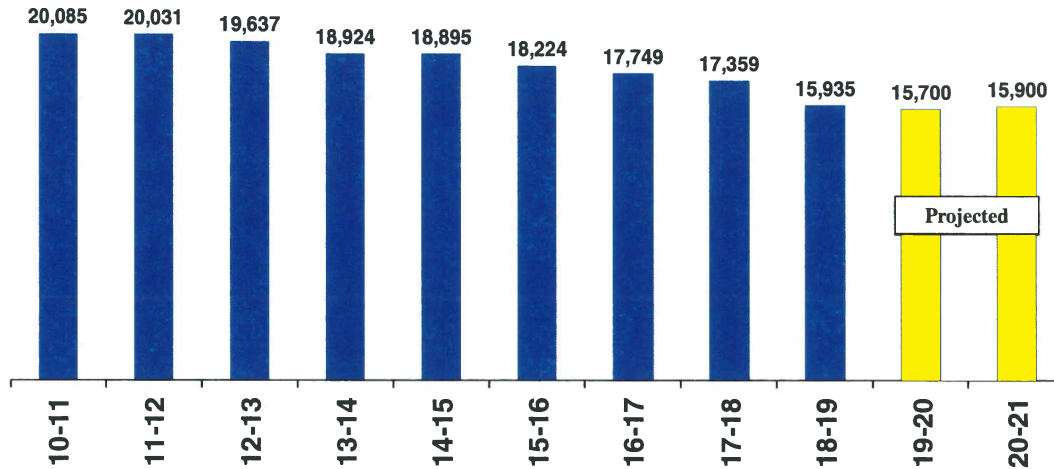
As of 1/14/2020

Scholarship Expenditures
(In $ millions, by academic year)

Actual

10-11	11-12	12-13	13-14	14-15	15-16	16-17	17-18	18-19
$57.2	$59.5	$60.8	$61.2	$63.9	$65.0	$68.3	$72.2	$68.4

As of 1/14/20

13
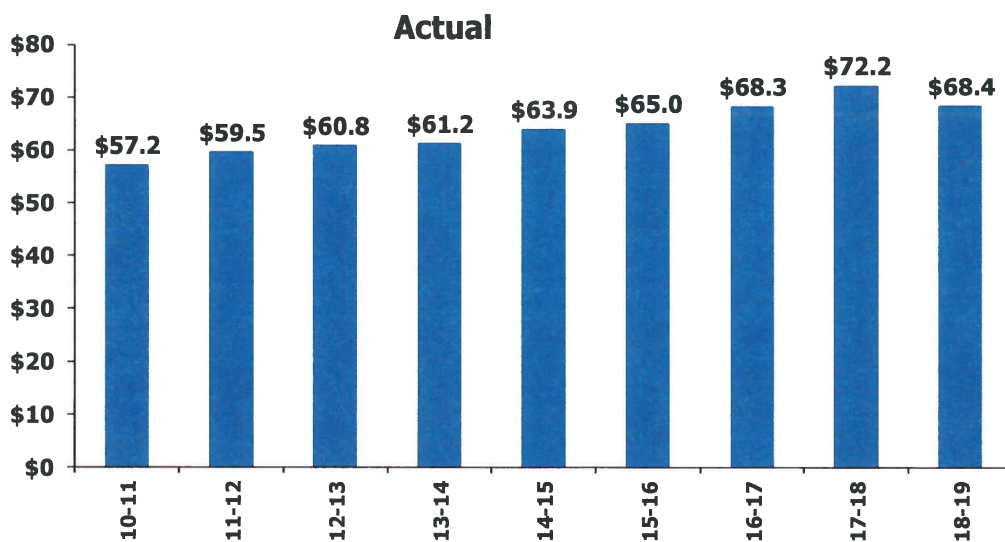
Oklahoma's Promise Office Service Data

	Phone calls received (July 1 – June 30)	E-mails received (July 1 – June 30)
2003-04	9,324	1,287
2004-05	12,677	2,053
2005-06	13,059	2,510
2006-07	13,951	3,105
2007-08	16,086	5,062
2008-09	16,809	7,070
2009-10	18,219	7,719
2010-11	20,405	7,101
2011-12	19,470	8,317
2012-13	17,454	7,970
2013-14	16,828	9,812
2014-15	17,150	13,489
2015-16	19,835	15,687
2016-17	16,209	15,954
2017-18	16,102	15,460
2018-19	15,231	15,442

History of Total Recipients & Expenditures
By Academic Year
(as of 1/8/2020)

Academic Year	Total Recipients	% Change	Total Expenditures	% Change
1995-1996	1		$564	
1996-1997	470		$537,318	
1997-1998	619	31.7%	$758,685	41.2%
1998-1999	850	37.3%	$1,077,588	42.0%
1999-2000	1,245	46.5%	$1,699,893	57.7%
2000-2001	1,717	37.9%	$2,311,004	35.9%
2001-2002	2,004	16.7%	$2,913,845	26.1%
2002-2003	2,982	48.8%	$4,589,334	57.5%
2003-2004	5,889	97.5%	$10,433,086	127.3%
2004-2005	9,155	55.5%	$17,755,071	70.2%
2005-2006	12,101	32.2%	$25,860,675	45.7%
2006-2007	14,670	21.2%	$33,769,665	30.6%
2007-2008	16,927	15.4%	$43,008,963	27.4%
2008-2009	18,302	8.1%	$50,843,941	18.2%
2009-2010	19,432	6.2%	$53,156,696	4.5%
2010-2011	20,085	3.4%	$57,174,211	7.6%
2011-2012	20,031	-0.3%	$59,515,478	4.1%
2012-2013	19,637	-2.0%	$60,800,141	2.2%
2013-2014	18,924	-3.6%	$61,202,357	0.7%
2014-2015	18,895	-0.2%	$63,879,669	4.4%
2015-2016	18,224	-3.6%	$65,049,828	1.8%
2016-2017	17,749	-2.6%	$68,294,792	5.0%
2017-2018	17,359	-2.2%	$72,156,891	5.7%
2018-2019	15,935	-8.2%	$68,405,126	-5.2%
2019-2020 Estimate	17,100	-1.5%	$77,300,000	7.1%
2020-2021 Estimate	15,900	-7.0%	$72,400,000	-6.3%

Oklahoma's Promise - Oklahoma Higher Learning Access Program
2018-19 Scholarships

Institution	Fall 2018 $ Amount	Fall 2018 # of Students	Spring 2019 $ Amount	Spring 2019 # of Students	Summer 2019 $ Amount	Summer 2019 # of Students
Public Research Universities						
Oklahoma State Univ.	$6,088,735.51	2,361	$ 5,625,762.77	2,180	$556,909.20	558
Univ. of Oklahoma	$4,837,316.40	2,091	$ 4,515,882.00	1,984	$392,057.40	545
OUHSC	$165,026.40	64	$ 155,450.40	63	$10,693.20	11
Subtotal	$ 11,091,078.31	4,516	$ 10,297,095.17	4,227	$ 959,659.80	1,114
Public Regional Universities						
Cameron University	$785,681.00	381	$688,661.50	338	$103,648.00	119
East Central Univ.	$1,149,895.32	479	$1,105,570.43	444	$138,573.80	125
Langston University	$342,354.68	168	$299,473.44	149	$17,772.33	27
Northeastern State Univ.	$2,274,406.90	932	$2,097,257.56	857	$310,503.94	259
Northwestern Okla. State Univ.	$550,837.75	204	$507,537.75	174	$80,170.25	62
Okla. Panhandle State Univ.	$117,040.00	48	$112,728.00	46	$7,238.00	8
Rogers State Univ.	$713,046.00	383	$646,106.00	336	$67,708.00	74
Southeastern Okla State Univ.	$1,112,894.00	403	$1,039,698.00	393	$118,153.00	90
Southwestern Okla State Univ.	$1,610,718.00	592	$1,455,682.50	539	$174,438.00	155
Univ. of Central Oklahoma	$5,731,379.43	1,968	$5,216,979.82	1,803	$757,149.49	638
Univ. of Science and Arts of OK	$389,677.00	132	$335,526.00	115	$129,014.00	57
Subtotal	$ 14,777,930.08	5,690	$ 13,505,221.00	5,194	$ 1,904,368.81	1,614
Public Community Colleges						
Carl Albert State College	$236,478.25	212	$166,148.11	173	$15,421.25	30
Connors State College	$246,372.00	196	$237,127.00	186	$26,656.00	49
Eastern OK State College	$215,352.87	159	$205,569.10	144	$20,886.70	36
Murray State College	$330,567.00	177	$268,811.00	147	$40,202.00	52
Northeastern OK A&M Coll.	$251,069.25	201	$224,297.89	173	$18,232.50	42
Northern Oklahoma College	$318,155.00	282	$306,185.00	257	$46,265.00	97
Oklahoma City Comm College	$733,385.20	710	$629,570.16	616	$168,705.32	329
OSU Inst of Tech - Okmulgee	$460,955.00	250	$407,740.00	213	$278,954.00	152
OSU Tech - Oklahoma City	$371,339.50	309	$344,865.00	282	$62,118.00	95
Redlands Community College	$135,794.68	76	$135,175.32	77	$34,374.48	41
Rose State College	$489,883.70	402	$409,249.60	329	$73,866.80	125
Seminole State College	$178,497.00	147	$167,607.00	126	$23,166.00	33
Tulsa Community College	$1,001,265.20	954	$890,761.30	833	$190,722.35	336
Western OK State College	$106,058.85	90	$93,840.55	73	$18,327.45	35
Subtotal	$ 5,075,173.50	4,165	$ 4,486,947.03	3,629	$ 1,017,897.85	1,452
Independent/Private Colleges and Universities						
Bacone College	$39,639.00	15	$36,019.00	13	$1,448.00	2
Community Care College	$6,335.00	6	$4,344.00	2	$2,715.00	2
Family of Faith College	$5,792.00	2	$5,249.00	2	$ -	0
Mid-America Christian Univ.	$116,745.00	48	$114,754.00	44	$ -	0
Muscogee Nation	$11,424.00	8	$13,440.00	10	$4,480.00	4
Oklahoma Baptist Univ.	$489,418.00	185	$456,265.00	162	$3,077.00	5
Oklahoma Christian Univ.	$201,091.00	73	$162,538.00	63	$12,489.00	14
Oklahoma City Univ.	$169,778.00	62	$169,054.00	63	$5,611.00	5
Oklahoma Wesleyan Univ.	$93,758.00	34	$70,590.00	26	$4,344.00	5

Institution	Fall 2018 $ Amount	Fall 2018 # of Students	Spring 2019 $ Amount	Spring 2019 # of Students	Summer 2019 $ Amount	Summer 2019 # of Students
Oral Roberts Univ.	$351,502.00	128	$321,637.00	119	$29,684.00	22
Randall Univ. (formerly Hillsdale)	$81,993.00	31	$79,459.00	27	$7,602.00	8
Southern Nazarene Univ.	$240,006.00	94	$234,576.00	89	$11,946.00	17
SW Christian Univ.	$113,125.00	49	$108,600.00	46	$ -	0
University of Tulsa	$556,397.00	221	$508,448.00	206	$33,292.00	49
Subtotal	$ 2,477,003.00	956	$ 2,284,973.00	872	$ 116,688.00	133
Proprietary Colleges						
National American Univ.	$ 1,120.00	1	$ -	0	$ -	0
Platt College	$ -	0	$ 2,240.00	1	$ -	0
Spartan College of Aeronautics	$ 13,216.00	7	$ 13,888.00	7	$ 224.00	1
Tulsa Welding School	$ 2,800.00	2	$ 3,520.50	3	$ 1,400.00	1
Subtotal	$ 17,136.00	10	$ 19,648.50	11	$1,624.00	2
State Career-Technology Centers						
Autry TC	$5,266.13	7	$6,148.13	8	$ -	0
Caddo Kiowa TC	$2,250.00	2	$2,250.00	2	$ -	0
Canadian Valley TC	$ -	0	$ -	0	$ -	0
Central TC\	$ -	0	$675.00	1	$ -	0
Chisholm Trail TC	$1,800.00	2	$ -	0	$ -	0
Eastern OK TC	$4,793.48	2	$3,595.11	2	$ -	0
Francis Tuttle TC	$7,920.00	8	$11,103.40	11	$ 2,481.60	4
Gordon Cooper TC	$6,055.50	6	$9,908.40	6	$ 1,687.68	2
Great Plains TC	$2,229.75	3	$2,259.75	3	$ -	0
Green Country TC	$3,750.00	3	$2,720.00	2	$ -	0
High Plains TC	$1,012.50	1	$2,009.25	1	$ -	0
Indian Capital TC	$31,486.50	33	$41,124.00	30	$ -	0
Kiamichi TC	$2,700.00	2	$900.00	1	$ 975.00	1
Meridian TC	$8,833.95	7	$7,311.45	7	$ -	0
Metro Tech Center	$10,120.15	9	$7,224.90	7	$ 1,318.50	1
Mid-America TC	$600.00	1	$818.00	1	$ -	0
Mid-Del TC	$5,274.00	4	$1,577.00	4	$ -	0
Moore-Norman TC	$2,607.50	2	$1,292.50	1	$ -	0
Northeast TC	$2,154.58	3	$1,206.50	2	$ -	0
Northwest TC	$525.00	2	$525.00	2	$ -	0
Pioneer TC	$900.00	1	$900.00	1	$ -	0
Pontotoc TC	$6,429.90	3	$4,286.60	3	$ -	0
Red River TC	$5,523.75	3	$3,682.50	2	$ -	0
Southern OK TC	$5,077.00	5	$6,493.00	7	$ -	0
Southwest TC	$1,654.80	2	$1,182.30	1	$ -	0
Tulsa Tech Center	$45,124.93	31	$42,083.59	39	$ 1,467.93	2
Wes Watkins TC	$9,876.65	7	$12,824.47	7	$ -	0
Western TC	$5,018.00	6	$4,500.00	5	$ 1,686.00	3
Subtotal	$ 178,984.07	155	$ 178,600.85	156	$ 9,616.71	13
Totals*	$ 33,617,304.96	15,492	$ 30,772,485.55	14,089	$ 4,009,855.17	4,328
Unduplicated student totals		15,334		13,947		4,285

*Totals contain a duplicate number of students due to students enrolling at more than one institution.

