Downtown Shreveport from Bossier City side of the Red River

Achieving a Comprehensive Public University in Shreveport-Bossier: Analysis of Alternative Strategies

Prepared for

The Community Foundation of North Louisiana
The Committee of One Hundred, Inc. (Shreveport-Bossier)
The Shreveport-Bossier Imperative for Higher Education
Louisiana Board of Regents

February 2012

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Strategies for the Global Knowledge Economy

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February 16, 2012

Ms. Paula Hickman
Executive Director, The Community Foundation of North Louisiana

Dr. Phillip Rozeman
Chairman, The Shreveport-Bossier Imperative for Higher Education, Greater Shreveport Chamber of Commerce

Mr. Vernon Chance
Executive Director, The Committee of One Hundred, Inc., Shreveport-Bossier

Dr. Jim Purcell
Commissioner of Higher Education, Louisiana Board of Regents

Dear Ms. Hickman, Drs. Purcell and Rozeman, and Mr. Chance:

With this letter, Eva Klein & Associates (EKA) is pleased to submit its report of our study—*Achieving a Comprehensive Public University in Shreveport-Bossier: Analysis of Alternative Strategies*—which your organizations have co-sponsored.

Report Contents

The following notes on content may guide readers to parts of the Report that they may find of greatest interest:

- **Chapter 1—Introduction** describes the sponsor organizations, the *client*, and the methodology/tasks of the study. Its exhibits provide details about the consultants, interviewees/participants, and data/documents.
- **Chapter 2—The Shreveport-Bossier Metro Area** is an overview of the Shreveport-Bossier Metropolitan Statistical Area (MSA), with some regional information included. Information is provided about demographics and employment/industries. An overview of current economic development strategies provides essential context for the subsequent analysis of unmet higher education needs (in Chapter 4).
- **Chapter 3—Higher Education Contexts** is an overview in two parts—State of Louisiana and Shreveport-Bossier. The first part summarizes some recent and current higher education issues, plans, and initiatives in the State. The second part describes higher education assets in Shreveport-Bossier and the larger region.
- **Chapter 4—Unmet Higher Education Needs in Shreveport-Bossier**—Derived from Chapters 2 and 3 and other data, Chapter 4 defines and describes what the consultants conclude are the *unmet higher education needs of the metro area*. ***These conclusions are very important, as they define the problem to which a solution is being sought and for which alternatives are examined.***
- **Chapter 5—Overview of Models/Alternatives** is a summary of EKA's national research on models used elsewhere to achieve greater higher education assets and performance in underserved markets. Generic models are described and some examples listed.
- **Chapter 6—Evaluation of the Alternatives** is the core evaluation/analysis of the alternative models, as they would apply to the Shreveport-Bossier situation, plus additional specific scenarios. It is a "pros and cons" analysis, but organized into four parts—***Advantages / Requirements*** and ***Disadvantages / Mitigation***.
- **Chapter 7—Conclusions and Recommendations** provides an overall summary of conclusions from Chapters 1 through 6, followed by the consultant team's recommendations.
- **Chapter 8—Exhibits** provides additional material to support information provided in the main chapters.

Interested readers with limited time to devote to this subject may wish to read Chapters 6 and 7 only, which constitute an *Executive Summary*. One may use earlier chapters for reference, if needed. A *Briefing Summary* and a PowerPoint summary/presentation—both much briefer than this document—also are available.

EKA

CHALLENGES

This study has been especially challenging for EKA in several ways. First, because the study was an unusual collaboration between local/regional organizations and the Board of Regents, we had a special obligation to be equitably responsive to contractual and scope requirements of our multiple sponsors.

Second, it has been supremely important to us to continuously think of ***the client*** for this work as being the people of Shreveport-Bossier and people of the larger region who are served by the higher education enterprise—***and not*** as any institutions or systems that are the components of that enterprise. *Keeping our eye on this ball* has been challenging, given the great variety of opinions and politics that inevitably surround the issues examined in this kind of strategic analysis. On the matter of politics, we have assiduously refrained from being influenced in our analyses by any strongly held positions of participants; we have endeavored to consider political factors only in terms of evaluating the pragmatic feasibility of accomplishing any particular solution.

Finally, there is inherent challenge today in the matter of how to reinvent higher education for the 21st century: The demands and needs are greater now in the *Global Knowledge Economy* than they ever were in the Agricultural and Industrial Economies. Yet, the resource base may be more constrained in future than in the past. As a society, going forward, we need to educate a greater portion of our population to higher levels of knowledge and skills. And, beyond quantity, we also must continue to strengthen the quality of outcomes. New approaches and fresh thinking definitely are required. Thus, we continuously reminded ourselves that our assignment was being carried out within a more far-reaching context. Our study was but one of several policy and structural solutions that Louisiana has been and is considering for strengthening higher education performance for the benefit of the citizens of the State and its regions.

About this study more specifically:

- We made a great effort to engage the widest participation that was possible, given limitations of calendar and budget for our work. Exhibit 1.2 provides evidence of the participation achieved.
- We took advantage of a significant body of prior and concurrent work that was/is relevant to our assignment. Many other studies and commission findings, as well as hard data from many sources, supported our qualitative interview data/findings. Exhibit 1.3 is a bibliography.
- We sought to identify practicable models by which to achieve a more comprehensive university presence in Shreveport-Bossier and then subjected those models to systematic, critical evaluation.
- As facilitators, we worked to seek consensus among key participants. Because all scenarios studied had both potential advantages and disadvantages, the matter of reaching conclusions and recommendations did not come easily to us. In fact, it is fair to say that we began the work with certain tentative ideas about hypothetical solutions, and we ended the work with very different conclusions. More importantly, in the end, this Report's conclusions and recommendations were achieved in a dialogue with key stakeholders/ sponsors—rather than being *solely* the consultant team's opinion.

With the enclosed Report, we offer our best wishes for a successful outcome on this specific matter of how best to secure the benefits of a comprehensive public university in Shreveport-Bossier and thereby meet currently unmet needs. While the primary focus has been on the Shreveport-Bossier metro area, inevitably we had to consider the broader needs and future of the larger region. Your actions pursuant to this study will have significant and, we hope, positive impact both for underserved populations and industries in the Shreveport-Bossier metro area and for all of Northwest and North Louisiana. And, that region is of great consequence in the overall future economic prosperity and social progress of the entire State.

Very truly yours,

Eva Klein

Eva Klein

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4—Unmet Higher Education Needs in Shreveport-Bossier

5—Overview of Models/Alternatives

6—Evaluation of Alternatives for Shreveport-Bossier

7—Conclusions and Recommendations

8—Exhibits

1 —Introduction

Sponsor Organizations

The Client

Study Description

Sponsor Organizations and Consultant

Following is brief information about the entities that collectively sponsored this study, including community-based organizations in Shreveport-Bossier and the Louisiana Board of Regents. This study may be unusual in that it represents a significant partnership initiative between business and community organizations representing a region (metro area) and the State's higher education governance agency—which, in this endeavor, are seeking to work collaboratively to find solutions to unmet needs—rather than working separately or serially.

The Shreveport-Bossier Imperative for Higher Education

The vision of the Shreveport-Bossier Imperative (SBI) of the Greater Shreveport Chamber of Commerce is to increase the educational achievement of Louisiana citizens and to position higher education to be more responsive to the workforce needs of the people of Louisiana. In so doing, we hope Louisiana citizens will demand investment in education as a foundation for our future. The result will be a Louisiana that successfully capitalizes on the emerging *Knowledge Economy.*

The SBI mission centers on challenging complacency; educating the business community and public about the higher education enterprise; creating vision and agendas/solutions around the vision; and collaborating and communicating with state policy leaders and leaders in other Louisiana communities.

The SBI grew out of an earlier Higher Education Task Force, which was established initially to meet short-term and longer-term objectives:

- **Short-term**—Develop a collaboration strategy between higher education, business, economic development and government leadership to develop and support a community strategy to focus efforts on education opportunities and performance of our region
- **Long-term**—Develop a set of community-wide post-secondary education goals with metrics and communication plan with focus on expanding postsecondary education opportunities and connecting higher education resources and assets to economic development.

The Community Foundation of North Louisiana

The Community Foundation of North Louisiana (the Foundation) has been the community's "savings account" since 1961. The Foundation provides a variety of charitable funds and gift options to help its partners achieve their vision for a stronger, more vibrant community. By bringing together fund donors, their financial advisors, and non-profit agencies, the Foundation is a powerful catalyst for building charitable giving and effecting positive change in the area.

The funds managed by the Foundation are invested for the community's benefit and then are returned to the community in the form of grants to all sorts of charitable endeavors, from the arts to education to the social service sector.

Recognized for its commitment to integrity and sound financial practices, The Community Foundation oversees more than $75 million in assets for the community's benefit. Main activities of the Foundation are in the realm of **grant-making** for community advancement purposes and **convening** community partners to develop solutions to needs.

Study Co-Sponsors

This study is unusual in that it is co-sponsored by regional constituent organizations in Shreveport-Bossier and the Louisiana Board of Regents.

Sponsors of this study are:

- The Shreveport-Bossier Imperative for Higher Education
- The Community Foundation of North Louisiana
- The Committee of One Hundred, Inc.
- The Louisiana Board of Regents

Analysis and facilitation were provided by Eva Klein & Associates, Ltd., Great Falls, Virginia.

THE COMMITTEE OF ONE HUNDRED

Mobilizing business for a better NW Louisiana–
COMMITTEE OF ONE HUNDRED

The Committee of One Hundred, Inc. (C-100) is a non-political, non-profit membership group organized as an educational, civic and charitable organization whose members are the highest-ranking local executives of businesses and professional enterprises in Northwest Louisiana. The mission of the C-100 is to mobilize the regional business community for the betterment of northwest Louisiana through the assertion of leadership and influence. The C-100 works in many ways to mobilize the business community to improve Shreveport, Bossier City and the surrounding areas—maintaining active interests in regional economic development, education and community relations.

The business makeup of the C-100 ranges from large national employers to single owner businesses. Currently, composed of 190 members, the C-100 has 130 active, voting members in addition to advisory members who have served as active members for 10 years or more, military liaisons who are commanding officers of military facilities in NW Louisiana and at-large members who, while not eligible for active membership, are recognized for a one-year term for their significant community leadership.

LOUISIANA BOARD OF REGENTS

The Board of Regents (BoR or Regents) is a state agency created by the 1974 Louisiana Constitution, as successor to the former Coordinating Council for Higher Education. The BoR coordinates all public higher education in Louisiana.

Through statewide academic planning and review, budgeting and performance funding, research, and accountability, Regents coordinates the efforts of the state's 34 public colleges, universities and professional schools. Regents also serves as the state liaison to Louisiana's accredited, independent institutions of higher learning. While not involved in overseeing the day-to-day operations of college campuses, Regents is responsible for setting important statewide standards, including minimum admissions requirements as well as benchmarks and targets for the GRAD Act—Louisiana's signature higher education reform policy.

EVA KLEIN & ASSOCIATES, LTD.

EKA
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Strategies for the Global Knowledge Economy

Eva Klein & Associates (EKA) is a national higher education strategy firm based in Northern Virginia. EKA's niche focus is *Strategies for the Global Knowledge Economy*—with most of its work in two realms—*Re-inventing the 21st Century Institution* and *University Engagement and Economic Development Strategies*.

EKA is the only US-based consulting firm that has focused for more than two decades on the *challenges and opportunities at the intersection of higher education strategy and regional economic development strategy*. In Louisiana, EKA's prior experience has included work under contracts with the LSU System, certain LSU institutions, the Board of Regents, and community and economic development organizations in Shreveport-Bossier and in New Orleans.

Recently, EKA was selected in a competitive process to provide a study for the New Orleans Regional Planning Commission and its university and community partners that is entitled—*Closing the Loop on University-Based Innovation Capacity in New Orleans.*

Exhibit 1.1 provides bios for Eva Klein and C. Joseph Carter, PhD, the two consultants who performed this study.

THE CLIENT

WHO IS THE CLIENT?

At the outset of this study, it was essential to EKA to establish that the only way the analysis could be conducted properly was for the consultant team to be free of an obligation to represent any particular organization, institution, or system.

Thus, we and the study's sponsors have agreed that the actual ***clients*** for the study are the people of Shreveport-Bossier and the people of the larger region who are served by the higher education enterprise in its entirety, and not particular institutions or systems that form parts of that enterprise.

Further, it was agreed between the sponsors and consultant that there were to be no pre-conceived outcomes or answers. We agreed to let the facts, collective opinions of stakeholders, and our analysis of all those data and factors lead to independent conclusions and recommendations.

WHAT IS THE GEOGRAPHY?

As the direct focus of the study is Shreveport-Bossier MSA, the current and future MSA population is an important first definition of *Clients*. They are represented in this initiative by the Shreveport-Bossier sponsor organizations.

To the extent that Louisiana Tech University and other regional institutions are pertinent to the study, by extension, *Clients* also indirectly include the populations of the Ruston area and the entire, larger North Louisiana region.

In a third definition, the entire State is indirectly the *Client* for work that addresses how to meet Shreveport-Bossier needs. The region and the State are represented in this initiative by the Board of Regents as co-sponsor and by the participation of the higher education system offices and management boards.

Others who examine the same questions may do so with different geography assumptions—for example, considering all programs available in the larger Northwest or North Louisiana region—without regard to differences applicable to metro area populations. Thus, differences in geography assumptions can lead to differences in some conclusions.

STUDY DESCRIPTION

Following is a summary of EKA's assignment. Exhibits provide additional information.

OBJECTIVES

The study's objectives were to:

- Formulate a statement of unmet needs, a solution to which has eluded leadership and which they wish to solve now
- Identify the few viable options for growth/presence of a more comprehensive public university in Shreveport-Bossier—including various collaborative program models and a possible consolidation of institutions
- Facilitate a dialogue/decision process among regional higher education leadership; their respective system boards; the BoR; and the metro area/regional business/community leadership
- Provide analyses, as necessary, to prepare for and support dialogue and decision process
- Document the proposed solutions in a presentation report and make presentations of it.

TASKS/METHODS

Task 1—Study Scope Development, Review of Studies/Relevant Data, and Review of Cases/Models Elsewhere

Task 2—Initial Discussions with Local Shreveport-Bossier Leaders—Public, Private, Academic Institutions

Task 3—Detailed Discussions and Campus Visits with Most (Likely) Directly Affected Higher Education Institutions

Task 4—Initial Discussions with System-Level Higher Education Leaders

Task 5—Prepare Initial Analysis and Begin Draft Conclusions and Recommendations

Task 6—Facilitated Dialogue (Group) and/or Individual Institution Follow Up Meetings

Task 7—Summary Report and Presentations

Task 8—Ongoing Communications with Principals, Stakeholders, and Project Management.

PARTICIPANTS

Local coordination was led by Vernon Chance, Paula Hickman, Don E. Jones, Phillip Rozeman, MD, and John F. (Jack) Sharp. Board of Regents coordination was led by Jim Purcell, Commissioner, Kim Hunter-Reed, Chief of Staff, and Larry Tremblay, Interim Deputy Commissioner for Academic and Student Affairs. Interviewees and meeting participants are listed as Exhibit 1.2.

DATA

Prior Louisiana studies and various Louisiana data were reviewed. Also, selected national data and models in other places were reviewed. A list of data and documents that the consultants used or reviewed is provided as Exhibit 1.3.

This study was authorized in Fall 2011 and its completion required by late January 2012 (later amended to late February 2012). The schedule precluded primary research for quantitative data. Nor was the scope intended to include a detailed program-by-program review of existing programs (and enrollments in them) of area institutions. Rather, the consultants relied on data from previous relevant studies and secondary sources for economic and higher education information, and they devoted their available time to *qualitative interview* research with higher education providers, governing/management boards, and constituencies—to discuss aspirations, ideas, and opinions of the stakeholders and decision-makers.

Data Variations

Due to use of several secondary sources and prior studies, not all data are for the same years and from the same sources.

Thus, there may be minor variations in data presented in parts of this Report—for population, industries, employment, enrollments, or higher education program and institutional data.

2—The Shreveport-Bossier Metro Area

METRO AREA AS PRIMARY STUDY FOCUS

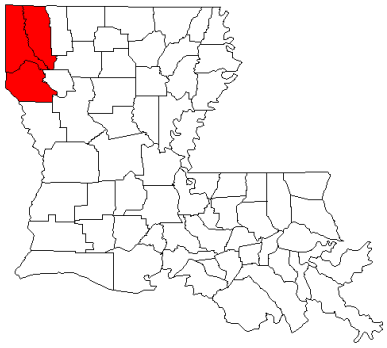
OVERVIEW

Shreveport-Bossier City is the urban center of Northwest Louisiana, 180 miles due east of Dallas, and it also is the commercial, educational and cultural focal point of the Ark-La-Tex, the geographic region formed by the junction of Arkansas, Louisiana and Texas. The Shreveport-Bossier metropolitan area has a population of approximately 400,000, with a civilian labor force of 180,000. The largest employer is Barksdale Air Force Base, with about 9,000 employees.

The medical-related sector, including health care, research and education, employs 15,000. Nearly 9,000 more are employed by the casino gaming sector, and the largest industrial employer has been General Motors, although we understand that GM will close its Shreveport plant. The industrial sector also includes a variety of smaller manufacturers.

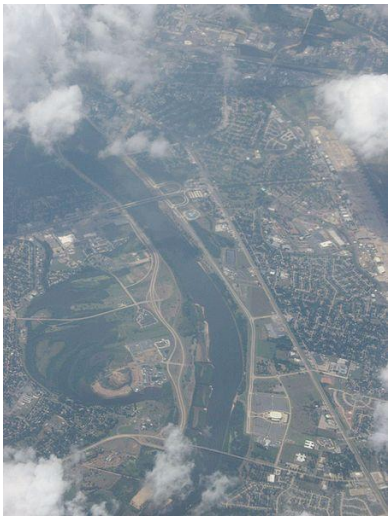
REGION VS. METRO AREA

It may be useful to describe geography assumptions for this study. When the focus of planning is regional, the first tough questions are about defining the region. Regionalism is complicated to practice because there is, in effect, no single way to define a region. Sometimes the same approximate geographic area can be defined differently for different planning purposes.



In the north of Louisiana (also sometimes referred to as the I-20 Corridor), planning for economic development or for higher education often is undertaken on the regional level—variously defined as Northwest Louisiana or as North Louisiana—with the latter extended to include the Northeast Delta region. For example:

- The Consortium for Education, Research, and Technology (CERT) which was implemented pursuant to an EKA recommendation to the Biomedical Research Foundation of NW Louisiana in the 1990s, casts a wide regional net in its focus on *North Louisiana*.
- The Community Foundation is an organization with *North Louisiana* in its name.
- Economic development marketing now is carried out, on a 14-parish regional basis, by the North Louisiana Economic Partnership (NLEP)—a merger of two predecessor organizations—the North Louisiana Economic Development Corporation and the Northwest Louisiana Economic Development Foundation.
- Regents define NW Louisiana as a nine-parish region. A new study of two-year community and technical college needs adds three parishes, to define a "North Central Area."



That said, there also are times when a more localized focus is indicated, or required. The Shreveport-Bossier Standard Metropolitan Statistical Area (SMSA or MSA), coinciding with Caddo, Bossier, and DeSoto parishes, indeed does share interests with the other northern parishes of the State. But, as a larger urban center, it also has some characteristics, needs, and economic development strategies which apply distinctly or differentially to the urban center/MSA. Clearly, one defining feature of the Shreveport-Bossier metro area is that it is critically linked demographically and economically to the multi-state Ark-La-Tex region, in addition to being an integral part of the State of Louisiana. Also, as an urban area, it is appropriate for Shreveport-Bossier to benchmark its educational attainment, economic characteristics, and other demographics to other urban centers of comparable size and characteristics—rather than to rural parishes in the region.

At present, the local study sponsors are not seeking to address *all* needs of North Louisiana's population; their focus is the greater metro area. Thus, this study is essentially and primarily about the Shreveport-Bossier MSA and only secondarily about the impact of higher education on the MSA's two larger regions—North Louisiana and the Ark-La-Tex.

IMPORTANCE OF SHREVEPORT-BOSSIER METRO WITHIN LOUISIANA

Shreveport-Bossier, the largest MSA north of I-10, historically has been an important urban center of industry and commerce in Louisiana. Today, based on the 2010 census, while it is about one-third the size of New Orleans and one-half the size of Baton Rouge in population, it is nonetheless the State's third largest metro area. Its population is just under 9 percent of the State's total population and just under 12 percent of the urban/MSA population of the State.

Total Population of Louisiana and Populatons of its Eight Largest Metro Areas (MSAs)

	Rank by Size	Number	Percent of State Population
Louisiana--ALL		4,533,372	100.0%
New Orleans	1	1,167,764	25.8%
Baton Rouge	2	802,484	17.7%
Shreveport-Bossier	**3**	**398,604**	**8.8%**
Lafayette	4	273,738	6.0%
Houma	5	208,178	4.6%
Lake Charles	6	199,607	4.4%
Monroe	7	176,441	3.9%
Alexandria	8	153,922	3.4%
Subtotal--8 Selected MSAs		3,380,738	74.6%
Shreveport-Bossier as Percent of State's "Urban" Population			**11.8%**
Source: US Census Bureau, 2010			

The slightly larger Shreveport-Bossier City-Minden Combined Statistical Area (CSA) is made up of *four* parishes—combining the Shreveport-Bossier City MSA and the Minden Micropolitan Statistical Area. As of the 2010 census, the CSA had a population of 570,201—about 72,000 more people than the Shreveport-Bossier MSA alone.[1] By this geographic definition, the metro/urban area is about half the size of New Orleans and about 72 percent the size of Baton Rouge.

This is an urban/metro area with economic development strategies and significant potential for expansion of population and economic activity—all to the benefit of the State as a whole. The metro area's leadership maintains a larger regional focus on North Louisiana but also has several specific economic development strategies it is pursuing for the metro area. Many organizations have worked on several initiatives during the past several decades.

RACIAL MIX IN SHREVEPORT-BOSSIER

The MSA—Caddo/Bossier/DeSoto Parishes

Data from the 2010 census reveal that the Shreveport-Bossier MSA has roughly the same percentage of non-white population as New Orleans and, like New Orleans, a much smaller percentage of white population than the State has overall. It is not surprising that minority populations are more concentrated in urban centers. What may be unusual is that the Shreveport-Bossier MSA has a higher African-American population (38.9 percent) than even New Orleans MSA (34 percent)—the State's largest urban center.

Comparison of Shreveport-Bossier MSA by One-Race Population Counts and Percentages with All of Louisiana and with its Largest Urban Center, New Orleans MSA

	All Louisiana		New Orleans		Shreveport-Bossier	
	Number	Percent	Number	Percent	Number	Percent
Total Population	4,533,372	100.0%	1,167,764	100.0%	398,604	100.0%
White	2,836,192	62.6%	679,773	58.2%	224,828	56.4%
Non-White						
Black or African American	1,452,396	32.0%	397,095	34.0%	155,174	38.9%
Hispanic or Latino (All)	192,560	4.2%	91,922	7.9%	13,816	3.5%
American Indian / Alaska Native	30,579	0.7%	5,192	0.4%	1,937	0.5%
Asian (All)	70,132	1.5%	31,808	2.7%	4,652	1.2%
Subtotal--Non-White	1,745,667	38.5%	526,017	45.0%	175,579	44.0%

Note: The percentage of African American / Black is much higher for City of Shreveport than for the total MSA. See below.

Source: U.S. Census Bureau, 2010 Census

[1] http://en.wikipedia.org/wiki/Shreveport_%E2%80%93_Bossier_City_%E2%80%93_Minden_combined_statistical_area

City of Shreveport and City of Bossier—Different Demographics

But, the above MSA statistics include City of Shreveport, Bossier City, and the non-urban areas of Caddo, Bossier, and DeSoto parishes. When one looks at the data only for the City of Shreveport and Bossier City, a very different set of demographics appears.

In the table below, selected 2010 census statistics are shown for City of Shreveport and for Bossier City. They indicate that the MSA actually has at least two very distinct sets of demographic characteristics. (Statistics for the State are shown for comparison purposes in the last column.)

- The City of Shreveport, by itself, accounts for about half the total population of the three-parish MSA. Unlike Bossier City and all of Louisiana, Shreveport did not gain population in the last decade; in fact, Shreveport had a minor decline in population.
- As to racial mix, the City of Shreveport is now a place where the African-American "minority" is now the numeric "majority," with 54.7 percent of the City's population—well in excess of the overall average for the State. And, this is not the case for Bossier City, where the African-American population is about one-quarter of the total population.
- Both cities have slightly higher high school graduation and bachelor's degree completion than the State overall. This is logical, given the urban character of these populations.
- Per capita income in the past 12 months does not vary much between Shreveport, Bossier City, and Louisiana; however, median household income in Bossier City notably exceeds that of the State and median household income for Shreveport notably lags that of the State.
- Finally, the City of Shreveport has a higher percentage of firms that are black-owned—somewhat higher than for the entire State and much higher than for Bossier City.

City of Shreveport and Bossier City--Selected Statistics

2010	Shreveport	Bossier City	Louisiana
Population	199,311	61,315	4,533,372
Population, percent change, 2000 to 2010	-0.40%	8.60%	1.40%
White persons, percent	41.20%	65.40%	62.60%
Black persons, percent	54.70%	25.60%	32.00%
High school graduates, percent of persons age 25+, 2005-2009	83.80%	87.80%	80.50%
Bachelor's degree or higher, percent of persons age 25+, 2005-2009	24.50%	22.10%	20.60%
Per capita money income in past 12 months (2009 dollars) 2005-2009	$21,859	$23,987	$22,535
Median household income 2005-2009	$35,219	$47,057	$42,167
Total number of firms, 2007	16,715	4,974	375,808
Black-owned firms, percent, 2007	17.90%	8.60%	15.90%
Persons per square mile, 2010	1,891.40	1,448.20	104.9
Source: http://quickfacts.census.gov/qfd/states/22/2208920.html			

These data support the concerns that all the local Shreveport-Bossier leaders expressed in interviews—that the metro area must ensure that adequate attention is devoted to programs, access, and completion for its African-American population—which for the good of those individuals and the good of the area's economy—must not be underserved.

Implications of Racial Mix for Higher Education

Racial demographics provide one important example of how the metro area's higher education needs could differ from the needs of the broader region.

All solutions regarding higher education in a metro area with this kind of racial mix must take directly into account how well-served are that metro area's minority populations (which actually constitute the majority population in Shreveport).

To do otherwise would to be severely under-prepare a significant portion of the local knowledge work force.

INDUSTRY AND EMPLOYMENT BASE

BY ALL OCCUPATIONS AND AVERAGE WAGES

Data for mid-2010 show the distribution of employment and average annual wages of the Shreveport-Bossier MSA employment base in standard occupational categories. In this count, about 170,000 were employed, at an average annual wage of $36,640 for all occupations. Please see Note (9) at the bottom of the table for an explanation of the *Location Quotient.*

May 2010 Metropolitan and Nonmetropolitan Area Occupational Employment and Wage Estimates
Shreveport-Bossier City, LA
All Occupations by Two-Digit Code, by Location Quotient in Descending Order
(RSEs and Hourly Wages Omitted)

		Employment Estimates			Wage
Occupation Code	Occupation Title	Employment (1)	Employment per 1,000 jobs	Location quotient (9)	Mean Annual (2)
00-0000	All Occupations	170,460	1000	1.00	$36,640
49-0000	Installation, Maintenance, and Repair Occupations	9,160	53.735	1.39	$37,680
39-0000	Personal Care and Service Occupations	6,360	37.328	1.39	$22,430
29-0000	Healthcare Practitioners and Technical Occupations	13,400	78.637	1.36	$60,330
47-0000	Construction and Extraction Occupations	9,250	54.281	1.36	$39,200
33-0000	Protective Service Occupations	5,580	32.741	1.31	$36,960
37-0000	Building and Grounds Cleaning and Maintenance Occupations	6,980	40.951	1.25	$20,380
31-0000	Healthcare Support Occupations	6,270	36.794	1.18	$22,640
35-0000	Food Preparation and Serving Related Occupations	16,160	94.779	1.09	$19,970
41-0000	Sales and Related Occupations	19,070	111.865	1.06	$30,070
53-0000	Transportation and Material Moving Occupations	11,350	66.559	0.99	$29,870
43-0000	Office and Administrative Support Occupations	27,430	160.934	0.95	$29,210
25-0000	Education, Training, and Library Occupations	10,700	62.775	0.94	$42,750
21-0000	Community and Social Service Occupations	2,290	13.436	0.90	$42,520
23-0000	Legal Occupations	1,160	6.821	0.87	$71,290
11-0000	Management Occupations	6,970	40.9	0.86	$85,930
51-0000	Production Occupations	8,830	51.781	0.80	$36,090
13-0000	Business and Financial Operations Occupations	4,540	26.635	0.56	$54,100
17-0000	Architecture and Engineering Occupations	1,680	9.882	0.55	$57,800
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,190	7.009	0.52	$35,840
19-0000	Life, Physical, and Social Science Occupations	660	3.885	0.46	$60,670
45-0000	Farming, Fishing, and Forestry Occupations	160	0.945	0.29	$33,080
15-0000	Computer and Mathematical Occupations	1,250	7.326	0.28	$58,750

About May 2010 National, State, Metropolitan, and Nonmetropolitan Area Occupational Employment and Wage Estimates *(several of the original notes were removed for purposes of this table by the consultants):*

(1) Estimates for detailed occupations do not sum to the totals because the totals include occupations not shown separately. Estimates do not include self-employed workers.

(2) Annual wages have been calculated by multiplying the hourly mean wage by a "year-round, full-time" hours figure of 2,080 hours; for those occupations where there is not an hourly mean wage published, the annual wage has been directly calculated from the reported survey data.

(9) The location quotient is the ratio of the area concentration of occupational employment to the national average concentration. A location quotient greater than one indicates the occupation has a higher share of employment than average, and a location quotient less than one indicates the occupation is less prevalent in the area than average.

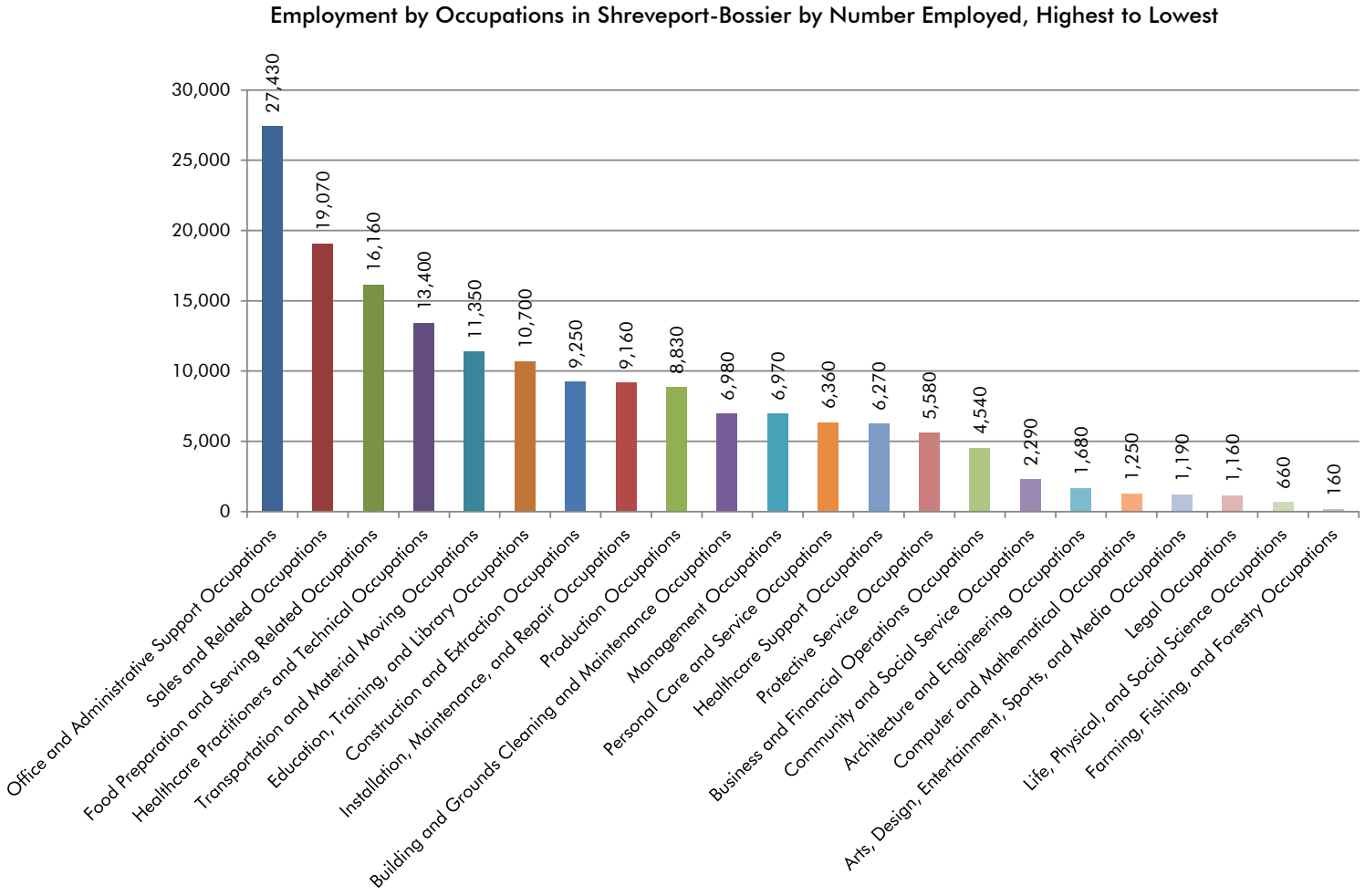
http://www.bls.gov/oes/current/oes_43340.htm#00-0000

The above counts are by the broad two-digit occupation codes, although the details of the employment distribution by occupation sub-codes also are interesting to review. For more details, refer to http://www.bls.gov/oes/current/oes_43340.htm#(3).

Shreveport-Bossier's relatively uncommon employment base related to the Gaming industry is included among the 6,000+ in *Code 39—Personal Care and Service Occupations*, which also includes a wide variety of distinctly different types of service job categories.