2019 Oklahoma's Promise
"State Champion"
High Schools

(Most Oklahoma's Promise graduates; number shown in parenthesis)

Class		2019 Graduates*	Cumulative Total ('96-'19)*
B	Champs	Moss (9)	Mountain View - Gotebo (161)
	Runner-Up	Indiahoma & Webbers Falls (8)	Buffalo & Timberlake (148)
A	Champs	Soper (16)	Wright City (202)
	Runner-Up	Sentinel & Smithville (11)	Depew (188)
2A	Champs	Dove Science Acad - OKC (23)	Northeast Academy - OKC (491)
	Runner-Up	Hobart (17)	Dove Science Acad - OKC (353)
3A	Champs	Sequoyah-Tahlequah (32)	Okmulgee (351)
	Runner-Up	Okmulgee (24)	Atoka (346)
4A	Champs	Southeast - OKC (40)	Southeast - OKC (905)
	Runner-Up	Stilwell (34)	Broken Bow (743)
5A	Champs	Santa Fe South – OKC (81)	NW Classen – OKC (873)
	Runner-Up	Tahlequah (56)	Tahlequah (864)
6A	Champs	Union – Tulsa (164)	Union – Tulsa (1,760)
	Runner-Up	Putnam City (92)	Broken Arrow (1,524)

*Total graduates determined as of 1/14/2020.

Note: Class level is based on the 2018-19 OSSAA basketball classification.

Oklahoma's Promise Students
By County and High School

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Adair County						
CAVE SPGS HS	27	2	3	0	1	1
COOKSON HILLS	46	0	3	0	0	2
STILWELL HS	384	37	28	26	31	34
WATTS HS	89	8	4	4	4	7
WESTVILLE HS	242	17	19	23	17	14
Alfalfa County						
BURLINGTON HS	56	4	3	2	4	0
CHEROKEE HS	102	3	2	4	3	6
TIMBERLAKE HS	129	4	8	2	4	1
Atoka County						
ATOKA HS	270	16	14	16	14	16
CANEY HS	61	5	5	5	3	6
STRINGTOWN HS	77	4	3	11	8	3
TUSHKA HS	205	13	8	13	11	3
Beaver County						
BALKO HS	29	5	0	1	4	1
BEAVER HS	45	3	0	2	3	2
FORGAN HS	28	3	0	1	1	1
TURPIN HS	74	5	7	0	4	5
Beckham County						
CARTER HS	4	0	0	0	0	0
ELK CITY HS	237	25	19	17	14	28
ERICK HS	55	2	0	1	2	2
MERRITT HS	51	3	2	4	3	3
SAYRE HS	180	5	2	4	10	9
Blaine County						
CANTON HS	106	4	5	6	4	3
GEARY HS	101	4	0	3	2	4
OKEENE HS	115	8	2	8	6	4
WATONGA HS	189	5	5	4	8	7
Bryan County						
ACHILLE HS	129	4	6	7	4	5
BENNINGTON HS	79	4	6	4	5	2
CADDO HS	98	4	6	5	17	7
CALERA HS	132	12	9	9	9	6
COLBERT HS	168	9	10	4	9	2
DURANT HS	483	31	37	35	38	25
ROCK CREEK HS	118	6	6	7	9	5

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Bryan County (cont.)						
SILO HS	112	5	10	16	7	7
VICTORY LIFE ACAD	27	1	1	2	0	0
Caddo County						
ANADARKO HS	325	27	20	16	16	21
APACHE HS	140	9	9	6	6	11
BINGER-ONEY HS	88	9	5	3	2	4
CARNEGIE HS	169	12	12	14	8	12
CEMENT HS	82	5	3	0	1	5
CYRIL HS	54	3	0	3	3	1
FT COBB-BROXTON HS	110	3	5	9	3	2
GRACEMONT HS	22	5	5	2	4	3
HINTON HS	125	6	5	5	5	6
HYDRO-EAKLY HS	127	13	5	7	7	3
LOOKEBA-SICKLES HS	79	2	5	4	5	1
RIVERSIDE INDIAN SCHL	9	0	0	1	0	0
Canadian County						
CALUMET HS	57	7	9	0	8	1
EL RENO HS	334	18	23	20	35	22
MUSTANG HS	727	59	79	53	64	51
PIEDMONT HS	178	22	25	13	27	18
SW COV CHRISTIAN	13	0	0	1	1	0
UNION CITY HS	35	5	2	1	5	2
YUKON HS	498	57	54	74	49	59
Carter County						
ARDMORE HS	398	24	22	27	28	43
DICKSON HS	186	10	15	11	6	16
FOX HS	57	4	7	0	3	5
GLOBAL HARVEST	1	0	0	0	0	0
HEALDTON HS	77	6	4	7	10	4
LONE GROVE HS	172	14	13	10	8	9
PLAINVIEW HS	125	10	8	11	10	11
SPRINGER HS	23	2	2	0	1	3
WILSON HS	77	3	5	3	7	7
Cherokee County						
HULBERT HS	97	7	15	15	9	11
KEYS HS	186	11	13	20	18	16
MARKOMA CHRISTIAN	1	0	0	0	0	0
SEQUOYAH HS	203	17	24	18	21	32
TAHLEQUAH HS	633	39	49	42	45	56

County/HS	Graduates						County/HS	Graduates					
	96-14	2015	2016	2017	2018	2019		96-14	2015	2016	2017	2018	2019
Choctaw County							**Cotton County**						
BOSWELL SR HS	110	3	5	4	3	5	BIG PASTURE HS	51	5	2	2	1	1
FT TOWSON HS	110	6	9	5	2	3	TEMPLE HS	36	2	4	4	4	0
GOODLAND CHRISTIAN	5	0	0	0	0	0	WALTERS HS	160	15	14	9	8	3
HUGO HS	272	15	22	12	5	15							
SOPER HS	100	5	4	9	11	16	**Craig County**						
							BLUEJACKET HS	30	4	2	3	3	5
Cimarron County							KETCHUM HS	153	7	11	16	10	14
BOISE CITY HS	108	3	6	1	2	5	VINITA HS	227	17	15	15	18	11
FELT HS	18	0	3	2	1	0	WELCH HS	77	4	4	5	5	1
KEYES HS	26	3	2	2	0	0	WHITE OAK HS	19	0	0	0	0	0
Cleveland County							**Creek County**						
COMM. CHRISTIAN	42	3	4	7	2	2	BRISTOW HS	272	17	14	24	8	12
DIMENSIONS ACAD	1	0	1	1	0	0	DEPEW HS	157	6	8	8	5	4
LEXINGTON HS	137	11	10	11	4	13	DRUMRIGHT HS	91	6	7	12	2	6
LITTLE AXE HS	120	12	7	8	7	11	EAGLE POINT CHRISTIAN	3	2	3	0	2	1
MOORE HS	637	39	53	45	47	51	KELLYVILLE HS	98	10	6	5	7	5
NOBLE HS	319	21	28	19	17	15	KIEFER HS	57	3	8	6	4	8
NORMAN HS	667	69	51	62	41	52	MANNFORD HS	306	11	10	10	20	7
NORMAN NORTH HS	524	44	43	56	28	44	MOUNDS HS	80	3	3	0	7	4
OU HIGH SCHOOL	13	0	0	0	0	0	OILTON HS	41	3	5	3	4	3
SOUTHMOORE HS	244	58	46	50	58	39	OLIVE HS	84	6	3	2	3	3
SW CHRISTIAN ACAD	4	0	0	0	0	0	SAPULPA HS	539	48	48	38	28	29
WESTMOORE HS	671	81	80	66	91	80							
							Custer County						
Coal County							ARAPAHO HS	76	6	0	6	3	7
COALGATE HS	162	12	6	13	11	12	BUTLER HS	12	0	0	0	0	0
OLNEY HS	9	0	0	0	0	0	CLINTON HS	307	18	18	33	23	21
TUPELO HS	60	4	3	2	7	5	THOMAS HS	125	8	4	4	4	3
							WEATHERFORD HS	251	13	8	20	21	19
Comanche County													
CACHE HS	112	10	13	10	19	10	**Delaware County**						
CHATTANOOGA HS	82	5	6	5	5	4	COLCORD HS	155	9	12	12	9	11
EISENHOWER HS	586	38	35	42	39	42	GROVE HS	369	38	36	17	26	33
ELGIN HS	182	16	17	15	13	16	JAY HS	251	12	15	15	17	14
FLETCHER HS	115	2	3	3	5	1	KANSAS HS	227	18	16	14	13	16
GATEWAY ACAD	2	0	0	0	0	0	OAKS MISSION HS	95	1	4	5	4	2
GERONIMO HS	61	2	4	5	2	4							
INDIAHOMA HS	45	9	2	4	10	8	**Dewey County**						
LAWTON CHRISTIAN	8	0	2	0	0	0	SEILING HS	124	4	4	6	3	5
LAWTON HS	564	46	33	31	46	29	TALOGA HS	33	2	2	0	1	3
MAC ARTHUR HS	372	22	25	30	30	26	VICI HS	57	4	5	3	5	9
STERLING HS	96	7	8	4	1	4							

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Ellis County						
ARNETT HS	46	2	3	3	1	1
FARGO HS	43	6	1	3	1	4
GAGE HS	21	0	2	0	0	0
SHATTUCK HS	55	0	2	2	1	2
Garfield County						
CHISHOLM HS	102	6	9	2	4	1
COV-DOUGLAS HS	71	6	3	7	4	2
DRUMMOND HS	44	4	3	1	1	2
ENID HS	623	50	42	45	36	39
GARBER HS	71	6	2	6	3	4
KREM-HILLSDALE HS	75	5	1	3	2	2
LINCOLN ALT SCHL	1	1	0	0	0	0
OKLA BIBLE ACAD	50	3	2	1	1	2
PIONEER-PV HS	174	8	8	3	6	7
WAUKOMIS HS	41	4	6	4	2	4
Garvin County						
ELMORE CITY HS	82	3	8	6	7	5
LINDSAY HS	87	7	12	8	13	14
MAYSVILLE HS	95	3	4	5	3	1
PAOLI HS	59	5	5	3	1	1
PAULS VALLEY HS	252	12	25	14	24	18
STRATFORD HS	121	12	10	13	15	5
WYNNEWOOD HS	127	6	9	10	9	9
Grady County						
ALEX HS	79	5	1	3	3	0
AMBER-POCASSET HS	91	1	3	3	4	3
BRIDGE CREEK HS	108	10	9	13	12	13
CHICKASHA HS	313	23	20	17	21	18
MINCO HS	106	7	5	10	7	7
NINNEKAH HS	66	5	3	5	4	4
RUSH SPRINGS HS	91	9	2	4	5	4
TUTTLE HS	147	7	15	10	14	9
VERDEN HS	51	0	3	1	3	3
Grant County						
DEER CRK-LAM HS	59	2	1	1	0	3
MEDFORD HS	74	2	4	3	2	4
POND CRK-HUNT HS	117	2	4	3	2	2
WAKITA HS	28	0	0	0	0	0

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Greer County						
GRANITE HS	93	5	1	1	2	3
MANGUM HS	143	8	11	11	9	8
Harmon County						
HOLLIS HS	192	4	11	11	10	11
Harper County						
BUFFALO HS	131	5	1	3	2	6
LAVERNE HS	107	3	5	7	9	9
Haskell County						
KEOTA HS	81	3	3	6	7	5
KINTA HS	26	3	8	1	6	5
MC CURTAIN HS	52	2	5	6	5	7
STIGLER HS	148	13	14	12	19	6
Hughes County						
CALVIN HS	48	2	4	0	1	3
DUSTIN HS	25	0	0	0	0	0
HOLDENVILLE HS	187	13	12	8	5	9
MOSS HS	93	7	9	10	8	9
STUART HS	68	1	7	6	5	1
WETUMKA HS	64	6	5	6	3	9
Jackson County						
ALTUS HS	375	26	27	20	26	22
BLAIR HS	67	4	3	3	1	3
DUKE HS	40	3	4	2	0	4
ELDORADO HS	36	3	0	0	0	0
NAVAJO HS	69	4	4	5	4	6
OLUSTEE HS	48	1	2	0	0	0
OLUSTEE-ELDORADO HS	1	0	0	1	3	3
Jefferson County						
RINGLING HS	114	5	7	8	5	5
RYAN HS	65	6	3	7	3	3
WAURIKA HS	127	1	5	5	2	4
Johnston County						
COLEMAN HS	44	5	7	6	4	4
MILBURN HS	46	1	2	1	0	0
MILL CREEK HS	22	0	1	3	3	3
TISHOMINGO HS	149	10	11	3	5	8
WAPANUCKA HS	85	5	6	4	5	4

County/HS	Graduates						County/HS	Graduates					
	96-14	2015	2016	2017	2018	2019		96-14	2015	2016	2017	2018	2019
Kay County							**Lincoln County**						
BLACKWELL HS	260	19	11	11	14	9	AGRA HS	87	4	3	2	5	5
BRAMAN HS	10	0	0	0	0	0	CARNEY HS	44	3	4	1	8	2
NEWKIRK SR HS	112	16	7	17	11	6	CHANDLER HS	181	16	21	13	12	16
PONCA CITY HS	459	28	34	31	38	38	DAVENPORT HS	73	2	4	2	3	6
TONKAWA HS	127	5	5	11	10	6	MEEKER HS	128	4	10	4	9	10
							PRAGUE HS	149	9	10	13	10	13
Kingfisher County							STROUD HS	151	6	13	13	15	11
CASHION HS	56	2	6	8	4	0	WELLSTON HS	119	6	9	7	2	5
DOVER HS	52	1	0	0	2	1							
HENNESSEY HS	168	18	7	16	10	12	**Logan County**						
KINGFISHER HS	221	16	18	13	10	10	COYLE HS	110	5	7	6	8	5
LOMEGA HS	88	7	2	7	2	7	CRESCENT HS	97	5	6	3	1	3
OKARCHE HS	69	3	1	6	5	1	GUTHRIE HS	307	24	33	20	45	29
							MULHALL-ORL HS	63	3	4	2	3	2
Kiowa County													
HOBART HS	203	15	12	9	11	17	**Love County**						
LONE WOLF HS	27	0	0	1	0	1	MARIETTA HS	144	11	14	19	10	23
MTN VIEW-GOTEBO HS	141	5	3	4	4	4	THACKERVILLE HS	43	2	2	1	11	2
SNYDER HS	127	6	7	1	6	3	TURNER HS	49	6	5	2	1	1
Latimer County							**Major County**						
BUFF VALLEY HS	36	4	4	5	2	4	ALINE-CLEO SPGS HS	48	0	4	1	0	4
PANOLA HS	37	1	2	4	0	0	CIMARRON HS	63	4	2	1	3	1
RED OAK HS	59	5	8	6	4	3	FAIRVIEW HS	256	11	6	6	7	8
WILBURTON HS	103	10	4	12	11	5	RINGWOOD HS	72	3	3	2	5	9
LeFlore County							**Marshall County**						
ARKOMA HS	18	2	0	2	1	6	KINGSTON HS	148	10	15	15	7	16
BOKOSHE HS	55	3	0	4	0	3	MADILL HS	230	22	19	20	23	26
CAMERON HS	83	1	2	4	3	1							
HEAVENER HS	100	6	6	12	9	12	**Mayes County**						
HOWE HS	63	4	9	5	9	7	ADAIR HS	179	14	13	14	15	6
LE FLORE HS	55	4	3	5	5	3	CHOUTEAU HS	111	13	6	9	9	12
PANAMA HS	107	7	23	14	7	9	LOCUST GROVE HS	364	21	22	14	18	21
POCOLA HS	71	3	4	3	5	11	PRYOR HS	284	16	20	15	33	28
POTEAU HS	205	19	18	17	29	14	SALINA HS	134	10	14	12	11	13
SPIRO HS	191	12	5	8	17	12	BRADFORD CHRISTIAN	5	1	0	0	1	0
TALIHINA HS	116	8	7	12	14	16							
WHITESBORO HS	40	6	3	1	2	7							
WISTER HS	86	2	2	8	4	8							

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
McClain County						
BLANCHARD HS	160	15	11	27	15	14
DIBBLE HS	87	5	3	11	4	6
NEWCASTLE HS	125	11	15	9	18	14
PURCELL HS	171	21	14	14	17	15
WASHINGTON HS	131	6	13	6	10	9
WAYNE HS	112	7	11	9	12	10
McCurtain County						
BATTIEST HS	56	1	2	4	4	3
BROKEN BOW HS	564	46	39	35	35	24
EAGLETOWN HS	71	5	4	3	0	2
HAWORTH HS	155	15	12	14	6	8
IDABEL HS	213	9	18	11	33	23
SMITHVILLE HS	74	7	2	5	8	11
VALLIANT HS	215	16	12	14	13	13
WRIGHT CITY HS	154	10	11	13	6	8
McIntosh County						
CHECOTAH HS	312	29	27	24	27	30
EUFAULA HS	232	10	10	10	9	12
HANNA HS	30	1	2	0	0	0
MIDWAY HS	23	4	0	1	1	5
Murray County						
DAVIS HS	128	16	10	13	10	14
OKLA SCH FOR DEAF	21	1	6	2	2	0
SULPHUR HS	245	15	17	13	12	14
Muskogee County						
BLVD CHRISTIAN	4	0	1	1	0	0
BOYNTON HS	3	0	0	0	0	0
BRAGGS HS	22	0	0	3	5	2
FT GIBSON HS	289	20	14	12	13	20
HASKELL HS	123	7	8	16	9	14
HILLDALE HS	183	23	22	22	16	18
MUSKOGEE HS	500	42	45	40	52	48
OK SCH FOR BLIND	7	0	2	0	1	3
OKTAHA HS	117	6	7	8	9	3
PORUM HS	86	5	4	6	1	2
WARNER HS	99	7	13	13	8	12
WEBBERS FALLS HS	63	0	4	4	2	8
Noble County						
BILLINGS HS	17	0	0	1	0	0
FRONTIER HS	67	3	1	2	1	3
MORRISON HS	102	7	8	6	5	6
PERRY HS	118	10	6	7	7	8
Nowata County						
NOWATA HS	102	4	6	11	10	9
OKLAHOMA UNION HS	63	3	3	7	6	6
S COFFEYVILLE HS	25	1	3	0	0	0
Okfuskee County						
BOLEY HS	6	0	0	0	0	0
GRAHAM HS	24	0	0	0	0	0
GRAHAM-DUSTIN HS	0	0	1	4	4	1
MASON HS	88	9	10	6	7	7
OKEMAH HS	151	13	6	12	11	11
PADEN HS	65	4	3	4	5	0
WELEETKA HS	69	7	8	8	4	6
Oklahoma County						
ASTEC Charter HS	189	22	26	18	33	28
BETHANY HS	192	21	20	20	20	8
BISHOP MC GUINNESS	118	11	8	19	16	8
CAPITOL HILL HS	290	47	52	58	44	41
CARL ALBERT HS	411	35	38	33	27	37
CASADY SCHOOL	18	2	1	8	2	1
CHOCTAW HS	402	35	38	33	43	35
CHRISTIAN HERIT ACAD	55	4	1	1	4	2
CLASSEN HS	372	33	27	26	15	29
CROOKED OAK HS	127	6	8	14	11	17
CROSSINGS CHRISTIAN	4	2	0	1	2	1
DEER CREEK HS	154	21	19	24	13	27
DEL CITY HS	604	45	56	52	55	44
DESTINY CHRISTIAN	8	2	3	4	3	3
DOUGLASS HS	322	32	20	34	14	10
DOVE SCI ACAD-OKC	220	27	29	31	23	23
EDM MEMORIAL HS	389	50	38	43	30	47
EDM NORTH HS	334	37	34	35	37	35
EDM SANTA FE HS	456	56	44	44	41	48
EMERSON	51	7	3	6	4	6
GRACE CHRISTIAN	5	0	0	0	0	0
HARDING CHARTER	197	35	25	24	28	32
HARDING FA ACAD	96	19	19	23	22	20
HARPER CHARTER	0	0	1	0	0	0
HARRAH HS	219	15	22	13	12	8
HARVEST CHRISTIAN	3	0	0	0	0	0
HARVEST LIFE SCHL	1	0	0	0	0	0
HERITAGE HALL	15	3	1	1	2	4
JOHN MARSHALL	231	9	15	17	22	17
JOHN WESLEY	3	0	0	0	0	0
JONES HS	150	11	5	9	7	8

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Oklahoma County (cont.)						
LIFE CHRISTIAN	7	0	2	0	0	0
LUTHER HS	118	6	10	6	5	8
MERCY SCHOOL INST	2	0	2	2	1	1
METRO CAREER ACAD	3	0	0	0	2	0
MIDWEST CITY HS	623	50	57	39	35	50
MILLWOOD HS	177	16	13	11	12	10
MT ST MARYS HS	125	13	10	7	8	6
NEW LIFE CHRISTIAN	6	0	0	0	0	0
NORTHEAST ACAD	418	19	10	20	13	11
NW CLASSEN HS	612	56	40	53	61	51
OK SCHL SCI & MATH	150	16	10	9	7	6
OK CENTENNIAL HS	94	23	26	20	14	12
OK CHRISTIAN ACAD	19	1	1	3	4	1
OK CHRISTIAN SCHL	20	1	0	0	0	0
PATHWAYS	63	2	0	16	13	17
PUTNAM CITY ACAD	14	1	0	1	0	1
PUTNAM CITY HS	852	61	65	76	80	92
PC NORTH HS	635	64	57	74	77	66
PC WEST HS	648	51	56	56	51	63
SANTA FE SOUTH HS	473	71	68	67	72	81
SEEWORTH	8	1	3	1	0	2
SOUTHEAST HS	588	70	78	58	71	40
STAR SPENCER HS	210	13	13	12	9	6
TRINITY SCHOOL	1	0	0	0	0	1
US GRANT HS	653	91	52	76	87	54
WESTERN HGTS HS	387	23	38	24	29	31
WINDSOR HILLS BAPT	1	0	0	0	0	0
Okmulgee County						
BEGGS HS	168	16	17	7	13	13
DEWAR HS	84	2	7	8	6	3
HENRYETTA HS	202	11	6	14	12	18
MORRIS HS	214	8	11	14	11	9
OKMULGEE HS	240	24	15	27	21	24
PRESTON HS	111	15	24	12	13	10
SCHULTER HS	35	2	1	2	0	0
WILSON HS	60	0	1	5	5	3
Osage County						
BARNSDALL HS	55	4	2	3	2	4
HOMINY HS	139	5	2	8	2	9
PAWHUSKA HS	214	16	13	8	9	7
PRUE HS	46	3	1	1	4	6
SHIDLER HS	47	2	3	3	1	3
WOODLAND HS	119	7	5	5	7	4
WYNONA HS	15	0	0	1	2	0

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Ottawa County						
AFTON HS	97	8	11	4	7	5
COMMERCE HS	89	9	7	6	6	7
FAIRLAND HS	98	10	7	2	7	7
MIAMI HS	238	20	19	17	17	16
PICHER-CARDIN HS	27	0	0	0	0	0
QUAPAW HS	85	4	4	5	3	4
WYANDOTTE HS	108	16	6	6	5	4
Pawnee County						
CLEVELAND HS	284	22	22	21	18	10
PAWNEE HS	119	12	9	8	9	11
Payne County						
COV COMM SCHL	2	0	0	0	0	2
CUSHING HS	193	12	16	10	16	20
GLENCOE HS	62	5	3	1	1	1
LINCOLN ACAD	59	1	5	3	2	0
PERKINS-TRYON HS	198	11	12	9	13	12
RIPLEY HS	125	2	7	4	3	6
STILLWATER HS	533	30	44	39	39	42
YALE HS	143	7	7	7	4	3
Pittsburg County						
CANADIAN HS	95	8	3	11	6	5
CROWDER HS	103	6	6	5	6	6
HAILEYVILLE HS	51	5	7	7	3	1
HARTSHORNE HS	89	9	7	11	14	8
INDIANOLA HS	73	5	4	4	1	2
KEY ACAD	1	0	0	0	0	0
KIOWA HS	66	5	5	5	4	4
LAKEWOOD CHRISTIAN	7	1	0	0	3	1
MC ALESTER HS	452	25	23	26	24	14
PITTSBURG HS	32	2	1	0	2	2
QUINTON HS	111	7	5	8	5	3
SAVANNA HS	100	5	8	6	9	10
Ponotoc County						
ADA HS	199	31	27	15	35	20
ALLEN HS	134	9	8	13	7	9
BYNG HS	222	21	15	13	7	17
LATTA HS	116	7	8	5	7	7
MC LISH HS	9	0	0	0	0	0
ROFF HS	99	7	5	3	7	3
STONEWALL HS	53	1	1	3	2	5
VANOSS HS	109	3	10	5	9	7