By Highest to Lowest Numbers Employed

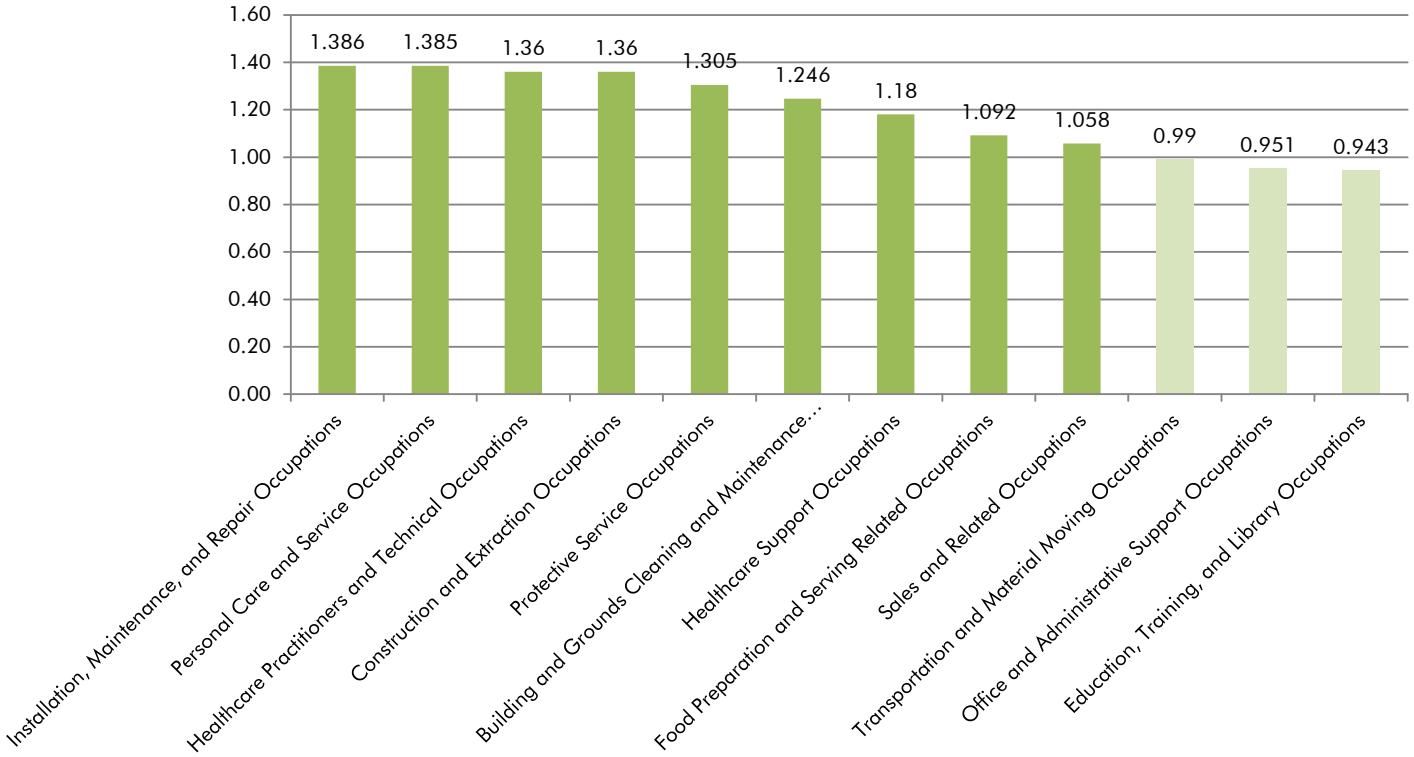
In this graph, the above BLS employment data (from the *Employment* column on the previous page) are arrayed by highest to lowest numbers employed in the Shreveport-Bossier MSA.



By Concentrations of Occupations Compared with National Averages

Finally, the following array (next page) from the same data, shows those occupation codes in which the numbers employed in Shreveport-Bossier have a high *Location Quotient*, meaning that those greater than 1.0 exceed the national average for those occupations (darker green) and those that are just below 1.0 are slightly below/near the national average for those occupations (lighter green).

Occupation Categories in Which Shreveport-Bossier Exceeds the National Average (by Location Quotient)



Following are some observations about the categories in which the Shreveport-Bossier employment number concentrations are high, relative to national averages:

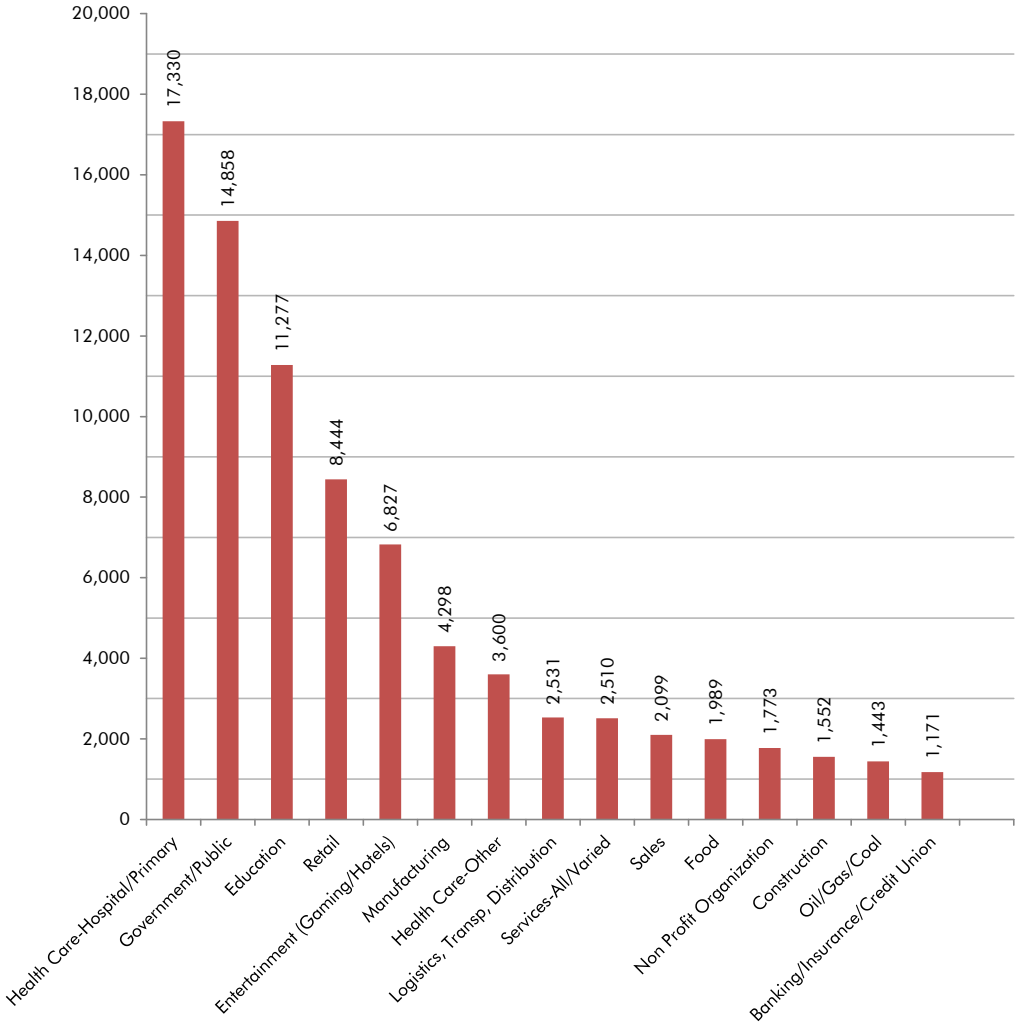
- **Health Care Practitioners/Technical Occupations and Health Care Support Occupations**. It is self-evident that health care is a major service industry and employment base, with Practitioners/Technical Occupations at 13,400 and Support Occupations at 6,270.
- **Personal Care and Service Occupations** includes Gaming Dealers (1,060); Gaming Supervisors (330) and Slot Supervisors (130), in addition to Hairdressers, Child Care Workers, and various other service occupation categories. We may assume that Shreveport-Bossier exceeds the national average in concentration in this occupation category due to the gaming industry.
- **Protective Service Occupations**. There is no immediately obvious explanation for the high numbers in this code. Highest sub-codes are for Police/Sheriff (1,100) and Security Guards (1,730). This code also includes Gaming Surveillance Officers and Gaming Investigators.
- **Construction and Extraction Occupations**. Just fewer than 2,000 of the 9,250 (about 21 percent) of the jobs in this code are in Extraction industry job titles. These types of jobs do not exist everywhere. The rest are well-distributed among skilled trades, including supervisory—making this a fairly large industry in Shreveport-Bossier.
- **Food Preparation and Serving**. The presence of the casino hotels may explain, in part but not entirely, the slightly above-average numbers in many types of food service occupations.

BY INDUSTRIES

In the graph below, the consultants adapted and slightly reorganized data on major employers (those with 100 or more employees) in Shreveport-Bossier MSA, to array them by size.[2]

- Clearly **Health Care** (both primary and other) with about 20,000 of the 80,000+ in these counts is the single largest industry.
- The very large **Government** number, nearly 15,000, includes the 9,000+ **Federal Military and Civilian Employees** at Barksdale AFB; three parish governments; three public school systems; and various public services (Sheriff, transportation, etc.) of the cities and parishes.
- **Entertainment (Gaming and Tourism/Hotels)** also is large (almost 7,000).
- Industries for which there is an existing base of reasonable size, on which growth can be planned include **Oil/Gas/Coal** related businesses; **Manufacturing** (mostly small/specialized); **Logistics/Transportation/Distribution**; and **Financial and Other Services**.

Industries in Shreveport-Bossier by Total Number Employed



Source: Adapted and reorganized from data in *North Louisiana Employer Directory, 2010*, North Louisiana Economic Partnership

Economic Development Strategies Bearing Fruit

In the cases of **Health Care** and **Gaming/Tourism**, these large figures result from explicit local economic development strategies of the last two decades:

(1) to make Shreveport-Bossier a *Regional Health Care Center* for the Ark-La-Tex and Northwest Louisiana

(2) to bring casino gambling to the riverfronts of the two cities, thereby expanding entertainment and tourism.

[2] Source: These data were adapted and reorganized from data in *North Louisiana Employer Directory, 2010*, North Louisiana Economic Partnership, http://nlep.org/docs/Major-Employers.pdf

BY LARGEST EMPLOYERS—MSA AND LARGER CSA

Top 10 Employers by Parish

Following are the top 10 employers in each of the three parishes that comprise the Shreveport-Bossier MSA and, with Webster Parish added, the area that comprises the Shreveport-Bossier-Minden CSA.

Bossier Parish	
Barksdale Air Force Base	9,018
Bossier Parish School Board	2,638
Harrah's Horseshoe Casino & Hotel/Harrah's LA Downs	2,000
Diamond Jack's Casino Resort	963
City of Bossier City	826
Boomtown Casino	787
McElroy Metal, Inc.	700
Wal-Mart Supercenter - Airline Drive	639
Bossier Parish Community College	586
Cellxion, LLC	485
Caddo Parish	
Caddo Parish School Board	6,587
LSU Health Sciences Center	6,094
Willis Knighton Health System	5,061
City of Shreveport	2,641
GM Shreveport Operations	2,093
Christus Schumpert Health System	2,018
U.S. Support Company	1,618
Overton Brooks VA Medical Center	1,533
Eldorado Resort Casino	1,500
Sam's Town Hotel & Casino	1,265
DeSoto Parish	
DeSoto Parish School Board	791
International Paper	500
DeSoto Regional Health Sys	286
Dolet Hills Mining Venture	200
Hendrix Manufacturing Ltd	145
Mansfield Nursing Center Inc.	80
Plantation Management Corp	80
DeSoto Council On The Aging	61
Brookshire Grocery Co	60
Country Auto Truck Stop	60
Webster Parish	
Webster Parish School Board	985
Minden Medical Center	513
Kenyan Enterprises Inc. (Piggly Wiggly & Save-A-Lot)	500
Wal-Mart Supercenter - Minden	425
Fleming Subway Restaurants, Inc.	358
Trane Company	260
Springhill Medical Center	232
City of Minden	203
Meadowview Health and Rehab Center	178
International Paper/Container Division	161
Source: *North Louisiana Directory of Major Employers*, North Louisiana Economic Partnership	

By Region's Largest Employers in Health Care, Education, and Public Schools

Professional service industry segments are very large and significant in Shreveport-Bossier and the larger region. Following are Education (mostly postsecondary), Health Care, and Public School System employee counts for all of North Louisiana—as the region is defined by the North Louisiana Economic Partnership.

Education Employers in North Louisiana	
Institution/Employer	**Employees**
Louisiana Tech University	1,400
University of Louisiana at Monroe	1,206
Northwestern State University	912
Grambling State University	805
Bossier Parish Community College	553
Louisiana State University in Shreveport	546
Southern University at Shreveport	344
Centenary College of Louisiana	306
Louisiana School for Math, Science, and the Arts	188
MINACT Inc. (Career Tech Provider--Residential)	134
Total (above Education)	**6,394**

Health Care Employers in North Louisiana	
Institution/Employer	**Employees**
LSU Health Sciences Center	6,094
Willis Knighton Health System	5,490
Christus Schumpert Health System Shreveport	2,018
St Francis Medical Center	1,671
Overton Brooks VA Medical Center	1,533
Glenwood Regional Medical Center	950
Natchitoches Regional Medical Center	575
Northern Louisiana Medical Center	535
Minden Medical Center	513
Brentwood Behavioral Health System	423
LifeCare Hospitals, Inc.	370
Highland Clinic, A Professional Medical Corporation	340
Morehouse General Hospital Inc	295
DeSoto Regional Health System	292
Homer Memorial Hospital	267
Springhill Medical Center	232
Care Solutions Inc	200
Shriners Hospitals for Children	194
Sabine Medical Center	185
North Caddo Medical Center	181
Christus Coushatta Health Care Center Coushatta	175
DSD Community Connection Inc	150
P & S Surgical Hospital	150
Cornerstone Hospital of Bossier City	146
Union General Hospital	140
Ark La Tex Cardiology	134
Doctors Hospital Shreveport	115
Total (above Health Care)	**23,368**

Public School System Employers in North Louisiana	
System/Employer	**Employees**
Caddo Parish School Board	6,587
Ouachita Parish School Board	3,015
Bossier Parish School Board	2,807
Webster Parish School Board	985
Lincoln Parish School Board	963
Natchitoches Parish School Board	823
DeSoto Parish School Board	805
Morehouse Parish School Board	507
Union Parish School Board	460
Sabine Parish School Board	425
Bienville Parish School Board	400
Jackson Parish School Board	360
Red River Parish School Board	267
Claiborne Parish School Board	140
Total (above Public School Systems)	**18,544**

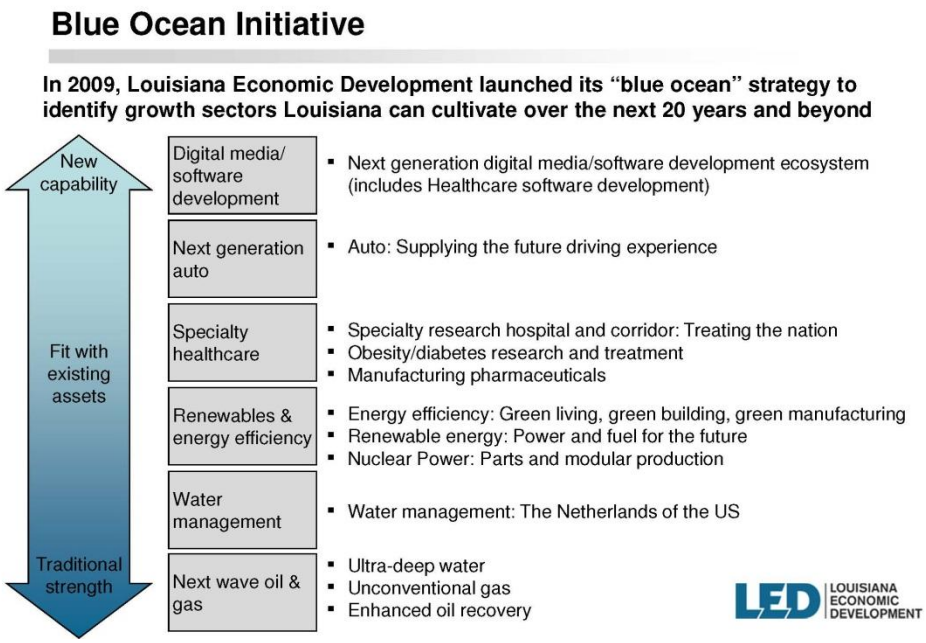
Source: *North Louisiana Major Employers Directory* 2010, North Louisiana Economic Partnership

ECONOMIC DEVELOPMENT STRATEGIES

It is certainly not the purpose of this study to assess, analyze, or plan current and future economic development strategies for Shreveport-Bossier. However, to the extent that this study is intended to assess alternative solutions for meeting *unmet higher education needs*—and to the extent that the Shreveport-Bossier leadership believes that these unmet needs tie directly to their economic future—the following is a highly abbreviated snapshot of the existing strategies for economic growth, as compiled by EKA, primarily from our informal knowledge of Shreveport-Bossier and our prior studies. **This narrative does not represent an "official" view.**

LOUISIANA'S STATE STRATEGY

A version of Louisiana's *Blue Ocean Initiative*, which provides context, is as follows:[3]



SHREVEPORT-BOSSIER AREA STRATEGIES

Health Care (Regional Medical Center and Specialty Health Care)

In the mid-1990s, when EKA first worked in Shreveport-Bossier, it clearly was then a strategy to have this metro area emerge as a *regional medical center* in the Ark-La-Tex—serving populations well beyond the immediate urban area and nearby parishes with secondary and tertiary health care specialties. The growth of the Health Care sector has been steady, and includes major system resources of LSU Health Sciences Center-Shreveport (LSUHSC-S), the Willis-Knighton Health System, the Christus-Schumpert Health System, the Overton-Brooks Veterans Administration Medical Center, Shriner's Hospital for Children, and numerous smaller providers. Health Care requires a continuous supply of practitioners, researchers, and technical support personnel—many requiring advanced degrees for career entry or progress.

There has been some growth in clinical and applied research, which benefits from the large patient population base—and there remains great potential for further growth in this realm. For example, discussions are underway at present between LSUHSC-S, the Biomedical Research Foundation (BRF), and Pennington Biomedical Research Center (PBRC), to collaborate in clinical and applied research. Additional collaborations of this kind will be undertaken through an agreement between BRF, LSUHSC-S, and the Southern Research Institute of Birmingham.

Blue Ocean Industry Targets

Louisiana Economic Development lists *Key Target Industries* for the State as follows:

- Advanced Manufacturing
- Agribusiness
- Clean-Tech
- Digital Media and Software
- Energy
- Entertainment
- Specialty Health Care
- Water Management

Shreveport-Bossier's local strategies are consistent with several of the above.

Within **Specialty Health Care**, Shreveport-Bossier is strong in, and focused on, the second two of three LED priorities:

- Obesity/Diabetes Research and Treatment
- **Pharmaceuticals Manufacturing**
- **Specialty Hospital and Medical Districts**

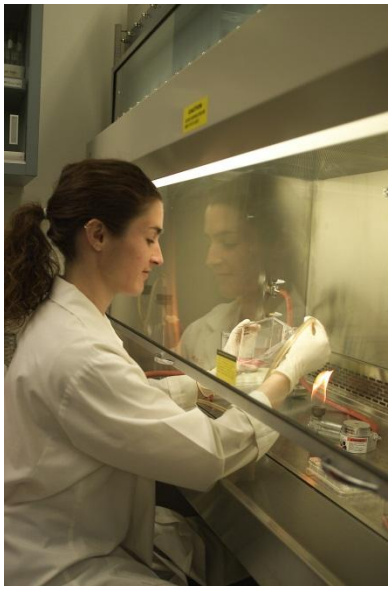
Shreveport-Bossier Area Strategies

This list of Shreveport-Bossier Area Economic Development Strategies is NOT official. It is a compilation created by EKA:

- Health Care (Regional Center and Specialty Health Care)
- Biomedical/Biosciences
- Gaming and Tourism
- Military Base/Defense-Related
- Film-Making and Digital Media/ Entertainment
- Other/General Information Technologies
- Energy/Gas Production and Management
- Advanced Manufacturing
- Distribution/Logistics

[3] *Louisiana: The Next Great State for Business Investment*, PPT presentation, Louisiana Economic Development.

Biomedical/Biosciences



Different from, but companion to, Health Care *per se* is the longstanding local focus on development of a biotech/biosciences industry base. The focal point is the InterTech Science Park strategy to develop an urban science and technology park interwoven into 800 acres of the City. Since 1998, the BRF and its partners have been developing the region's human, financial and physical infrastructure required for biotechnology companies to flourish. InterTech also has urban redevelopment and human capital development objectives that even extend to program investments in public schools.

InterTech provides tenants with access to academic facilities, researchers, core equipment laboratories, animal care, multi-tenant wet lab and office space, land for building, venture capital, business planning assistance and financial incentives.

As examples of progress, Red River Pharma and Dr. Reddy's Pharmaceuticals are both showing significant growth and have completed expansions in the last 12 months. Embera Neurotherapeutics is well into Phase 2 clinical trials. These companies spun out of LSUHSC-S. See Exhibit 2.1 for additional information about InterTech Science Park and its tenants.

Gaming and Tourism

Already well-established, the casino hotel business may continue to grow in Shreveport-Bossier. While we surmise that many of the jobs are at levels not requiring any post-high school degree or requiring only two-year degrees, it may be useful to consider a baccalaureate level program in Hospitality and Tourism—which could be articulated with programs at the Associate degree level. Consultation with the hotel/gaming/food service employers to project their needs, especially for entry-level management positions, would be useful.

Casino image from
http://www.samstownshreveport.com/play

Military Base/Defense-Related

Barksdale AFB is the single largest economic entity and employer in the MSA. It is the home of the Air Force 2nd Bomb Wing and the Air Force Global Strike Command. As with other major military bases, Barksdale requires support for its mission from the private sector.

B-52H Stratofortress Bomber
96th Bomb Squadron
http://www.barksdale.af.mil/photos/mediagallery.asp?galleryID=2000

A few years ago, there was discussion of Barksdale becoming home to the new Air Force Cyber Command. The State and the Bossier City community made investments relating to this strategy, including the Cyber Innovation Center (CIC) in Bossier City. While that Air Force Command did not materialize in Bossier, the CIC is a resource/asset that plans to expand, with a modified/enlarged mission. The CIC, a non-profit economic development agency, expects to further facilitate private sector support via nationally-known technology contractors who are locating there. The expanded concept is now called National Cyber Research Park.[4] A new second building is being planned that is to include the Digital Media Center that, earlier, was planned for a site in Shreveport. See Exhibit 2.2 for more details.

This effort, like others, will require higher education as a major component—for both degrees and research.

cyber innovation center
Collaboration • Research • Technology

[4] Information from http://www.cyberinnovationcenter.org/

In general, the presence of so large a military base asset continues to present many economic development opportunities—including targeting defense industry firms and their subcontractors.

Film-Making and Digital Media/Entertainment

http://www.moonbotstudios.com

With significant help from tax credit incentives, a state investment in a Digital Media Center and in training funds, higher education programs, and other local advantages, this industry has been growing and flourishing in Shreveport-Bossier. The region's film industry ("Hollywood South") is becoming a leading source of film production in the US—ranked third in production volume by *Variety* magazine a few years ago. Centenary College is home to the studio of renowned animator, Bill Joyce; there are other key players in the region. As digital media company examples, MOONBOT Studios, Blade Studios, CRM, Twin Engines, and Millennium are all achieving market success. Other companies are emerging. Workforce support is provided by programs at Bossier Parish Community College (BPCC) and LSU in Shreveport.

Opportunities continue to grow with film making, and for use of digital media in a number of different forms (advertising, technical training, military, and entertainment). Even some of BioSpace I in InterTech Science Park is being used for some of these companies.

In addition, the Foundation for Arts, Music, and Entertainment of Shreveport-Bossier, Inc. (FAME) is a non-profit organization that constitutes *"a passionate movement to rebuild an inner city neighborhood around an active music and entertainment industry."*[5] Parts of central Shreveport are targeted for redevelopment as an entertainment district, with focus on revival and preservation of local music and arts heritage. FAME's target area was originally to be the location of the Digital Media Center, which now is planned for National Cyber Research Park.

Other Information Technologies

With capacities in defense and entertainment/media applications of information technologies and additional potentials in manufacturing and other industries, it seems obvious that growth of many IT segments and applications are a natural need and strategy. In reality, these days, there is no metro area that does not need to have a robust complement of IT-related businesses, as information technology now is ubiquitous. These industry segments need to be supported by higher education programs from the associate level through the master's level in Shreveport-Bossier, with some generalist programs and some that are industry-specific. It might even be possible to argue the need, in future, for some doctoral-level programs—in connection with applied research and product development—which are essential ingredients.

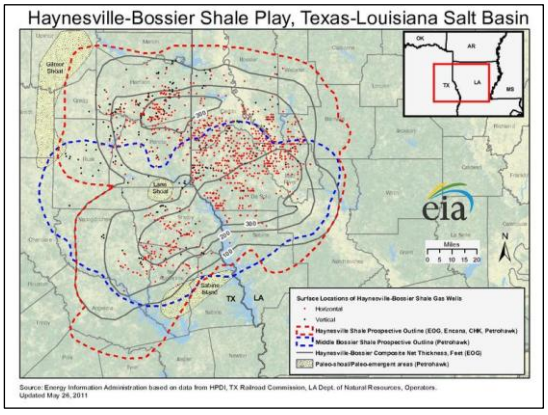
Possible Economic Impact of the Haynesville Shale

A study prepared by economist Dr. Loren Scott, entitled *Economic Impact of the Haynesville Shale on the Louisiana Economy*, projected nearly $17 BB in sales for Haynesville Shale operators; $4.3 BB in household earnings for residents; and 111,329 jobs created in 2010. The State of Louisiana was projected to receive $304 million in tax revenue, and local governments were projected to receive nearly $233 million in taxes from Haynesville Shale activity.

http://www.nlep.org/docs/newsletter-052010.pdf

Energy/Gas Production and Management

In a short treatment of this subject, one concludes that (1) Shreveport-Bossier has been prominent historically in commerce related to energy, with both expertise and physical means to take advantage of the current/future opportunities in directional drilling of gas reserves (Haynes Shale[6]); (2) The area has some extraction industry companies at present—a base on which to grow; and (3) Technologies for safe extraction and related applications also might sensibly form the subject of selective research focus. While the price of natural gas is down at present, the reserves exist and represent opportunities for the long-run. This is a *major opportunity* that will be pursued.



[5] Information from http://www.famefoundation.us/AboutFame.cfm

[6] Map image from http://en.wikipedia.org/w/index.php?title=File:Haynesville_Shale_Map.pdf&page=1

Advanced Manufacturing

At present, the area has a variety of small, specialized manufacturers,[7] but advanced 21st century manufacturing must be an important target of opportunity—as it must be for all of Louisiana and, more generally, for the entire US. The editor of the major manufacturing location magazine in the South recently addressed a gathering of the Committee of One Hundred, the Manufacturing Council, and the North Louisiana Economic Partnership (NLEP) about these opportunities, which include the fact that manufacturing companies now are moving plants ***from*** China to locations in the South of the US. We are told that NLEP's Executive Director, Kurt Foreman, indicated in a recent meeting that the NLEP's list of opportunities is the highest it has ever been.

We do not actually know to what extent Shreveport-Bossier is focused on Advanced Manufacturing for its future, although informal conversations seem to indicate that this is regarded as important. Unofficially, EKA is prepared to suggest that this should be a high priority, if it is not currently. (See notes at right.)

To be sure, the presence of a strong College of Engineering at Louisiana Tech in Ruston and the presence of various undergraduate and graduate business programs at several institutions in the metro area and region are important to attracting such manufacturers. But, if the metro area is to capture some of this growth potential, it needs to be able to offer companies in-place options for both local recruitment and for continuing education of employees. EKA believes that this argues for the presence of Engineering programs in Shreveport-Bossier—in addition to the programs offered in Ruston.

Distribution/Logistics

Our review of industries and employment revealed that there is an existing base, albeit small, of companies in distribution and logistics.

The metro area includes a significant inland port and multi-modal capacities. Nearly 30 million people in some of America's strongest consumer markets are within a one-day reach by motor freight—markets such as Dallas-Fort Worth, Houston, Austin and New Orleans. That's why UPS ranks Caddo-Bossier among the top five cities in the country capable of reaching the largest population with next-day service. The Port's infrastructure, logistics and transportation network take full advantage of its superior geography by offering rail transportation, water and barge, air and motor freight transportation.[8]

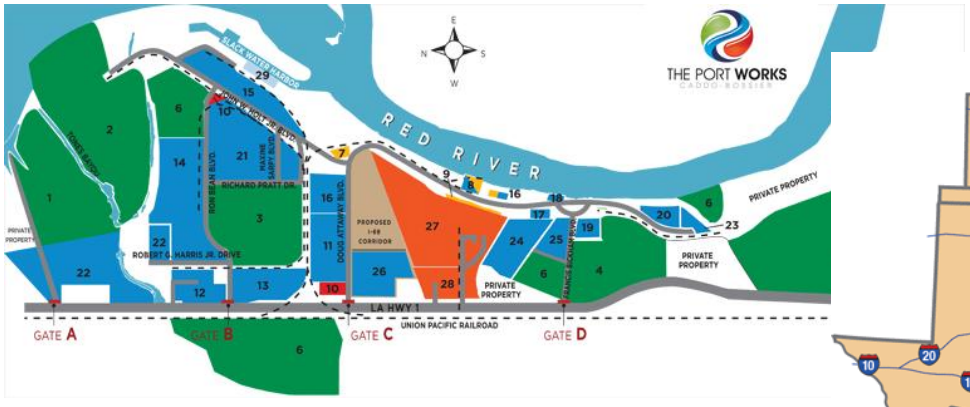
Why Advanced Manufacturing? And Why More Education Attainment for Manufacturing?

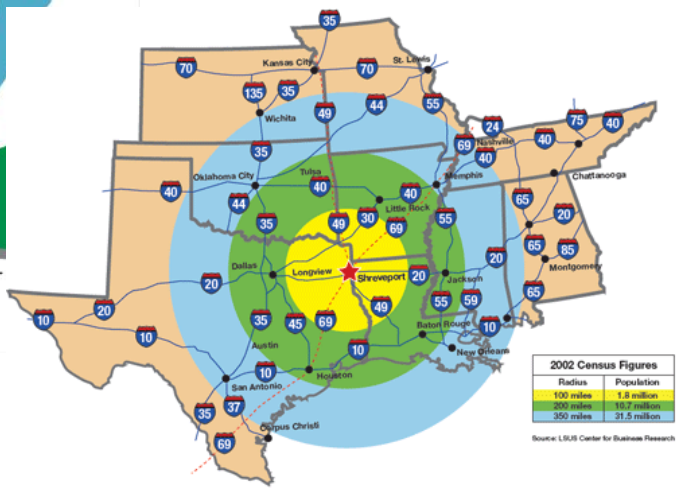
Following 25 years of work with universities and communities in *Knowledge-Based Economic Development*, EKA unequivocally believes that Advanced 21st Century Manufacturing ***MUST BE*** a cornerstone of US and regional economic development strategies.

Service industries will not, of themselves, provide a large enough employment base at income levels for sustaining a stable and growing middle class. Making smart things and selling them to others will still need to be the cornerstone of wealth creation.

For our subject, the problem is that modern manufacturing is nothing like the assembly lines of the past. In some factories today, a factory floor job bears a minimum education requirement of a master's degree, for example in Robotics.

It would be wrong to assume that Manufacturing of the future will not require many more people with higher education attainment and highly sophisticated technical and business skills. It is certain that it will.





[7] For a detailed list of manufacturers in the metro area / parishes, see http://www.nlep.org/docs/Major-Manufacturers.pdf.

[8] Information about the Port and images are from http://www.portsb.com/industrial-park/location.cfm.

ANALYSIS/COMMENTARY—THE SHREVEPORT-BOSSIER METRO AREA

The Shreveport-Bossier metro area has had in the past and does now have specific economic development strategies, led by various organizations and coalitions, that have been, and that are being, pursued for economic growth. The target industry sectors that we understand to be the local priorities, as summarized above, make sense. These economic development priorities are consistent with the:

- Shreveport-Bossier metro/regional economic base
- State's *Blue Ocean* priorities
- Common sense about the directions of the *Global Knowledge Economy*.

Nearly all the economic targets, including Manufacturing and Distribution/Logistics (and perhaps excluding only Gaming/Tourism) will require significant strength of education and skills in the local *knowledge workforce*—some at the two year / technical level and some at baccalaureate and graduate levels.

In our opinion, the Shreveport-Bossier MSA has great potential for economic and population growth. Although the MSA has not grown in its population in the last decade, signs of recognition of Shreveport-Bossier's location advantages are beginning to appear in some national rankings. The local and regional economies are benefiting, too, from Louisiana's overall rising business image and from focused LED economic development investments.

As the City of Shreveport's minority population has now become a "majority" population, it is vital that this population segment become an increasingly successful component of the local *knowledge workforce.*

Some Shreveport-Bossier Metro Area Rankings

#1 "Best Place to Raise a Family in Louisiana" (*Forbes*, 2009)

#3 "Best City in Nation for Independent Filmmaking" (*MovieMaker* magazine, 2010)

#4 "National Economic Development: (*Site Selection* magazine, 2011)

#7 "Best Cities for Jobs" among mid-sized metropolitan areas (*Forbes*, 2011)

#19 "Best Place to Raise a Family in the Nation" (*Forbes*, 2009)

#20 "Top 25 Best Cities for Recent Graduates" (*The Daily Beast*, 2011)

3—Higher Education Contexts

Higher Education Landscape—Louisiana

This section provides a brief summary of some recent and current initiatives and plans that provide contexts for addressing the higher education situation in Shreveport-Bossier. The consultants omitted the more general information about Louisiana's higher education enterprise structure and other material that already is well-known to readers of this report.

Postsecondary Education Review Commission (PERC), 2010

Act 309 of the 2009 Regular Legislative Session created the Postsecondary Education Review Commission (PERC) and charged it to review the entire postsecondary education enterprise and recommend ways to best serve citizens of the State, in context of the State's fiscal challenges.

The PERC Commission concluded on five major focus areas: (1) dramatically improve graduation rates; (2) align program offerings with institutional mission and economic priorities; (3) emphasize institutional quality and performance in the funding formula; (4) enhance tuition and financial aid policies; and (5) reevaluate the postsecondary governance structure.