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Pottawatomie County						
ASHER HS	48	8	5	1	3	5
BETHEL HS	142	9	11	12	17	21
DALE HS	108	9	9	5	9	10
EARLSBORO HS	40	3	2	2	5	5
FAMILY OF FAITH	7	0	1	1	0	1
JIM THORPE ACAD	6	2	3	2	1	0
LIBERTY ACAD	12	2	0	0	0	0
MACOMB HS	78	3	4	1	4	4
MAUD HS	60	8	6	2	1	1
MC LOUD HS	252	17	14	17	9	6
SHAWNEE HS	478	29	35	35	41	37
TECUMSEH HS	274	19	20	24	31	13
WANETTE HS	77	3	4	1	1	0
Pushmataha County						
ANTLERS HS	224	12	15	17	12	16
CLAYTON HS	99	7	7	5	5	6
MOYERS HS	52	0	5	7	6	1
RATTAN HS	91	9	5	6	7	8
Roger Mills County						
CHEYENNE HS	33	4	1	2	1	4
HAMMON HS	74	1	2	2	1	3
LEEDEY HS	89	8	3	3	1	3
REYDON HS	32	0	1	0	0	0
SWEETWATER HS	16	1	0	2	3	2
Rogers County						
CATOOSA HS	171	21	17	18	20	13
CHELSEA HS	103	7	6	8	4	9
CLAREMORE CHRISTIAN	10	0	2	3	0	0
CLAREMORE HS	389	43	32	40	32	36
FOYIL HS	70	6	7	6	5	4
HOPE HARBOR ACAD	0	0	0	0	0	1
INOLA HS	187	12	7	12	19	10
OOLOGAH-TALALA HS	189	15	20	14	12	8
SEQUOYAH HS	99	10	13	14	10	12
VERDIGRIS HS	110	9	11	13	6	8
Seminole County						
BOWLEGS HS	72	2	3	2	2	5
BUTNER HS	54	1	3	1	3	4
KONAWA HS	142	12	9	11	6	6
NEW LIMA HS	40	4	5	6	3	2
SASAKWA HS	34	6	1	1	3	1
SEMINOLE HS	212	11	20	20	15	15

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Seminole County (cont.)						
STROTHER HS	57	1	4	7	5	3
VARNUM HS	69	2	2	5	4	3
WEWOKA HS	87	2	5	7	10	11
Sequoyah County						
CENTRAL HS	118	15	8	12	7	8
GANS HS	56	5	4	4	3	5
GORE HS	152	7	3	8	5	8
MULDROW HS	259	19	26	9	19	12
ROLAND HS	195	26	22	24	20	19
SALLISAW HS	294	21	16	19	20	11
VIAN HS	215	16	15	12	18	11
Stephens County						
BRAY-DOYLE HS	99	2	5	4	5	6
CENTRAL HS	65	12	5	2	3	3
COMANCHE HS	167	12	10	13	12	12
DUNCAN HS	400	35	38	33	31	24
EMPIRE HS	90	4	4	3	11	4
MARLOW HS	196	15	18	16	14	13
VELMA-ALMA HS	111	4	6	5	7	4
Texas County						
GOODWELL HS	32	1	3	0	1	1
GUYMON HS	191	15	17	14	19	28
HARDESTY HS	25	2	1	0	1	0
HOOKER HS	102	8	2	9	5	10
TEXHOMA HS	82	4	4	3	6	8
TYRONE HS	14	4	6	2	5	4
YARBROUGH HS	10	0	1	3	2	2
Tillman County						
DAVIDSON HS	40	3	1	2	0	0
FREDERICK HS	157	18	14	8	14	14
GRANDFIELD HS	60	6	5	7	3	2
TIPTON HS	113	6	2	1	9	4
Tulsa County						
AUGUSTINE CHRISTIAN	8	1	3	2	1	2
BT WASHINGTON	764	59	82	61	61	64
BERRYHILL HS	164	12	10	9	6	12
BISHOP KELLEY	144	14	11	7	8	10
BIXBY HS	231	22	24	21	26	16
BROKEN ARROW HS	1,025	114	108	87	99	91
CASCIA HALL	36	1	1	7	7	8
CENTRAL HS-TULSA	255	7	17	15	9	11

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Tulsa County (cont.)						
CHARLES PAGE HS	577	54	61	50	50	49
COLLINSVILLE HS	201	15	15	15	10	17
CORNERSTONE CHR AC	0	0	0	0	0	1
DOVE SCI ACAD-TULSA	84	14	19	14	22	21
EAST CENTRAL HS	299	19	16	22	27	18
EDISON HS	410	40	30	34	47	53
EVANGELISTIC TEMPLE	7	0	0	0	0	0
GLENPOOL HS	275	20	20	16	15	14
GRACE CHRISTIAN SCHL	17	0	0	0	0	0
HOLLAND HALL	38	4	8	4	6	4
HOPE CHRISTIAN ACAD	0	0	0	1	0	0
IMMANUEL LUTHERAN	0	0	0	0	0	1
JENKS HS	492	79	63	61	79	82
LANGSTON HUGHES	0	0	0	0	0	2
LIBERTY HS	64	4	13	5	11	7
LIGHTHOUSE CHRISTIAN	0	0	0	1	2	0
LINCOLN CHRISTIAN	54	2	1	5	1	6
MARGARET HUDSON	3	1	0	0	0	0
MC LAIN HS	195	6	7	4	3	5
MEMORIAL HS	350	17	21	27	26	23
METRO CHRISTIAN	43	3	0	1	2	2
MINGO VLY CHRISTIAN	15	0	1	0	1	0
NATHAN HALE HS	262	15	6	13	16	5
NEW LIFE CHRISTIAN	2	0	0	0	0	0
OKLA JOB CORPS	2	0	0	0	1	0
OWASSO HS	347	44	56	42	55	53
PEACE ACADEMY	28	6	6	1	3	6
PROJECT 12	2	0	0	0	0	0
REGENT PREP SCHOOL	2	2	0	0	0	1
REJOICE CHRISTIAN	16	1	0	0	2	1
RIVERFIELD COUNTRY	4	0	2	0	0	0
SKIATOOK HS	205	24	19	21	13	6
SPERRY HS	167	8	12	11	8	6
ST MARYS	1	0	0	0	0	0
STREET SCHOOL	8	2	2	0	0	5
SUMMIT CHRISTIAN	12	3	1	1	0	0
TOWN & COUNTRY HS	8	2	1	2	2	3
TULSA ADVENTIST ACAD	0	1	0	0	0	0
TULSA HOPE ACAD	1	1	0	0	1	0
TULSA LEARNING ACAD	7	1	3	2	5	4
TULSA MET HS	5	2	1	3	1	0
TULSA ARTS & SCI	96	10	7	10	8	11
UNION HS	1,000	158	131	152	155	164
VICTORY CHRISTIAN	100	12	5	6	8	6
WEBSTER HS	266	12	30	23	21	26
W ROGERS COLL HIGH	239	27	35	27	17	32
WRIGHT CHRISTIAN	29	1	2	0	1	0

County/HS	Graduates 96-14	2015	2016	2017	2018	2019
Wagoner County						
COWETA HS	196	20	16	17	19	20
OKAY HS	68	6	1	3	2	6
PORTER HS	73	5	4	5	4	2
WAGONER CHRISTIAN	13	0	0	1	0	0
WAGONER HS	187	19	29	19	28	27
Washington County						
AMERICAN CHRISTIAN	8	0	0	0	0	0
BARTLESVILLE HS	551	54	50	51	50	45
CANEY VALLEY HS	118	9	10	9	7	5
COPAN HS	66	1	2	2	1	3
DEWEY HS	115	17	14	9	8	7
WESLEYAN CHRISTIAN	13	4	4	2	2	2
Washita County						
BURNS FLAT-DC HS	146	2	3	2	1	4
CANUTE HS	46	4	4	1	1	6
CORDELL HS	184	5	7	11	7	3
CORN BIBLE ACAD	62	2	1	3	1	0
SENTINEL HS	122	4	4	4	6	11
WASHITA HEIGHTS HS	55	0	0	0	0	0
Woods County						
ALVA SR HS	191	10	7	3	8	9
FREEDOM HS	26	2	4	0	1	2
WAYNOKA HS	62	3	2	2	4	0
Woodward County						
FT SUPPLY HS	30	2	2	1	0	1
MOORELAND HS	84	4	3	3	7	6
SHARON-MUTUAL HS	42	5	2	3	4	5
WOODWARD HS	317	19	15	11	12	25
Oklahoma Virtual Charter Schools						
EPIC HS	12	13	32	48	78	90
INSIGHT SCHOOL OF OK	0	1	0	2	1	5
OKLA CONNECTIONS ACD	0	3	8	8	10	6
OK VIRTUAL CHTR ACAD	9	12	18	20	14	10
Other						
OUT OF STATE	18	4	1	1	1	2
HOME SCHOOL	286	41	33	48	40	33

Statewide OKPromise Grac	96-14	2015	2016	2017	2018	2019
	78,138	6,145	6,075	5,978	6,054	5,945

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION

Improving our future by degrees

October 28, 2019

The Honorable Kevin Stitt
Governor of Oklahoma
Chair, State Board of Equalization
2300 North Lincoln Boulevard
Oklahoma City, Oklahoma 73105

Dear Governor Stitt:

Re: FY2021 Official Funding Estimate for Oklahoma's Promise

In compliance with Section 34.87 of Title 62 of the Oklahoma Statutes, the Oklahoma State Regents for Higher Education have adopted an official funding estimate of $72.4 million for the FY2021 revenue needs of the Oklahoma's Promise scholarship program. The State Regents further recommend that $70 million of the funding estimate be allocated from the General Revenue Fund and the remaining $2.4 million be funded from the program's trust fund reserve. The State Regents approved the funding estimate at their meeting on October 24, 2019.

Enclosed is a copy of the agenda item that further explains the estimate. If you have any questions or need additional information, please contact me at (405) 225-9120.

Sincerely,

Glen D. Johnson
Chancellor

GDJ/blf

Enclosure

cc: Members, State Board of Equalization
       The Honorable Greg Treat, President Pro Tempore, Oklahoma State Senate
       The Honorable Charles McCall, Speaker, Oklahoma House of Representatives
       The Honorable Roger Thompson, Chair, Senate Appropriations Committee
       The Honorable Kevin Wallace, Chair, House Appropriations and Budget Committee
       The Honorable Dewayne Pemberton, Chair, Senate Appropriations Subcommittee on
           Education
       The Honorable Chris Kidd, Vice Chair, Senate Appropriations Subcommittee on
           Education

The Honorable Mark McBride, Chair, House Appropriations and Budget Subcommittee
    on Education
The Honorable Toni Hasenbeck, Vice Chair, House Appropriations and Budget
    Subcommittee on Education
The Honorable Mike Mazzei, Secretary of Budget
The Honorable Michael Rogers, Secretary of State and Education
Mr. John Budd, State Chief Operating Officer and Secretary of Agency Accountability
Ms. Brandy Manek, Director of Budget, Policy and Gaming Compliance, OMES
Ms. Shelly Paulk, Deputy Budget Director for Revenue, OMES
Mr. Anthony Sammons, Director of Fiscal Staff, Oklahoma State Senate
Mr. Mark Tygret, Director, Fiscal Division, Oklahoma House of Representatives

AGENDA ITEM #11:

Oklahoma's Promise.

SUBJECT: FY2021 Official Funding Estimate for the Oklahoma's Promise Scholarship Program.

RECOMMENDATION:

It is recommended that the State Regents provide to the State Board of Equalization a funding estimate of $72.4 million for the Oklahoma's Promise scholarship program for fiscal year 2021 and further recommended that $70 million of the funding estimate be allocated from the General Revenue Fund with the remaining $2.4 million funded from the program's trust fund reserves.

BACKGROUND:

Oklahoma's Promise was created by the Oklahoma Legislature in 1992. The program is designed to increase the education attainment level of Oklahoma's population by providing an incentive for more students to aspire for college, prepare themselves academically in high school, and ultimately earn a college degree or other postsecondary credential.

Students from families with incomes of $55,000 or less must enroll in the program in the 8th, 9th, or 10th grade [the income limit is scheduled to increase to $60,000 in 2021-2022]. To earn the scholarship, students must complete a 17-course college preparatory curriculum, achieve at least a 2.50 GPA in the required core curriculum and a 2.50 GPA overall, attend school regularly, and refrain from substance abuse or delinquent acts. Students completing the requirements are eligible for a scholarship equal to public college tuition. In college, students are subject to an annual family income check at $100,000. To retain the scholarship in college, students must also meet certain academic and conduct requirements.

During the 2007 session, the Oklahoma Legislature passed SB 820 providing a dedicated funding process to ensure full and stable financial support for the program. The implementation of a dedicated funding process for the Oklahoma's Promise program was a long-standing legislative goal of the State Regents.