PERC adopted 22 recommendations that pertained to the above areas, including, for example: promoting constitutional changes to relieve the disproportionate impact of deficits on higher education and health care; provisions for tuition benchmarking and increases; provisions to increase admission requirements and to increase tuition autonomy, in connection with performance and graduation rate improvements; reviews of Role/Scope/Mission statements; academic program reviews, both for duplication and excess hours to completion; and so forth.

GRAD Act (Granting Resources and Autonomies for Diplomas)

The GRAD Act was approved by the legislature and signed into law by Governor Bobby Jindal in June 2010. The GRAD Act includes four performance objectives: student success; articulation and transfer; workforce and economic development; and institutional efficiency and accountability. While the initial focus is on the critical area of student success, there are 52 measures of institutional progress that will be tracked and evaluated annually by the BoR.

Under the GRAD Act, the BoR has entered into six-year performance agreements with each of the participating institutions. In the agreements, the institution commits to meeting specific performance objectives in exchange for increased tuition authority and eligibility to participate in certain autonomies. Each institution has its own goals for progress and will be measured against its own improvement plan.

BoR Master Plan for Higher Education—2011 to 2025

Presented to the Legislature in Fall 2011, the new 2011 *Master Plan* includes goals organized into a three-part framework:

- **Attainment**. Increasing the educational attainment of the State's adult population to the Southern Regional Education Board average, or 42 percent, by 2025
- **Research**. Investing strategically in university research, to foster science/technology-based innovation in Louisiana
- **Accountability**. Achieving greater efficiency and accountability in the postsecondary education enterprise.

Driving Themes are expressed as: *Educational Attainment; Skilled Workforce; Research; Accountability/Efficiency/Effectiveness; and Revised Role/Scope/Mission.*

The *Master Plan* outlines 18 objectives, 71 activities, and 65 performance measures to achieve the goals. Via these, implementation will be monitored, evaluated and reported through 2025.

PERC's Charge

To review and analyze Louisiana's educational needs, relevant data, current policies and practices, and funding mechanisms; and in the context of the State's financial challenges, recommend to the Board of Regents and to the Legislature the most efficient and effective ways for the State to meet its goals of providing citizens with the educational attainment necessary to meet the critical needs of our State and regions.

The GRAD Act

"Recognizing the importance of higher education to the state of Louisiana, the Legislature worked hard on the creation and passage of the GRAD Act. Louisiana's future is tied to a knowledge based economy, and the GRAD Act will assure that higher education will be focused on the 21st Century economy and all the opportunities associated with it."

Jim Tucker, Speaker of the House of Representatives and author, GRAD Act

Comments on the Master Plan

"A tremendous amount of progress has been made in Louisiana since 2001 and we have more students achieving the dream of attending college than ever before, but today's economy requires that students not only attend, they have to graduate. To reach the goal of increasing the educational attainment of our adult population to the SREB average of 42% the progress we've made must not only continue, it must accelerate."

Bob Levy, Chairman,
Louisiana Board of Regents
Regents Adopts Master Plan,
August 24, 2011

GOVERNANCE COMMISSION

Established pursuant to House Concurrent Resolution 184 of the 2011 Legislative Session, a Governance Commission was charged with submitting recommendations regarding higher education governance and structure in the State. In its January 2012 *Final Report,* the Commission outlined 21 recommendations to improve higher education in meaningful ways and to *"shake up the status quo."*[9] Organized into four broad categories (budget, formula and efficiencies; articulation and transfer; tuition and financial aid; and governance) the key recommendations include:[10]

- Clarifying the Board of Regents' constitutional and statutory authority making it the entity accountable for higher education performance (in lieu of a creating a single governing board)
- Identifying the Board of Regents funding formula as both a sound recommendation tool and a required distribution model for systems and institutions
- Granting tuition authority to higher education management boards through a tuition policy to be set by Regents, eliminating the need for a 2/3 vote of the Legislature
- Decoupling TOPS from the actual cost of tuition
- Repackaging need-based GO Grants to provide eligible students at least 55 percent of their total need, when added to other forms of financial aid
- Aligning institutions to the appropriate management system legislatively based on recommended role, scope and mission statements developed by the Board of Regents.

The 21 final recommendations are found at: http://www.regents.doa.louisiana.gov/assets/docs/Administration/Governancefinalrecommendations.pdf

DATA-SHARING AND THE EMPLOYMENT OUTCOMES REPORT, 2011

Response to House Concurrent Resolution No. 66 and Act 397 of the 2011 Regular Session of the Louisiana Legislature, Louisiana Board of Regents, Louisiana Workforce Commission, and Louisiana Department of Revenue, January 2012

This *Response* report was generated by the three above agencies to describe work relating to the challenge of assessing employment outcomes of postsecondary education—in the context of a federal initiative to encourage such analyses by the states. This report describes data-sharing practices of the Regents and the Louisiana Workforce Commission (LWC). It also describes the first version of an *Employment Outcomes Report*—designed to evaluate the personal economic value of postsecondary education and to answer several questions of policy import to the State. Utilizing available BOR and LWC data, Regents was able to produce an initial baseline report, the *2011 Employment Outcomes Report*, to examine the employment outcomes of all completers of Louisiana public postsecondary education institutions, as well as outcomes for Louisiana residents and non-residents separately. This is the first iteration of a report that will be updated. Following is the conclusion section of the document.

Conclusion

In accordance with HCR 66 and ACT 397, this report has identified the current and on-going data sharing agreements and efforts between the BOR, LWC and LDR. The three collaborating agencies will continue to review, refine and expand their data sharing practices in order to enhance each agency's ability to use data to evaluate its performance and track Louisiana's graduates into the workforce. In order to achieve this goal, the Board of Regents, the Workforce Commission and the Louisiana Department of Revenue will formalize an ongoing working data and policy workgroup to continue to improve data sharing practices; address

[9] *Governance Commission Adopts Recommendations*, press release, November 29, 2011
[10] *Ibid.*

data shortcomings; and eventually answer data questions regarding the workforce alignment of Louisiana public postsecondary programs and employment outcomes.

The *Executive Summary* of the Board of Regents *Employment Outcomes Report, 2011* is provided as Exhibit 3.1. The data are interesting. One especially interesting point is that these data would tend to confirm the general belief that higher education is a means of recruiting human capital. The outcomes indicate that only 12.4 percent of the 17,820 bachelor's degree completers in 2008-09 were not Louisiana residents, but 18 months later, 24.4 percent of these non-residents were found to be employed in the Louisiana UI Wage System. Completers at other degree levels were in the Louisiana UI Wage System at different percentages.

FLAGSHIP COALITION / AGENDA

For two decades and more, since the chancellorship of Dr. Mark Emmert at LSU A&M, the opinion has been growing that LSU must become more competitive as a nationally prominent *flagship,* land-grant, research university—like its counterparts in other states. In the recent past, this has led to some changes, including change from open admissions (focus on access) to raised admissions standards and an increased focus on research.

It is our understanding from conversations that the GRAD Act came about largely due to LSU's advocacy of greater autonomy in such matters as personnel, procurement, and capital development—to follow patterns in other states in which leading universities are granted certain authorities rather than operating fully as "state agencies." As LSU pressed for these changes, the result was their extension to other universities in the form of the GRAD Act.

At present, an organization called the Flagship Coalition, with a 35 member statewide volunteer board, is seeking to restructure LSU, to make it more like counterparts elsewhere, with Florida, Alabama, and Georgia serving as most proximate models. EKA has never seen any documentation in writing about the Flagship Agenda or the Flagship Coalition but, from collective comments in several different conversations, we have constructed an understanding of the current intentions: As we understand it, the intentions are to significantly restructure LSU such that most or all the academic and research units of the current System would become part of the single institution (*One LSU*), all reporting to a single CEO in Baton Rouge. This includes the Law Center, the Ag Center and Pennington Research Center. In some versions being discussed, the *One LSU* also may include the two Health Sciences Centers in New Orleans and Shreveport. We understand that the parties to the discussions are addressing, with some differences of opinions, which elements of the former charity hospital system that LSU manages would remain within LSU and which might be transferred or sold. We understand that several among the leaders believe that only those that are directly supportive of the medical school missions should be retained, with the others divested.

While the eventual outcome is not known (at least to EKA), in various versions of the *One LSU* scenario, we can presume that there ostensibly would no longer be an LSU System Office as it is now organized, and that the LSU Board of Supervisors, possibly in an altered form, would be the management board for the *One LSU*.

In this restructuring mix, the future of the three smaller LSU campuses—at Eunice, Alexandria, and Shreveport—also must be under discussion. It is our understanding—again only from informal conversations and not from any official source—that there may be two lines of thinking under consideration:

- Divest these three smaller campuses, as they are not truly part of the flagship mission
- Keep these three smaller campuses at least for the present, but manage them in future from somewhere inside the new LSU single-institution organization, as branch campuses.

The latter considerations obviously bear quite directly on the subject of this study—for the future of LSU-Shreveport.

ROLE/SCOPE/MISSION AND MEETING LOUISIANA'S NEEDS STUDY, NCHEMS

"Developing a Postsecondary Education System to Meet the Needs of Louisiana, Draft Summary of NCHEMS Report to the Board of Regents," **Summary of November 30, 2011**

A Concurrent Resolution enacted in the 2011 legislative session directed the Regents to study statewide postsecondary educational opportunities; establish Role/Scope/Mission for each public institution; and develop a plan to optimize resource uses.

In response, the Regents engaged the National Center for Higher Education Management Systems (NCHEMS) to address the following:

- An ideal system to meet the State's needs
- Changes needed to realize the ideal system
- Criteria by which to shape a higher education system that is responsive to state and regional needs
- Needed changes in institutional role, scope, and mission
- Policy and capacity changes needed to enable students in all parts of the State to pursue their academic interests.

The NCHEMS report describes the current Role/Scope/Mission of each existing institution in terms of constituent audiences, academic program array, and special mission elements. Institutions are classified first in categories presently used by the Regents—comprehensive research university, specialized units, statewide universities, regional universities, and community and technical colleges. NCHEMS then suggests governance and Role/Scope/Mission changes that would bring the existing structure closer to an ideal one.

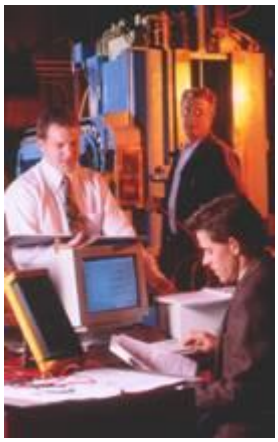
The governance changes would create a *flagship system* consisting of LSU A&M plus the specialized units (Pennington, Law, Agriculture, and the two Health Sciences Centers). A *regional university system* would include all present UL System institutions plus LSU at Alexandria (LSUA), LSU in Shreveport (LSUS), Southern A&M University (SU A&M) and Southern University in New Orleans (SUNO). A *comprehensive community college system* would be made up of all colleges presently in that system, plus LSU in Eunice and Southern University in Shreveport (SUSLA). NCHEMS considers these three systems to form an "ideal" structure, but defers to the Governance Commission for recommendations on actual system changes.

NCHEMS suggests that an institution's present Role/Scope/Mission should change rarely, and, if that is a constraint, any additional programs needed should be obtained via collaboration with or importation from an institution that is already authorized to offer the program. Finally, the report proposes specific Role/Scope/Mission changes for particular universities: Louisiana Tech, Grambling State University (GSU), SU A&M, SUNO, University of New Orleans (UNO), and Northwestern State University (NSU).

NOTE: The Regents had requested that NCHEMS undertake this study, in order to provide the Board with its input and advice. However, EKA has been advised that the Board did not accept or agree with some of the NCHEMS findings. The Board therefore directed the Regents staff to develop its own response to the Concurrent Resolution. That Regents staff draft report will be considered by the Board of Regents at its meeting scheduled for February 28th and is therefore unavailable to the consultants at this time.

Higher Education Landscape—Shreveport-Bossier Metro Area and the Region

Regional Overview—North Louisiana



North Louisiana is served primarily by 11 technical, two-year, four-year, and graduate colleges and universities that support regional workforce and the economy. Approximately 20,000 students in two-year and technical college programs and 40,000 students in four-year and graduate universities are taught by 2,600 faculty. Collectively, these institutions offer 225 certificate programs, 275 associate degrees, 225 baccalaureate degrees, 115 master's degrees, and 20 doctoral degrees. Some non-local institutions also provide programs.

The Consortium for Education, Research, and Technology of North Louisiana (CERT) is a unique collaboration of these North Louisiana higher education institutions, formed to match their research and educational resources with the work force needs of regional businesses.

Public Universities in the I-20 / I-49 Region

Three senior institutions of the University of Louisiana System (UL System) are located along the I-20 Corridor in the larger region; one more is located on the I-49 Corridor in Natchitoches. The four senior institutions in the region (but not domiciled in Shreveport-Bossier) are:

Louisiana Tech University (Louisiana Tech or Tech)

Founded in 1894, this selective admissions university offers more than 80 undergraduate majors and a wide variety of graduate degrees in its 31 master's and 10 doctoral programs. Tech has about 1,500 freshmen and a total of almost 12,000 students. Because its College of Engineering and Science is the only engineering college in the northern part of the State and because Tech has been growing its research programs and has several organized research centers, focused on specific areas of inquiry, Tech is an important regional higher education asset. The University also is considered an integral part of Ruston's development; a new research/tech park campus is being developed to attract and grow technology companies.

Grambling State University (Grambling or GSU)

Grambling State University (GSU) emerged from the desire of African-American farmers in rural North Louisiana to educate black children in this part of the State. From this history, GSU is an historically black university that is not part of the Southern University System. GSU is in Grambling, a small community in Lincoln Parish, a few miles from Ruston, the home of one of its system/sister institutions—Louisiana Tech. Grambling enrolls about 5,000 students in many baccalaureate and some masters programs in Arts/Sciences, Business, Education, and Professional Studies, and offers a doctoral program in Education. GSU offers one of the region's few nursing programs at the baccalaureate and master's levels. GSU is the region's current public institution option for African-American students who want to move on to four-year programs in an institution that strongly supports their culture.

University of Louisiana at Monroe (UL-M)

UL-M is part of the thriving community of Monroe, the urban center of the eleven parishes that comprise Northeast Louisiana—and in the heart of the Delta region, in Ouachita Parish. The University enrolls nearly 9,000 students and has been growing steadily. UL-M offers 85 degree programs ranging from associate to doctoral degrees in six colleges—Arts and Sciences; Business Administration; Education and Human Development; Health Sciences; Pharmacy; and the Graduate School. UL-M has the only College of Pharmacy in the northern part of the State—with clinical portions of Pharmacy programs conducted in Shreveport, near LSUHSC-S.

Northwestern State University (Northwestern or NSU)

Founded in 1884 as the State Normal School, Northwestern State University originally was dedicated to the education of teachers. It is the oldest UL System institution. Northwestern gradually added programs in nursing, business, liberal arts, and the sciences, and graduate programs. Today, NSU offers more than 50 undergraduate and graduate degree programs. Northwestern offers one of two nursing programs at the baccalaureate level in the region; its College of Nursing and Allied Health is in Shreveport. NSU, which enrolls about 9,000 students, has taken a leadership role in electronic delivery of classes as students are taking classes via the Internet, compressed video or desktop video. Seventeen degree programs are available completely online.

DOMICILED COLLEGES AND UNIVERSITIES IN SHREVEPORT-BOSSIER

If secondary sites of Louisiana Tech and NSU's Nursing programs are included, all four of Louisiana's four public higher education systems are represented in the Shreveport-Bossier SMA—together with one private not-for-profit college (Centenary) and various for-profits. Following are brief overview descriptions.

Private, Not-for-Profit

Centenary College of Louisiana

One of the oldest colleges in the US (founded in 1825) Centenary College is a distinguished and selective liberal arts college with an extremely colorful history. The College today offers undergraduate programs in the arts, humanities, natural sciences, and social sciences, which strengthen the foundation for students' personal lives and career goals. Master's programs are offered in Education and Business. Among professional programs is the 3/2 Engineering Program with five collaborating major universities in NY, MO, CA, OH, and TX and programs to prepare students for graduate programs in health care fields. This Methodist-affiliated College, enrolling 800 students, is the sole private not-for-profit college in the metro area—and an important asset among local higher education providers.

Public Institutions—Two Year and Technical

Bossier Parish Community College

Bossier Parish Community College (BPCC) is an institution in the Louisiana Community and Technical College System (LCTCS) that grew from a post-12th grade local school program in Bossier City. It is today a fast-growing institution, operating in a new campus since 2005, offering many two-year associate and certificate programs. Today, BPCC is the third largest LCTCS institution, after Delgado Community College (New Orleans) and Baton Rouge Community College. Its enrollment is about 7,100 students and it is expected to reach 9,000 or more in a few years. BPCC also has entered into significant partnerships with some four-year institutions in the region.

Southern University in Shreveport

Southern University at Shreveport (SUSLA), a two-year institution of the Southern University System, identifies itself via its commitments to the total community. SUSLA prepares students for careers in technical and occupational fields; awards certificates and associate degrees; and, offers courses and programs that are transferable to other institutions. SUSLA's programs are organized via its Divisions of Allied Health (largest), Behavioral Science/Education, Business Studies, Humanities, and Science/Technology, and its School of Nursing. SUSLA is dedicated to cultural diversity, provides developmental and continuing education, and seeks partnerships with business and industry. This SU System campus has been growing in enrollments, now enrolling about 2,800 students, and has several strong partnerships with four-year institutions.

Northwest Louisiana Technical College, Shreveport-Bossier and Minden Campuses

Northwest Louisiana Technical College (NWLTC) covers LCTCS Region 7, a nine-parish region that includes Shreveport-Bossier SMSA and Shreveport-Bossier-Minden CSA and five other parishes. One of its five campuses is the Shreveport Branch which has been offering programs for 75 years, initially as Shreveport Trade School. NWLTC enrolls about 3,000 students, with the largest enrollment in its Shreveport campus, delivering technical instructional programs which provide skilled employees for business and industry that contribute to the overall economic development and workforce needs of the State.

Public Institutions—Four-Year and Medical/Professional

Louisiana State University in Shreveport

Founded in 1967, at the same time as SUSLA, and initially a two-year branch campus of LSU A&M, Louisiana State University in Shreveport (LSUS or LSU-Shreveport) was granted baccalaureate status in 1972. Today, LSUS enrolls 4,500 students and offers baccalaureate and some master's level programs from its campus in south Shreveport. (*Because LSUS is a focal point of this study, it is described in detail in a separate section of this Chapter, below.)*

Louisiana State University Health Sciences Center in Shreveport (LSUHSC-Shreveport)

The primary mission of LSU Health Sciences Center in Shreveport is to provide education, patient care services, research, and community outreach. LSUHSC-S encompasses the School of Medicine, the School of Graduate Studies, the School of Allied Health Professions, and the LSU Hospital (all in Shreveport) and E.A. Conway Medical Center (Monroe) and Huey P. Long Medical Center (Pineville/Alexandria). LSU University Hospital, with 459 beds, began as part of the Louisiana Charity Hospital system and today is managed by the LSU System, serving as the clinical rotation teaching hospital for the School of Medicine, which was created in 1975. LSUHSC-Shreveport, enrolling about 800 students, is the younger of the State's two comprehensive academic health sciences centers and was originally managed from the LSU Health Sciences Center in New Orleans. From 2000 to 2005, the Shreveport campus of LSUHSC gained administrative separation from New Orleans as an independently managed and accredited academic health sciences center. LSUHSC-Shreveport researchers also occupy state-of-the-art laboratories in the Biomedical Research Institute, constructed on the Health Sciences Center campus by the Biomedical Research Foundation of NW Louisiana. In addition to the Level 1 Trauma Center, two centers of excellence are the Feist-Weiller Cancer Center and the Center of Excellence for Arthritis and Rheumatology. This institution is a significant community, regional, and state resource. Its major partners/affiliations include:

- LSU Health Sciences Foundation
- LSU-Shreveport (Master's in Public Health Program)
- Biomedical Research Foundation (Biomedical Research Institute)
- Overton Brooks Veterans Affairs Medical Center
- Shriners Hospitals for Children in Shreveport (Pediatric Orthopedic Surgery)
- St. Jude Children's Research Hospital (Affiliate Program for Pediatric Oncology)
- Willis-Knighton Health System (Neurosurgery, Transplantation Surgery, Urology).

Small, Local For-Profit Institutions

Small enrollment, for-profit schools and colleges focused on trades include:

- American School of Business
- Ayers Career College
- Guy's Shreveport Academy of Cosmetology Inc.
- Pat Goins Shreveport Beauty School / Pat Goins Benton Road Beauty School
- Diesel Driving Academy

Oversight of For-Profits

The BoR has licensing authority over all proprietary/for-profit institutions and maintains data on these institutions.

Online Programs

When a student searches the Internet for "colleges in Shreveport or Bossier," many dozens of online programs appear in lists—including the major for-profits, minor for-profits, and many public institutions. These are, of course, not place-dependent, and they are programs that are available to anyone anywhere. It must be assumed that at least some of the Shreveport-Bossier population enrolls in such online degree programs offered by any number of providers.

- Blue Cliff College-Shreveport
- American Commercial College Shreveport.

Mention of these schools is included in this narrative only for the sake of presenting a complete inventory. They are not highly relevant to the unmet needs discussion that this chapter precedes. More information about proprietary schools is available on the BoR website at http://www.regents.doa.louisiana.gov/index.cfm?md=pagebuilder&tmp=home&pid=21&pnid=0&nid=7

PROGRAMS OF NON-DOMICILED PUBLIC INSTITUTIONS IN SHREVEPORT-BOSSIER

At present, to our knowledge, no LSU A&M programs are offered in Shreveport-Bossier. Three UL System institutions do offer programs/have presence in the Shreveport-Bossier metro area.

College of Nursing and Allied Health, Northwestern State University

NSU's programs in Nursing in Shreveport date to the 1940s, when its baccalaureate nursing program began to replace hospital-based diploma nursing programs. NSU indicates that 7,000+ students have earned nursing degrees since the College's founding. NSU's Nursing programs are associate, baccalaureate and master's levels. Although instruction occurs in some other locations and online, Shreveport is the main College campus/location.

The NSU College of Nursing was just redefined and expanded, in Summer 2010, as the *College of Nursing and Allied Health*. Radiologic Sciences programs are offered.

Clinical Pharmacy Program, University of Louisiana at Monroe

The academic programs offered by UL-M's College of Pharmacy are: Bachelor of Science in Toxicology (BS), Doctor of Pharmacy (PharmD) and Doctor of Philosophy (PhD). The College of Pharmacy operates in three campuses—in Monroe, Shreveport, and Baton Rouge. Facilities in Shreveport, adjacent to LSUHSC-S, serve as a base for clinical training.

Barksdale AFB Program, Louisiana Tech University

Louisiana Tech offers several degree programs at its Barksdale AFB location, including: Associate of General Studies; Bachelor of General Studies; Bachelor of Arts in Psychology; Electrical Engineering Technology; Master of Arts in Counseling and Guidance; Master of Arts Industrial Organizational Psychology; and Master of Business Administration.

Louisiana Tech University Barksdale Program

Degrees Conferred and Headcount Enrollment: 2006-2007 to 2009-2010

Degrees Conferred:	2006-07	2007-08	2008-09	2009-10
Associate of General Studies	27	23	20	9
Bachelor of General Studies	98	104	88	89
Bachelor of Science, Elect. Engr. Tech			2	
Master of Arts in Counseling and Guidance and in Industrial Organizational Psychology	55	59	48	40
Master of Business Administration	5	4	1	0
Total Degrees Conferred	**185**	**190**	**159**	**138**
Headcount Enrollment (Fall Semester)	**795**	**694**	**666**	**653**

Adapted from report provided by LSU System

The above data suggest that the Bachelor of General Studies degrees constitutes the largest program at Barksdale and that degree production and headcount enrollment have declined slightly since 2006-07.

Technology Transfer Center, Louisiana Tech University

Louisiana Tech also has a 20,000 SF Tech Transfer Center (T2C) facility in Shreve Park Industrial Campus, a business park being developed near the Airport. The T2C is a modern conference center and educational facility with video teleconference/distance learning capabilities. The T2C is used by Tech to facilitate technology transfer activities through meetings, conferences and workshops. In addition to these activities, the T2C hosts graduate level classes and is home to two formal post graduate Louisiana Tech degree programs:

- Master of Science in Engineering and Technology Management (MSE&TM)
- Executive Master of Business Administration (EMBA).

Non-Domiciled, Online, and Out-of-State Institutions with Presence in Shreveport-Bossier

University of Phoenix

Based on our review, of the large for-profit degree providers, we found only one—University of Phoenix—that has a physical location/presence in Shreveport-Bossier—its Bossier City campus.

Louisiana College—Planned Law School

Founded in 1906, Louisiana College is a private, coeducational college of liberal arts and sciences with selected professional programs and the only Baptist four-year institution in Louisiana. Programs are essentially at the baccalaureate level, with an MA in Education. The College's campus is in Pineville, across the Red River from Alexandria, in Central Louisiana.

We understand that Louisiana College is planning to open a Law School in Shreveport in the 160,000 SF Waggonner Federal Building, formerly a federal courthouse. At present, the State's four Law Schools are all in the south—LSU Law Center and Southern University Law Center (Baton Rouge) and Tulane Law School and Loyola University Law School (New Orleans).

Wiley College

Founded in 1873, shortly after the Civil War, Wiley College is a privately-supported, historically black, primarily liberal arts, residential, co-educational and undergraduate institution in Marshall, Texas. Marshall, TX is about a half-hour drive from Shreveport. Wiley currently enrolls about 1,350 students and offers 14 majors in four academic divisions—Social Sciences and Humanities, Sciences, Business and Technology, and Education.

SUSLA reports that Wiley (rather than Grambling) is increasingly the institution of choice for many SUSLA graduates who wish to go on to baccalaureate degrees. In addition to recruitment of students to its Marshall Campus, Wiley is operating from a Shreveport location—the Fire and Police Training Academy—and is marketing in Shreveport, as the adjacent advertisement indicates.

Although Wiley's campus is a short drive from Shreveport, the College seems to have determined that there are place-bound populations in Shreveport and thus there is a market that Wiley can serve with a Shreveport location.

CONSORTIUM FOR RESEARCH, EDUCATION, AND TRAINING OF NORTH LOUISIANA

CERT,[11] the Consortium for Education, Research, and Technology, serves as the intermediary—the convener and facilitator—that links the institutions of the Louisiana postsecondary systems with industry, to support workforce development, technology transfer, and economic development in the 22-parish region of North Louisiana.

Mission

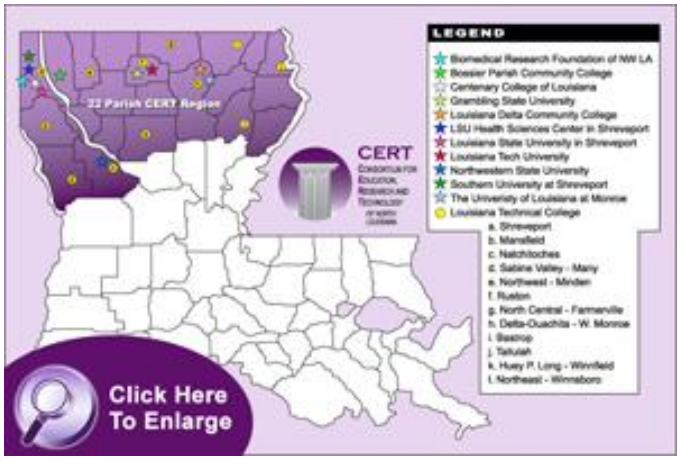
CERT's mission is to match Louisiana's higher education resources with the economic and workforce development of citizens and businesses in the 22-parish region of North Louisiana.

CERT strives to create a highly-skilled workforce and to foster economic development by partnering with industry, education, and government. In its various roles, CERT seeks to support:

- The technological workforce needs of companies in North Louisiana, through the development of customer-focused, flexible training programs and institutes
- Technology transfer, by developing specialized areas of expertise to help form new technology businesses in areas such as biomedical, manufacturing, information, and environmental technologies
- Economic development, by attracting technology-oriented businesses to North Louisiana that will access the resources of the colleges and universities.

Member Institutions

- Biomedical Research Foundation of NW LA
- Bossier Parish Community College
- Centenary College of Louisiana
- Grambling State University
- Louisiana Delta Community College
- Louisiana State University in Shreveport
- Louisiana Tech University
- NW Louisiana Technical College and NE Louisiana Technical College (formerly campuses of Louisiana Technical College)
- LSU Health Sciences Center in Shreveport
- Northwestern State University
- Southern University at Shreveport
- The University of Louisiana at Monroe



CERT's Focus

- Link Region Higher Education
- Intermediary
- Convener / Facilitator
- Link to Business
- Workforce Development
- Technology Transfer
- Economic Development

More information about current CERT initiatives is provided as Exhibit 3.2.

[11] Most of the information on this page is taken from http://www.certla.org/

LSU in Shreveport—History and Current Status

As LSU-Shreveport is a major focal point of this study, more details about its history and current status are provided than for other local/regional institutions. This section is divided into:

- **LSU-Shreveport Today**—basic information
- **Recent History of Concerns**—comments about factors in recent considerations of how to grow LSUS.

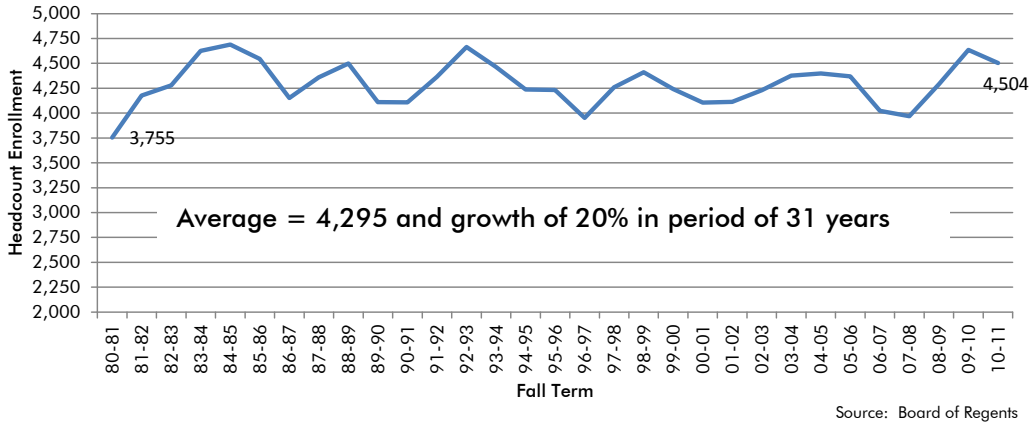
Earlier history of LSU-Shreveport, from its founding to the 1980s, approximately, is provided as Exhibit 3.3. This section of Chapter 3 includes discussion of recent/pending program proposals and the Role/Scope/Mission proposal.

LSU-Shreveport Today

Enrollment

In Fall 2010, LSUS's enrollment was 4,504, including 4,058 undergraduates and 446 graduate students. LSUS has had fairly stable enrollments, averaging 4,300, for a long time.

Headcount Fall Enrollment History--LSU in Shreveport: 1980 to 2011



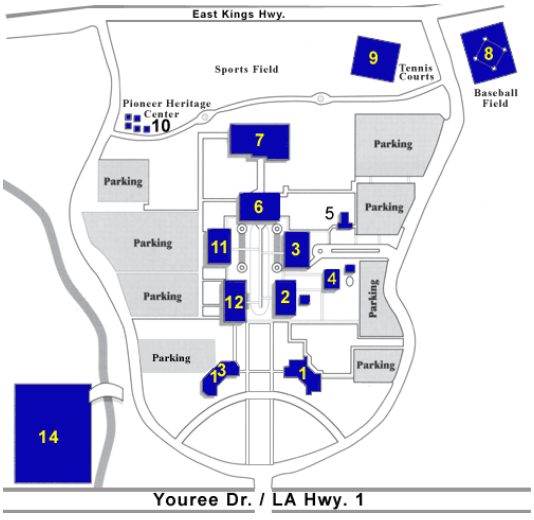
Source: Board of Regents

Facilities and Location

The campus is comprised of 258 acres and encompasses more than 660,000 net square feet (NASF) of space. It contains a very good library and some athletic facilities, in addition to main academic/administrative buildings. Major instructional and student services facilities were built between 1967 and 1994. The campus is attractive and well-maintained and has in its acreage significant room for expansion.

Current facilities are somewhat underutilized. In a quick analysis in EKA's 2009 *Academic Strategy* study, EKA hypothesized that the campus might have the capacity for as many as 4,500 to 5,500 full time equivalent students (FTEs), depending upon policies for scheduling and utilization of instructional space.[12] In Fall 2010, LSU-Shreveport's total undergraduate and graduate FTEs were 3,784—indicating capacity for FTE growth in the range of 700 to 1,700.[13] (This quick analysis can and should be verified with a proper *Space Capacity Analysis*.)

The campus location in south Shreveport—an area that is mainly residential with supporting retail/commercial—does not make it "feel" like a very "urban" university—as do campuses that are integrated into the core of urban centers.



[12] A quick comparative analysis of gross and net square feet of space per FTE may be found in *Academic Program Strategy*, EKA, 2009. However, that analysis, it should be noted, was not a full and formal *Space Capacity Analysis* and is not a definitive study of LSU-Shreveport's present top capacity.

[13] Student Credit Hour Production, SPSCHFTE FALL 2010-2011, Louisiana Board of Regents, http://as400.regents.state.la.us/pdfs/ssps/fall10/spschfte210.PDF

Degree Programs

Baccalaureate degree programs that mirror the offerings of many traditional undergraduate institutions are offered through the University's recently re-organized two Colleges—the College of Business, Education and Human Development and the College of Arts and Sciences. Degree programs offered by LSUS are as follows:

LSU-Shreveport Degree Programs

Programs listed are from the 2008-2009 LSUS *General Catalog*.

Some of these already have become targets for changes, but they are listed here as a point-in-time "snapshot" as of EKA's facilitation of the *Academic Program Strategy*.

Recent consolidation into two colleges—with all professional programs organized under a single college, was motivated by desire to reduce administrative costs.

Not included in the 2009 list at right is the newly approved MS in Biology.