By statute, the State Regents must provide a funding estimate to the State Board of Equalization no later than November 1 of each year. The funding estimate is for the fiscal year that begins the following July 1. The seven-member State Board of Equalization is comprised of the Governor, Lieutenant Governor, State Auditor and Inspector, State Treasurer, Attorney General, Superintendent of Public Instruction, and the President of the Board of Agriculture. The Board is responsible for certifying the total amount of funds that the Legislature can appropriate from the state's General Revenue Fund. The Board also has the responsibility to determine the amount of revenue necessary to fund the Oklahoma's Promise scholarships and subtract that amount from the total funds available for appropriation from the General Revenue Fund.

45

POLICY ISSUES:

The Oklahoma's Promise program plays an important role in the State Regents' goal to increase the proportion of Oklahoma's population earning a college degree or other postsecondary credential.

ANALYSIS:

Fiscal Year 2020-2021 Funding Estimate

Based on current data and projections, the funding estimate for the Oklahoma's Promise program in 2020-2021 is $72.4 million, a reduction of $4.9 million or six percent from the 2019-2020 funding level of $77.3 million. The number of students expected to receive an Oklahoma's Promise award in 2020-2021 is about 16,000.

Factors taken into consideration to calculate the estimate include:

- enrollment rates of 8th, 9th, and 10th grade students in the program;
- the rate at which Oklahoma's Promise students complete the high school requirements to be eligible for the scholarship;
- high school-to-college-going rates;
- student enrollment patterns at colleges in Oklahoma;
- student persistence/award-retention rates in college;
- the number of college semester credit hours in which students enroll;
- the tuition rates at each institution;
- estimated tuition increases for 2020-2021; and
- changes in institutional tuition policy such as flat-rate tuition structure.

46

High School Student Enrollment in Oklahoma's Promise

The number of high school students enrolling in Oklahoma's Promise had been steadily declining since 2012. However, the 2020 high school graduating class is the first class enrolled at the current $55,000 family income limit; its enrollment is projected to be about 8,500, an increase of 550 or seven percent from the 2019 graduating class.

# OKPromise High School Enrollment
(By High School Graduation Year)

As of 9/25/19

47
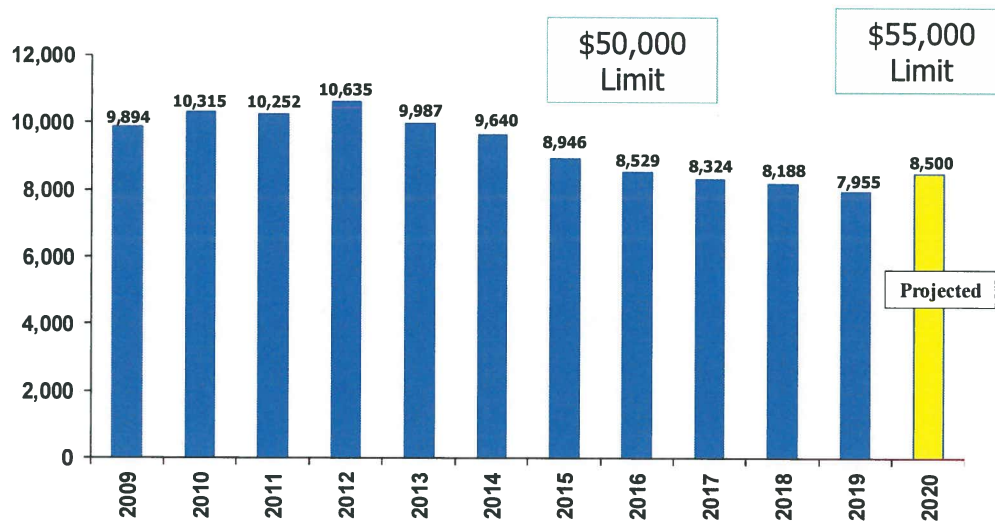
High School Requirement Completion Rates of Oklahoma's Promise Students

Over the past seven years the percentage of enrolled students who successfully complete the program's high school requirements to be eligible for the scholarship has increased significantly. About seventy-four percent of Oklahoma's Promise students enrolled in the high school graduating class of 2019 completed the program requirements. The increased completion rate means that about 500 more 2019 graduates will receive the scholarship than would have if the completion rate had remained at sixty-five percent. It is projected that the completion rate will reach seventy-five percent for the class of 2020.

High School Requirement Completion Rates
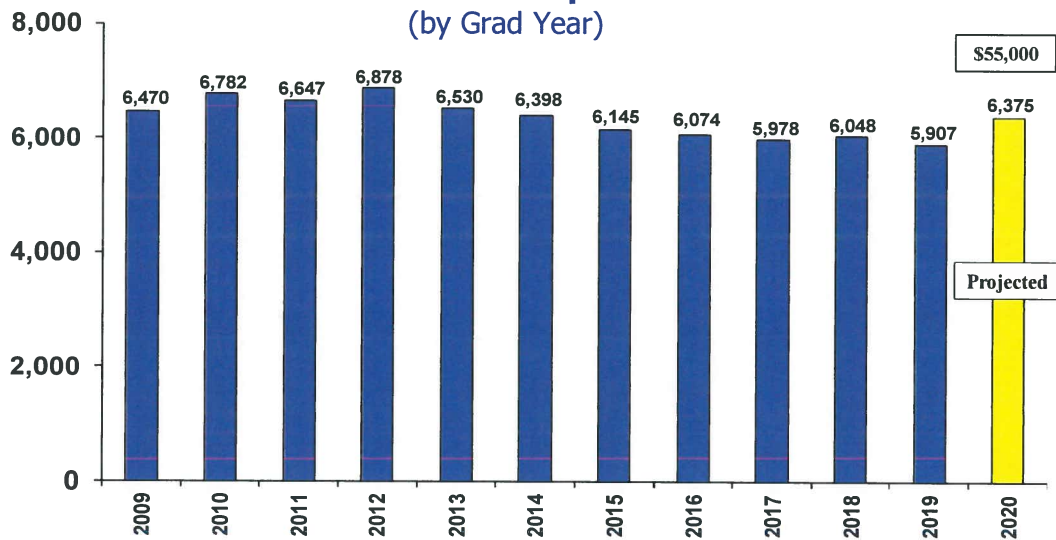## (by grad year)

As of 10/1/19

48
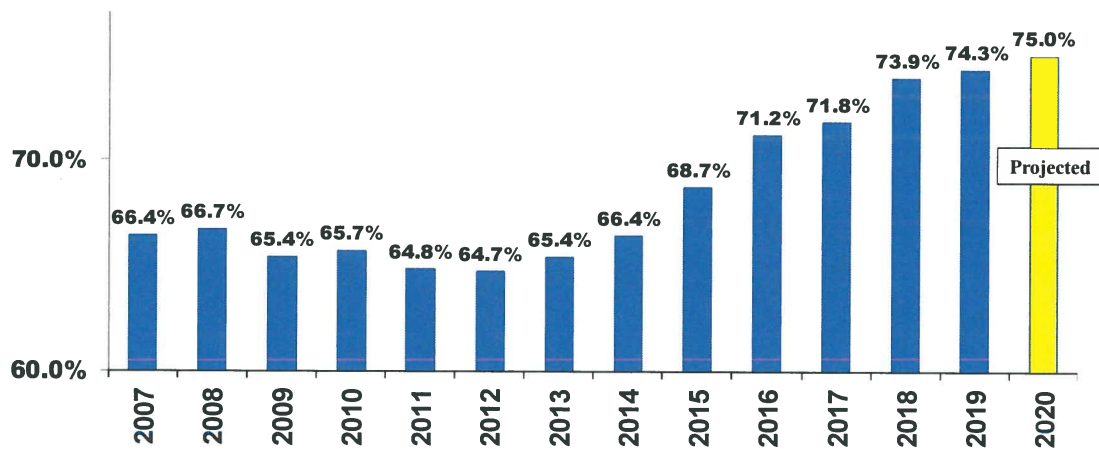
<u>Number of High School Students Completing the Program Requirements</u>
The number of Oklahoma's Promise students in the 2020 high school graduating class meeting the requirements to be eligible for the scholarship is expected to be about 400-500 more than the graduating class of 2019.

High School Students Completing
OKPromise Requirements
(by Grad Year)

| Grad Year	Students
2009	6,470
2010	6,782
2011	6,647
2012	6,878
2013	6,530
2014	6,398
2015	6,145
2016	6,074
2017	5,978
2018	6,048
2019	5,907
2020	6,375 (Projected)

$55,000

As of 9/30/19

49

Program Cost Savings

In 2018-2019, total actual scholarship expenditures decreased by $3.9 million or five percent compared to 2017-2018. The program experienced significant cost savings due to two primary factors – (1) the implementation of statutory fiscal reforms approved by the Legislature in 2017, and (2) an increase in the number of state system institutions not raising tuition.

OKLAHOMA'S
PROMISE
OKLAHOMA HIGHER LEARNING ACCESS PROGRAM

Scholarship Expenditures
(In $ millions, by academic year)
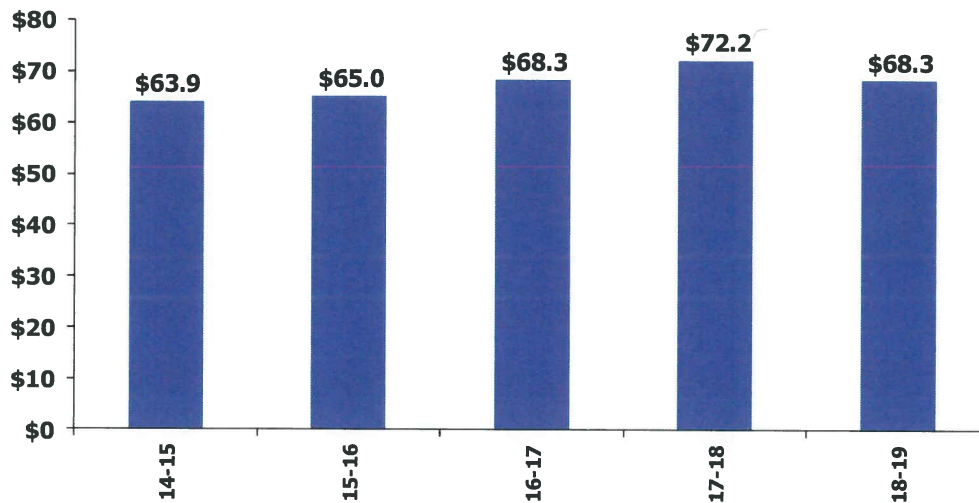
As of 9/17/19

(1) Two of the significant fiscal reforms from the 2017 legislation went into effect in 2018-2019:
   - The prohibition of any award payment for noncredit remedial courses.
   - The application of the $100,000 family income limit to every Oklahoma's Promise college student every year. Previously, the $100,000 limit was applied only once when the student first entered college.

   A third legislative fiscal reform, capping the number of credit hours for which the award will pay in college at 129, applies to students graduating high school in 2018 and thereafter. This reform is expected to generate additional cost savings beginning in 2021-2022 when the 2018 graduates enter their fourth year of college.

(2) In 2018-2019, six institutions, or nearly one quarter of the state system institutions, did not increase tuition rates. In the previous eight years, at most only two institutions had no tuition increase. Additional cost savings should be experienced in 2019-2020 since twelve institutions, or nearly half of state system institutions, did not increase tuition rates (see the table below).

50

Number of Institutions with No Tuition Increase

(Resident Tuition Only; Not Tuition & Fees)

2009-10 to Present, 25 Institutions

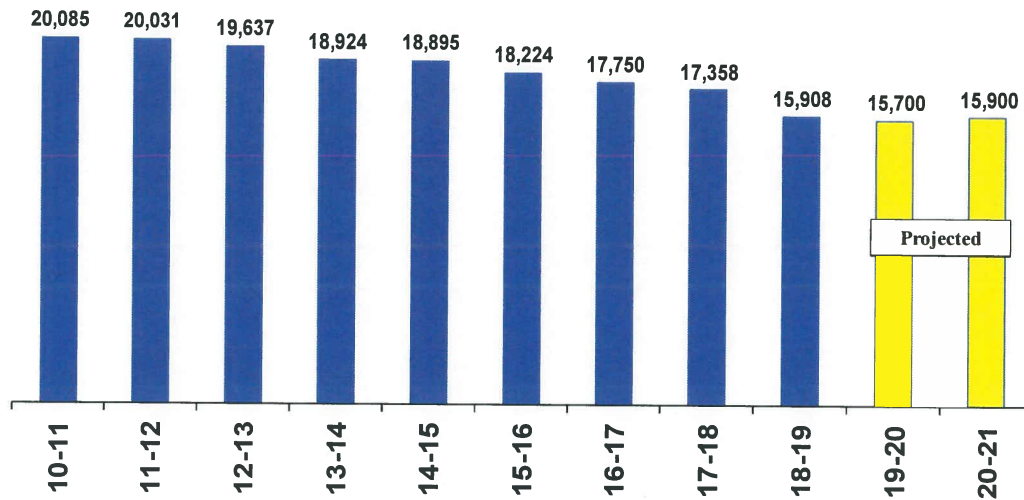| Year	# of Institutions With No Tuition Increase	% of Institutions With No Tuition Increase	Institutions With No Tuition Increase
2009-10	All 25 (tuition freeze)	100%	All 25
2010-11	0	0%	
2011-12	0	0%	
2012-13	1	4%	CSC
2013-14	2	8%	OU, OSU
2014-15	2	8%	OSU, WOSC
2015-16	1	4%	WOSC
2016-17	0	0%	
2017-18	2	8%	OPSU, USAO
2018-19	6	24%	OU, SOSU, OPSU USAO, EOSC, MSC
2019-20	12*	48%	OU, OSU CU, OPSU, SOSU CASC, CSC, EOSC, MSC OCCC, RCC, WOSC

*Does not include OSU-IT, Okmulgee which also had no tuition increase.