Baccalaureate Programs Offered by LSU-Shreveport	
Accounting	
Biochemical Science	
Biological Sciences	
Chemistry	
Speech	
Community Health	
Computer Information Systems	
Computer Science	
Criminal Justice	
Elementary Education	
Pre K - 3 Elementary	
Elementary 1 - 5	
Elementary and Secondary Education	
Health and Physical Education	
English	
Finance	
Fine Arts	
Foreign Language-French	
Foreign Language-Spanish	
General Business Administration	
General Studies	
Geography	
History	
Management and Administration	
Marketing	
Mass Communications	
Mathematics	
Physics	
Political Science	
Psychology	
Secondary Education	
Biology	
Chemistry	
English	
Mathematics	
Physics	
Social Studies	
Sociology	
Graduate Degree Programs Offered by LSU-Shreveport	
M.A.	Liberal Arts
M.B.A.	Business Administration
M.Ed.	Curriculum and Instruction
M.Ed.	Reading
M.S.	Counseling Psychology
M.H.A.	Health Administration
M.S.	Human Services Administration
M.S.	Computer Systems Technology
Ed. Spec.	School Psychology
M.S.	Kinesiology and Wellness
M.P.H	Public Health

Program Productivity

Some programs have experienced limited enrollment and have conferred few degrees in the last several years. Based on Regents data (compiled in 2009 for the *Academic Program Strategy* study), by CIP codes, the highest enrollments and degrees, sorted here by the baccalaureate degrees conferred, are in Business, Liberal Arts/General Studies, Psychology, Education, and Biological Sciences—current strengths of LSU-Shreveport.

LSU-Shreveport Degrees Conferred by Two-Digit CIP Codes Representing 10 Percent or More of Total LSU Shreveport Degrees: 2007-2008

By CIP Codes	Bachelor's Degrees Conferred	% of LSUS Bachelor's Degrees	Master's Degrees Conferred	% of LSUS Master's Degrees
Business, Management, Marketing	128	25%	27	26%
Liberal Arts General Studies	96	18%	8	8%
Education	66	13%	34	33%
Psychology	59	11%	16	16%
Biological and Biomedical Sciences	53	10%		0%

Source: Compiled by Eva Klein & Associates, Ltd., from data of the Louisiana Board of Regents, http://as400.regents.state.la.us/pdfs/cmpl/cmpl0708/cmplcpgt.pdf

Non-Degree Programs

In 2009, the Division of Continuing Education offered a range of personal interest and leisure programs, as well as professional development programs, highlights of which included:

- LPN or CNA in Nursing
- Animation and Visual Effects
- Insurance/Financial.

Articulation with Other Institutions in Metro Shreveport-Bossier

LSU A&M University and Louisiana Tech University

Master's programs in English, History, and Environmental Science have been offered, but have not attracted significant interest.

LSU Health Sciences Center in Shreveport

There are cooperative MS programs with LSUHSC-Shreveport in which LSU-Shreveport faculty members teach and direct research theses:

- Biochemistry and Molecular Biology
- Cellular Biology and Anatomy
- Microbiology and Immunology
- Pharmacology and Therapeutics
- Physiology and Biophysics.

Community Colleges

LSU-Shreveport has been proactive in developing transfer and articulation agreements with BPCC and SUSLA. Annually, about 60 percent of enrolling students enter as transfer students from other institutions, and these students do well at LSU-Shreveport.

Articulation with Local Public Education

LSU-Shreveport has a dual enrollment program for high school seniors. In the Early Start (dual enrollment) program, LSUS faculty offer courses at high schools and work closely with the high school teachers qualified to teach college courses. This program is beneficial for the students, teachers, and schools in general, and it is anticipated that LSU-Shreveport enrollment will increase due to the success of this program. Enrollment in this program has grown significantly.

Collaborations

LSUS has been quite open to collaborations with other institutions—but only some of those that have been attempted have worked as well as was hoped.

Low High School Completion

Like other universities, LSU-Shreveport contends with the problem of under-preparation of high school graduates and a too-low rate of high school completion. This is a factor in enrollment as well as a challenge for an engaged public university.

Current Niches of Strength

LSU-Shreveport has some interesting competitive niches and strengths, based on the following list derived primarily from EKA's 2009 *Academic Program Strategy* study:

- **Pre-Health Professions**. LSU-Shreveport has an excellent reputation for preparation of students for application to Schools of Medicine, Dentistry, and (graduate) Allied Health. In fact, the University draws some students from outside the area to its undergraduate Biology programs. This feature has never been marketed adequately.
- **Teacher Education**. Given graduation requirements, 100 percent of teacher education degree completers at LSU-Shreveport achieve Louisiana state certification.
- **Small College Environment and Accomplished Alumni**. Small class size, access to faculty and individualized attention makes for outstanding graduates. LSUS graduates have distinguished themselves as President of the Charlotte Regional Partnership, Senior Researcher at the Argonne National Lab, John F. Kennedy School of Special Warfare, and Assistant Press Secretary at the White House.
- **The Center for Business and Economic Research at LSU Shreveport**. This research/service program provides business and economic research for the Northwest Louisiana region. The Center acts as a collection center for research data and strives to be a partner with government, business and industry to promote economic growth for the region.
- **Bioinformatics**. LSUS continues to receive recognition on a national and international level for these capabilities. This program has been evaluated as "Outstanding" by the National Institutes of Health (NIH), with external advisory committees composed of members from institutions such as Cal Tech, Emory, SUNY, and Ohio State University. At the undergraduate level, Bioinformatics is, at present, a concentration in the Computer Science degree and it is in the master's level program of Computer Systems Technology.
- **Animation and Visual Effects**. LSUS recently hired new faculty in this field. At present, the University is offering a master's degree concentration in Animation and Visual Effects—under the umbrella of Masters of Liberal Arts. Undergraduate concentrations are available for both computer science and fine arts majors.

- **Actuarial Science**. This is a small, but very high-quality program, a concentration within the BS in Mathematics. Graduates have been employed all over the country and are compared favorably with graduates from other institutions.
- **International Lincoln Center in American Studies**. This program sponsors student forums, seminars, and fellowships, as well as travel and internship experiences in Washington, DC.
- **Red River Watershed Management Institute**. This program is located at C. Bickham Dickson Park adjacent to LSU-Shreveport. This 585-acre park next to the Red River is the site of cutting-edge environmental research led by LSUS faculty and offers outstanding opportunities for students to study environmental issues.
- **LaPREP (Louisiana State Preparatory Program)**. This is a highly acclaimed program designed to encourage 7th and 8th grade at-risk children to remain in school. The program includes summer classes at LSUS and immerses the participants in math and science. This program has been nationally recognized with the Jefferson Award, Jacqueline Kennedy Onassis Award, and the CASE award.

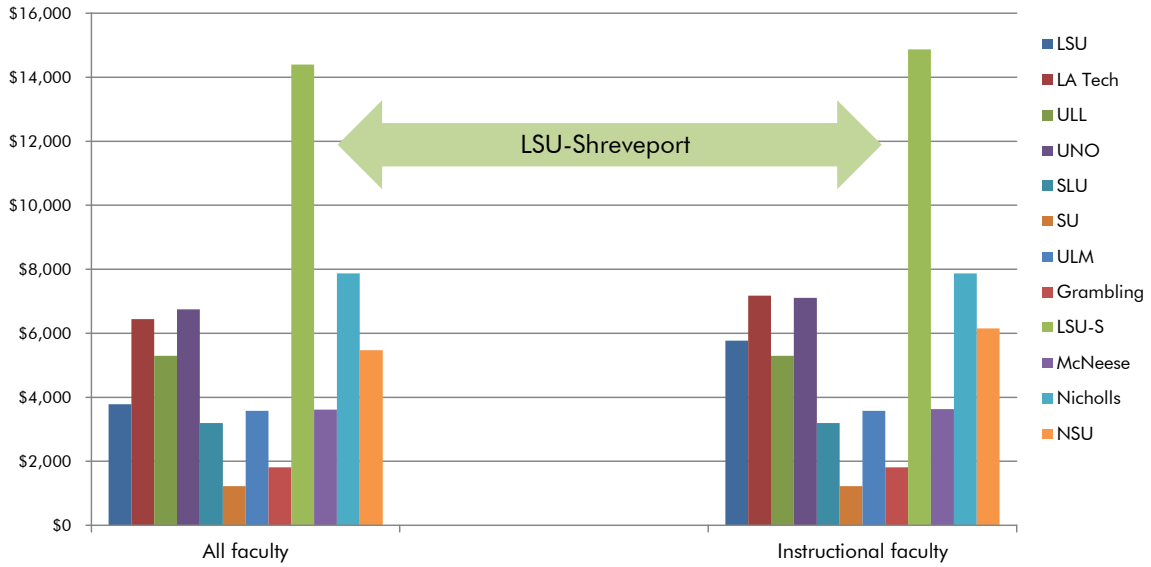
Recent Notable LSUS Achievements

Another perspective on LSU-Shreveport's strengths is provided by the following information about recent LSU-Shreveport achievements that was provided to EKA by Dr. Carolyn Hargrave, LSU System:

Productivity and Success Rate of BOR Special Fund Enhancement Awards, FY07-FY11

- LSUS's productivity of both total ($14,401) and instructional faculty ($14,869) are each nearly double that of the next closest campus.
- LSUS is highly productive even though there are some disciplines in which it cannot compete in certain years under program rules.

BORSF Enhancement Award Campus Productivity:
Dollars Per Faculty ('07-'11)



- LSUS received the 2nd highest amount of total awards during the period of all SREB-3 and SREB-4 schools (more than $1.8 MM).
- LSUS's total awards are nearly seven percent of the State's total, even though it has the smallest total faculty count, representing only two percent of the total faculty.

2010-2011 Value Added Results for Teacher Preparation

- LSUS scored above the mean for experienced teachers in two programs, Mathematics Alternate Certification Programs & English-Language Arts Alternate Certification Programs.
- LSUS scored above the mean for new teachers in one program, Undergraduate Reading Program.
- LSUS had the second highest ranked program in the State in Mathematics Alternate Certification Program & English Language Arts Alternate Certification.
- Compared to other programs in North Louisiana, LSUS had the most effective programs in Undergraduate Social Studies & Mathematics, and Alternate Certification Programs in Mathematics & English-Language Arts.

Louisiana Biomedical Research Network

LSU-Shreveport is a collaborator in Louisiana Biomedical Research Network (LBRN), which includes LSU A&M, LSU-Shreveport, Louisiana Tech, SU A&M, UL-M, and Xavier University. Mentor Campuses include LSUHSC-New Orleans, LSUHSC-Shreveport, Tulane Medical Center, PBRC, and the Tulane National Primate Center. The purpose of the collaborative is to raise the research competitiveness of Louisiana researchers. The collaborative was established in September 2001 and is now in its third phase, with continued funding by NIH and the BoR Support Fund.

RECENT HISTORY OF LSUS'S CONCERNS

Remediation and Admissions Standards

In the 1990s, when the Board of Regents sought to reduce the remediation being done at four-year institutions, the effects of this policy led to concentrating more enrollments in the two-year institutions. In response, LSUS initially self-imposed higher admission standards, based on the idea that it should establish itself as a senior college, rather than continue to compete with the community colleges for underprepared students. In Fall 2005, the Regents established new admissions criteria, in tiers. Under that policy, a student could not enroll in LSUS if he/she needed more than one remedial course or if he/she scored below 18 in both Math and English ACT tests. In Fall 2009, a Math ACT score of 19 was required for a student to be exempt from taking remedial mathematics courses. For Fall 2012, there is a further policy change in Regents' admissions standards, which also will affect LSUS's enrollments. See Exhibit 3.4.

Thus, these recent and ongoing admissions standards changes, while appropriate policy, have added to the history of LSUS's ongoing competition for freshmen students with two local community colleges, which have both lower admissions standards and lower tuition rates.

Recent Specific Program Proposals and Role/Scope/Mission Proposal

Specific program proposals that have been the subject of debate and frustration at LSUS are:

- EdD in Educational Leadership
- PhD in Bioinformatics and Computational Biology
- MS in Biology (formerly Environmental Biology)—recently approved by the Regents.

The broader Role/Scope/Mission debate attends the above EdD and PhD proposals.

Community Interests and Support

It is nearly impossible to engage in any conversation about LSUS's current situation and possible future scenarios for a more comprehensive public institution in Shreveport-Bossier, without hearing one or another version of recent debates over specific LSUS program proposals and about the change in Role/Scope/Mission that LSUS and its community supporters have been pursuing.

For example, in January 2008, Shreveport community leaders met with the Commissioner of Higher Education and voiced their concerns about the lengthy, difficult program approvals process and the lack of certain degrees at LSUS, including undergraduate and graduate programs, and including selected doctoral programs. Interviewees reported that the Commissioner of Higher Education was made acutely aware that improvements were needed. LSU-Shreveport has a very large compilation (not included in this Report) of letters of support and other documentation of the community's strong support for the Role/Scope/Mission change and for selected graduate programs.

Interviewees for this study provided EKA various evidence of unmet needs in the form of comments, position vacancy announcements, and other materials. Notable among these is information from Caddo Parish Schools that they must have convenient access to an EdD program and that there are 45 candidates for that program at present. We understand that

the Schools may seek an out-of-state provider. A letter from Caddo Parish School Board is provided as Exhibit 3.5.

Chronology of Role/Scope/Mission and Program Proposals

EKA received and briefly reviewed three versions of detailed chronology of actions/events relating to most recent program and Role/Scope/Mission proposals of LSU-Shreveport. The only observations drawn from this material is that, while facts and dates are consistent, it is the case that there are differing perceptions surrounding this history, and that these differing perceptions have become a focal point for tensions and aggravations among the parties. In EKA's view, the varying perceptions about this recent history are only relevant as a background factor for planning how to proceed differently in the future.

Effects of the Regents *Moratoria* on Program Approvals

In numerous interviews, interviewees mentioned the effects of the Regents' *moratoria* on program approvals as yet another factor in LSU-Shreveport's frustrations about program approvals. EKA reviewed the facts about this. It is the case that the Regents had in effect three separate *moratoria* on new program approvals for much of the period during which LSUS has been pursuing its approvals for the above three programs. (The *moratoria* were in effect for 50 of 72 months from December 2005 through September 2011).

However, each time, the policy included grounds for exceptions that might be made by the Regents. In fact, a number of exceptions were granted to various institutions during the *moratoria*—two of which were for LSU-Shreveport (Post-Masters Academic Certificate (P.M.C.) - School Turnaround Specialist and BA in Art Education Grades K-12). Thus, these *moratoria* could have been a contributing factor to slowing program approvals for LSU-Shreveport. However, given the fact of exceptions granted, they do not entirely suffice to explain why LSU-Shreveport has proposed so few new programs in the last several years—some of which, if the case were made, might have been approved as exceptions.

A Very New Program List

During preparation of this Report, LSU-Shreveport did additional internal planning work on the base that the 2009 *Academic Program Strategy* had provided. The following is a current (as of January 2012) list of programs that LSU-Shreveport believes are highest priorities for implementation in Shreveport-Bossier. With the exception of the MS Biology program, which was approved by the Board of Regents in January, none of the programs cited below has been submitted for review as yet:

- BS Engineering
- BS Energy Management
- BS Information Technology
- MS Biology **(submitted; now approved)**
- MS Accounting
- MFA in Computer Graphics and Digital Media
- DBA Doctorate Business Administration
- EdD Education Leadership
- PsyD Applied Doctorate in Psychology with concentrations in School Psychology and Counseling Psychology.

Following are some informal observations. This program list is equally distributed among baccalaureate, master's and doctoral level programs and is basically sensible. All three proposed doctorates are applied doctorates. The rationale for a DBA is less obvious than the rationale for applied doctorates in Education and education-related Psychology. The MFA in Computer Graphics and Digital Media relates to local industry; it alternatively could be considered as a Professional Master of Arts (PMA) program. It also might be reasonable to

consider a five-year Master of Accountancy program building on the BS degree, as another way of meeting the need for graduate level Accounting and preparation for CPA examinations.

In addition, LSU-Shreveport's leadership believes that an entire program triage, for updating content and focus of some existing programs and eliminating or merging others, as proposed in the 2009 study, is still warranted.

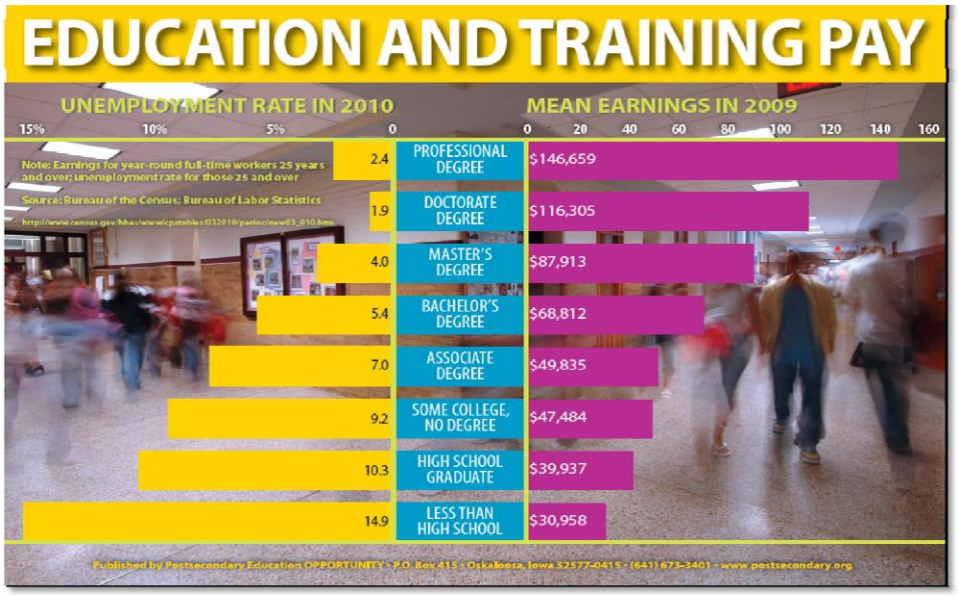
Analysis/Commentary—Higher Education Contexts

Louisiana

Crossfire of Opinions—Higher Education's Role in Economic Development

Unlike in some states (e.g., North Carolina or Massachusetts) in which devotion to public higher education has been an article of faith among many generations of legislators/policy-makers, Louisiana does not have such thoroughly embedded or commonly-held cultural beliefs in the intrinsic values of higher education. In Louisiana, one has the impression that there is a gamut of opinions on this question.

The BOR is the natural state-level advocate for higher education, and takes this role seriously. So, too, do the postsecondary system management boards and the individual institutions. Many business/community organizations also are strong and insistent advocates.



It is commonly understood that higher education attainment levels are associated with higher lifetime earnings for individuals. Benefits to individuals are not the only story. There also are many factors of purposeful economic strategy that can change the path of labor market projections; and, perhaps more important, that require asset-building. Asset-building includes ***human capital formation*** as much as it includes hard capital asset formation.

One senses that there is a lesser degree of consensus about commitment to the values of higher education for economic development—beyond the much narrower question of workforce preparation. For example, the Louisiana Economic Development (LED) *5-Year Strategic Plan* does not overtly include objectives relating to how higher education attainment levels and research/innovation/partnerships are to be strategically cultivated for, and connected to, the overall growth of the economy, or tied to specific target segments.

We have heard anecdotally that there are legislators who believe that the States' higher education investments and outcomes are sufficient to support the State's economy and perhaps some who do not even feel that the current level of investment is necessary.

Louisiana never has been among top-achieving states in educational attainment, although it made progress in recent years, before the recent fiscal problems—as indicated by the data in the table below, showing comparisons of Louisiana with the Southern Regional Education Board (SREB) and national averages, from 1990 to 2007.[14]

Louisiana gained ground in bachelor's degree attainment, from 16.1 percent of the state population in 1990 to 20.1 percent in 2007. But, the other states did not stand still. In 2007, Louisiana reached 20.3 percent of adults with bachelor's degrees that had been the US statistic in 1990. The disparity, or gap, between Louisiana and both SREB and all US statistics was greater in 2007 than in the previous two data periods.

Educational Attainment in the Adult Population in 1990, 2000, and 2007: US, SREB, and Louisiana

	Percent With High School or GED Credentials			Percent With Bachelor's Degrees or Higher		
	1990	2000	2007	1990	2000	2007
United States	75.2	80.4	84.0	20.3	24.4	27.0
SREB States	71.3	77.7	81.8	18.7	22.5	24.8
SREB States as % of US	94.8	96.7	97.4	92.1	92.4	91.8
Louisiana	68.3	74.8	79.4	16.1	18.7	20.1
LA vs. US	-6.9	-5.6	-4.6	-4.2	-5.7	-6.9
LA vs. SREB	-3.0	-2.9	-2.4	-2.6	-3.8	-4.7

Source: SREB Analysis from US Census data, SREB Fact Book 2009 and EKA Analysis

Since Louisiana must compete with 49 other US states and globally with other advanced and emerging economies, the State cannot afford to gravitate to the position that baccalaureate and graduate education is of limited value to its economy.

It is clearly the case that the business and community leadership of Shreveport-Bossier, while very pleased with the accomplishments of its two-year institutions, insists that more advanced levels of education, with more participants and completers, must be part of the MSA's economic and prosperity strategies.

Two Year vs. Four-Year and Beyond

There appears to be an emerging policy direction that the State needs educational attainment primarily at the two-year and technical levels—a position often bolstered by work force data.

Formal workforce/labor market projections and efforts to connect higher education outcomes to work force needs, such as Louisiana's current effort on *Employment Outcomes* reporting, are a new trend in education policy, and a good thing. To some extent, investments can and should be guided by workforce data and we certainly would never argue against the idea of pursuing more two-year degree/certificate completion. The only risk is to interpret the workforce connections too literally, and to thus risk simplifying solutions to complex challenges.

It is our impression that labor market projections, while important and useful, are not the only factor in policy-making for educational attainment. Our society long ago established that the value of higher education is not merely for pursuit of an entry-level occupation, but also for long-term career growth and for non-work, life pursuits and civic engagement. Economic arguments are made for higher lifetime earnings, greater independence, less incarceration, etc.

[14] *Louisiana Higher Education: A Six-Point Advocacy Agenda*, Eva Klein & Associates for community organizations in Shreveport-Bossier, 2010

Fiscal Constraints—Certainly Now and Maybe Forever

Louisiana has concluded three difficult budget years and, like most states, does not project major fiscal improvements for the near future. Resource constraints always heighten the effects of the above mix of views and aggravate the inter-system and inter-institutional competition for resources. In Louisiana, as the mix of state support vs. self-generated (mostly tuition) revenues is changing materially, this competition may become a bit less about state dollars and much more about attracting student markets. Institutions that do not have optimally attractive programs and effective marketing will suffer more in future than they may have in the past.

Moreover, although the state, national, and global economies eventually may turn to positive growth, it has been EKA's belief, for some time, that higher education never again will be able to garner growing resources without serious business model changes and without demonstrating much greater attention to productivity of outcomes.

In shaping recommendations from this analysis, the consultants are taking seriously the matter of moving toward better deployment of resources. The consultants do not believe that mergers in higher education typically result in significant savings and they do represent temporarily increased costs for the merger implementation period. However, just as good as reducing budgets, and perhaps much better, is gaining more and better outcomes for the same level of resources invested over the long term.

Admission Standards, Accountability, and the New Master Plan

The BoR promulgates policy on admissions standards—defined somewhat differentially for three categories—flagship, statewide, and regional. Recently, four-year institutions were required to abandon open admissions policies, where these existed. In Fall 2012 (the coming Fall class), new standards that will apply to admissions of First-Time Freshmen, Adults, and Transfers will serve to reduce four-year institution enrollments and are likely to increase two-year institution enrollments. As noted above, Exhibit 3.4 provides a summary of currently in-effect standards and the standards that go into effect for Fall 2012.

In Shreveport-Bossier, we understand that a drop in natural enrollment levels is expected at LSU-Shreveport; it is highly likely that many/most public senior institutions in the region and State will experience some enrollment declines—at least temporarily.

In general, changes underway, and being considered, in Louisiana higher education are consistent with change trends elsewhere, and are all good. It is sensible to focus more on completion and success, rather than just on access. It is good policy to shift the burden of remediation from four-year to two-year institutions and to make effective use of those institutions for workforce development. It is entirely appropriate for higher education institutions to meet new standards of accountability in their use of taxpayer resources. In general, with actions of the last several years and the new *Master Plan*, Louisiana seems, to us, to be moving in the correct directions.

Current Initiatives—Governance Commission and the LSU Flagship Agenda

Some of the Governance Commission's recommendations are pertinent context for consideration of our subject—how to achieve a more comprehensive public university presence in Shreveport-Bossier. In particular, we must bear in mind the Governance Commission's urging of alignment of institutions to management systems, based on missions—which suggests more defined missions for the systems.

Conversations and press coverage about the "flagship agenda," LSU System/Board plans to examine reorganization and collaboration, and the recent transfer of The University of New Orleans from the LSU System to the UL System also are among the backdrop for the considerations in this study. Among other things, these developments must be considered in

any analysis of which system would be the most suitable home for a potentially merged LSU in Shreveport and Louisiana Tech.

SHREVEPORT-BOSSIER METRO

Region vs. Metro Area and the Issue of Program Duplication

It is true that North Louisiana has a large complement of institutions and programs. It is true, as two examples, that one of the few Pharmacy colleges in the State is at UL-M and one of the State's relatively few Engineering colleges is at Louisiana Tech. Shreveport also is home to one of the two LSU Health Sciences Centers.

In its 2008 report entitled *An Assessment of Unmet Postsecondary Education Needs in the Shreveport/Bossier Area of Louisiana*, NCHEMS essentially used a variety of regional data to demonstrate that all of Shreveport-Bossier's higher education needs are met with programs offered within the region. (This NCHEMS report is summarized in Chapter 4, below.)

It is EKA's observation that this position, while not unreasonable, is not a full picture of the situation, when today's trends for increasing participation of place-bound populations, including working adults, are taken into account. Hypothetically, if one could start again to locate institutions and programs, today one might put professional programs such as Pharmacy and Engineering in the largest urban centers, rather than in smaller communities.

Thus, today, if much improved educational attainment is the policy goal, and if this includes serving what ultimately will become huge numbers of adults, it is not quite enough to say that the program is available to the 18 year old *who can go away to college*. It is our view that, in its 2008 report, NCHEMS demonstrated that for those who enroll, needs are met, but that analysis did not as convincingly address needs of those who are not showing up in the enrollment data.

And, yet, on the other side of the argument, we agree that wholesale duplication of every program makes no sense either. Technology provides options for distributed delivery, although it is not likely to fully replace all face-to-face instruction. Thus, it is necessary to triage duplication into two types—*unnecessary duplication* and *purposeful duplication.* Fine-tuned judgments, rather than set answers, may be the way of the future.

Above Average Track Record in Articulation and Collaboration, but with Fierce Competition

Program collaborations increasingly will be another way to bridge gaps in higher education, without full replication of stand-alone programs and costs—or for the purpose of making stronger, higher-quality programs.

We do not know how well collaboration works in other regions of Louisiana, but we can compare the North Louisiana institutions with groups of institutions in other regions in other states with which we are familiar.

CERT

Although EKA admits to some bias on this point (as we were involved in the formation of CERT), we believe it is reasonable to assert that this region—North Louisiana—has a better than average track record in forging collaborations between institutions, or at least in sustaining dialogue among them about common issues. CERT has been one important vehicle for these partnerships—and provides the unusual advantage of a forum in which the region's presidents/chancellors get together on a regular basis, to take up common purposes. Again, please refer to CERT initiatives, Exhibit 3.2.

Federal Social Innovation Fund Grant

Exhibit 3.6 provides information about Shreveport-Bossier's recent award of a very important grant—one of only five in the US that were awarded in 2011, based on the region's exceptional track record in program collaborations for workforce education. The Community Foundation and CERT were instrumental in acquiring this important grant.

Two-Year to Four-Year Articulation

Along with other forms of collaboration, the institutions in this region have been relatively strong in the specific matter of forging program articulation programs. For EKA's 2010 study—*Six Point Advocacy Agenda for Higher Education* (in response to proposed higher education budget cuts), we reviewed a lengthy compilation, provided by CERT, of program articulation. This information is provided as Exhibit 3.7.

BPCC@NSU and BPCC@Grambling. These programs allow students who fall short of admission requirements at the two universities to enroll in BPCC developmental course and 12 hours of non-developmental courses. Upon successful completion, these students are fully admitted to the university. During the program, they have access to all student activities available at the university. Each program enrolls approximately 300 students per semester.

SUSLA. This two-year institution also has a number of articulation programs with four-year institutions, including LSUS. SUSLA also is working on special programs with the high schools. SUSLA leadership expresses significant concerns, shared by others, about the low levels of baccalaureate attainment among Shreveport's African-American population. Leadership also believes that its status as a two-year institution is anomalous both in the SU System and more generally in the US, as most HBCUs are senior institutions. Any solutions that can engage SUSLA much more directly helping to produce black baccalaureate completers would be an important part of the solutions to unmet needs in Shreveport-Bossier.

Fierce Competition

All that said about collaborations, EKA also concludes that Shreveport-Bossier has been, at the same time, a battleground among several institutions that see it as an important market for growth of their programs and enrollments. Being surrounded by a number of larger UL System institutions in the region, all with broader Role/Scope/Mission, LSUS has found itself unable to compete in several program areas—and in overall growth. UL System institutions seem to have had a better history in overall program development and enrollment growth—drawing many students from Shreveport-Bossier—at least for those who can travel to the other institutions or become residential students. Some of their programs also are offered in the two cities.

LSU in Shreveport—At the Center of the Analysis

EKA is taking no position on the relative accuracy of various interpretations and perceptions about the facts and events of the last decade—because there is truly no point in "assigning blame." It is our opinion, however, that LSU-Shreveport's failure to grow as one might have expected it to arises from a number of factors that include:

- Strained relationships among LSU-Shreveport, the LSU System, and the BoR
- Significant local capacity at two-year institutions, making local competition for first-time freshmen problematic for LSU-Shreveport
- Historical prohibition on student housing—limiting severely the non-commuter cohort in earlier years—and more recent decisions of LSU-Shreveport to not develop housing
- Self-inflicted wounds in that program development and updating have not occurred as they should have at baccalaureate and master's levels
- Relatively weak positioning, recruitment, and marketing
- Very effective competition from UL system institutions in the I-20 Corridor.

Although it was important to us to understand the recent past, the past has been used in this study only as a means of informing our opinions about what might work best for the future. EKA's best estimation of the prospects for the three specific longstanding LSUS program proposals, and for Role/Scope/Mission, *in the current structure and situation*, is as follows:

- The Regents approved the MS in Biology as this report was being completed.
- The Regents are not likely to approve the change in Role/Scope/Mission based on LSU-Shreveport's submissions any time soon. Regents are hoping to see more program development at baccalaureate and master's levels occur first.
- Approval of the PhD in Bioinformatics seems unlikely in the near future (and, in any case, Regents indicates that this has not actually been formally submitted)
- Approval of an EdD in Education Leadership might have prospects if developed in a new way (and not as part of the consortium that now no longer exists).

None of this would preclude development, submission, and approvals of many other programs.

4—Unmet Higher Education Needs in Shreveport-Bossier

Selected Relevant Studies

From the 1960s (and even much earlier), the local Shreveport-Bossier community continuously advanced initiatives that resulted in the creation of the MSA's higher education assets, including: LSU in Shreveport, LSU Health Sciences Center in Shreveport, Southern University in Shreveport and Bossier Parish Community College—all four of which came into existence in/about 1967.

In more recent times, the issue of whether Shreveport-Bossier's higher education needs are met adequately and, if not, how to meet them, has been embodied in several studies of which we are aware—from 1994 through 2011—now nearing two decades of thought and study.

A Time to Choose, Morrison Study, 1994

A Time to Choose: A Report Prepared by Morrison & Associates for Shreveport-Bossier, Louisiana, February 4, 1994

The above titled report was the result of a study sponsored by the Caddo Parish Commission, the City of Shreveport, the Bossier City Chamber of Commerce, the Greater Shreveport Chamber of Commerce, the Committee of 100, and the Coordinating and Development Corporation. Morrison & Associates, consultants, conducted the study.

The study focused principally on four economic development strategies for Shreveport-Bossier:

- Becoming a center of development of African American business
- Building a strong technology base in science, engineering, and manufacturing
- Developing as a center for entertainment, music, conventions, and retirement
- Strengthening neighborhoods and building community leadership.

Morrison avers that future economic growth will occur where there is *"a critical mass of technically sophisticated workers, scientists, and engineers"* with *"global linkages with other centers of technology development..."* Thus, the report concludes: *"The long-term prospects for Northwest Louisiana depend on expanding investment in research, technology, and technology transfer."* The means by which Shreveport-Bossier can and must establish its place as a technologically sophisticated center is by strengthening the higher education enterprise in its midst. The foremost step to that end is to merge LSU-S and Louisiana Tech. Morrison adds:

"A merger of Louisiana Tech and LSU-S represents the single most important step in creating secure, high paying jobs in Northwest Louisiana."

Numerous advantages are cited for Shreveport-Bossier, if the two universities are merged, among them:

- A major institution capable of meeting the needs of citizens and business in northwest Louisiana
- Undergraduate engineering technology programs
- Doctoral programs in engineering, the sciences, and business
- Other graduate programs in promising areas
- Expanded research opportunities for the merged institution and the (then named) LSU Medical Center
- Research and development capacity needed to attract investment and industries
- Infrastructure for technology transfer and engineering and management support.

In addition to the LSU-Shreveport/Louisiana Tech consolidation, Morrison also called for five-year development plans for SUSLA and for BPCC as part of the overall strategy recommended for strengthening higher education in Shreveport-Bossier.

It is High Time for a Solution

This summary of studies demonstrates that this is not at all a new question or problem for Shreveport-Bossier.

It is not surprising that the community leadership truly wishes to, at last, have a bold and definitive solution for positioning the Shreveport-Bossier community to compete more effectively in an economic environment that depends heavily on human capital resources.

They hope to achieve the beginnings of such solution as a result of this study and to begin to develop consensus toward implementation.

BOARD OF REGENTS SHREVEPORT-BOSSIER STUDY, 1997

Report of the Board of Regents Ad Hoc Committee on Higher Education in the Shreveport/Bossier Metropolitan Area, 1997

We believe that this BoR study was prompted by Regents' concerns about program duplications and may also have been prompted by concerns about aggressive competition among institutions not domiciled in the MSA for delivery of programs in Shreveport-Bossier. This study was mandated shortly after the creation of the CERT consortium, which was given a significant role in the study and which was to monitor progress in the metro area thereafter.

The study began with demographic and economic analyses of the Shreveport-Bossier situation and included a short description of all the institutions in the cities and in the region—much as this report does. The nine recommendations were aimed at:

- Improving the coordination of delivery of higher education programs and defining the roles of institutions
- Reinforcing the roles of BPCC and SUSLA (then SUSBO)—rather than the senior institutions—in developmental education
- Reducing program duplication at BPCC and SUSLA
- Preserving the legitimacy of Louisiana Tech and NSU (and presumably others) to offer certain programs in Shreveport-Bossier
- Establishing LSUS as the primary senior institution which, along with LSU Health Sciences, would provide the baccalaureate and graduate programs for the urban area—with the understanding that "non-domiciled" institutions would offer unique programs.

Because a higher education center model also is being reviewed in this present study, it is very interesting that the notion of LSUS serving as a ***Higher Education Center*** in Shreveport-Bossier.

Recommendation #5. *LSUMC and LSUS are assigned the primary responsibility of providing baccalaureate and graduate programs and services for the S/BMA. LSUMC will maintain and expand, as appropriate, its offerings in the health care and allied health fields. LSUS will expand its programs and services to meet the needs of the citizens, business, and industry in the S/BMA.*

Recommendation #6. *LSUS should be designated, with regard to upper level undergraduate and graduate level programs and coursework, as the Higher Education Center for the S/BMA, and, as such, LSUS will serve as facilitator, coordinator, and partner (as appropriate), in bringing programs at these levels to the S/BMA from other higher education institutions.*

Recommendation #7 (in part)*.....NSU will continue to offer appropriate programs in nursing at its single-purpose Nursing Education Center in Shreveport. LA Tech, the only institution with engineering programs north of I-10, will continue to offer engineering education at appropriate locations for the citizens of the S/BMA.*

MERGER CONCEPT ANALYSIS, EKA, 2005

LSU in Shreveport and LSU Health Sciences Center in Shreveport, Merger Concept Analysis, Volume 1: Summary Report, June 2005 and Volume 2: Analytical White Paper, May 2005, prepared for Dr. John C. McDonald, Chancellor, LSUHSC-S and Dr. Vincent Marsala, Chancellor, LSU in Shreveport, Eva Klein & Associates, May and June 2005

Dr. Vincent Marsala and Dr. John McDonald engaged EKA to examine the feasibility and desirability of merging the two institutions, in the prospects that such a merger would result in an institution of strengthened capacities to serve higher education needs of the Shreveport-Bossier City metro area and its surrounding region. The call for this examination was prompted by the chancellors' concern that Shreveport-Bossier, one of Louisiana's four largest metropolitan areas, lacked a resident university (public or private) with instruction, research,

Coordination of Delivery

…"The guiding principle for coordination of the delivery of higher education services to the S/BMA is that the institutions "domiciled in Shreveport/Bossier City have the primary responsibility to provide programs and services in the S/BMA. The role of the "non-domiciled" institutions will be to offer unique programs, when demand warrants, with the "domiciled" institutions participating in the delivery of these services as appropriate." (p. 13)

…LSUS, as the only senior university in the S/BMA, has the primary responsibility of providing programs and services in the S/BMA at the baccalaureate and graduate levels. LSUS must be prepared to develop new programs when the needs for such are identified in the S/BMA…(p.14)

and outreach assets that were sufficiently comprehensive to meet the diverse educational needs of its citizens and to advance *knowledge-based economic development* in the region. The premise of the study began with five questions to be answered:

1. *Does the Shreveport-Bossier City area need a major (public) university with a much broader array of educational assets than it currently has?*
2. *By what means could this kind of institution best be developed in the Shreveport-Bossier metropolitan area—with emphasis on its occurrence as expeditiously as possible?*
3. *In pursuing a merger, would there be adverse consequences (actual harm) to the two institutions that would outweigh its potential longer-term benefits for the Shreveport-Bossier area and the State?*
4. *Is there merit to creating a university with a particular or unusual strategic focus, mission, and market identity, rather than attempting to replicate existing comprehensive university models? If yes, what might that unique mission, focus, and model be?*
5. *If merger is a promising strategy for meeting the metro area's needs, what are the possibilities of gaining necessary support in the local community and at the State level for this strategy? More particularly, as significant new resources would be needed for success, what is the probability of obtaining support for these investments?*

By the conclusion of the study, questions were reframed as follows:

1. *What is the real goal and is the rationale for it compelling?*
2. *Is there stakeholder support that can and will deliver the resources needed for an expanded public institution in Shreveport-Bossier?*
3. *Would a new university model help achieve needed stakeholder support?*
4. *Would a merger of LSU-S and LSUHSC-S provide structural components for developing this model and make a difference in accelerating its realization?*
5. *If "yes," can risks of a merger be mitigated?*

The analysis included assessment of "fit" in several categories: students and student services; faculties; administrations; academic programs; and facilities. Incentives and disincentives for a merger were examined.

The alternative of a three-way merger, including also Louisiana Tech University, was posed, largely because it was raised in a key interview, and its merits were considered and described briefly in the report as follows:

> *One proposition encountered in the course of our interviews is that the need for a truly comprehensive university in Shreveport-Bossier could be met by adding Louisiana Tech University to the merger, making it then a merger of three institutions.*
>
> *The underlying rationale is that Louisiana Tech already has in place program offerings that are needed in Shreveport-Bossier and that a merged LSU-S and LSUHSC-S still would have to gain authorization and resources to offer. This would be one way to answer the question about how to bring Engineering and Technology programs to the Shreveport-Bossier metropolitan area.*

To review national data, EKA looked at then-current data for MSAs in the US of most comparable size to Shreveport-Bossier and found that, indeed, most of them do have more significant, more comprehensive public institutions. (Those data are provided later in this chapter.)

Through the writing of the *Analytical White Paper* (later provided as Volume 2), the working conclusion was a tentative "yes" to the merger concept. In the *Summary* (Volume 1), at the

study's end, the conclusion was more guarded, primarily due to the consultants' concern that sufficient political support and added resources that would make the merger successful might not be achievable. The final conclusion of the study was stated as follows:

Conclusions

The true goal, we conclude, is that one articulated by the chancellors at the outset—to achieve a larger, more comprehensive and more responsive "21st century university" in Shreveport-Bossier.

We conclude that a merger, per se, would not lead to achievement of the true goal. This is particularly true if substantial new resources are not provided.

With several considerations, conditions, and caveats, we also conclude that a merger might be one tool toward achievement of the above true goal. It would not be instigated to achieve an organizational ambition of the two existing institutions. Rather, it would be a means for building political and community support.

Therefore, a merger of LSU-S and LSUHSC-S is a useful tactic that should be considered further only if it is one part of making the case for a larger strategy that includes:

- *Defining the vision/model for a "new university"*
- *Stabilizing the existing funding and political base, especially for LSUHSC-S*
- *Acquiring commitments for major new funding to enact a "new university" vision and model in a reasonably near-term timetable.*

STUDY OF UNMET NEEDS IN SHREVEPORT-BOSSIER, NCHEMS, 2008

An Assessment of Unmet Postsecondary Education Needs in the Shreveport/Bossier Area of Louisiana, National Center for Higher Education Management Systems (NCHEMS) for the Board of Regents, May 2008

The impetus for this study may have been LSU-Shreveport's proposal to the Regents for a doctoral program in Bioinformatics that would be offered through collaboration between LSUS, Louisiana Tech, and the LSU Health Sciences Center-Shreveport. Strong community support for the program was seen as indicating aspirations for expanding LSUS's Role/Scope/Mission to encompass doctoral level education beyond the particular program proposed. Consequently, the BoR determined that a study of unmet needs for postsecondary education in Northwest Louisiana should be undertaken. NCHEMS was commissioned to conduct the study, taking into account all institutions in the region.

The study purported to examine higher education services available to recent high school graduates, adults, employers, and communities in the region. Services considered ranged from basic literacy to undergraduate and graduate level instruction to research. To establish context, NCHEMS reviewed related, prior studies, including EKA's studies; population demographics; educational attainment levels; and characteristics of the area's economy and workforce. Also, interviews were conducted with various stakeholder groups.

Findings that were drawn from these sources included these:

- Expectation of relatively stable regional population
- Educational attainment levels generally typical of the State
- Significantly lower educational attainment levels among African Americans
- Employment primarily in health care, entertainment, and military
- Per capita income well below national averages
- Employment opportunity that requires postsecondary education largely limited to health care and education

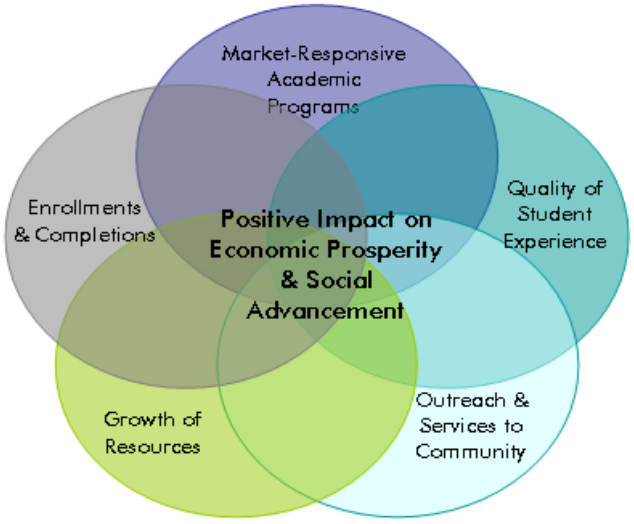
- Percentage of high school graduates in the region who continue to higher education below the state average, and the state average significantly below the US average
- More Caddo and Bossier parish students enrolled at Louisiana Tech than at any other four-year institution
- Greater access to upper division instruction in Shreveport-Bossier needed to serve adults
- More graduate programs needed in Shreveport-Bossier
- No basis for launching doctoral programs to serve local employer needs
- Press for doctoral programs and research capacity in Shreveport-Bossier more a reflection of community aspirations than employer needs
- Academic programs needed in the region already exist in the region with few exceptions
- No change in institutional mission is required to meet the region's higher education needs
- Unmet needs should be met through collaboration among the institutions present there
- Merging institutions is not a necessary strategy to meet the region's higher education needs.

The study's recommendations include creating a University of Shreveport whose essential function would be to broker academic program delivery from the region's other three universities to the LSUS campus. Role/Scope/Mission of the constituent institutions of the University of Shreveport would not be changed. LSU-Shreveport would have the franchise for lower division, general education instruction. Upper division instruction in their respective undergraduate majors would be provided by LSU-Shreveport, Louisiana Tech, and Grambling. Undergraduate programs in Engineering delivered by Louisiana Tech and graduate programs in Educational Leadership by Northwestern and Grambling were specifically recommended. Also, authority for LSUS to add a Master's program in Business Management was recommended.

ACADEMIC PROGRAM STUDY FOR LSUS, EKA, 2009

Louisiana State University Shreveport Academic Program Strategy, Eva Klein & Associates, Summer, 2009

This study was undertaken for the LSU System Office and LSUS in 2009, shortly after the NCHEMS study. Its overall purpose was to formulate strategies that would provide the framework for long-term development of LSUS as a comprehensive, urban university with an appropriate mix of academic, research, and outreach programs. The key considerations in identifying that mix were needs of the Shreveport-Bossier metro center for accessible undergraduate and graduate degree programs, research and technology development aligned with local enterprises, and outreach activities in support of further economic development.



As context, EKA reviewed economic conditions in Louisiana and the Shreveport-Bossier metropolitan area. This was accompanied by consideration of the interdependence that exists in economic, educational, cultural, and civic life between cities and universities.

A key finding was that Louisiana in general, and Shreveport-Bossier in particular, are not well advanced in attracting knowledge-based industries. Also, the history of LSUS was reviewed to identify circumstances that have constrained its growth and shaped its current status. Among those found were a rather traditional and constricted program array, reliance for enrollment on a commuter student population (the University having no campus housing,) competition with two-year schools for lower division students, and competition brought by universities from elsewhere in the region that offer bachelor's and master's degree programs in Shreveport-

Bossier. Finally, the University's current academic programs, their degree production, and inter-institutional relationships in the metro area were examined. Among areas of strength identified were programs in pre-health professions, teacher education, bioinformatics, animation, and visual effects.

Several initiatives were identified as key needs:

- Reconfigure academic programs so that all are high quality and market responsive
- Grow incoming enrollment and improve retention and degree completion rates
- Strengthen recruitment and marketing
- Improve the quality of student experience in and beyond the classroom
- Recognize and respond to scheduling and support service needs of adult students
- Build greater engagement with the community
- Grow both state and self-generated resources.

Strategies designed to address these needs included the following:

- Assess all existing programs as well as proposed new ones
- Where appropriate, revamp traditional programs to inter-disciplinary structure and content
- Align programs more closely with industry, service, and professional enterprises in the metro area
- Build graduate programs in health care fields based on alliances with the LSUHSC-Shreveport
- Develop graduate programs oriented to urban needs
- Build on existing strengths
- Align program delivery calendar and schedule with underserved populations' needs
- Where possible, meet changed needs by re-structuring and revising presently authorized degree programs
- Seek re-instatement of LSUS' designated service area to reduce program duplication in the Shreveport-Bossier market.

Employing these strategies, a comprehensive array of undergraduate and graduate academic programs was outlined, combining some new programs, along with retained and revised existing ones. In addition, a more compact organization of the University's departments and colleges was designed to facilitate inter-disciplinary program development and delivery and enhance administrative efficiency.

HIGHER EDUCATION ADVOCACY STUDY, EKA, 2010

Louisiana Higher Education: A Six-Point Advocacy Agenda, Eva Klein & Associates for the Shreveport-Bossier Higher Education Imperative and Co-Sponsors, November 2010

When the Governor was indicating that FY2011 budget constraints might result in a cut to Louisiana's higher education budgets of as much as 32 percent, the local leadership groups in Shreveport-Bossier engaged EKA to conduct a study of issues and to frame an agenda for advocacy for North Louisiana's institutions. It became apparent early on that the fate of North Louisiana's institutions could not really be seen as much different from the overall fate of higher education in the state budget process. EKA's efforts then turned to creating advocacy agenda issues that the local community could join with advocacy efforts of others.

Challenges

Four Challenges were identified, as follows:

I—Competitiveness in the Global Knowledge Economy

Increased educational attainment of the population and, therefore, stronger K-12 and higher education outcomes, including better support for innovation, are essential for US global competitiveness in the *21st Century Global Knowledge Economy.* Our global challenges—perhaps not fully understood by the public—actually are staggering.

II—Louisiana's Human Capital Performance

Louisiana must compete in this Global Knowledge Economy context, despite the fact that our State has not been competitive in the metrics by which the Global Knowledge Economy is measured.

- Louisiana's FY2009 college enrollments were below the FY2001 enrollment level
- In 2008, only **26%** of Louisiana adults (25 years+) held a degree—*associate or higher*.

Louisiana must work to close the competitiveness gap by applying even more resources to education, and by being more effective with the resources applied.

III—Statewide and Regional Perspectives

Regionalism is important, *but Louisiana needs statewide Human Capital solutions*.

A Regional View. Some challenges and solutions are best addressed on a regional level. NW Louisiana's institutions long ago embraced the active practice of regional collaborations. Also, these institutions commit to continuing to work together on a new ***Regional Higher Education Plan***, to build on their past collaborations and to further enhance opportunities and outcomes for learners in their communities.

Statewide Solutions. However, the fate of NW Louisiana's higher education institutions in serving the region is ***completely tied*** to the fate of statewide higher education goals, policies, resources, and performance. ***NW Louisiana leadership thus hopes to engage with statewide and regional partners in creating solutions for the State and its people.***

IV—The Current Fiscal Crisis and Views to the Future

Louisiana is in a severe fiscal crisis for FY2012, but FY2012 is neither the first nor last hard year. Institutions already have applied substantial personnel, program, and other cuts. Short-term solutions applied for FY2012 will affect the State's long-term future—and thus leaders must take that long-term future into account.

Solutions

Solutions were posed for two distinct time horizons:

- Immediate alternatives to solve the ***FY2012 budget***
- Longer-term solutions to strengthen the State ***beyond FY2012***.

FY2012

To solve the FY2012 challenge, the State should preserve its higher education capacities for the future by a reasonable cut, such as 10 percent from the FY2011 base. Institutions seek a bridge funding solution, to buy some time for carrying out longer-term productivity solutions. The recommendation was a cut of about 10 percent to institutional budgets and a bridge fee in the range of $6 to $7 per credit hour.

Long-Term

To be more competitive in the Global Knowledge Economy and to reverse its brain drain, the State must grow enrollments by significant numbers and increase higher education investments in the future. This also means improving K-12 outcomes which directly affect higher education

NW Louisiana's institutions agree that they must do more to achieve critical outcomes for people, businesses, and communities in the State and region in the new context of the Global Knowledge Economy. NW Louisiana constituents propose short-term measures to buy some time—to permit orderly and responsible development of longer-term measures toward those ends.

outcomes (and tuition revenues). At the same time, institutions must press forward with a long-term productivity and effectiveness agenda for the people of the State. This set of recommendations included, with some details:

- Stabilization ("Floor") for Future Growth
- Better, More Focused, Regional Plans
- Re-Evaluation of Student Costs
- Better, More Relevant Metrics for Evaluation of Institutional Performance.

LSU WORK GROUP (DRAFT), LSU SYSTEM, FALL 2011

Preliminary Report of the LSU System Work Group on Organization and Collaboration, 2011: "First Report on Maximizing Teach, Research, and Outreach at LSU in Shreveport for the Shreveport-Bossier Region, LSU System," Fall 2011

The above referenced work group was formed in Fall 2011 by Dr. John Lombardi, President of the LSU System. Its indicated purposes were to conduct a "fresh review" of higher education needs and opportunities in the part of the State referred to as the I-20 corridor and to focus attention specifically on available offerings and unmet needs in Shreveport-Bossier. The latter emphasis is termed *"the LSU in Shreveport Initiative."*

With respect to the I-20 Corridor, the Preliminary Report's principal conclusions are that:

- The variety of post-secondary education programs and presently available access to those programs are ample to meet the needs of most students.
- Major structural or governance changes affecting the post-secondary educational institutions in the region would be neither cost-effective nor contribute to more effective educational services.

The region that the Preliminary Report considers to be Shreveport-Bossier comprises Bienville, Bossier, Caddo, Claiborne, De Soto, Lincoln, Natchitoches, Red River, Sabine, and Webster parishes. The Report indicates that, for the region thus defined, the LSU System will evaluate educational needs, as well as organizational structure, infrastructure, and administrative functions that can best meet those needs, with due consideration for good use of resources and collaboration among LSU system institutions.

The report interprets data descriptive of the region's post-secondary institutions, employment profile, student enrollment patterns, and preferred fields of study to indicate *"reasonably good alignment"* between program offerings and employer needs. The Report further concludes that the incidence of students from the region who enroll in the region's colleges and universities is evidence that the "current needs" in the region for access to post-secondary education are being "substantially met" for all students.

The stated objective of the *LSU in Shreveport Initiative* is to *"understand the possibilities for collaborative approaches to enhancing the educational opportunities available to citizens of Northwest Louisiana."* This objective is to be pursued through expanding articulation paths between the two-year and senior institutions in Shreveport. Also, opportunities for place-bound students to access academic programs not present in Shreveport-Bossier would be expanded by offering programs on the LSUS campus that are imported from other universities.

UPDATE REPORT ON ORGANIZATION AND COLLABORATION, FEBRUARY 2012

Report to the Board of Supervisors from the Work Group on Organization and Collaboration, adopted February 3, 2012

This one-page document, which EKA received as this Report was in final edit status, appears to provide objectives and describe process elements by which the LSU System will continue to study *"alternative opportunities for organizational and/or collaboration improvements."*

TWO-YEAR EDUCATION NEEDS—SELECTED REGIONS, FUTUREWORKS, 2011

Assessment of the Technical and Two-Year Postsecondary Education Needs In Selected Regions of Louisiana: Responses to Study Resolutions Offered by Members of the Louisiana State Legislature, Regular Session 2011, Numbers SCR 61, SCR 88, HCR 182, SR 98 and SCR 73, FutureWorks, December 2011

This study was commissioned by the Regents, pursuant to several legislative resolutions. It is included with the studies relevant to Shreveport-Bossier because one of the defined regions studied is called **Greater North Central Area, SCR 88**—and is defined to include the northwest region (BOR and LCTCS), composed of nine parishes: Bienville, Bossier, Caddo, Claiborne, De Soto, Natchitoches, Red River, Sabine and Webster, to which FutureWorks added Winn, Jackson, and Lincoln parishes. Pages 12 through 19 of the Report address this region.[15]

Following presentation of demographic, economic, and interview data, the recommendations offered for this region are based on the conclusion that expansion of two-year college services is needed. The recommendations are as follows:

Recommendations

1. The data and findings suggest there is a need for expanded two-year college services in the region to serve the workforce and economic development needs of the north central region. At the same time, it is also clear there is a need for assessments and clear planning to determine how those expanded services might best be developed and organized. We recommend that the leadership of NwLTC and BPCC begin a deliberate planning process to determine the best means of meeting the identified needs of the region maximizing all of the resources of both institutions. As such, the college leaders shall by no later than December 2012 present to the Board of Supervisors of the LCTCS a comprehensive plan for improving the level of two-year college services to the citizens of north central Louisiana.

As part of that planning process, we recommend the college leaders consider how to:

- *Expand college services now offered in the technical college and community college;*
- *Assess facilities usage with an objective to increase access in rural communities to both technical/occupational education and Associate's programs throughout the region;*
- *Bolstering workforce development services across the region;*
- *Implement joint operating agreements for more efficient facilities utilization and increased program access;*
- *Share important services (such as student supportive services and services to support persistence) across all programming provided by the technical college and community college.*

2. We recommend that the leadership focus particular attention on building capacity at the smaller campuses and growing technical education programs as a part of the planning effort. With the exception of Shreveport, all of the current NwLTC sites are small and have relatively few enrollments. Even so, they serve as important entry points into postsecondary education for many residents living in rural parts of the region.[16]

[15] FutureWorks, *Assessment of the Technical and Two-Year Postsecondary Education Needs In Selected Regions of Louisiana: Responses to Study Resolutions Offered by Members of the Louisiana State Legislature*, Regular Session 2011, pp. 12-19

[16] Ibid, p. 19

COMPARISON DATA—PUBLIC INSTITUTIONS IN PEER METRO AREAS

FOUR PEER METRO AREAS

The Community Foundation's annual *Community Counts Report Card* for the Shreveport-Bossier area (2010 edition) used four MSAs as peers: **Jackson, MS; Baton Rouge, LA; Columbus, GA; and Montgomery, AL.** Following are brief comments on the public higher education resources of those four peer MSAs.

Baton Rouge, Louisiana

Baton Rouge is home to the LSU A&M Campus and several other LSU System institutions. In addition, Southern University A&M, Baton Rouge Community College, Capitol Area Technical College, and Southeastern Louisiana University School of Nursing are in Baton Rouge. Clearly, the Baton Rouge MSA includes a significant concentration of Louisiana's public higher education enterprise—institutions, programs, enrollments, and research programs/centers.

Jackson, Mississippi

Jackson State University

Jackson is home to Jackson State University (JSU), a historically black university that was founded initially as a private Baptist institution and later acquired by the State, the institution became Jackson State College and then acquired university status in 1974. In 1979, JSU was officially designated ***the* Urban University of the State of Mississippi** (http://promotions.jsums.edu/show_aboutjsu.asp?durki=454).

JSU's website indicates a very significant array of master's programs and many doctoral programs in its colleges of Education/Human Development; Public Service; Business; Science, Engineering, Technology; and Liberal Arts. Business degrees are to the doctoral level; Engineering degrees are to the master's level.

The University of Mississippi Medical Center

Jackson is also home to The University of Mississippi Medical Center, the State's only academic health science center. UMMC encompasses six health science schools: medicine, nursing, dentistry, health-related professions, graduate studies and pharmacy. The School of Pharmacy is headquartered on the Oxford campus. Enrollment in all programs is more than 2,400 students. (http://www.umc.edu/medical_center/overview.html)

Columbus, Georgia

Columbus State University

Columbus State University (CSU) is a public university that offers 50 undergraduate and 35 graduate degree programs through four colleges. CSU enrolls about 8,000 students. Programs are offered in letters and sciences, education, health professions and the arts. The University recently completed a new performing arts campus in downtown Columbus, which houses a music school, visual arts center, and the college's nationally recognized theatre department. Additional innovative centers provide opportunities for research and educational activities in the environmental sciences, space science, and writing. http://education-portal.com/columbus,_georgia_(ga)_colleges.html.

Columbus Technical College

Part of the technical college system in Georgia, Columbus Technical College (CTC) offers programs leading to associate's degrees, technical certificates and diplomas in more than 50 program options. Areas of study include business and information systems, health services, early childhood education, cosmetology and management. Training in technical services includes programs in automotive repair, drafting and welding. Community and distance education programs are also available. Columbus Technical College enrolls about 3,700.

Montgomery, Alabama

Auburn University—Montgomery

In some ways similar to LSU-Shreveport, Auburn—Montgomery offers many baccalaureate and masters programs in Business, Education, Liberal Arts, Nursing, and Sciences. From the website, it appears that there is one doctoral program in Public Administration and Public Policy. This is a collaborative or joint program with Auburn University (land-grant institution's main campus).

Alabama State University

This historically black public institution enrolls 5,600+ students. ASU's colleges are Liberal Arts/Social Sciences; Business Administration; Education; Health Sciences; Science, Mathematics, and Technology; Visual and Performing Arts; and University College. There is also a Division of Aerospace Studies. Founded initially as a Normal School, Education is still a major focus today; nearly 50 percent of ASU's total undergraduate students and 80 percent of its graduate students are enrolled in education. Master's level programs are offered in several disciplines such as History, Accountancy, Forensic Science, Math, Biology, and Counseling, but the vast majority of master's programs are in Education. There are three doctoral programs—in Physical Therapy; Educational Leadership, Policy and Law; and Microbiology.

Troy University—Montgomery Campus

This campus of Troy University is located in downtown Montgomery and is specifically focused on serving the "nontraditional" student, who is often a working adult. Troy-Montgomery offers 29 programs—all of which can be completed in evening-scheduled classes. Weekend, TV, online and blended classes are also available. The average age of students at Troy's Montgomery Campus is 28. Most are employed at the nearby Maxwell-Gunter Air Force Base or in the civilian workforce throughout the tri-county area.

A LARGER SAMPLE OF MSAS

Data from EKA's 2005 *Merger Concept Analysis* are shown here. They also support the conclusion that few MSAs of comparable size do not have a larger, more comprehensive institution within them than does Shreveport-Bossier.

LSUS is the smallest of this group of institutions. The second smallest, Florida Gulf Coast, was then a virtually new institution, created due to local advocacy. Opened in 1997, it already exceeded LSUS's enrollment in 2004 by roughly 2,000. It is much larger in 2011.

Figure 1: Comparison of Public Comprehensive Universities in SMSAs of Closest Comparable Size to Shreveport-Bossier City

Standard Metropolitan Statistical Area	Population (April 2000)	Institution	Enrollment	Carnegie Class
Chattanooga, TN	465,161	University of Tennessee-Chattanooga	8,528	Masters I
Des Moines, IA	456,022			
Kalamazoo-Battle Creek, MI	452,851	Western Michigan University	29,178	Doctoral/Research Ext
Lansing-East Lansing, MI	447,728	Michigan State University	44,452	Doctoral/Research Ext
Modesto, CA	446,997			
Fort Myers-Cape Coral, FL	440,488	Florida Gulf Coast University	5,825	Masters I
Jackson, MS	440,801	Jackson State University	7,815	Doctoral/Research Ext
Boise City, ID	432,345	Boise State University	18,431	Masters I
Madison, WI	426,526	University of Wisconsin-Madison	41,588	Doctoral/Research Ext
Spokane-Cheney, WA	417,939	Eastern Washington University	9,506	Masters I
Pensacola, FL	412,153	University of West Florida	9,508	Masters I
Canton-Massillon, OH	406,934			
Saginaw-Bay City, MI	403,070	Saginaw Valley State University	9,168	Masters I
Salinas, CA	401,762			
Santa Barbara, CA	399,347	University of California-Santa Barbara	20,847	Doctoral/Research Ext
Shreveport-Bossier City, LA	**392,302**	**LSU-Shreveport**	**4,377**	**Masters I**
Lafayette, LA	**385,647**	**University of Louisiana-Lafayette**	**16,208**	**Doctoral/Research Int**
Beaumont, TX	385,090	Lamar University	10.379	Masters I
York, PA	381,751			
Corpus Christi, TX	380,783	Texas A&M University	7,861	Masters I
Average Population/Enrollment	418,785		11,665	

Source: Census Data. Not all institutions in these SMSAs are listed. A few have substantial private universities.

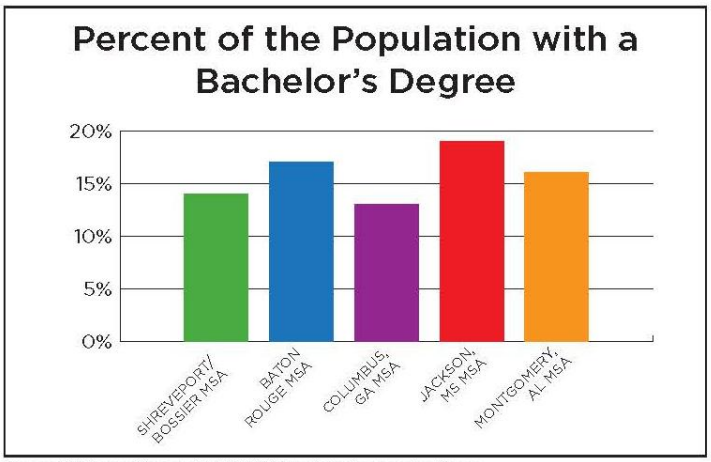
COMPARISON DATA—HIGHER EDUCATION ATTAINMENT

FOUR PEER METRO AREAS VS. SHREVEPORT-BOSSIER

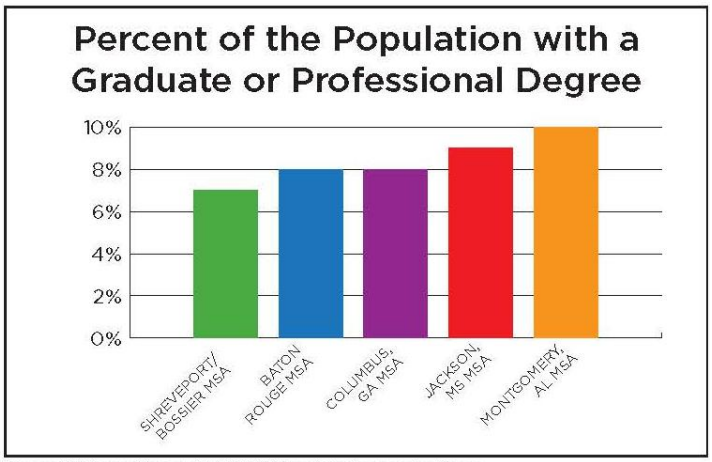
The two graphics below are from *Community Counts, 2010,* with the same four peer metros.

When compared with these four peer communities, the Shreveport-Bossier MSA has a smaller percentage of college graduates than do three of the four other MSAs. And, the Shreveport-Bossier MSA has the smallest percentage of residents with a graduate or professional degree of all five MSAs. This is part of the data to support the fact that growth of graduate education opportunities in Shreveport-Bossier is a way to maintain competitiveness.

It is likely that greater presence of higher education programs, whose faculty would virtually all have graduate degrees, is part of the explanation for the differences. Certainly, the immense higher education presence in Baton Rouge is a differential factor. Also, three of the four peer cities are state capitals, which also may be a factor in the numbers of the populations with graduate/professional degrees.



Source: US Census Bureau, 2006-2008 American Community Survey



Source: US Census Bureau, 2006-2008 American Community Survey

LOUISIANA'S LARGEST MSAS VS. SHREVEPORT-BOSSIER MSA

For another view, the education attainment statistics for Shreveport-Bossier MSA are compared below with the statistics for the two larger MSAs—New Orleans and Baton Rouge—and with the fourth largest—Lafayette. The averages for the four Louisiana MSAs are calculated, and the Shreveport-Bossier differentials from the averages are shown.

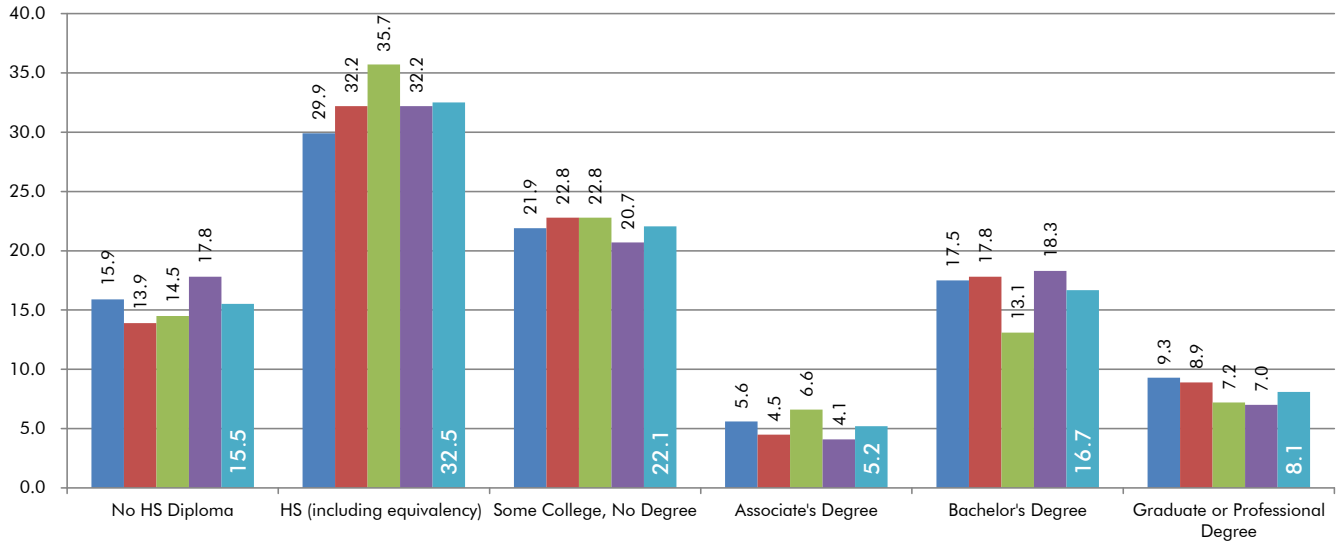
Shreveport-Bossier compares favorably with Louisiana's other cities in high school completion and in associate degree completion. It does not compare favorably with the other Louisiana cities at the bachelor's or graduate/professional levels.