51

Projected Scholarship Recipients

Due in large part to the 2017 legislative fiscal reforms, the number of scholarship recipients in 2018-2019 declined by 1,450 or eight percent compared to 2017-2018. The projected number of scholarship recipients in 2019-2020 is expected to be about 15,700 and rise to about 15,900 in 2020-2021.

Scholarship Recipients

| Year	Recipients
10-11	20,085
11-12	20,031
12-13	19,637
13-14	18,924
14-15	18,895
15-16	18,224
16-17	17,750
17-18	17,358
18-19	15,908
19-20	15,700 (Projected)
20-21	15,900 (Projected)

As of 9/30/19

52

The Impact of Income Growth and Inflation on Program Eligibility

The following charts show how family income growth and inflation have impacted the potential number of Oklahoma students/families eligible to participate in the program. For example, the percentage of Oklahoma families with incomes under $50,000 has declined from sixty-one percent in 2000 to only thirty-eight percent in 2018. In 2018, the percentage of families with income under $75,000 was actually less than the percentage of families with income under $50,000 in 2000.

Oklahoma Family Incomes
%'s Under $50,000, $75,000 & $100,000
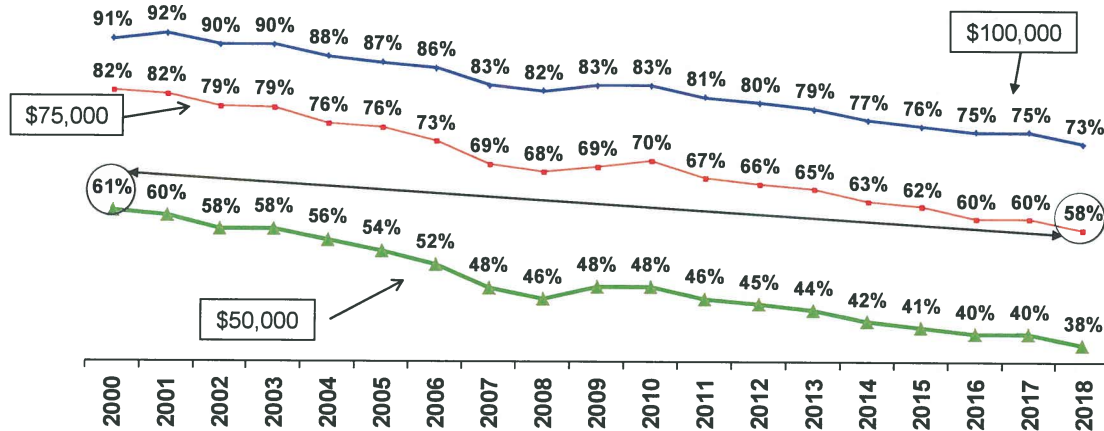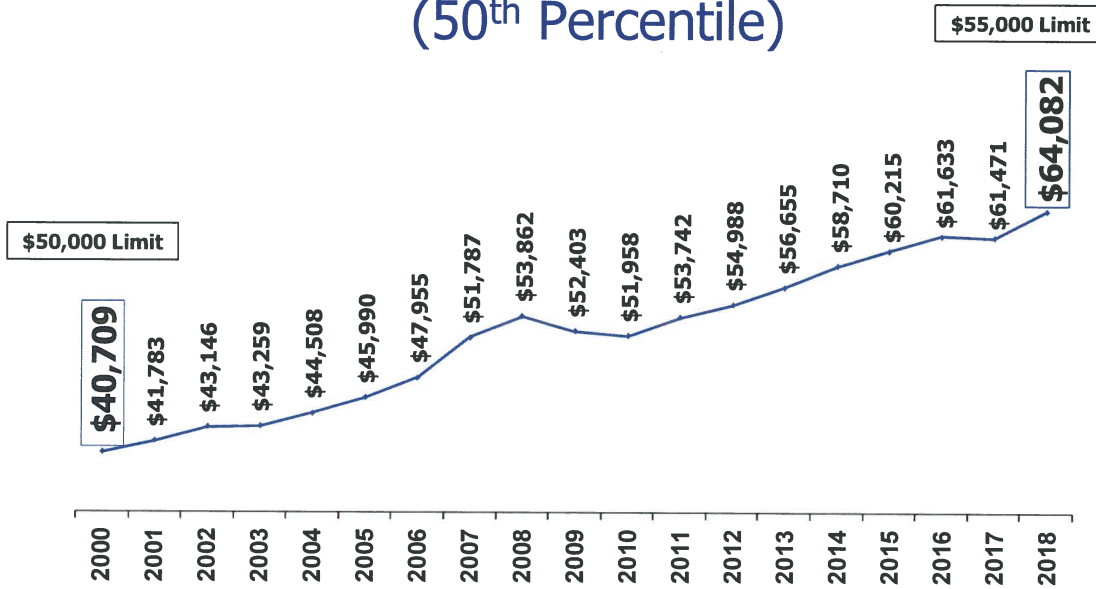

Source: US Census Bureau, 2000 Census, American Community Survey-2001-2018

53

Oklahoma Median Family Income

The median family income (50th percentile) for Oklahoma has grown from about $40,700 in 2000 to nearly $64,100 in 2018, an increase of $23,400 or fifty-seven percent. During the same period, the Oklahoma's Promise family income limit increased from $50,000 to $55,000, or ten percent. The income limit is scheduled to increase to $60,000 beginning in 2021-2022.

Oklahoma Median Family Income
(50th Percentile)

$55,000 Limit

$50,000 Limit

Year	Income
2000	$40,709
2001	$41,783
2002	$43,146
2003	$43,259
2004	$44,508
2005	$45,990
2006	$47,955
2007	$51,787
2008	$53,862
2009	$52,403
2010	$51,958
2011	$53,742
2012	$54,988
2013	$56,655
2014	$58,710
2015	$60,215
2016	$61,633
2017	$61,471
2018	$64,082

Source: US Census Bureau, 2000 Census, American Community Survey, 2001-2018

Consumer Price Index

Based on the U.S. Consumer Price Index, $50,000 in 2000 is equivalent to about $74,500 in 2019.

54

As shown below, the program's trust fund had a balance of $10.9 million at the end of FY2019. It is recommended that $2.4 million be budgeted from the trust fund balance for FY2021 scholarship expenditures. This action would be consistent with a goal to maintain a reserve fund balance of approximately ten percent.

Oklahoma's Promise
Funding Sources / Year End Trust Fund Balances

	Funding Estimate	From General Revenue	Budgeted From Trust Fund	June 30 Trust Fund Balance	Balance as % of Funding
FY'2011	$57,000,000	$57,000,000		$15,626,849	27.4%
FY'2012	$63,200,000	$63,200,000		$20,121,256	31.8%
FY'2013	$63,000,000	$57,000,000	$6,000,000	$19,852,259	31.5%
FY'2014	$62,700,000	$57,000,000	$5,700,000	$12,400,074	19.8%
FY'2015	$61,000,000	$57,000,000	$4,000,000	$4,910,968	8.1%
FY'2016	$61,700,000	$59,000,000	$2,700,000	$649,223	1.1%
FY'2017	$67,800,000	$67,800,000	$0	$521,449	0.8%
FY'2018	$74,300,000	$74,300,000	$0	$2,120,053	2.9%
FY'2019	$76,800,000	$76,800,000	$0	$10,867,838	14.2%
FY'2020 est.	$77,300,000	$77,300,000	$0		
FY'2021 est.	$72,400,000	$70,000,000	$2,400,000		

Total Budgeted From Trust Fund FY'11 to FY'21 $20,800,000

55

Oklahoma State Regents for Higher Education
Overview of State Student Financial Aid Programs
(Summary Updated as of 8/21/20)

FY2021 State Appropriations/allocations for Student Aid:

	Amount	Estimated Recipients
Oklahoma's Promise	$72,400,000	15,500
Oklahoma Tuition Aid Grant (OTAG)	$14,404,839	15,000
Concurrent Enrollment Tuition Waiver	$12,982,900	19,000
Academic Scholars Program	$6,056,989	1,500
Oklahoma Tuition Equalization Grant (OTEG)	$2,521,688	1,250
National Guard Tuition Waiver Reimbursement	$1,390,998	1,800
Regional University Baccalaureate Scholarships	$717,054	250
International Scholarship Program	$87,262	7
Future Teachers Scholarship	$67,999	70
Nigh Scholarships	$47,599	35
Tulsa Reconciliation Scholarship/Wm. P. Willis	$34,000	60
Chiropractic Education Scholarship	$27,200	25
Total	$110,738,528	na

Total State Appropriations/Allocations for Student Aid Since FY2001:

Between FY2001 and FY2021, state appropriations for state student financial aid programs grew from $28 million to $110.7 million, an increase of $82.7 million or 295%. Much of the growth is attributable to the Oklahoma's Promise scholarship which increased from $1.4 million in FY2001 to $72.4 million in FY2021. As a percentage of higher education's total appropriation, student aid funding has increased from 3.4% to 13.1%.

Fiscal Year	Total Higher Ed State Appropriation*	Student Aid Appropriation/ Allocation	Student Aid as % of Total Higher Ed Appropriation
FY2001	$816,200,000	$27,957,995	3.4%
FY2002	$860,500,000	$30,310,030	3.5%
FY2003	$851,300,000	$34,110,259	4.0%
FY2004	$767,900,000	$37,919,262	4.9%
FY2005	$802,100,000	$47,760,262	6.0%
FY2006	$889,400,000	$59,223,562	6.7%
FY2007	$1,020,000,000	$72,423,562	7.1%
FY2008	$1,099,100,000	$85,066,419	7.7%
FY2009	$1,093,900,000	$90,966,419	8.3%
FY2010	$1,055,900,000	$90,966,419	8.6%
FY2011	$1,010,700,000	$93,673,390	9.3%
FY2012	$1,008,500,000	$99,812,301	9.9%
FY2013	$1,012,300,000	$99,792,540	9.9%
FY2014	$1,045,500,000	$100,092,540	9.6%
FY2015	$1,044,500,000	$100,016,261	9.6%
FY2016	$1,025,100,000	$100,644,179	9.8%
FY2017	$877,800,000	$98,989,361	11.3%
FY2018	$847,900,000	$103,413,808	12.2%
FY2019	$853,500,000	$113,413,808	13.3%
FY2020	$879,400,000	$117,213,808	13.3%
FY2021	$842,814,742	$110,738,528	13.1%

*includes funding for Oklahoma's Promise

Meeting of the
OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION
April 22, 2020

AGENDA ITEM #22-c (1):

Oklahoma College Savings Plan.

SUBJECT: Program Update for 2019.

RECOMMENDATION:

This item is provided for information purposes only.

BACKGROUND:

The Oklahoma College Savings Plan (OCSP) began operation in April 2000. The Board of Trustees that oversees the OCSP is chaired by the State Treasurer. The Chancellor for Higher Education, an ex officio member of the board, currently serves as vice-chair. The State Regents' office also provides staffing support for the OCSP board.

The OCSP is Oklahoma's "529" plan, a designation based on the IRS code section which authorizes state "qualified tuition plans." As a "529" plan, earnings on investments in the program are exempt from both federal and state income taxes if used for qualified higher education expenses. The 2017 federal Tax Cuts and Jobs Act authorized withdrawals of up to $10,000 per year to be used for eligible K-12 tuition expenses beginning January 1, 2018.   In addition, Oklahoma provides an annual state income deduction on contributions of up to $10,000 per taxpayer or $20,000 for joint-filers.

POLICY ISSUES:

The OCSP is designed to encourage Oklahoma families to save for higher education expenses. An OCSP account can be opened with as little as $100 with subsequent contributions as small as $25 dollars or $15 per pay period. By encouraging savings, students are more likely to have the financial resources to afford college expenses without resorting to excessive student loan debt.

ANALYSIS:

As the current contract for management services expires in June 2020, the board issued a new Request for Proposals (RFP) in October 2019. Five responses were received and the board awarded a new contract to TIAA-CREF Tuition Financing Inc. to continue administering the direct-sold program and a contract to Fidelity to administer the advisor-sold program. As a result of the re-bidding process, the new contracts will feature lower costs for account holders.
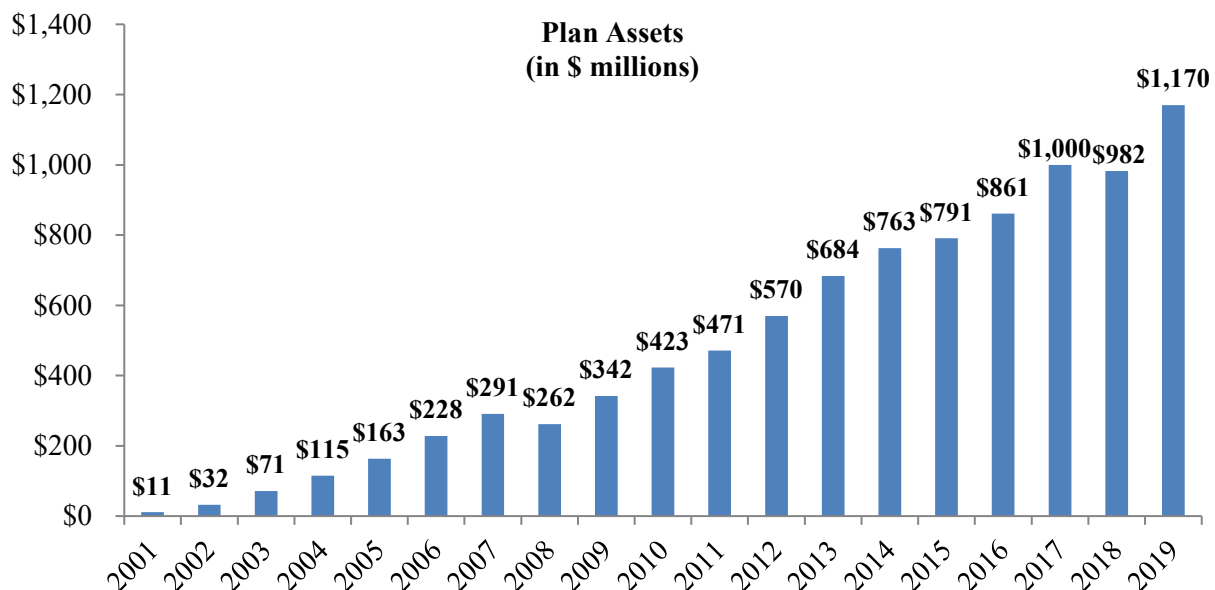
Account and Asset Growth

The following table shows the growth of the program over the past nineteen years. Following a slight decline in assets in 2018, the program experienced a 19 percent increase in 2019. Since the program's inception, Oklahoma families have withdrawn just over 600 million to pay for college expenses.

OCSP History of Account and Asset Growth

	# of Investment Option Accounts	Unduplicated Total Accounts	Annual % Chng	Total Assets	Annual % Chng
As of 12/31/01	3,830		160%	$10,729,693	251%
As of 12/31/02	12,017		213%	$32,262,626	201%
As of 12/31/03	18,647		55%	$70,823,971	120%
As of 12/31/04	24,390		31%	$115,325,223	63%
As of 12/31/05	28,741		18%	$163,146,757	41%
As of 12/31/06	32,735		14%	$228,073,626	40%
As of 12/31/07	38,123		16%	$290,897,749	28%
As of 12/31/08	41,744		9%	$262,026,337	-10%
As of 12/31/09	44,466		7%	$342,305,879	31%
As of 12/31/10	47,326		6%	$422,735,335	23%
As of 12/31/11	51,088		8%	$470,891,493	11%
As of 12/31/12	54,915	45,170*	7%	$570,296,748	21%
As of 12/31/13	58,869	48,453*	7%	$684,331,826	20%
As of 12/31/14	62,974	51,830*	7%	$762,694,816	11%
As of 12/31/15	66,549	54,637*	6%	$791,295,519	4%
As of 12/31/16	70,741	56,948*	4%	$861,154,764	9%
As of 12/31/17	75,377	59,688*	7%	$1,000,310,064	16%
As of 12/31/18	80,772	64,911*	7%	$982,341,603	-2%
As of 12/31/19	85,397	67,898*	5%	$1,170,364,579	19%

*Beginning with 2012, the program administrator began providing the number of total unduplicated accounts irrespective of the number of investment options within each account.

Plan Assets (in $ millions)

2001: $11
2002: $32
2003: $71
2004: $115
2005: $163
2006: $228
2007: $291
2008: $262
2009: $342
2010: $423
2011: $471
2012: $570
2013: $684
2014: $763
2015: $791
2016: $861
2017: $1,000
2018: $982
2019: $1,170

Allocation of Investments

Most account owners choose the aged-based investment option that automatically adjusts the types of investments for the account as the child grows older. The following table shows the distribution of accounts and assets among the investment options as of December 31, 2019.

	# of Investment Option Accounts	% of Total	Total Assets	% of Total
Age-Based Allocation	45,306	56.09%	$609,953,252	52.12%
Equity Index Option	4,794	5.94%	$65,906,121	5.63%
Guaranteed Option	7,766	9.61%	$78,158,971	6.68%
Balanced Option	4,493	5.56%	$48,912,314	4.18%
Diversified Equity Option	3,833	4.75%	$41,955,961	3.58%
Fixed Income Option	1,528	1.89%	$12,833,959	1.10%
100% Equity Index Option	7,013	8.68%	$133,326,712	11.39%
Subtotal Direct-Sold Accounts	74,733	87.51%	$991,047,290	84.68%
Advisor-Sold Accounts	10,664	12.49%	$179,317,289	15.32%
Total - All Accounts	85,397	100.00%	$1,170,364,579	100.00%

OCSP History of Qualified Withdrawals for College Expenses

Year	Qualified Withdrawals	Unique Beneficiaries
FY2001	-$12,681	3
FY2002	-$230,549	92
FY2003	-$1,478,822	417
FY2004	-$3,136,835	854
FY2005	-$6,562,560	1,418
FY2006	-$11,534,223	2,103
FY2007	-$16,741,130	2,607
FY2008	-$20,513,720	3,047
FY2009	-$23,941,975	3,454
FY2010	-$27,863,243	3,943
FY2011	-$31,799,282	4,239
FY2012	-$36,150,803	4,603
FY2013	-$41,578,157	5,018
FY2014	-$46,393,229	5,431
FY2015	-$52,262,552	5,901
FY2016	-$57,121,259	6,408
FY2017	-$62,679,670	6,806
FY2018	-$74,863,498	9,480
FY2019	-$85,608,114	9,077
Total	-$600,472,302	27,389

Investment Options and 2019 Investment Performance

Direct-Sold Program – The direct-sold program has nine investment options, including three age-based Managed Allocation options that mix equity, real estate, fixed income, and money market mutual funds based on the age of the beneficiary.

	2019 Performance
Conservative Managed Allocation	+3.32% to 20.52%
Moderate Managed Allocation	+8.77% to 23.82%
Aggressive Managed Allocation	+12.22% to 27.57%
U.S. Equity Index	+30.49%
Diversified Equity	+28.02%
Global Equity Index	+27.55%
Balanced (60 percent equities, 40 percent bonds)	+20.38%
Fixed Income Option	+8.61%
Guaranteed Option (principal protected from loss)	+1.90%

Advisor-Sold Program – The advisor-sold program has a total of eighteen investment options, including six age-based portfolios, two static portfolios, and ten individual fund options. The 2019 performance reflects Class A shares.

Age-Based Portfolios	2019 Performance
Ages 0-8	+20.47%
Ages 9-11	+18.52%
Ages 12-14	+12.84%
Ages 15-16	+9.60%
Ages 17-18	+7.27%
Ages 19+	+5.56%

Static Portfolios	2019 Performance
Capital Appreciation	+20.44%
Capital Preservation	+7.81%

Individual Funds	2019 Performance
AllianzGI Best Styles International Equity	+18.21%
AllianzGI Best Styles U.S. Equity	+27.45%
AllianzGI Global Allocation	+17.51%
AllianzGI Income & Growth	+19.32%
PIMCO Income	+7.26%
PIMCO Real Return	+7.70%
PIMCO Short Asset Investment	+2.12%
PIMCO Total Return	+7.49%
TIAA-CREF Small-Cap Blend Index Fund	+24.54%
TIAA-CREF U.S. Large Cap Equity	+31.49%

Program Costs for Participants

Direct-sold program - There are no enrollment fees or commissions assessed on contributions in the direct-sold program. The annual administrative fee to participants is based on a management fee assessed for TIAA-CREF's administrative services plus the underlying mutual fund fees (excluding the Guaranteed Option, which has no administrative fee). Total annual fees for participants range from 0.35% to 0.78%, depending on the investment option.

Advisor-sold program - Investments in the advisor-sold program are purchased as either Class A or Class C shares. Class A shares have a 4.25% initial sales charge, a $20 annual account maintenance fee, and total annual asset-based fees ranging from 0.81% to 1.67%. Class C shares have a 1.00% initial sales charge, a $20 annual account maintenance fee, and total annual asset-based fees ranging from 0.94% to 2.42%.

National Rating

SavingforCollege.com, an independent and authoritative website on state college savings plans, continues to give the OCSP direct-sold program a high rating of 4.5/5.0 and the advisor-sold program a rating of 3.5/5.0.

ACADEMIC AFFAIRS

Regent Casey and Regent Sherry Orientation
August 25, 2020

1

ACADEMIC AFFAIRS

- **Functions and Missions -** 3.2 Functions of Public Institutions
  - Research Institutions
    - Undergraduate and graduate, including Ph.D. & Ed.D.
    - Research
    - Statewide programs

  - Regional Universities
    - Undergraduate and graduate at the master's level with these differences:
    - No Graduate programs
      - OPSU
      - USAO
    - Limited first-professional degrees:
      - PharmD – SWOSU
      - Optometry – NSU
      - Physical Therapy – LU
      - DNP Nurse Practitioner - NWOSU
    - Limited associate degrees
      - LU, OPSU, CU, RSU, SWOSU, UCO

  - Community Colleges
    - Undergraduate lower division work (associate)

  - Constituent Agencies – specialized functions under OU and OSU
    - OU: Law, Health Sciences, Geological Survey, Tulsa
    - OSU: Vet Med, Ag Experiment Station, Ag Extension, OSU-OKC, OSUIT, Health Sciences
  - Branch Campuses
  - University Center of Southern Oklahoma (SEOSU, MSC)
  - University Center at Ponca City (NOC, NWOSU, SWOSU)

  - Key Staff: Dr. Debbie Blanke, Dr. Stephanie Beauchamp, & Dr. Kyle Foster   2

ACADEMIC DIVISIONS

- **Academic Programs**
  - Coordinate academic programs within the system
  - New Program Requests
    - Degrees, Certificates, Traditional and online
    - LOI, proposal, protest procedures
  - Program Modifications
    - Requirement changes: courses, credit hours, option addition and deletions, name changes
  - Program suspensions and deletions
  - Academic Plans/Degree Completion Plans

  - Key Staff: Dr. Debbie Blanke, Dr. Stephanie Beauchamp, and Dr. Rochelle Rush

3

ACADEMIC DIVISIONS

- **Academic Policies**
  - Policy Compliance
    - Exceptions to policy
    - Reporting requirements
    - Policy audits – completed by our system auditor
  - Policy Modification
    - Statute – veterans admissions
    - Accreditor – PLA, contractual agreements, and transfer with CareerTech Centers
    - System requested – UCSO in process

    - Process includes: COI, COP, SR posting and approval

4

ACADEMIC DIVISIONS

- **Academic Policies (continued)**
  - State authorization of private institutions (federal requirement to maintain Title IV funding)
  - State Authorization Reciprocity Agreement (SARA)
  - Accreditation monitoring (for public and private)
  - State agency role in the triad (accreditation, state, USDE)
  - Institutional financial status notification (for pubic and private)

  - Key staff: Dr. Debbie Blanke, Dr. Kyle Foster, and Ms. Elizabeth Walker

5

TEACHER EDUCATION

- **Oklahoma Teacher Connection**
  - Teach Oklahoma, Lead Oklahoma and Educators Rising – Pre-collegiate programs designed to encourage student interest in teacher education careers, as well as prepare students for academic, college and career success.

  - OTC Collegiate Grant Program - Collaborative effort with the colleges of education to help address needs in teacher education, including teacher recruitment, retention, placement and professional development objectives.

6

TEACHER EDUCATION

- **Oklahoma Teacher Connection (continued)**
  - Reading Conference – Annual conference in conjunction with higher education institutions to offer teachers, administrators and higher education faculty substantive reading professional development and curriculum alignment.

  - Teach Oklahoma Conference – Biennial conference designed to focus on effective practice in pre-collegiate teacher recruitment courses, as well as professional development designed to improve teaching and learning. This conference emphasizes recruitment and retention.

7

TEACHER EDUCATION

- **Oklahoma Teacher Connection (continued)**

  - Teacher Shortage Task Force – Purpose is to recruit and retain teachers for Oklahoma classrooms, as well as address the current needs in education for professional development, support and advancement in the field. The OTC Assistant Vice Chancellor is represented on this Task Force.