Educational Attainment Comparison: Shreveport-Bossier MSA with Three Other Largest Louisiana MSAs

4 Largest Louisiana MSAs	New Orleans-Metairie-Kenner	Baton Rouge	Shreveport-Bossier City	Lafayette	Averages--These 4 MSAs	S-B Above (Below) 4 MSA Avg
No HS Diploma	15.9	13.9	14.5	17.8	15.5	(1.0)
HS (including equivalency)	29.9	32.2	35.7	32.2	32.5	3.2
Some College, No Degree	21.9	22.8	22.8	20.7	22.1	0.8
Associate's Degree	5.6	4.5	6.6	4.1	5.2	1.4
Bachelor's Degree	17.5	17.8	13.1	18.3	16.7	(3.6)
Graduate or Professional Degree	9.3	8.9	7.2	7.0	8.1	(0.9)
Degree--Associate and Higher	32.4	31.2	26.9	29.4	30.0	(3.1)

The above data are arrayed below in a bar graph, with additional comments.

Educational Attainment of the Population 25 Years and Older: 4 Largest Louisiana MSAs



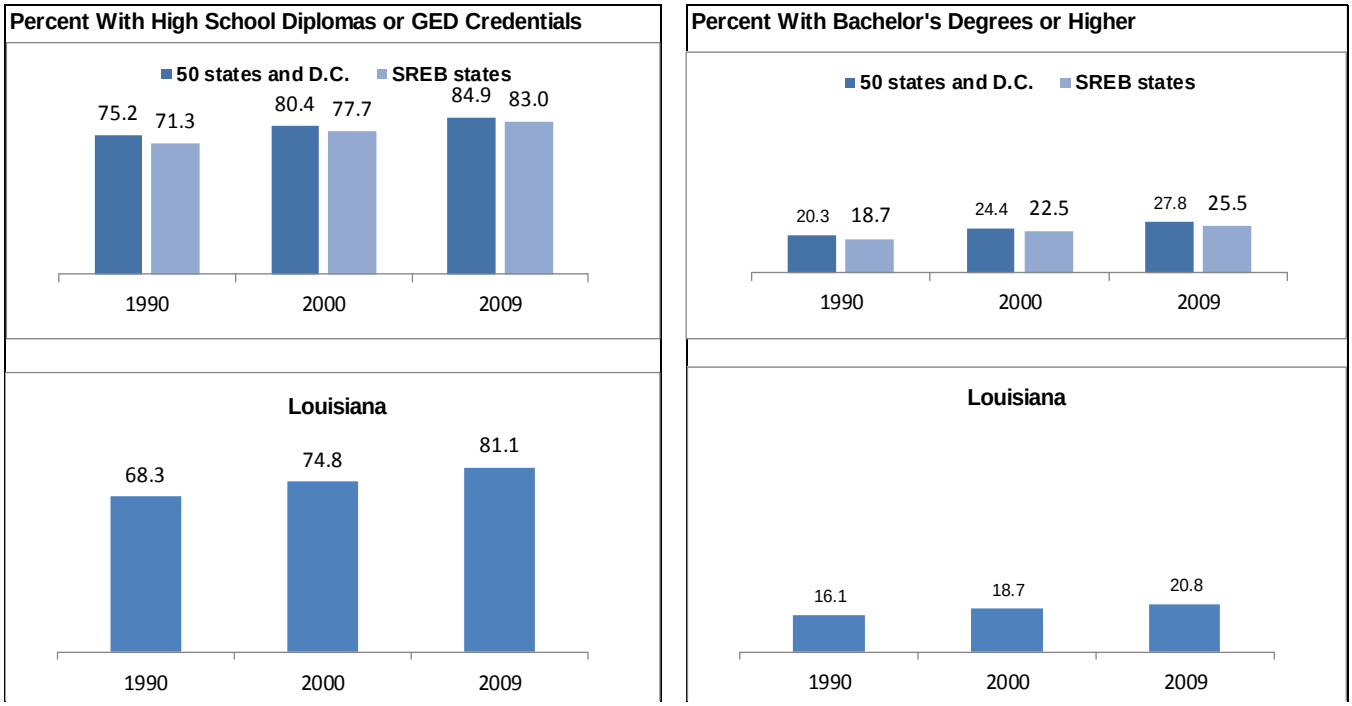
- New Orleans-Metairie-Kenner
- Baton Rouge
- Shreveport-Bossier City
- Lafayette
- Averages--These 4 MSAs

This particular comparison is useful in corroborating several of the intuitive beliefs among leadership and findings from less formal data.

- Shreveport-Bossier, the green bar, outperforms New Orleans, Baton Rouge, Lafayette, and the four-MSA average in the percentage of its population that has a high school diploma or equivalent.
- Shreveport-Bossier is equivalent to Baton Rouge in the percentage that have some college/but no degree, and these two MSAs outperform the other two MSAs and the four-MSA average.
- Shreveport-Bossier outperforms all three of the other MSAs and the four-MSA average in associate degree completions. This is a finding that is entirely consistent with our other hard and soft data.
- Shreveport-Bossier significantly lags all three other MSAs and the four-MSA average in the percentage of the population with bachelor's degrees. This finding, too, is consistent with other data and with our general impression that follow-through to the four-year degree level is ***an unmet need*** in the Shreveport-Bossier metro area.
- Shreveport-Bossier also lags New Orleans and Baton Rouge (but not Lafayette) and the four-MSA average in the percentage of the population that has completed a graduate or professional degree. This too is consistent with our belief that master's level (and some doctoral level) degree attainment is insufficient.

SREB AND NATIONAL AVERAGES VS. LOUISIANA AND SHREVEPORT-BOSSIER MSA

Overall, Louisiana has been underperforming the US and SREB averages, as shown in the graphic data below from the Southern Regional Education Board (SREB).



And, the Shreveport-Bossier MSA slightly underperforms Louisiana in the percent of the adult population with bachelor's degrees or higher. If the Shreveport-Bossier business and community leadership believe, as they do, that they are competing with not only SREB states and the US, but also with foreign economies, for growth, then this is further evidence of what they perceive as lack of competitiveness.

Percent of Adult Population With Bachelor's Degrees or Higher

	Percent
50 states and D.C.	27.8
SREB states	25.5
Louisiana	20.8
Shreveport-Bossier MSA	20.3

Sources: 50 States/DC, SREB states, and Louisiana from Table 2--Educational Attainment of the Adult Population, SREB, 2009. Shreveport-Bossier data from American Community Survey, 2010

WORKFORCE PROJECTIONS BY DEGREE LEVEL REQUIRED

We also reviewed various workforce reports provided to us by interviewees and some additional Louisiana Workforce Commission (LWC) data. In one report, LWC concludes that:[17]

- Some training or education in a technical or community college is required for 50 percent of jobs requiring long-term training and 25 percent of jobs requiring moderate-term training.
- There is demand for 3,892 more 2-year and technical positions than there is supply of completers. This figure represents 51 percent of supply.
- The supply of four-year completers exceeds demand by 10,312.
- At the doctoral and professional level, supply exceeded demand by 836 graduates.

These data support the position of those who argue that more associate degrees and technical diplomas are required but that no more (and possibly fewer) baccalaureate and graduate degrees would be called for—in Louisiana overall and, thus, for the Shreveport-Bossier area.

The consultants also looked at projected growth in occupation-related education and training and experience requirements for Regional Labor Market Area (RLMA) 7, which includes the Shreveport-Bossier MSA and several additional NW Louisiana Parishes.

While statewide needs beyond the associate degree level may or may not be met, the table below, showing data for RLMA 7, indicates that, without change, there will be increasing deficits of completers in this region ***at post-baccalaureate levels of education***. Although these data show a lower growth percentage for needs at the bachelor's level than at graduate levels, clearly one must pass through the baccalaureate, to move to post-graduate studies. Also, in absolute numbers, the numbers of baccalaureate degrees required will be nearly the same as for the associate degree—2,150 bachelor's degrees versus 2,240 associate degrees.

Shreveport - Northwest - Regional Labor Market Area 7[1]

Projections for All Occupations to 2018 - By Level of Education and Experience Required

In Descending Order by Calculated Percent Growth

	2008 Estimate	2018 Projected	10 Year Growth	% Growth 2008 to 2018 Projected[2]	Annual New Growth	Annual Replace-ment	Annual Total Openings
Associate	9,990	12,220	2,240	22.4%	230	180	400
Doctoral	750	890	140	18.7%	20	10	30
Master's	2,500	2,930	430	17.2%	40	50	90
First Professional	3,040	3,480	430	14.1%	40	60	100
Postsecondary Vocational	12,810	14,160	1,430	11.2%	150	270	410
Work Exp in Related Occupation	19,440	20,630	1,330	6.8%	130	370	500
Bachelors	22,200	24,140	2,150	9.7%	220	440	660
Work Experience + Bachelors	9,430	9,650	410	4.3%	40	220	260

Note 1: Regional Labor Market Area 7: Bossier, Bienville, Caddo, Claiborne, Desoto, Lincoln, Natchitoches, Sabine, Red River, & Webster

Note 2: Percent growth from 2008 to 2018 calculated by EKA

Source: Louisiana Workforce Commission, Revised 2011, *http://www.laworks.net/LaborMarketInfo/LMI_OccProjEducation_Revised.asp?years=20082018*

[17] *Workforce Needs of Postsecondary Education*, Louisiana Workforce Commission, powerpoint presentation (no date). Notes provided re: the above data: *"The supply side for this analysis uses Board of Regents data, and includes completers for fiscal year 2008. The demand side uses the 2006-2016 occupational projections. LED worked with LSU to compare supply of annual completers to annual projected openings resulting from job growth and replacements."*

ANALYSIS/COMMENTARY—UNMET HIGHER EDUCATION NEEDS IN SHREVEPORT-BOSSIER

OVERVIEW

Across a considerable span of years, EKA has collaborated with institutions and community leaders in recognizing and calling attention to unmet needs for higher education assets and programs to serve the people of Shreveport-Bossier. EKA has been an advocate for expanded higher education opportunities as a key, indeed an essential, condition for the metro area's future economic development. The consultant team nonetheless took a fresh look at older and current data and strategies. Still convinced that Shreveport/Bossier remains underserved, EKA is now engaged in consideration of models by which a more comprehensive public university might become a reality in Shreveport-Bossier. This section of the Report describes, as context for evaluation of alternative solutions, unmet needs that such a university would serve.

Needs identified are broadly categorized as ones of limited access to, and insufficient attainment of, higher education for segments of the Shreveport-Bossier population; ones that call for bringing additional academic degree programs to the metro area; and ones critical to growing research and intellectual capital in support of economic development.

EKA asserts that higher education planning must recognize changing characteristics among those who aspire to university-level education. Increasingly, they are older, are more likely to enroll on a part-time basis, and they are place-bound by employment and family obligations. This "new traditional" student and many who fit the more conventional definition of "traditional" are not free to go away to college. They require access to a public, comprehensive university in their immediate locale, if they are to pursue postsecondary education.

In Shreveport-Bossier, access is ample at the associate degree level, but not beyond. LSU-S and Centenary are the only baccalaureate institutions resident there. A few programs are delivered by Louisiana Tech at Barksdale AFB, and by various proprietary schools in the area. The undergraduate programs offered are primarily in the arts and sciences, education, and business. Nursing, Allied Health, and Medicine degree programs also are available. But, a range of business and technology-oriented programs (anything involving Engineering) are almost entirely absent at the baccalaureate level. Opportunities for graduate and professional study are even more limited. Overall, the available program array is considerably narrower than is customarily found and needed in an urban center.

Some past assessments conducted by other parties, not by EKA, have concluded that the need for additional academic programs to be sited in Shreveport-Bossier is over-estimated and, for particular programs, is non-existent. One line of such reasoning argues that jobs offered by local employers, in the main, do not require education at baccalaureate or higher levels. Another posits that, so long as a given academic program is offered anywhere in North Louisiana, there is no compelling reason to offer that program in Shreveport-Bossier. Still another considers the numbers of Shreveport-Bossier students who enroll at institutions outside the metro area to be proof that distance is not a deterrent to access for those not enrolled.

EKA finds these arguments to be seriously flawed. Their central—and mistaken—premise is that if some citizens and employers are being adequately served by the *status quo*, then all are. Thereby, these arguments disregard the benefits of advancing educational attainment among the place-bound, developing higher levels of employment opportunity, and building Shreveport-Bossier's overall *intellectual assets and human capital* for competing successfully in the *Global Knowledge Economy*.

Underserved Populations

Who are the underserved in Shreveport-Bossier? They are recent high school graduates, they are transfers from the region's two-year colleges, and they are adults.

In all three categories, there are, of course, some who can and do have means, freedom, and desire to pursue higher education at institutions elsewhere in Louisiana and beyond. But, others do not have that option.

The Place-Bound

Clearly, the latter includes younger and older adults for whom jobs, family responsibilities, economic circumstances, or all three, preclude the choice of going elsewhere, either as a resident or commuting student. Some of these place-bound individuals want to begin a degree program, while others seek to complete one begun at an earlier age. (The latter is a target segment that is considered important to the goal of achieving higher degree attainment levels.)

A further concern arises when students must leave the metro area in order to gain access to a chosen program of study. As community leaders have expressed it, *"We suffer a 'brain drain' by exporting students to other universities, other states, and other regions of Louisiana. They leave, and they don't come back."*

Students who enter higher education at one of the local community colleges need seamless opportunities to subsequently transfer to a local university. Some of these students are adults; others are at or near traditional college-going age. Their ties to the metro region were formed prior to entering BPCC or SUSLA and reinforced while enrolled there. Although some find online program solutions (virtually impossible to track or count) and some attend proprietary programs locally, many will continue their studies only if a suitable baccalaureate program, at a public tuition cost level is available in the metro area.

Certainly, providing access locally serves personal development and career goals of these learners. But, it also serves the public interest by raising levels of educational attainment in the community demographics and helping to build and retain the talent/skill pool in the area.

College-Going Rate and the Public Education Challenge

Further, there are young people coming out of Caddo and Bossier Parish secondary schools who do not participate in higher education, but should. Various factors may account for why they do not participate in greater numbers, but access to more visible, comprehensive, and supportive higher education opportunities in Shreveport-Bossier surely would help raise participation and attainment rates.

It is well beyond the scope of this analysis to tackle the problem of poor performance of public pre-K to 12 education and low high school completion rates—one major cause of low college-going rates. We only will comment that a truly comprehensive "urban university" should have the intellectual capital, some available time, and a few loose resources that it can commit to working with school system partners to reverse the destructive trends of the last few decades. While LSU-Shreveport, Centenary, the region's other institutions, and CERT presently support improvements in pre-K to 12 education, and while they train teachers, counselors, and other school personnel in large numbers, what may be needed in future is a more *aggressive and systematic* approach to advocating for and creating *"enterprise re-design."*

Minority (Now Majority) Population

Locally accessible opportunities are especially needed to serve the 54 percent of Shreveport's population that is African American. SUSLA, as an HBCU institution, serves admirably by engaging students from this population in its two-year degree programs. However, for SUSLA graduates and others, the absence of a more comprehensive, public university in the metro area can be an overwhelming deterrent to continued study for a baccalaureate degree. In

Evidence of the Place-Bound

Both Grambling and Wiley College (Marshall, TX) are reasonably nearby options for black students in Shreveport seeking baccalaureate programs at an HBCU.

But, Wiley College, although 30 minutes away, has found it worthwhile to open a Shreveport location to capture enrollments that it apparently cannot lure to Marshall.

disproportionate numbers, many of these citizens are disadvantaged economically, are in unstable family units, and lack role models who encourage pursuit of further education. In addition, any of several common circumstances—unemployment, lack of transportation, single-parent status, etc.—can make commuting to a campus elsewhere in the region impossible.

Service Delivery

For all segments of the Shreveport-Bossier population who are underserved by lack of a more comprehensive, public university in the metro region, distance to an alternative institution is not the only constraint. There is also the need for instruction and campus services to be offered at times of day and days of the week that comport with those students' availability to meet classes and attend to registration, academic advisement, financial aid, career counseling, and the like.

It is our impression that LSUS has focused insufficiently on creating the marketing message, backed up by the delivery systems that are designed expressly for the place-bound working young people and adults. This would need to be a strong commitment in any future solution.

Baccalaureate	Master's	Doctoral
Allied Health (concentrations in)	Professional Master of Science (concentrations in)	EdD Educational Learning and Leadership
Pre-Physical Therapy	Health Care Informatics	
Pre-Occupational Therapy	Forensic Sciences	PhD Bioinformatics and Computational Biology
Pre-Physician Assistant	Professional Master of Arts (concentrations in)	
Pharmacy Assistant	Graphic Design	EdD School Psychology
Medical Imaging	Animation/Visual Effects	
Medical Lab/Diagnostic Tech.	Humanities	
Public Safety (concentrations in)	Social Sciences	
Criminal Justice Administration	Criminal Justice	
Law Enforcement	Mass Communications	
Homeland Security	Master of Arts in Teaching (concentrations in)	
Emergency Planning & Admin.	Elementary	
Business Administration (Generalist)	Secondary	
Oil and Gas Accounting	Special Education	
Petroleum Land Management	Transportation	
Supply Chain Management/Logistics		
5-Year Baccalaureate + Master's in Accountancy		
Nursing	Science Teaching (concentrations)	
Pre-Physician Assistant	Mathematics	
Physiology	Chemistry	
	Physics	
	New MBA Concentrations	
Digital Media	Public Administration	
Health Information Management	Industrial Management	
Gerontology	Innovation Management	
	Statistics	
International Business	Instructional Design & Technology	
Engineering	Environmental Biology	
Engineering Technology	Social Work	
Industrial	Speech Pathology	
Energy Management		
Occupational Health & Safety		
Gas/Oil Extraction		
Sustainability/LEEDS		
Hospitality Management		
Computer Sciences (concentrations in)		
Systems and Networks		
Information Technology		
Building Information Modeling		
Geographic Systems		
Visual and Theater Arts (concentrations)		
Drawing and Painting		
Graphic Design		
Animation and Visual Effects		
Theater		
Communications (New Concentrations in)		
Print and Broadcast Journalism		
Electronic Media		
Public Relations		
Management (New Concentrations in)		
Hospitality		
Gerontology		
Entrepreneurship		

Source: Interviewees for this study and Academic Program Strategy for LSUS, EKA, 2010

DEGREE PROGRAMS

Suggestions from Interviewees

In the course of this study, individual and group interviews were conducted with a broad body of stakeholders who, in various connections, have an interest in or a responsibility for higher education opportunities in Shreveport-Bossier. Among them were officials and staff members of colleges and universities in the region, the UL and LSU systems, the Board of Regents/Commissioner of Higher Education, the Governance Commission, and the Office of the Governor. Also included were legislators, civic leaders, and community organizations. In each case, EKA asked interviewees to name academic programs that they believe are needed, but are not presently offered in Shreveport-Bossier.

Academic Program Strategy-2009

Further inputs were gained from EKA's 2009 analysis. In that study, this same consultant team concluded that a considerable number of programs should be added, deleted, or redesigned, to better align the University's degree programs and the content of the programs with contemporary student, community, and employer needs.

Summary

The adjacent table lists academic programs that, based on present and previous studies, are seen as possible unmet needs in the Shreveport-Bossier metro area. These are perceptions informed by the interviewees' observations, experiences, and knowledge. Some would require establishment of degree programs not now approved for LSU-Shreveport. Others could be offered as new concentrations under degree programs already in place. Still others would involve redesigning existing program elements to better address contemporary needs and interests.

New LSUS List

In addition to the above, we repeat here the very new list provided by LSUS in January 2012—shown earlier in this chapter—of high priorities:

- BS Engineering
- BS Energy Management
- BS Information Technology
- MS Biology (**now approved**)
- MS Accounting
- MFA in Computer Graphics and Digital Media
- DBA Doctorate Business Administration
- EdD Education Leadership
- PsyD Applied Doctorate in Psychology with concentrations in School Psychology and Counseling Psychology.

As noted earlier, with the exception of the MS in Biology, recently approved, the above programs have not been proposed yet in the formal process by LSU-Shreveport.

Further Confirmation—Current Demand and Connection to Future Needs

However formulated, any initiative to launch a new program or concentrations should be preceded by additional assessment that validates its potential to eventually, if not immediately, attract substantive enrollment and produce meaningful numbers of degrees.

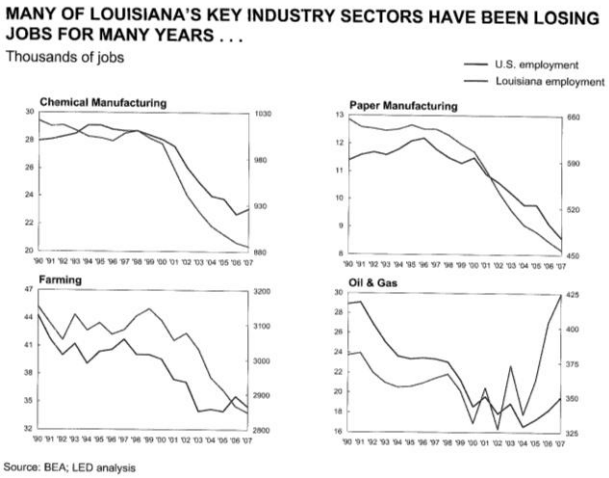
The subtlety required is that some programs may need to lead the market; that is, in some cases, it will be important to have some programs in place because they connect directly to economic development targets. Programs in Digital Media and related technology/art fields may be an example. Although there may not be *immediately* strong enrollments, the programs definitely should be part of the Shreveport-Bossier industry cultivation strategy.

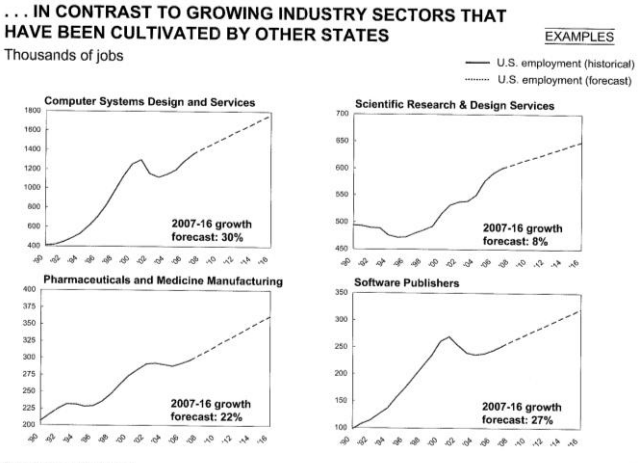
Intellectual Capital, Research, and Innovation Capacity

Deficits of programs and degree completions are only part of a broader story. A third need plays a vital role in a metro area's capacity to compete in the *Global Knowledge Economy*.

Responding to Global Economic Change of Huge Magnitude

The magnitude of change involved in our transition from the *Industrial Economy* to the *Global Knowledge Economy* is illustrated dramatically by the pair of graphic images below, from a 2009 LED presentation to the PERC Commission.[18]





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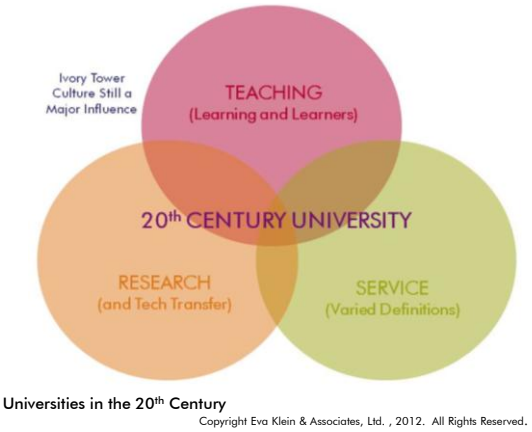
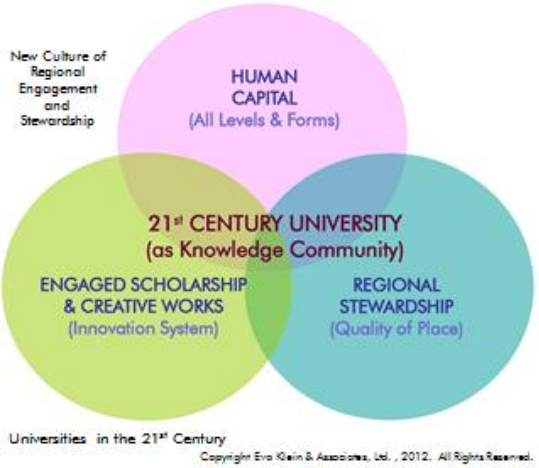
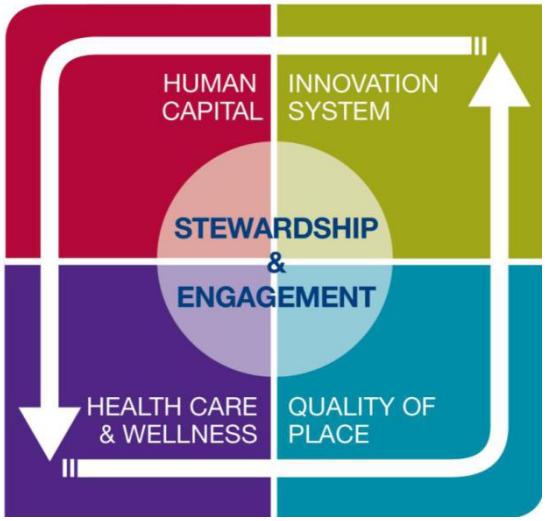
Business Investment: Discussion Document for the Postsecondary Education Review Commission, Louisiana Economic Development, August 10, 2009.



Universities in the 20th Century



Universities in the 21st Century



Above image is an *Engagement Model* for the 21st century university, from *The Relevant University: Making Community and Economic Development Matter*, Lloyd A. Jacobs, MD and Eva Klein, April 2010. Copyright 2010. All Rights Reserved.

Education, research, technology, entrepreneurship, and workforce capabilities—all aimed at creating a *regional innovation system*—are essential resources for success in competition in this utterly changed economic context.

When, in the 1990s, universities first began to be seen as resources in regional economic development, the focus was narrowly on *research*. The initial result was a focus on research parks; later incubators.

Contemporarily, we understand that to say that research can drive economic development is to oversimplify the actual complex processes that underlie contemporary economic activity. Our notion of these university roles must be broadened to a newly and more broadly defined idea of *innovation capacity*. Ready access to the intellectual resources of universities and to a workforce with higher levels of educational attainment is a factor that weighs heavily in those considerations. Also, to the *human capital* and *innovation capacity* requirements, *quality of place* is a third prime consideration in location decisions made by advanced knowledge-based companies.

Application to Shreveport-Bossier

It is our view that Shreveport-Bossier, unlike most metropolitan areas of similar size around the country, lacks in its midst a public university with a broad array of undergraduate and graduate degree programs and with research and problem-solving outreach capacity (and commitments) to support economic development in its locale. These assets must be embedded in Shreveport-Bossier to enable this urban center to generate a sufficient volume of innovation among its in-place businesses and industries and to attract new technology and science based enterprises that are increasingly the heart of a modern regional economy. And, we would conclude the same for any US metro area of some size.

Since at least the mid-1990s, EKA has observed the presence of several forces in the metro area's economy that call for a broadened higher education presence. They include slowing growth rates, declining employment in manufacturing, entry level jobs that increasingly require baccalaureate degrees, constantly escalating competition for attracting knowledge-based enterprises, constrained opportunities for in-service professionals to pursue advanced degrees, and the need that cities have to constantly renew their vibrancy as cultural, social, economic, and educational centers.

Consequently, the answer to what kind and how much higher education presence is needed to advance Shreveport-Bossier's economic development is that which:

- Responds to the needs of the enterprises and workforce already there
- Prepares workforce for enterprises that the metro area seeks actively to attract
- Includes in "workforce" those who are well beyond the technical employment level and specifically includes entrepreneurs and innovators with very high-level knowledge and skills
- Creates and applies knowledge to build new enterprises and enhance competitiveness of existing ones—all based on innovation
- Adds materially, in many ways, to the urban center's quality of place.

5—Overview of Models/Alternatives

Introduction

In this study, drawing on Internet research and the consultants' experience, the consultants examined four structural and organizational approaches that might serve to bring a more comprehensive university presence into being in a place that is underserved. For purposes of this model analysis, completely online programs are not considered; we know that they are always available, in addition to face-to-face and blended delivery programs.

In general, the inevitable conclusion one reaches in an analysis of this kind is that, in the 21st century, "place" or "domicile" of an institution increasingly is being "de-coupled" from what and where its programs are or can be. And this is not only because of online, global delivery. There are many institutions that have adopted the strategy of creating multiple locations. Usually, they are focused on the adult population that traditional public institutions have been quite slow to understand and gear up to serve.

In some cases, there are institutions that are pursuing revenues by selecting underserved markets in which to deploy low-risk, high enrollment programs. Among this new generation of very entrepreneurial institutions that have been expanding nationally and globally into MANY locations are two examples—one public and one private:

- **Troy University**—a public Alabama institution that now has 60 "teaching sites" in the US and elsewhere in the world.
- **Northeastern University**—a private institution in Boston that is inventing a new major push into selected metro areas. Northeastern has long been famous for its cooperative education (work-study) program. It now calls itself a *"global, experiential research university."* Northeastern has opened a campus in Charlotte, NC, as the first of a system of regional campuses in the US.

All this means that the traditional ways of defining "service areas" no longer apply. Market intelligence and response is critical. Regional planning for public resources is more difficult.

In this new and somewhat messy context, models used elsewhere and considered as baseline for this analysis are:

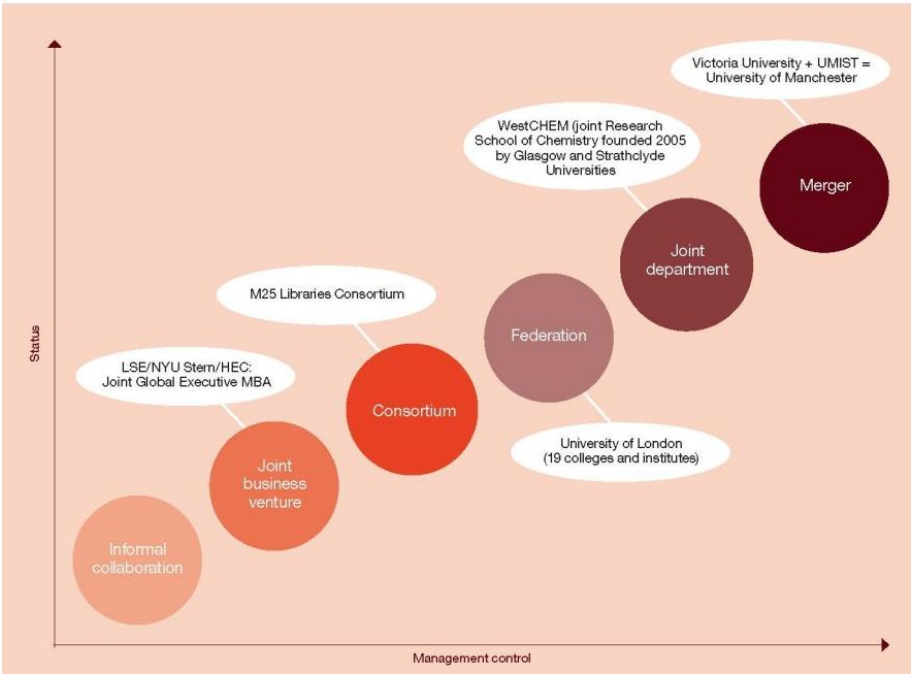
- Grow an In-Place Institution
- Partnerships—Program Collaboration
- Partnerships—Program Importation
  - To an existing institution/campus
  - To create a University Center
- Consolidation.

The first three of the four solutions assume that there is an existing institution and that that institution continues to grow programs and services by internal growth or by program collaboration or importation.

One of the four—Consolidation—assumes that two existing institutions are combined to create a single institution—as the means to achieve growth or improved impact.

Each of these four is described below, with examples from elsewhere.

Figure 1: The spectrum of collaboration options in the Higher Education sector



Another view of the spectrum of models from informal collaboration to merger is provided in the above graphic, from a study done for the UK. *"In the eye of the storm: Moving from collaboration to consolidation,"* John Berriman and Martin Jacobs, Price Waterhouse Coopers (UK), 2010

GROW AN IN-PLACE INSTITUTION

In this approach, a university retains its extant identity, but gains a significantly broadened franchise to offer academic programs and to engage in research and outreach activities beyond those permitted by its present role, scope, and mission. The intended result, often, is to change the institution from one offering a largely traditional base of undergraduate programs, perhaps with a limited number of master's degree program, to one typical of comprehensive public universities found in population centers around the country.

Such a university would, over time, develop additional undergraduate degree programs in disciplines that respond to workforce development needs and graduate degree programs that enable citizens to advance in professional attainment. Program diversification would be the impetus for growth in enrollment, faculty resources, research and outreach capacity, and engagement in regional economic development.

Expanding the potential of a university in this manner can be accomplished without complex organizational and governance changes that are integral to some of the other models that will be discussed. However, the first step must be to gain the requisite broadening of role, scope and mission. Moving then from potential to realization depends upon effective leadership, ambitious initiative, and disciplined use of resources.

Examples of significant internal institutional growth include:

- University of North Carolina-Charlotte (NC)
- Texas A&M University-Corpus Christi (TX)
- Kennesaw State University (GA)
- University of North Florida (FL)
- Middle Tennessee State University (TN)
- James Madison University (VA)
- Old Dominion University (VA)
- University of Alabama in Huntsville (AL)

While the above discussion is focused on relatively current/recent examples of growth-in-place, as a matter of historic context, it is also true that this is the very oldest and most traditional way by which all our universities have grown from their founding. And, this was equally true in the distant past, from the very earliest universities, such as the University of Paris and the University of Genoa, among others.