  - Dyslexia Task Force – Purpose is to create a Dyslexia Handbook to provide guidance to educators, students, families and community members about dyslexia, and the best practices for the identification, intervention and support for children with dyslexia. The OTC Assistant Vice Chancellor is the Chancellor's Designee on this Task Force.

8

TEACHER EDUCATION

- **Oklahoma Teacher Connection (continued)**
  - Teacher Shortage Employment Incentive Program (TSEIP) – A program designed to recruit and retain math and science teachers in Oklahoma by reimbursing eligible student loan expenses or providing an equivalent cash award.

  - OTC Facebook – Periodic posts are made to this social media page that highlights all levels of teacher education, including the outstanding contributions of educators, and the phenomenal activities occurring statewide.

  - Key staff: Dr. Goldie Thompson

9

STUDENT AFFAIRS

- Council on Student Affairs (COSA)
  - Chief student affairs officers from each institution
  - Admission, registrar, dean of students, financial aid, advising, etc.

- Oklahoma Student Government Association (OSGA)
  - Student congress with representatives from public and private institutions
  - Board of directors meet monthly, congress meets once

- Student Advisory Board (SAB)
  - Seven members elected from OSGA
  - Meets monthly (Sunday's) to discuss issues that relate to the State Regents programs and impacts on students

10

STUDENT AFFAIRS

- Annual Oklahoma Student Leadership Retreat
  - Opportunity for students to learn leadership skills and build a network of student leaders in Oklahoma
- Biennial Leadership Academy
  - Created by COSA to facilitate the professional growth and career advancement of student affairs specialists (every 2 years)
- OK Campus Compact
  - Presidential membership organization to promote service learning and civic engagement
- COSA Mentoring Initiative
  - Created by COSA to facilitate professional development for student affairs professionals by pairing them with a seasoned professional for mentoring opportunities throughout the academic year (ongoing).
- COSA Title IX Work
  - Coordinate discussion on collaborations among institutions for software to provide Title IX training for students and to provide professional development for faculty and staff on Title IX issues.
- Safety and Security
  - Coordinating with the Campus Safety and Security Task Force for professional development on safety, sexual assault, and other issues.

  - **Key staff: Dr. Debbie Blanke, Ms. Lindsay Echols, & Ms. Debbie Myrick**

11

STUDENT AFFAIRS – STUDENT PREPARATION FOR COLLEGE

- **10th grade PreACT**
  - Provides testing for all 10th grade students for college and career readiness
  - Review student performance and school data with K-12 faculty
  - Review student score reports with students and parents

- **Outreach** - to high school counselors, administrators, coordinators and Indian educators for college readiness efforts statewide

- **Professional Development** – for teachers, counselors and administrators to know how to prepare students for college
  - Fall Workshops regionally
  - Fall and Spring Conferences regionally
  - Summer Institute – statewide meeting

- **Summer Academies**
  - Math and Science Camps for 8th-12th Grade students around state at colleges and universities

- Key staff: Ms. Lisa Nelson & Ms. Annette Long

12

ACADEMIC/STUDENT AFFAIRS

- Work with the Oklahoma State Department of Education (SDE)
  - New Skills for Youth (NSFY) Grant
    - Individual Academic Career Plans (ICAP)
    - Redefining the Senior Year
  - Oklahoma Academic Standards
  - Accountability Task Force (School Grading System)
  - Assessment Task Force (ACT/SAT as CCRA)
  - Alternative Education Working Group

- Key staff: Dr. Debbie Blanke, Mr. Tony Hutchison, Dr. Rachel Bates, and Ms. Colbi Beam

13

STUDENT AFFAIRS

- Scholars for Excellence in Child Care Program
  - Contract with DHS to enable Community Colleges to offer specialized programs to recruit and train licensed child care staff
- Two-Year College TANF Initiative
  - Contract with DHS to provide Temporary Assistance to Needy Families
  - Enables community colleges to make available specialized education and training programs (vocational programs) that lead to employment opportunities. Recipients are required to work 30 hours per week.

- Key staff: Dr. Goldie Thompson & Ms. Gina McPherson

14

SPECIAL PROJECTS

- Course Equivalency Project (CEP)
- Summer Academies
- Concurrent Enrollment
- Reach Higher
- Math Success Group
- Complete College America (CCA)
- Cooperative Agreement Programs (CAP)
- Online Education Task Force
- Workforce Development

15

COURSE EQUIVALENCY PROJECT (CEP)

- Initiated in 1995
- Facilitate the transferability of courses between the colleges and universities in the state
- One of a few states in the nation with an extensive state-wide program
- Program includes some private institutions
- 50 disciplines involved
- Over 8,100 courses on the matrix

16

COURSE EQUIVALENCY PROJECT (CEP)

- Approximately 50% of the lower division courses offered on our campuses are on the matrix
- Each discipline has a team of faculty members who determine the common course content and learner outcomes
- To qualify, a course must have 75% of the common course content and matching student learner outcomes
- The matrix is updated annually
- The information is accessible electronically at www.OkCourseTransfer.org
- Current effort is to transition from course descriptions to include student learning outcomes
- Key staff: Dr. Debbie Blanke and Ms. Angel Icenhour

17

SUMMER ACADEMIES

- Officially established in 1989 under SB 269: "Said academies shall be established for instruction in the areas of science and mathematics as well as multidisciplinary studies."

- The goal is to inspire, excite and motivate students in the STEM disciplines

- Exploration of career interest, postsecondary opportunities and college awareness with "hands-on" experiences on campus

- Promote rigor, relevance and relationships

18

SUMMER ACADEMIES

- Seek partnerships with industry directed towards relevant work experiences
- 25 Academies on 17 Campuses in Summer 2018
- Both residential and commuter academies
- Emphasis on underrepresented groups in STEM
  - Opens doors for first-generation and underserved students
- Due to COVID-19, 2020 Academies were postponed to Summer 2021

Key staff: Ms. Lisa Nelson, Ms. Annette Long, Ms. Amy Brandley, and Ms. Colbi Beam

19

CONCURRENT ENROLLMENT

- Enables qualified seniors and juniors to enroll in college courses while still in high school
- Seniors receive tuition waivers for up to 18 credit hours within the senior year and juniors may receive up to 9 credit hours in the junior year (dependent on available funding)
- Students must pay fees and purchase textbooks and other materials
- Selected initiatives to deliver concurrent in high schools to expanded populations (TCC, CSC, OCCC, OU)
- In 2018-2019 academic year, more than 13,000 students enrolled in over 120,000 credit hours

Key staff: Dr. Debbie Blanke, Mr. Tony Hutchison, Dr. Kyle Foster, & Dr. Rachel Bates

20

REACH HIGHER
OKLAHOMA'S DEGREE COMPLETION PROGRAM

- Goals of the Reach Higher Program
  - Provide opportunities for Oklahomans with previous college credit to earn degrees in an accelerated format
  - Offer flexible and intensive course schedules to meet the needs of working adults
  - Offer a curriculum designed with the input of Oklahoma business leaders to ensure that students are prepared to succeed in the workplace
  - Provide recognition and support of non-traditional students at a statewide level

21

REACH HIGHER
OKLAHOMA'S DEGREE COMPLETION PROGRAM

- Reach Higher FlexFinish Degree programs:
  - Bachelor of Science in Organizational Leadership
  - Associate in Arts or Associate in Science in Enterprise Development (General Studies or Business Administration)
- Program is offered at seven regional universities, twelve community colleges and two technical branches
- In the B.S. in Organizational Leadership program, participating institutions share a common core (27-30 credit hours); each institution offers its set of specialized courses for their degree (12-18 credit hours)
- Statewide and institutional marketing plans

22

REACH HIGHER
OKLAHOMA'S DEGREE COMPLETION PROGRAM

- Institutions meet to coordinate efforts and share best practices
- Indian Educators joined Reach Higher spring 2017
- 9,611 program graduates since fall 2019
- http://www.reachhigherok.org/
- Key staff: Dr. Debbie Blanke , Dr. Stephanie Beauchamp, Ms. Sheila Smith, Ms. Tisha Bradford, and Ms. Brittany Blake

REACH HIGHER
OKLAHOMA'S DEGREE COMPLETION PROGRAM

- Grant from SHEEO and Lumina for an "Adult Promise"
- Reach Higher DirectComplete
- Focus on adults returning to college for degrees to fill critical occupations in Oklahoma
- Built on partnerships with employers, tribes, nonprofits, workforce agencies
- $777,300 for 3 years for statewide initiative (2016-2019)
- We are on a "no-cost extension" of time through Fall 2020.

- Key staff: Dr. Debbie Blanke, Dr. Stephanie Beauchamp, Ms. Tisha Bradford, Ms. Sheila Smith, and Ms. Brittany Blake.

24

REACH HIGHER
OKLAHOMA'S DEGREE COMPLETION PROGRAM

- Key projects from grant funds:
- Website redesign and updating
- Reach Higher ReConnect – recruitment
- Reach Higher CoachConnect – coaching training
- ShowWhatYouKnowOK.org – competencies for college credit website
- ROADMapsOK – portal in development to compile all college credit earned into degree mapping for expedient degree completion maps

- Key staff: Dr. Debbie Blanke, Dr. Stephanie Beauchamp, Ms. Tisha Bradford, Ms. Sheila Smith, and Ms. Brittany Blake.

25

MATH SUCCESS GROUP

- Goal: Improve math completion rates in college
- Activities:
  - Fourth year, twelfth grade transition course
    - Designed for students requiring math remediation
    - Minimizes loss of math skills by not taking a year off from math
    - Courses designed by math consultants from SREB
    - Coordinating efforts with the State Department of Education
  - Corequisite math course
    - Remediation incorporated into credit course
    - Increases completion rate
    - Reduces time to graduation
- Key staff: Dr. Rachel Bates and Ms. Colbi Beam

26

CCA INITIATIVES

- Degree Completion Plan
- 15 To Finish
  - Designed to increase 15+ hour enrollment by full-time students
  - Decrease time-to-degree
- Co-Requisite
  - Designed to pair remedial work with the credit bearing work to improve success in the content and improve degree completion
- Reverse Transfer
  - University transfer students sending credits earned back to community college for associate degree
  - Increases completion rate
- "Better Deal" for Adult Students
  - Ensuring that adult students coming back can earn credit for prior learning, access supports and resources to minimize past mistakes, and connect with degrees that lead to high demand occupations
  - Increases completion rate

- Key staff: Mr. Tony Hutchison, Dr. Debbie Blanke, Dr. Rachel Bates, and Ms. Angel Icenhour

27

CCA INITIATIVES

Complete College America (CCA) is the most comprehensive and ambitious higher education initiative ever undertaken by the state of Oklahoma.

The CCA Momentum Year focuses on Oklahoma's strategies for setting college students up for success in their first year, guiding students to make good decisions during their college years, and supporting them on a clear path to graduation.

Key staff: Mr. Tony Hutchison, Dr. Debbie Blanke, Dr. Rachel Bates and Ms. Angel Icenhour

28

COOPERATIVE AGREEMENT PROGRAMS (CAP)

- Agreements between colleges and career tech centers for collegiate level technical content and rigor
- Technical college certificates, associate in applied science, and technical baccalaureate degree programs
- In place now:
  - Prior Learning Assessments (PLA) for recognized industry credentials
  - Contractual arrangements – for industries that require a degree for licensure/credentialing – mostly health care
  - Transfer credit for technical courses

- Key staff: Dr. Debbie Blanke, Dr. Stephanie Beauchamp, & Ms. Angel Icenhour

29

ONLINE EDUCATION TASK FORCE

- Goals of the Task Force:
  - Increase accessibility of Oklahoma online courses
  - Facilitate timely graduation and increase graduation rates by increasing educational opportunities
  - Provide affordable and high quality Oklahoma-based online courses and programs
  - Facilitate collaboration and cooperation between state system institutions that will provide improved programs of study and promote increased efficiencies

30

ONLINE EDUCATION TASK FORCE

- Summary of Activities:
  - Establish in Fall 2012
  - Developed matrix for online course review (Quality Matters rubric)
  - Initiated Online Quality Summit
  - Professional Development for Online Teaching/Learning
  - Accessibility Training
  - Affordable Learning Content/Open Educational Resources
  - Established the Online Consortium of Oklahoma (OCO) to facilitate/manage continuation of these activities (membership organization)
- Key staff: Dr. Debbie Blanke, Mr. Brad Griffith, & Ms. Brittany Blake

31

WORKFORCE DEVELOPMENT

- Collaborate with Oklahoma Works:
  - Oklahoma Workforce Development through OK Department of Commerce/US Department of Labor
  - Governor's Council on Workforce and Economic Development
  - Career Pathways
  - System Oversight Subcommittee
  - Lumina Grant for Returning Adult Learners

- Key staff: Dr. Debbie Blanke & Dr. Stephanie Beauchamp, for Academic Affairs; Mr. Tony Hutchison & Mr. Matt Eastwood for System Planning & Analysis/Workforce Development Data

32

QUESTIONS?