By their nature, colleges and universities have focused on growth not only in terms of size and breadth of offerings, but also in quality, as judged internally by the scholarship standards of the "Academy" and by the resultant prestige and recognition accorded to institutions by society. Today, that prestige is measured by various classification systems and rankings, in addition to the Academy's internal ways of bestowing recognition and respect. In public systems, growth in mission and changes in classifications often are controlled by policy of governing boards, whereas in private institutions, it is mostly a matter of market strategies and market responses.

Partnerships—Program Collaboration

Another approach to expanding the availability of higher education in a given locale relies on partnerships between higher education institutions. Such partnerships usually take one of two forms—*Program Collaboration* and *Program Importation*. The first is addressed in this section.

In this model, two institutions share responsibilities for instruction in one or more selected academic programs, on one or both of the partners' campuses. Program collaborations involving more than two partners also exist. Typically, collaborative programs are ones in which each institution has some strengths, but the strengths of each one are complemented when joined with a partner institution's personnel, equipment, facilities, or student populations. Sharing may be accomplished in a number of ways such as exchanging, loaning, or jointly appointing faculty members; assigning to each partner responsibility for delivering a discrete component of the program curriculum; and co-enrollment of students.

A common form is termed a 2+2 program wherein a community college and a university co-develop a baccalaureate degree curriculum that a student pursues for the first two years at the community college and, upon successful completion, has assured entry to the upper division component at the partner university.

A similar arrangement, termed a 3+2 program, enables students to enroll at a four-year institution, spend three years there taking general education and specified pre-requisite courses, then enter a professional school curriculum at a second senior institution. Some such programs assure admission to the professional school, if the first three years of study are successfully completed, but others do not. The latter instead are based on affiliation agreements between the two institutions that spell out course sequences and performance standards which, if met, qualify a student to pursue the professional school curriculum, but do not guarantee admission. Degrees earned in 3+2 programs may be from one or both institutions and may be at graduate or undergraduate level.

However the partnership may be structured, the defining characteristic of the collaboration model is that both partners play an active role in program delivery.

Examples of program collaborations for degree programs include some local examples:

- LSU-Shreveport and LSUHSC-Shreveport: Joint Master's in Health Care Administration
- Bossier Parish Community College: 2+2 programs with Louisiana Tech in Engineering and with University of Maryland University College in Cyber Technology
- Bossier Parish Community College co-enrollment with Northwestern and Grambling: Students take BPCC developmental courses and university non-developmental courses at the university campuses.
- Centenary College's 3+2 Engineering Program. This program leads to two degrees: a BA from Centenary and a BS from the engineering institution. Centenary students enrolled are guaranteed admission to one of five universities: Case Western Reserve University, Cleveland; Columbia University; Texas A & M University; University of Southern California; and Washington University in St. Louis.
- SUNY Cortland and Duke University: 3+2 degree programs in Forestry and Environmental Management
- East Stroudsburg State University and Pennsylvania State University: 3+2 program in Engineering
- Piedmont Community College and UNC-Charlotte: 2+2 Engineering Technology degree programs
- Oregon State University and 15 Oregon community colleges: Joint enrollment program

PARTNERSHIPS—PROGRAM IMPORTATION

TO AN EXISTING INSTITUTION/CAMPUS

Several different models are in use by which colleges and universities deliver academic programs on campuses that are not their own. In some such cases, a community college provides the lower division instruction and a university the upper division instruction in a degree program that is delivered fully on one or the other partner's campus. In other instances, one institution will host on its campus an academic program the instruction for which is provided in its entirety by another institution.

Such importation may occur because a needed program is not—in level, discipline, or both—within the host institution's approved program array or capabilities. Or, it may occur because undue cost and/or unnecessary program duplication would result if the host institution developed the program on its own.

Some programs, particularly at the graduate level, are acquired via importation because it is feasible for only a limited number of institutions to develop and maintain the advanced level of specialization required by the program.

Examples of program importation are:

- 25 bachelor's, 30 master's, and four doctoral degree programs offered by 15 partner institutions on the campus of St. Petersburg College (FL)
- NC State University's EdD program on the campus of UNC-Asheville
- 40+ bachelor's and master's degree programs on Lorraine County Community College's campus through its partnership with eight Ohio universities.

AS UNIVERSITY CENTERS

The consultants found that, at a number of locations throughout the US, physical sites have been established to which multiple institutions, collectively, bring an extensive array of academic programs. Unlike a host college or university that imports programs from other institutions to its own campus, these centers typically are stand-alone facilities that provide space plus technology, administrative support and student services for the programs offered there. The centers also are neutral territory. In most instances, they are located in areas without proximate access to an established, comprehensive public university. Programs offered lead to degrees that can range from associate to doctoral level.

A few examples of university centers are:

- University Center of Greenville (SC), where 75 bachelor, master's, and doctoral degree programs are offered by seven South Carolina universities
- Roanoke (VA) Higher Education Center where 200 programs of study are offered by 12 colleges and universities
- Learning Center for Rapides Parish (LA) where, from in-state, a community college, a technical college, and six universities and, from out-of-state, two universities, offer 10 associate, 12 bachelor, eight master's, and one doctoral degree program.

Roanoke Higher Education Center

The Roanoke (VA) Higher Education Center was created to serve the City of Roanoke ***despite the fact*** that Virginia Tech University (Virginia's land-grant research university) is relatively near Roanoke, only 39 miles away via I-81, in Blacksburg, VA.

Partners include:

- Averett University
- Bluefield College
- Hollins University
- James Madison University
- Mary Baldwin College
- Old Dominion University
- Radford University
- Roanoke College
- TAP/This Valley Works
- University of Virginia
- Virginia Tech Roanoke Center
- Virginia Western Community College
- Western VA Workforce Development Board.

The building itself is an adaptive re-use of the former headquarters of Norfolk and Southern Railroad in downtown Roanoke.

CONSOLIDATION

Another approach that may be used to bring about a stronger, more sustainable university is to consolidate the programs and resources of two institutions to form one. If in reasonably close proximity, they may operate on a single campus. Or, if warranted by distance, function, or service considerations, campuses of both the formerly independent institutions may be utilized.

REASONS FOR MERGERS

The reasons for such unions are varied, including circumstances wherein an institution:

- Faced financial failure
- Sought access to another institution's program array
- Found its mission to have become obsolete
- Determined that it could better carry out its mission through consolidation rather than competition with another institution.

Because colleges and universities are proud of their traditions and accomplishments, protective of their unique identities, and treasured by their constituents, merging two to form one is a controversial and complex undertaking—even when it is a logical response to an equally complex and challenging problem. Nevertheless, mergers among American higher education institutions, according to one source, have occurred at least 92 times dating back to the 19th century. Exhibit 5.1 provides a compiled list, from the 1830s to recent times. Scanning the list provides evidence that there are several major universities today that were, at some time in their history, the product of the consolidation of more than one institution. While many of these past mergers have involved a private institution in financial difficulty, consolidation of public colleges and universities is by no means unprecedented.

Examples of mergers or consolidations are:

- The Medical University of Ohio and the University of Toledo
- Baltimore Hebrew University and Towson State University
- New York University and Polytechnic University (NYC)
- Fordham University and Marymount College
- George Washington University and Mount Vernon College
- Illinois Institute of Technology and Midwest College of Engineering
- Kansas State University and Kansas College of Technology
- University of Massachusetts Boston and Boston State College.

CONTEMPORARY INTEREST IN MERGERS

There is new interest lately in this solution. Now, at governing board levels, consolidations are being considered for reasons not unlike those in Louisiana—improved scale, delivery, productivity, or effectiveness in meeting needs. Proposals to merge public institutions are presently, or recently have been, under consideration by governing boards and/or legislatures in several states, including Georgia, New Jersey, Vermont, North Dakota, Maryland, and Louisiana. The most recent action to merge institutions of which we are aware occurred in January 2012, when the Board of Regents of the University System of Georgia acted to form four institutions from what were eight institutions. (See notes at right about Georgia.)

Likewise in Europe, a wave of university mergers occurred in the early 1980s, another in the early 1990s, and still another is in immediate prospect. The issues that give rise to these developments, of course, differ from place to place, but a common thread among them is the aim of achieving more with constrained resources.

University System of Georgia

At its January 2012 meeting, the Board of Regents approved four consolidations among eight USG institutions:

- Waycross College and South Georgia College
- Macon State College and Middle Georgia College
- Gainesville State College and North Georgia College and State University
- Augusta State University and Georgia Health Sciences University

Implementation of these consolidations will unfold over the next 12-18 months through a transparent process that will involve the efforts of representatives from the institutions.
http://www.usg.edu/consolidation/

Will We See Increasing Instances of Collaborations and Consolidations in the Near Future?

"Tough financial times call for tough actions. Maximising income and securing enduring cost efficiencies are high on the agenda of the HE sector. Thinking well beyond the more regular cost management actions is likely to be a necessity for many HEIs.

We believe that HEIs should be asking themselves what lessons they can learn from both the private and public sectors about the value of collaboration, from the informal, to full blown mergers of activities or institutions."

"In the eye of the storm: Moving from collaboration to consolidation." John Berriman and Martin Jacobs, Price Waterhouse Coopers (UK), 2010, p. 13.

6—Evaluation of Alternatives for Shreveport-Bossier

Introduction—Analysis of the Four Main Models

Principles for the Analysis

The consultants created and applied the following decision principles in assessing alternatives by which to achieve a more comprehensive university presence in Shreveport-Bossier:

- Raise levels of educational attainment for the citizens of the metro area—now and future
- Provide local access to higher education opportunities for underserved populations—with special consideration of working, place-bound adults and the City of Shreveport's African-American majority
- Offer undergraduate and graduate programs that are sound in quality, responsive to interests of current and future learners in the metro area, and avoid unnecessary duplication—recognizing that some of these programs may need to be in place before mature demand materializes
- Provide efficient and effective administrative services that support the educational mission
- Contribute to regional economic development by increasing the metro area's "intellectual capital and innovation capacity" and thus its capabilities to both perform regionally relevant research and to support innovation in business and industry in many other forms of collaborations
- Produce at least some substantial results in a timely manner, as waiting decades for material improvement is unacceptable
- Maintain an active, physical location in the metro area with instruction delivered primarily face-to-face, but supplemented with distance delivery as appropriate.
- Contribute to social and cultural advancement in the metro area.

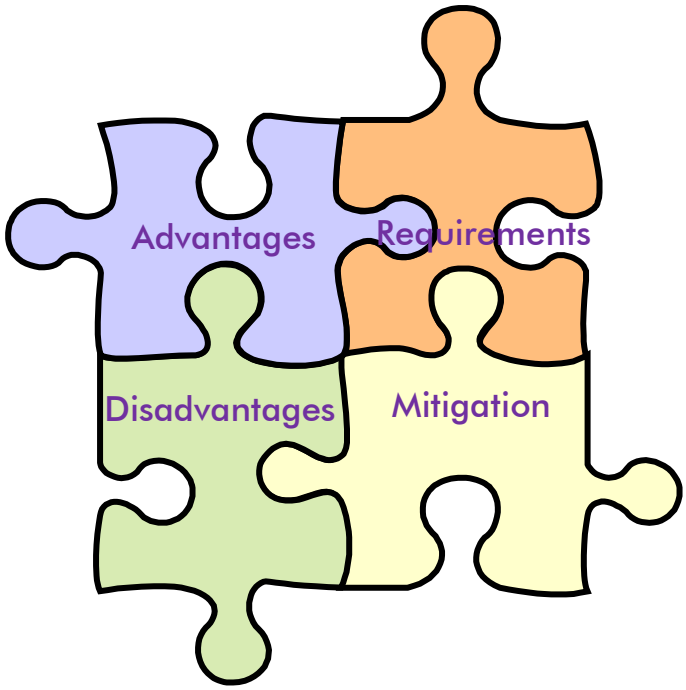
Structure of the Analysis

The consultants structured the analysis to systematically consider each of the four main alternatives defined in Chapter 5 in terms of:

- **Advantages**. Potential advantages to be gained
- **Requirements**. Conditions that must be met to realize those advantages
- **Disadvantages**. Risks posed by the potential solution
- **Mitigation**. Strategies by which those disadvantages/risks might be mitigated.

For the alternative of merging LSU-Shreveport and Louisiana Tech, the evaluation contains two additional subjects specific to this alternative:

- Possible Louisiana Tech programs for implementation/expansion in Shreveport-Bossier
- Financial considerations of consolidation (costs and savings).



Four More Specific Scenarios Considered

Four additional specific scenarios, suggested by interviewees, are described, with comments:

- Georgia Tech-Emory University Department of Bioengineering
- Indiana University-Purdue University at Indianapolis (IUPUI)
- Consolidation of LSU-Shreveport and LSUHSC-Shreveport
- Consolidation of LSU-Shreveport, LSUHSC-Shreveport, and Louisiana Tech.

1.—GROW LSU IN SHREVEPORT

Advantages, Requirements, Disadvantages, and *Mitigation* for the alternative of continuing to grow LSU in Shreveport follow.

ADVANTAGES

Ease of Implementation within Current Structures

Clearly, the most straightforward, least disruptive approach to building university presence in Shreveport-Bossier is to grow and expand the programmatic imprint of the public university that is already there. Doing so does not require difficult organizational and governance changes, and, if the growth actually is achieved, then the involvement of third parties in providing needed programs can be minimized.

Models that involve more than one institution in program delivery raise issues related to ownership and/or use of assets. They also introduce conflicting academic, personnel, and administrative policies to be reconciled. In simply growing the institution in place, all these complexities are avoided. This is a factor that strongly favors the idea of growth in place.

Community's Ownership of the Institution

LSUS has been present in Shreveport-Bossier for many years and has, thereby, acquired knowledge and understanding the metro area's interests and needs. By that presence and focus, the University and the community should be most easily enabled to maintain and grow mutually supportive relationships.

Improved Utilization of Existing Facilities

The LSUS campus has facilities adequate to accommodate a considerably larger enrollment than currently is there. Consequently, growing LSUS affords the opportunity to serve more students without additional capital investment, at least up to a certain level of growth.

REQUIREMENTS

Role/Scope/Mission Change Required

To serve the unmet needs identified and discussed extensively in this report and so many previous studies, the "Grow LSUS" model would require significant change in the University's present array of programs and, eventually, in Role/Scope/Mission. Due to the categories of institutions in Louisiana, this also could mean that LSUS would need to ultimately grow into being a University with a *statewide*, as well as regional, mission. At some time in the future, it would be granted authorization to offer doctoral programs in carefully selected areas, in addition to development of a diverse array of undergraduate and graduate programs. It also would need authorization and resources to pursue selective research programs and grow intellectual capital in selected areas that relate to economic development strategies in Shreveport-Bossier.

Realignment of Existing Programs and New Programs to Meet Needs

As EKA recommended in its 2009 *Academic Program Strategy* for LSUS, the University's existing programs bear review and realignment. There are some that need updating of name and content. There are some that should be eliminated altogether, or eliminated and replaced with newer programs. There are some that could be combined, or to which additional concentrations could be added.

It would be necessary to add academic programs that presently are not in LSU-Shreveport's approved program array. Program lists (not necessarily definitive) are provided elsewhere in this Report.

Major Changes in Institutional Marketing, Service Delivery and "Culture"

Becoming a more comprehensive university would bring to LSUS new responsibilities and opportunities that require a changed institutional perspective and culture. Priority attention to needs of underserved populations would be required, as would more effective outreach and accommodation for both traditional and non-traditional students. This would lead to changes in how and when instruction is delivered; seamless transitions for far more students from associate to baccalaureate programs; and support services that recognize and respond more specifically to the needs of an *urban* student body that is (and should be) highly diverse in many respects—age, race, family and employment circumstances, educational interests and goals, and more.

A changed image and branding, combined with far stronger student recruitment efforts, will be required if populations that LSUS does not presently attract in great numbers are to perceive the University as a place that is welcoming and prepared to meet their needs. Those populations include place-bound adults and minorities. It also includes students who can and otherwise will go elsewhere for college, then not return to the metro area following graduation.

Whether requirements just discussed can be met will depend foremost on whether the institution's leadership will be committed to making necessary programmatic, delivery, and operational changes—perhaps challenging recent priorities and ways of doing things among internal constituents. But meeting above requirements also is dependent upon decisions and actions of external leadership—the LSU System Board of Supervisors and the Regents.

DISADVANTAGES

Difficulty of Achieving Role/Scope/Mission Change

Authority to expand LSUS's Role/Scope/Mission resides with the Regents, not with either the institution or the community. To date, the status accorded to LSU-Shreveport by the Board is that of a regional university offering baccalaureate degree programs primarily, with a limited number of master's degree programs and little, if any, research franchise. Changing that status by growing LSU-Shreveport is not a foreseeable prospect.

That said, Role/Scope/Mission changes are possible, if a convincing case is made, and it is possible that this subject has been a greater preoccupation than is warranted. Indeed, significant growth can be achieved in programs with little or no change in Role/Scope/Mission.

Prospect of a Lengthy Time Horizon

Even leaving aside the Role/Scope/Mission issues, and focusing on baccalaureate and master's programs, the kind of institutional growth and development that would be required is not something that can happen quickly, especially in the present circumstances of little, if any, resources available for investment in selective programs that may not yield returns in early years. LSUS's budget is driven largely by enrollments. Its size does not afford economies of scale that enable institutions of larger scale to marshal internal "venture capital" for new initiatives. Resources there, as at all Louisiana institutions, have shrunk as a result of the State's budget reductions, and new admission requirements that soon go into effect may diminish the resource base further, if only temporarily. Near-term, prospects for improvements are weak.

Strengthening Identity / Brand

Currently, LSU-Shreveport's identity is one borrowed, distantly, from LSU A&M. While the LSU brand, as it applies to LSU A&M, is the strongest public university brand in Louisiana, the "LSU in Shreveport" brand is not one that is strong in its own right. Growing LSUS to become a more comprehensive university would require building a stronger and more distinct identity. That identity must be communicated and recognized within its own immediate locale and also by a broader population than appears to be presently the case. The means and the time required to define and establish a strong and unique identity are problematic considerations.

Absence of Engineering Remains Unsolved

Hypothetically, if all the other requirements could be met, growing LSUS might, in time, lead to academic offerings that addressed many of the unmet degree program needs now present in Shreveport-Bossier. More baccalaureate and master's degree programs certainly can be foreseen, and assume that a doctoral program in Educational Leadership might be authorized. However, it seems improbable that a school/college of engineering would be approved in any foreseeable circumstances. Consequently, it is not clear that this model could meet the need for engineering education in the metro region. Program importation still would be required—as an additional strategy.

Overcoming History and Attitudes

Just as LSU-Shreveport's history brings the advantage of long-time relationships with the community, system boards and staff, and Regents, it is also true that the institution is somewhat captive to the tenor and substance of those relationships, as they have grown to be in recent history. To overcome the inertia of the *status quo* and to profoundly change the institution, it would be necessary for all parties to get beyond precedents, outcomes, and mindsets that have formed over recent years. Present circumstances make a truly "fresh" start doubly difficult.

MITIGATION

Enrollment Growth Aided by Diversification

An essential factor in any better future for LSUS is enrollment growth. One strategy to bring about enrollment growth would be to broaden the geographical base from which prospective students are drawn. Campus residence halls or public-private housing development—coupled with an entirely new and aggressive marketing and recruitment program—could make that possible. Students from elsewhere would help growth by enlarging enrollment and they also would complement the University's primary focus on serving the metro area population by drawing additional talent to Shreveport-Bossier and diversifying the student culture on campus.

Programs in Technology, Not Engineering

The need for engineering education in Shreveport-Bossier could be met, to some degree, by creating, and obtaining approval for, a College of Technology at LSU-Shreveport. This would serve some area employer needs by training students in programs such as Construction Management Technology; Oil/Gas Extraction Technology; Electronics Engineering Technology; Logistics and Supply Chain Management; and Manufacturing Engineering Technology. Louisiana Tech remains the region's and metro area's resource for educating professional engineers in more standard engineering programs, both undergraduate and graduate. So, program importation still would be the adjunct solution for standard engineering degrees. Some of these Louisiana Tech programs are offered in Shreveport now; over time, perhaps more of these programs could be offered in Shreveport.

A "Fresh Start" in Attitudes/Relationships

Mitigation of the "history" factor would depend upon the institution, the system management board, and the Regents first acknowledging the need for a fresh start; for institutional leadership, board members, and their staffs to avow a commitment to bringing that fresh start about; and then for all parties to sustain that commitment in practice.

2.—PARTNERSHIPS—EXPAND PROGRAM COLLABORATIONS

Advantages, Requirements, Disadvantages, and *Mitigation* for the alternative of expanding Program Collaborations to meet unmet needs follow.

ADVANTAGES

Timely Implementation

Inter-institutional program collaborations can be relatively quick to design and implement. They typically are formed to deliver a program that at least one of the partner institutions already has, or can quickly acquire, authorization to offer. Partner institutions may share student populations, faculty personnel, facilities, equipment, or other necessary resources. Students may be co-enrolled. Either or both institutions may be named on degrees awarded. The defining characteristic is that both partners play active roles in program delivery.

Response to Specific Program Needs

Several degree program needs that are presently unmet in Shreveport-Bossier, e.g., Hospitality Management, could be brought to the metro region in collaborative arrangements between LSU-Shreveport and other institutions. Doctoral programs in selected areas could be among those established collaboratively, if the partner institution already has doctoral-granting authority. The Role/Scope/Mission issue could still be problematic, if the Regents consider LSUS's participation in a collaborative doctoral program to require a formal change in Role/Scope/Mission. (Then importation, not collaboration, would be required.)

Extensive 2+2 Collaboration or Co-Enrollment Program with SUSLA

A particular need present in Shreveport-Bossier is to provide more baccalaureate options for local African-American students. A promising means of addressing that need would be 2+2 programs developed ***and delivered collaboratively by LSUS and SUSLA*** in selected BA/BS areas that are most attractive to SUSLA graduates. These would be structured as seamless, uncomplicated sequences wherein students could complete at SUSLA the general education and pre-requisite requirements for a specified major at LSUS. The student then would have assured admission to upper division study in that major. The Louisiana Transfer Degree Program, with the Transfer Guarantee, provides the framework for further development.

The collaboration also could have faculty members from both institutions share in delivering upper and lower division components of the program. Collaboration could go still further to include financial aid, student services, advising, career planning, internships, and more.

That which is noted above can also be accomplished by the Louisiana Transfer Degree (TDG), which is designed to provide students with an opportunity to complete the first 60 hours of coursework toward a baccalaureate degree at a 2-year or community college. Students who successfully complete a designated transfer associate degree program are eligible to enter a 4-year Louisiana public university as a junior, with all 60 (non-developmental) credits transferring to the receiving university. The TDG allows for a guaranteed and easy transfer from an institution like SUSLA to an institution like LSUS.

Economies of Scale

In most instances, collaborative arrangements are built around a program that is already in place, or at least authorized at one or both partner institutions. The incentive to collaborate may be to attract greater enrollment in the program than either institution alone could generate, thus enabling more productive use of existing faculty and facility assets. Also, greater enrollment usually means increased resources. Greater scale could be a strong advantage for any programs where such conditions exist.

Alternative to Unnecessary Program Duplication

Program duplication by institutions is not always and everywhere undesirable. By providing greater access for students and advancing educational attainment, duplication often is well justified. In some cases, however, two institutions may be able to deliver collaboratively a specialized curriculum or advanced degree that, if duplicated, would not be practicable or productive at either site.

REQUIREMENTS

Willing Partners

The first requirement for successful, enduring program collaboration is that the partners are willing participants. Typically, willingness is prompted and sustained by an incentive or objective that can best be realized through shared, rather than individual and, perhaps, competing, initiatives. In the past, North Louisiana institutions have sought to create significant collaborative efforts when incentives and conditions were suitable. At times, these efforts were not undertaken or were, but did not succeed, due to disincentives or other constraints.

Acceptable Partnership Terms

Collaborative programs almost always entail consideration of resources—what kind, how much, who will supply them and who will receive them. The details of income and expense sharing—particularly who gets budgetary credit for program enrollments—must be resolved in ways acceptable to the institutions involved, and requires concurrence by their management boards and the BOR. Terms also must address matters such as joint faculty appointments, tenure and promotion considerations, assignment of administrative authority and responsibility, degree conferral, and more. All this is frequently difficult to achieve.

DISADVANTAGES

Competitive Policy and Cultural Barriers

Institutions bring distinctive cultures to a partnership. Even if they share a common view of the partnership's intended outcome, each partner has policies, practices, and competitive instincts that can be conflicting. Each will have firmly held beliefs about appropriate curriculum, faculty qualifications, and learning outcomes. Yet, collaboration calls for those differences to be reconciled, a task that is often difficult and may not be achieved in all attempted cases.

Logistical Hurdles

Efforts to form program collaborations also must overcome differences in how two universities go about daily operations. A notable example is the academic calendar, which can be semester-based or quarter-based. So, how to award course credits becomes an issue. If the partner campuses are separated by significant distances, assembling faculty, equipment, and learning resources in the right place at the right time can be a recurring difficulty. Responsibility for student relationships easily can become confused, leading to unintended and adverse consequences in advisement, evaluation, and records. Beyond the institutions themselves, it may be necessary for a collaborative program to satisfy requirements of a regional or program-specific accrediting agency, or both.

MITIGATION

Motivated Partners

Development and implementation of a collaborative program requires the partners to commit time, effort, and a measure of priority to the venture. Because there is always competition for those same commitments, the institutions involved must be more than willing; they must be motivated to pursue collaboration. To provide that motivation, there must be mutual and compelling benefit. In the end, collaboration only can succeed if each partner sees the joint effort as having greater advantage than working alone.

Facilitation by Governance Boards

If the BoR and the system management boards are inclined to extend program access via inter-institutional collaboration, there are, no doubt, policies and incentives that the boards could enact that would make collaborations more attractive and productive for institutions. These might include accommodation in Role/Scope/Mission definitions; favorable treatment in budget formulas; and expedited program review and approval processes.

3.—PARTNERSHIPS—IMPORT PROGRAMS TO LSUS OR TO A METRO UNIVERSITY CENTER

ADVANTAGES

Timely Implementation

As with inter-institutional collaborations, importing needed academic programs from other Louisiana institutions or from out-of-state institutions can be a relatively quick way to expand offerings in Shreveport-Bossier. For doctoral programs or for engineering programs, doing so avoids the hurdle of broadened Role/Scope/Mission that is required by the "Grow LSUS" approach. The program already exists at the provider institution, so the design-proposal-approval process required for new programs is avoided, as is acquiring the resources necessary to support and deliver them. Instead, the institution that already has the desired program brings it to Shreveport-Bossier, through on-site or blended on-site and on-line instruction. This is essentially the model for Louisiana Tech's programs "exported" to Shreveport, at Barksdale and at Tech's IC2 location.

Ultimate Flexibility and Unlimited Potential Partners

Hypothetically, the program importation model imposes no restriction as to which and how many programs might be brought in or on the matter of who the chosen providers might be. A practical constraint, however, is having sufficient demand, present or potential, to cover program costs and provide some incentive to the provider institution to undertake its delivery to Shreveport-Bossier. While regional and state institutions certainly could be sources of the needed programs, world-class programs in and beyond Louisiana could likewise be prospective providers. The possibilities are at least theoretically limitless.

Economies Achieved by Greater Use of LSU-Shreveport Campus

By usual measures of space utilization, LSUS has physical capacity to accommodate a considerably greater number of students than are presently enrolled there. If programs imported to Shreveport-Bossier are offered on the LSUS campus, the result could be more productive utilization of the facilities there. Access to the LSUS Library and to campus support services such as plant maintenance, security, parking, and the like would further contribute to cost-efficient and effective delivery of imported programs.

Community Influence or Control of a University Center

If programs were imported to a university center facility in the metro area, rather than to the LSU-Shreveport campus, the center would not be governed by one of the existing university management boards. It might be governed directly by the Board of Regents, as is the case with the Learning Center in Rapides Parish. Alternatively, it might be feasible for such a center to be an instrument of local government and/or non-governmental organizations in the community. In the latter case, possibly, how the center operates; the programs it imports; and the providers it selects would be decisions made with greater degrees of local influence or control.

Flexibility to Terminate Programs

The same flexibility that is available to launch an imported program is available to terminate one—subject to any contractual provisions. Occasions arise when a particular degree program is needed to serve an identified student cohort. When that cohort graduates, there is no reason to continue offering the program. In contrast to a program entrenched in a local institution, importation affords the flexibility to acquire the program when it is needed and the flexibility to close it when the need is met.

REQUIREMENTS

Authority and Governance

It is possible to import programs that meet metro area needs in a systematic and sustainable way. But, that is not an assured outcome. Decisions about what to import, from where, and on what terms should issue from clear, well considered purposes and objectives and equally clear, well considered assignments of responsibility and authority. Consequently, whether program importation is carried out on the LSUS campus or at a separate university center facility in the metro area, it must operate within a sound governance and administrative structure.

Competitive Process

A number of factors should be weighed in the search for and selection of programs to be imported. These include program reputation and quality, method of delivery, attractiveness to students, financial terms, and more. A competitive process, utilizing requests for proposals and defined criteria for evaluating responses, will help lead to a better result than would a sole-source solicitation.

Coverage of Host Costs

Wherever imported programs may be offered, either on the LSUS campus or at a separate university center location, costs incurred by the host site must be fairly compensated.

DISADVANTAGES

No Growth of Intellectual Capital and Innovation Capacity

Perhaps the foremost disadvantage of the importation model is that it does not bring growth to the "intellectual capital" embedded in the local area. This is true even if the provider provides face-to-face (rather than online only) instruction. While able instructors may be delivering the imported program, they do not become part of the community's asset base that is in place on an on-going basis to respond to other metro area needs such as applied research, business services, economic development, and cultural enrichment.

Adverse Impact on LSU-Shreveport

Presumably, LSUS would remain a functioning university if the importation model were employed to expand program offerings in Shreveport-Bossier. This model, however, of all those considered, places the greatest limitation on future prospects for LSUS to grow and become a more comprehensive urban university—or even to maintain its current enrollment size. Future efforts by LSUS to develop additional graduate programs likely would be pre-empted because importation would not be subject to the lengthy proposal/approval process and Role/Scope/Mission issues that attend to program growth at LSUS. Thus, if broadly and aggressively pursued, program importation would effectively "freeze in place" LSUS's further development and could even become a factor contributing to its failure.

Prospective or Strategic Needs Not Necessarily Served

Program importation is largely a market-driven model. That is to say, an institution that could bring a desired program to Shreveport-Bossier will be interested in doing so only if a baseline and sufficient market for the program can be demonstrated in the present. But, this open market approach does not assure that the programs these institutions choose to bring are necessarily those that support the future economic strategies for the Shreveport-Bossier market. Because the model is market-driven, rather than strategic, it is not responsive to needs that depend upon first making the program locally available in order to attract the interest, support, and enrollment needed to sustain it. A domiciled comprehensive public university, on the other hand, is a core part of the community's economic strategies. It can, selectively, start a few programs that support economic development or other community needs, but which require time to become fully self-supporting or productive.

Risk of Impermanence

A program exporter's commitment to offer a program in Shreveport-Bossier cannot be relied upon to be a durable one. As previously noted, importation is essentially market driven and, so, is vulnerable to discontinuance if enrollment drops, even if the downturn is temporary. Willingness to maintain a program in Shreveport-Bossier is also subject to conditions on the provider campus such as budget problems or personnel changes that the local area may not know and cannot influence. Ideally, a program is maintained from inception at least until enrolled students can complete their degrees. However, if that does not occur, the host institution inherits ill will and perhaps more binding obligations that can result when a program is prematurely terminated.

Cost to Students and Financial Aid

Providers from elsewhere only will bring programs to Shreveport-Bossier that cover their costs and, most likely, provide some financial incentive beyond direct costs. Consequently, costs to students almost certainly will be greater for enrollment in an imported program than would apply if the program were offered by a home-based university. That impact is exacerbated if students enrolled in a center program are considered by the provider university to be ineligible for financial aid.

University Center Facility Costs

If programs are imported by and delivered at a university center site that is separate from the LSUS campus, cost will be incurred to buy, build, or lease the separate facility and for its operation and maintenance. While housing imported programs in existing space at LSUS would not be cost-free, it is reasonable to expect that expenses incurred there would be lower than at a free-standing location.

Quality Control

Program reputation and provider commitments are important considerations in choosing a program for importation. Likewise, performance and outcomes criteria are critical to consistent, on-going program evaluation. That said, it must be acknowledged that quality and the degree to which it is present in a given academic program are largely matters of judgment. It is, therefore, difficult for an institution to argue irrefutably that a program of its own is or is not meeting specified standards of quality. For an imported program, it is well-nigh impossible. Consequently, the entity that hosts an imported program must expect that instances will arise in which curriculum, instruction, treatment of students, or other aspects of program quality will be challenged. Resolution of such challenges is far more difficult when the program provider is not a permanent, local institution.

MITIGATION

Strategic Program Solicitation

If program importation is done on the basis of *the community's initiative*—where a strategic view of needs is developed, and solicitations to outside institution providers are based on that strategy, there is the chance that the match between imported programs and strategic needs could be enhanced. Well planned solicitations for specific programs, based on sound assessment of needs, and directed to selected providers could lead to more systematic availability of academic programs that expand educational opportunity, raise educational attainment, and advance economic development in Shreveport-Bossier. It still might be the case that outside interest in some programs that are designed to meet prospective needs would not materialize.

Needs Assessments and Program Marketing

Solicitations that invite importation of a program will produce best results if supported by needs assessment that yields sound information about present and prospective student demand, community support that can be expected, and marketing efforts that will be provided by the host and expected of the provider. In the end, most program exporters only will be attracted by a strong, visible market that will provide revenues right away.

Contract Terms

Collegial resolution should always be tried first when performance issues arise between those who provide and those who import an academic program. However, prudence recommends that agreements between provider and host be formalized in contract terms that spell out each party's rights and responsibilities. Among those that should be addressed are program evaluation standards and methods, curriculum, staffing, delivery mode, treatment of students, costs and income, maintenance of student records, and expected outcomes.

Careful Use of the Model

The program implementation model, properly used, can bring certain programs to Shreveport-Bossier that would otherwise not become available within a predictable time horizon. It would, not, however, be advisable for the metro area to disregard its interest in sustaining and building the institutional capacity of its home-based institution. Consequently, if the importation model is employed, its use should be restrained to avoid bringing programs that directly compete with programs authorized under LSU-Shreveport's present Role/Scope/Mission. Also, a longer view should be taken with regards to programs for which there is a reasonable, near-term expectation that authorization can be obtained for LSUS. Put another way, program importation may be a quite useful solution for certain specific programs, where it makes obvious sense, but it should not be viewed as a total solution for achieving a more comprehensive university in Shreveport-Bossier.

4.—CONSOLIDATE LSU IN SHREVEPORT AND LOUISIANA TECH UNIVERSITY

ADVANTAGES

Broader Role/Scope/Mission

The aim of the consolidation model would be to create a single institution that is stronger than the sum of its parts, ***one university with a campus in Ruston and a campus in Shreveport***. The most immediate and obvious advantage gained is that the combined university would have greater scale and capacity, and also would have the Role/Scope/Mission already established for Louisiana Tech. The significance of this also resides in the BoR's classification of Louisiana Tech as a *statewide university*, while LSU-Shreveport is classified as a *regional university*. The former is permitted a considerably broader array of academic programs, both as to discipline and degree level, than the latter. Thus, academic programs and research initiatives already in place at Louisiana Tech, as well as new ones permitted for a statewide, but not a regional, university could be brought to Shreveport-Bossier upon determination that they are needed.

Dynamic Institutional Culture

Louisiana Tech and LSU-Shreveport have noticeably different institutional cultures. Strong leadership, enterprise, effective branding, and extensive engagement in professional studies have enabled Louisiana Tech to become a large, diverse university in a rural setting. The entrepreneurial spirit that characterizes Louisiana Tech's administration and faculty would be a positive force in bringing about the bigger, strong university presence that is needed in Shreveport-Bossier. LSUS would bring to the consolidated university positive elements of its culture, including "small-college" attention to students, as well as relationships, support, and understanding of local needs it has built through a long record of service to the metro area. The culture of the combined institution, thus, can incorporate the strengths of both.

Practicality and Proximity

If consolidation is the route taken to create a bigger, stronger university presence in Shreveport-Bossier, Louisiana Tech is best positioned geographically and programmatically to be the partner. It is, simply, the one institution that is both close enough to make operating on two campuses practical and that has functioning programs, such as Engineering, that are needed immediately in Shreveport-Bossier. Further, Louisiana Tech has many established activities and connections in the metro area. These include programs offered at Barksdale AFB, research collaboration with the LSUHSC-Shreveport, consulting relationships with various businesses and industries, and a large alumni contingent.

Program Diversity by Campus

The consolidation would result in one institution with two distinctly different campus environments—one in a city and one in a town. That circumstance invites constructive differentiation of academic program offerings, research, and outreach according to the needs and opportunities present in each setting. Thus, it becomes possible to determine and bring to Shreveport-Bossier what is needed, but not present there, whether or not the same programs and activities are carried on in Ruston.

Strong Brand and Credibility

The Louisiana Tech brand is well-known and respected in Shreveport-Bossier. Louisiana Tech's leadership has personal credibility in the metro area and the network of those who engage locally with Louisiana Tech in various educational, business, and civic endeavors is extensive. These advantages would be valuable in quickly gaining visibility and credibility for new programs that would be brought to Shreveport-Bossier. They also give reason to expect that Louisiana Tech's enlarged presence in the community would be readily and widely accepted.

Internal Capacity to Invest

Louisiana Tech is of a size (in students, faculty, budget, etc.) that affords the institution at least modest latitude for investment in new academic programs, research initiatives, and outreach activities with, of course, hope of a return in resources and/or institutional impact. That latitude is narrowed by cuts in state support, but Tech's enrollment at Barksdale, relationships in the metro area, and other assets could provide some "venture capital" with which to launch carefully selected, critically needed programs and activities in Shreveport-Bossier.

Larger Per-Student Resource Base

LSU-Shreveport's tuition is presently lower than Louisiana Tech's tuition. For 2011-2012, the tuition and mandatory fees for a Louisiana resident student taking 12 hours per semester are:

LSU-Shreveport $4,494 vs. Louisiana Tech $5,988

Although the manner and timing for implementing this change is important to work out, there is the prospect of higher tuition income, if Louisiana Tech's tuition and fees are applied in Shreveport-Bossier. At 2011-2012 levels, this would mean $1,494 more per year in revenues for a full-time resident student taking 12 hours.

Similarly, the per full time equivalent (FTE) student state appropriation is higher for Louisiana Tech, currently at $4,979 than for LSUS, currently at $3,778—a differential of $1,201.[19]

Thus, although some phasing in is required for tuition and fees, the consolidation would result in enhanced resources from both tuition and public funding. Based on the above, the total differential would be $2,695 more in resources/budget per (resident) FTE student.

Collaborations with LSUHSC-Shreveport

LSUHSC-Shreveport and Louisiana Tech are the two primary research-performing institutions in the area, and both have potential for substantial growth in research activities. While nothing in present circumstances precludes degree program and research collaborations between Louisiana Tech and the Health Sciences Center—in fact, some now exist—having Louisiana Tech fully present in Shreveport with a campus could facilitate such collaborations. Thus, a consolidation of LSU-Shreveport and Louisiana Tech is the alternative most favorable for cultivating the research and innovation enterprise in Shreveport-Bossier that community leaders believe is essential for economic development in the metro area. It also could mean that faculty of LSU-Shreveport who wish to engage in research would have more encouragement and support for doing so—because they now would be part of a research-oriented university.

Political Feasibility

Whether political consideration of a proposal to consolidate LSUS and Louisiana Tech would result in favorable or unfavorable action is presently unknown. However, interviews and anecdotal information gathered in the course of the study suggest that some outcomes of a consolidation are seen as highly positive. Further, combining the strengths of two complementary institutions in Northwest Louisiana would be compatible with the Regents' emphasis on regional solutions for meeting the State's higher education needs. This solution also fits with the desire of many Louisiana leaders to reduce the total number of independent public universities in the State—and would do so in ways that enhance access and outcomes.

[19] Board of Regents, FY 2010-11 Formula Appropriation per FTE Report, http://regents.louisiana.gov/assets/docs/Data/SCH/SCHBRCRPT.PDF)

Advocacy Advantage

At present, LSU/UL system differences, institutional loyalties, and immediate geography considerations lead to the communities—that are 70 miles apart—acting more as competitors than as collaborators. Thus, a further advantage of consolidation would be to join the interests of "Ruston" community advocates and "Shreveport-Bossier" community advocates more closely than they are now—eliminating their natural inclination to advocate differentially for LSUS and Louisiana Tech. Altogether, consolidation could create greater *common cause* in these communities. They thus could constitute a stronger, more cohesive voice for higher education in the Northwest.

Advantages of Bold Transformative Change

Bold transformative change is motivational to those who care about improving on the status quo. The result will be champions with a willingness to sacrifice to build a greater future. There are great intellectual resources on the campuses of Louisiana Tech and LSU-Shreveport and in the communities of Shreveport-Bossier and Ruston who can turn a bold idea into reality. There will be much support to making a greater whole from the sum of these parts.

Develop Long-Term Economies of Scale and Administrative Efficiencies

Over the long term, significant savings should accrue with the development of economies of scale and administrative efficiencies. During a time of changing environment in higher education on a national and state level, it benefits the community and state to take a proactive approach to planning to thrive in changing times.

REQUIREMENTS

Decision About System Home

If LSU-Shreveport and Louisiana Tech are to be consolidated, a necessary—and likely to be contentious—issue that must be resolved is: *In which system would the combined institution reside?* The consultants' conclusions and recommendation on the matter are presented elsewhere in this report. At this point, it is necessary only to point out that the question must be settled in order for a consolidation to move forward.

Commitments to Shreveport-Bossier

Shreveport-Bossier presently has a university in its midst, LSU-Shreveport. Interest in a consolidation possibility moves from the conviction among community leaders that the metro area must have a bigger, stronger university presence in order to meet the needs of underserved populations, to make needed programs available locally, and to help advance the area's innovation capacity and economic development. If *speculative interest* is to be converted into *active support and advocacy*, community leaders and citizens at large will need to be assured that a consolidation will not diminish the university presence already in Shreveport-Bossier and that a bigger, stronger university actually will result. To provide that assurance, it will be necessary to draw at least some specific terms that address program, personnel, and financial resources that will be committed to the Shreveport campus and time horizons for their installation—before a consolidation could be finalized.

Commitments to Ruston

Conversely, university and community people in Ruston express anxiety that a consolidation would result in diminished resources in, and attention to, the currently Ruston-based university and its immediate community. It is thus also a requirement that the terms of the consolidation provide some assurance that it is not the intent to grow Shreveport-Bossier *at the expense of Ruston*, but, rather, ***to leverage them together for the growth and success of both***.

Research and Innovation Capacity Commitments

While not integral to the process of consolidating LSU-Shreveport and Louisiana Tech, growth of research, technology transfer, innovation partnerships, and biomedical-linked economic development are outcomes to which community and business leaders in Shreveport-Bossier attach great importance. Consequently, tangible and intangible support for the consolidation and for the combined institution going forward will depend in part on a matter that is relatively separate from the core degree program issues, that is, LSUHSC-Shreveport and Louisiana Tech articulating clear strategies for advancing those innovation-focused outcomes—where their combined capabilities can lead to much greater accomplishments. Where policy or other barriers hinder collaborations, assistance from the respective system management boards will be required in developing solutions.

Expanded Commitments to Economic Development

Louisiana Tech has made significant commitments to economic development in Ruston and also has been somewhat active as a participant in economic development strategies in Shreveport-Bossier. If, by a consolidation, Louisiana Tech becomes the senior public institution in Shreveport-Bossier, its role as a partner with metro area economic development agencies and initiatives must expand, while its commitments in Ruston are maintained.

Leadership Continuity and Effectiveness

Leaders at both LSUS and Louisiana Tech are well respected, have long experience and are knowledgeable about the Shreveport-Bossier community. They will be valuable assets if a consolidation of the two institutions is launched. As the consolidated institution would be Louisiana Tech, the president of that institution would, necessarily, have the lead role in unifying the two institutions, both within and beyond the Shreveport campus. Dr. Dan Reneau's longstanding personal and professional relationships with the Shreveport-Bossier community have earned him a high degree of personal credibility and trust there. Thus, his personal role in the early stages of implementing a consolidation is critical. Similarly, Dr. Vince Marsala, long-time Chancellor of LSUS, can be enormously helpful in anticipating and helping reconcile conflicts that may arise from institutional differences in established policies and practices. With both Dr. Reneau and Dr. Marsala nearing retirement, if a consolidation is to be, an arrangement that secures their involvement and leadership in early implementation is needed.

DISADVANTAGES

Much Hard Work

LSU-Shreveport and Louisiana Tech now are separate institutions with different policies, systems, and practices that affect programs, personnel, and resources and that shape the conduct of their daily operations. If they are merged, an enormous volume of planning and implementation work must be done in order to integrate all that and to reach the necessary end wherein the two function as one institution. The tasks must be organized and performed systematically, they require attention to a great deal of detail, they are time consuming, and they impose real costs. Furthermore, the core activities of operating the institution must be maintained while these added duties are discharged. Thus, if consolidation implementation is not done well and not done in a reasonably timely way, the unintended consequences that follow for faculty, staff, and students can be exceedingly disruptive and damaging.

Personal and Organizational Stress

The burdens of added work, uncertainty about personal and professional consequences, and loss of institutional identity are just some of the aspects of a merger that bring great stress to the individuals and institutions that are caught up in it. That stress can be expected to create resistance and negative morale among some members of the faculty, staff, student body, alumni, and other constituencies.

Admissions Standards Differentials

For various policy purposes, LSUS is classified as a *regional university* and Louisiana Tech is classified as a *statewide university*. Based on the admission standards going into effect for Fall 2012, LSUS already will have some issues with new minimum high school grade point average (GPA) of 2.0 and reduced percentage allowed for admissions exceptions. In the event of a consolidation, the higher standards applicable to Louisiana Tech would be in place for the Shreveport Campus. Changes would include going from a minimum of 2.0 GPA on the core high school courses to minimum of 2.5, and going from an ACT composite score of 20 to 23. Unless handled very carefully, with a possible phase-in, there could be a loss of enrollment of some magnitude at the merged institution's Shreveport Campus. (This risk has ways of being mitigated, if not entirely eliminated.)

Commitment Risk

A decision to consolidate the two institutions will rely on commitments of the parties to supply needed resources, to do those things that will serve the broad purpose, and to avoid doing things adverse to its purpose. Those commitments, no doubt, would be made in good faith. However, present promises, no matter how well intended, are vulnerable to changed future circumstances—different people, altered resources, diminished options, changed priorities, etc. So, the risk that commitments made at the outset may not be fully kept must be recognized.

Complex Political, Governance, and Constituency Factors

To consolidate LSUS and Louisiana Tech will require enabling legislation that authorizes the restructuring and that specifies the university system in which the consolidated, single institution will reside. At the state level, parties that will be involved directly in shaping the outcome include the two systems' management boards, the Regents, the Governor, and the Legislature. On the local level, organizations and the general public in Ruston and Shreveport-Bossier will want to be assured that their respective communities will be at least as well served by a merged institution as by their separate ones. Constituents of two universities—alumni, faculty, staff members, students, donors, other friends—have views and interests to be considered. All these parties have valid, but not necessarily congruent, stakes in the outcome. Or, if their long-term interests actually may be congruent, they may not perceive them to be. So, it can be expected that there will be something less than perfect agreement about whether this change should occur and, if so, whether the merged institution should be in the UL System or in the LSU System. If a consolidation is to be, the challenge to be met is that of building broad enough (if imperfect) community support that persuades legislative and governance bodies that the change is in the best interests of Shreveport-Bossier, Ruston, the region, and the State. This is a complex challenge.

Long-Term Cost Efficiency vs. Merger-Specific Costs

It is certainly reasonable to expect that a merged institution eventually will realize greater cost efficiency in program delivery and administrative overhead than would be the case if two institutions, operating separately, provide the same programs and services. However, it is an inescapable reality that consolidating two universities to make one will bring consolidation-specific costs that otherwise would not be incurred. This would occur at the same time that the two institutions' capacity to absorb those costs is constrained by recent budget cuts, and prospects for obtaining special funding to meet them are clouded by the State's overall fiscal constraints.

Risk of Unmet Expectations

All who come to support an LSUS/Louisiana Tech merger will expect the outcome to benefit both institutions in ways that would not be otherwise attainable. Among the likely expectations: Gaining an urban base will enable Louisiana Tech to expand its size, reach, and stature as an academic institution. LSUS (or Shreveport-Bossier) will gain new programs with attendant growth of enrollment and budgetary resources. More and better higher education will be provided at public institution cost levels. Those served will experience only a seamless transition as the two institutions become one. While all these are examples of plausible expectations, they are not perfectly compatible. How quickly, smoothly, and fully they will be met cannot be guaranteed. Budget pressures will create competition for scarce dollars between the two campuses. Not every needed and desired program can be brought immediately to Shreveport-Bossier. Stepped up admission standards likely will result, at least for a time, in reduced enrollment at the newly merged University's Shreveport campus. Louisiana Tech's higher tuition rate, when applied at LSUS, will mean higher costs for future students. Changing from a semester academic calendar to one based on quarters will trigger widespread scheduling changes and course revisions. All this raises considerable risk that, upon implementation, the consolidation will be judged by some as falling short of expected outcomes.

MITIGATION

Communication Plan

Constituencies of both institutions have valid interests at stake if LSU-Shreveport and Louisiana Tech are to be consolidated. Before taking formal action, a critical step will be to design and conduct a well-planned communications strategy aimed at providing to constituents of both institutions accurate information about the purpose of the consolidation, its intended outcomes, and the implementation steps that must be taken to bring it about. Such communication will serve both to win greater support and to offset misinformation that can too easily get abroad.

Statutory or Contractual Provisions and a *Consolidation Implementation Plan*

If leadership at local and state levels decides to seek and devise a consolidation of LSU-Shreveport and Louisiana Tech, it will do so with the purpose of creating a single university capable of greater service than the two provide separately. It is essential that the good faith and good intentions brought to that task be perpetuated by means that assure their maintenance over time. Thoughtful ways to ensure commitments and to avoid negative outcomes, can and should be developed in three ways:

Enabling Legislation. The statutory language can serve that end by including at least some specific terms that address protection of the partner institutions' individual and joint interests; service due their immediate communities, the region, and State; equitable treatment of their respective current, restricted, and capital assets; interim governance arrangements that facilitate an orderly transition from two to one university and university system; and flexibility that enables the combined university to phase in changes that, if too abruptly implemented, would be unduly disruptive and hurtful.

Agreements. Similarly, memoranda of understanding should be developed to further formalize roles, commitments, and understandings between governance and management boards, public interest representatives in the two communities, and the two institutions.

Consolidation Implementation Plan. Every report of experience or observations of institutional mergers emphasizes that the key not only to success, but to avoiding disastrous results, is thorough advance planning. And, it is inconceivable that all the necessary positive elements of how the merger would be carried out can be captured in an enabling statute and in memoranda agreements. **Consequently, the pre-eminent strategy for mitigation of inherent risks is engagement of stakeholders in creation of a detailed *Consolidation Implementation***

Importance of an Implementation Roadmap

"For those who choose to pursue a merger, all the evidence shows that considerable time and effort is needed for merger planning, execution and then post-merger integration. In any HEI merger, strategic intent, culture, leadership, governance, academic reputation, people and communications will be as crucial as cost synergies, technology and infrastructure support.

So if merger is an option, start planning now."

"In the eye of the storm: Moving from collaboration to consolidation." John Berriman and Martin Jacobs, Price Waterhouse Coopers (UK), 2010, p. 13.

***Plan*—to be developed before the actual actions take effect**. Identifying the topics that must be addressed in such a plan is a major task in itself, one that, to be as comprehensive as necessary, will require broad involvement of personnel from both campuses. Curriculum, personnel, administrative functions, information systems, financial requirements, and much more must be addressed. Smaller working groups then will be needed to map the particulars of each topic—identifying issues and answering the questions of by whom, how, when, and by what means they will be resolved. Beyond that, opportunity for review and comment from those affected by the outcomes will be needed. This *Plan* would include one-time costs that must be incurred and how they will be funded. The well-conceived *Consolidation Implementation Plan* is so critical to success that it would be advisable for the enabling legislation to make proceeding with formalities of consolidation contingent upon the detailed *Consolidation Implementation Plan* being approved by the applicable management system board(s), and the Regents.

Funding

The State is under severe financial strain at present. Acknowledging that, it is still necessary to point out that consolidation of LSU-Shreveport and Louisiana Tech will achieve its aims best if some funds are forthcoming from some source to meet non-recurring implementation expenses. It is possible that the promise of a more comprehensive urban university might lead individuals, businesses, community organizations, and alumni in Shreveport-Bossier and Ruston to provide some required funding. Also, the leadership and faculty of Louisiana Tech and LSU-Shreveport will contribute their intellectual resources and efforts. Those hopes cannot completely offset the need for an allocation of one-time public funds. Provided in a matching arrangement, public funds might well induce private support and create a combined pool sufficient to cover unavoidable expenses that will arise if two institutions are consolidated.

Leadership Commitment

Commitments should be obtained from President Reneau and Chancellor Marsala that they will provide essential leadership to bring about successful implementation, if this restructuring is undertaken. Those commitments should be formalized in a memorandum of understanding that provides time horizons and the responsibilities that each would accept. Presumably, Dr. Reneau would be the chief administrative officer directing the implementation activities, and Dr. Marsala would serve as his senior advisor.

LOUISIANA TECH PROGRAMS FOR POSSIBLE IMPLEMENTATION/EXPANSION IN SHREVEPORT-BOSSIER

Engineering Program Possibilities

Following are preliminary candidates/ideas for programs that Louisiana Tech indicates it would like to consider for expansion or new implementation in Shreveport-Bossier, in Engineering-related areas. All, of course, would require further consultations with LSU-Shreveport and with the community; review of potential present and future demand; assessment of joint faculty resources, etc.

Program	Comments	Duplicate/Expand from Ruston = R + SB Or Unique/New in Shreveport/Bossier = SB
1. Engineering programs, in general, are a target of need and opportunity—none currently offered by LSUS—a few offered now by LA Tech in Shreveport		
BS in General Engineering	Generic BS; could be started fairly quickly, given that LSUS has some qualified faculty who could teach the non-engineering courses	SB
BS in Manufacturing Engineering	Good fit	SB
BS in Systems Engineering (perhaps Cyber or Nano)	Tech has not seen demand for this at graduate level	SB
BS in Electrical Engineering Technology	Good fit. LA Tech already offers this program at Barksdale	R + SB
Office of Minorities in Engineering (not correct name)	Focus on recruitment of minorities into Engineering. Exists in Ruston. Could expand to SB.	R + SB
Engineering Extension and Education Center	• Expansion of current tech transfer activities. More outreach, industry relationships, problem-solving function • Continuing education/professional development for engineers • Logically would be expanded at existing Tech Transfer Center at Shreve Park. May be considered for location at LSUS campus.	SB
PhD in Biomedical Engineering	Alliance with LSUHSC-S is natural advantage. This is also major area of expanding research collaborations. Location?	R + SB
MS in Computer Science	LSUS offers MS in Computer Science Technology; different CIP codes; may be different programs and may be suitable to be combined?	R + SB

Other Program Possibilities

This list is other (non-engineering) programs that Louisiana Tech offers as candidates for expansion or new implementation in Shreveport-Bossier. As with above, all these program ideas would require further consultations, and analysis for demand and resources.

1. Expansion of Master's and Doctoral Programs (other than Engineering) are big opportunity and meets needs. Also, some baccalaureate level programs.		
Applied and Natural Sciences		
BS in Agricultural Business		R + SB
BS in Environmental Science		R + SB
BS in Nutrition and Dietetics		R + SB
BS in Health Informatics and Information Management		R + SB
BS in Family and Child Studies		R + SB
BS in GIS (also in Liberal Arts)		R + SB
MS in Nutrition and Dietetics		R + SB
MS in Biology		R + SB
Masters in Health Informatics		R + SB
Graduate Certificate in Rural Development		R + SB
PhD in Applied Biology	Could be joint program with LSU HSC-S. LSUHSC-S currently offers PhDs in: • Biochemistry & Molecular Biology • Cellular Biology & Anatomy • Microbiology and Immunology • Molecular & Cellular Physiology • Pharmacology & Therapeutics	SB
Business		
BS in Business Management & Entrepreneurship		R + SB
BS in Sustainable Supply Chain Management		R + SB
MBA	Also offered by LSUS currently. LA Tech currently offers EMBA in SB. MBA programs could eventually be centered in SB but always likely at both locations	R + SB
MPA- Accounting		R + SB
Graduate Certificate in Information Assurance		R + SB
Liberal Arts		
BID-Interior Design		R + SB
BFA in Communication Design		R + SB
BS in Professional Aviation		R + SB
BS in Aviation Management		R + SB
MA in English	Check the MA in Liberal Arts at LSUS?? (different CIP)	R + SB
MA in History	Check the MA in Liberal Arts at LSUS?? (different CIP)	R + SB
MFA in Art		R + SB
AuD		R + SB
Graduate Certificate in Technical Writing and Communication		R + SB
Education		
EdD in Educational Leadership	All think there is big demand for this in SB; this has been a big priority of LSUS	R + SB
MA in Organizational Psych		R + SB
MS in Kinesiology	Suggested by LA Tech. Already offered by LSUS.	R + SB
PhD in Counseling Psychology	Considered priority by LSUS	R + SB
PhD in Organizational Psych		R + SB
Graduate Certificate in Dynamics of Domestic and Family Violence		R + SB

Financial Considerations of Consolidation

General Observations

Mergers of universities, both in the US and Europe, often have been seen as a strategic step by which to gain operating efficiencies and cost savings. A corollary assumption has been that enrollments and attendant revenue will be maintained and perhaps will grow as the combined program offerings attract more students.

However, observations on the subject from experience are highly consistent in pointing out that savings did not occur immediately and that, indeed, significant implementation costs were incurred. [20] [21] [22] [23] Knowledgeable observers also point out that merger, by providing new structure and new leadership, can open opportunities to implement strategies that ultimately lead to more productive use of institutional resources. To that, this cautionary note is added:

> *"For those who choose to pursue a merger, all the evidence shows that considerable time and effort is needed for merger planning, execution and then post-merger integration. In any HEI merger, strategic intent, culture, leadership, governance, academic reputation, people and communications will be as crucial as cost synergies, technology and infrastructure support."* [24]

The present study's scope and schedule did not provide for comprehensive analysis and projection of costs that might result, if Louisiana Tech and LSUS are merged. Moreover, it only should be necessary to engage in a detailed cost analysis in connection with creation of a *Consolidation Implementation Plan* and, thus, only if the decision-makers move in the direction of the consolidation solution. However, it is obvious that unique expenses would be incurred in the process of changing what is now LSUS to become the Shreveport campus of Louisiana Tech.

Costs of Consolidation

The following list indicates some that should be anticipated:

- Revising LSUS course syllabi for conversion from semester to quarter system
- Conforming personnel policies related to employment, compensation, evaluation, grievance, etc.
- Personnel compensation resulting from early retirements and severance benefits
- Design, production, printing, and distribution costs for consolidated publications
- Conforming administrative policies and procedures
- Conforming management information and records systems (e.g., accounting, budget, student information, academic transcript, alumni)
- Personnel training to implement the conformed policies, procedures and systems
- Printing letterhead and forms with common format and content
- Re-designing web sites to represent the consolidated institution
- Disseminating information about the consolidated institution to institutional constituents, prospective students, and the general public
- Legal fees

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[20] *Mergers in Higher Education: Knowledge Resource,* Helen Goreham, Leadership Foundation for Higher Education (UK), January 2011.
[21] *College and University Mergers: Recent Trends*, Lesley McBain, American Association of Colleges and Universities, July 2009.
[22] *Non-Profit Management: Merging Wisely*, David La Piana, Stanford Social Innovation Review, Spring 2010.
[23] *In the Eye of the Storm: Moving from Collaboration to Consolidation*, John Berriman and Martin Jacobs, Price Waterhouse Coopers (UK), 2010.
[24] Ibid.

- Conforming student admission standards and application processes
- Transferring LSUS endowments and other proprietary assets to the consolidated institution
- Potential forfeiture expense if vendor contracts in force are terminated early
- Replacing signage and other fixtures to reflect the merged institution's indicia.

Many of the implementation costs suggested by the above list will, of course, comprise both direct and indirect elements. Certainly, to consolidate the two institutions' organizations, programs, services, constituents, and administrative infrastructures will demand dollars and an enormous amount of people time and effort—the latter representing a significant opportunity cost.

Reportedly, prospects for significantly increased legislative appropriations to meet those expenses are slight to non-existent, given the State's present financial circumstances. Unconfirmed, but possible alternative sources of some assistance may be funds available to the State's executive branch to help launch beneficial initiatives, increased tuition revenue, and contributions from interested community organizations.

Savings from Consolidation

The preceding discussion has addressed expenses associated with consolidations. A fair question is: What savings might be anticipated?

Available literature on the subject suggests potential for savings of several kinds. Some examples are:

- Going from two to one governance structure and executive administration
- Economies of scale realized by
  - Combining administrative and support functions
  - Employing common operating policies and procedures
  - Greater purchasing volume
- More efficient use of physical facilities
- More productive assignment of faculty personnel
- Reducing unnecessary course and program duplication.

FOUR MORE SPECIFIC SCENARIOS CONSIDERED

The consultants reviewed two specific examples of collaboration models that offer demonstrations of flourishing instruction and research collaborations

- **IUPUI**. One of these is the shared role that Indiana University and Purdue University play in meeting higher education program needs in the metropolitan center of Indianapolis.
- **Georgia Tech-Emory**. The other is a joint program in Biomedical Engineering developed by Georgia Tech's College of Engineering and Emory University's School of Medicine.

Both of these specific models were commended to EKA for consideration by interviewees. Their possible application to the Shreveport-Bossier situation thus was considered.

In addition, in the course of the many interviews, two more possible solutions, entirely specific to the Shreveport-Bossier situation, were posed to the consultants by Louisiana stakeholders. These were:

- Consolidation of LSUHSC-Shreveport and LSU-Shreveport (the idea studied in 2005)
- A three-way consolidation of LSUHSC-Shreveport, LSU-Shreveport, and Louisiana Tech.

Both of these obviously are variations on the core model of Consolidation that was posed initially as an alternative to consider in this study, for Louisiana Tech and LSU-Shreveport.

As called for by our methodology, we considered these alternative ideas as well, although they were not primary focal points of the analysis, and they were not subjected to the full analysis of *Advantages, Requirements, Disadvantages,* and *Mitigation*.

In this final section of Chapter 6, we provide discussion and comments on all four of the above scenarios.

Coulter Department of Biomedical Engineering at Georgia Tech and Emory University

Enrollment as of Spring 2011

1,174 Undergraduates

158 Graduates

Undergraduate Degree Programs

Bachelor's degree in Biomedical Engineering conferred by Georgia Tech

Graduate Degree Programs

Doctorate conferred by Georgia Tech and Emory University

Doctorate conferred by Peking University, Emory University, and Georgia Tech

MD/PhD conferred by Georgia Tech and Emory University School of Medicine

Total Degrees Awarded

638 BS degrees
159 doctoral degrees

GEORGIA TECH UNIVERSITY AND EMORY UNIVERSITY—BIOMEDICAL ENGINEERING—PROGRAM COLLABORATION

DISCUSSION

The Wallace H. Coulter Department of Biomedical Engineering at Georgia Tech and Emory University was launched with a $25 million grant from the Wallace Coulter Foundation. Its facilities are located on the Georgia Tech campus, with the Faculty being supported and degrees being awarded jointly by Emory and Georgia Tech. http://www.bme.gatech.edu/

The Department is a high-profile example of success, claiming among other achievements a #2 ranking in Biomedical Engineering nationally, three NIH Centers of Excellence in Nanomedicine, and 56 NSF fellows. Organizationally and functionally, it is an example of inter-institutional collaboration that may be useful to similarly situated medical and engineering faculties in expanding joint efforts in this field.

CONCLUSION

This specific model example has been adapted in our *Recommendations* for Shreveport-Bossier.

Indiana University-Purdue University Indianapolis (IUPUI)—Merger, Then Growth

Discussion

Indiana University-Purdue University Indianapolis (IUPUI) is a major research university that enrolls more than 30,000 students and offers degree programs from baccalaureate to doctoral levels in virtually every discipline typically found in large, urban universities.

The history of IUPUI dates to as early as 1891, when Indiana University dispatched a single faculty member from its Bloomington campus to offer a course in Economics in Indianapolis. Over the years, this "extension" activity expanded to include other curricula; permanent facilities were acquired at various locations in the city; and faculty and staff were stationed there.

Purdue University took parallel steps to provide instruction in Indianapolis in engineering and scientific disciplines. In 1969, the two institutions merged their programmatic and physical presence in Indianapolis to form IUPUI, with Indiana University as the managing partner.

The programs/schools that currently comprise IUPUI are shown at right. Most are Indiana University, with Purdue providing the Engineering and Science programs.

IUPUI demonstrates that a major metropolitan center's higher education needs can be met through two universities' joint efforts.

One should, however, be cautious in viewing this example as a model readily transferable to other locales. While IUPUI embodies elements that approximate elements of collaboration, importation, and merger, it must be recognized that Indiana and Purdue each retains a home campus. Each was and is a large, complex institution with statewide constituencies and influence. Each possesses an international brand of great prominence and prestige. Neither is at risk of being disadvantaged or overshadowed by the other, so their relationship can be one of co-existence. Also, both institutions were substantively engaged in Indianapolis long before joining on one campus, with a single administration.

Because it is a unique story of one university's development, with elements of co-location, collaboration, merger, and growth-in-place, the early history of IUPUI (1891 to 1971) is provided for interested readers, as Exhibit 5.2. (It should be noted that Dr. Gray, the historian whose material is provided as Exhibit 5.2, refers to the IUPUI structure as a *merger*.)

Conclusion

Absent circumstances similar to those in Indianapolis, it is difficult to see an IUPUI-like institution emerging in most other places. The consultants concluded that, due to radically different circumstances, the IUPUI model, while fascinating and exceedingly successful, could not be transferred or adapted to suit the Shreveport-Bossier situation.

Indiana University and Purdue University Programs at IUPUI

Indiana University Programs

Art and Design
Business
Dentistry
Education
Health and Rehabilitation Sciences
Informatics
Journalism
Law
Liberal Arts
Library and Information Sciences
Medicine
Music
Nursing
Physical Education and Tourism Management
Public and Environmental Affairs
Social Work

Purdue University Programs

Purdue's schools of Engineering and Technology and Science make up the other components of IUPUI.

CONSOLIDATION OF LSU-SHREVEPORT AND LSU HEALTH SCIENCES CENTER-SHREVEPORT

DISCUSSION

This scenario is a concept advanced, from time to time, by many who use "the Birmingham model" as a point of comparison. It is a concept that EKA studied in depth in 2005 (*Merger Concept Analysis*), at the request of Drs. John McDonald and Vincent Marsala.

In the 2005 study, EKA examined in some detail the potential complementarity of programs, facilities, faculties, policies, etc. and found that there really was little in common among these factors to suggest that consolidation would result in ready synergies. Ultimately, the EKA conclusion then was that this merger might be beneficial, but only if there were significant investments made to actually create new programs not then present that would lead to a larger, stronger, "new" institution.

There are many hypothetically attractive features to the idea of consolidating the two LSU institutions in Shreveport, and it is certainly true that, particularly if there will be other restructuring within the LSU System, this additional restructuring would be politically easier to accomplish than would a consolidation involving two institutions in different systems.

But, today, this scenario must be evaluated in terms of its actual potential for meeting the three sets of expressly described unmet needs that have been defined in this study, and discussed in Chapter 4.

- **Degree Programs**. The degree programs (at all levels) that most currently are considered to be needed and absent in Shreveport-Bossier (for example, in areas of Education, Engineering, Business, Information Technology, etc.)—and the faculty to teach them—do not exist in LSUHSC-Shreveport any more than they do in LSU-Shreveport. It is not clear that the hypothetically consolidated institution automatically would acquire doctoral status for programs other than those in Health Sciences. And, it still would be necessary to acquire faculty for, develop, and submit for approval, many baccalaureate, master's, and doctoral programs, with growth of the former two providing the base for the latter.
- **Underserved Populations**. The delivery system changes that are required to do a better job of serving African-American "majority" and other place-bound students in Shreveport-Bossier are not immediately resolved either by an LSUHSC-Shreveport and LSU-Shreveport consolidation. They need to be developed by other strategies that involve BPCC and SUSLA and potentially Centenary College in this, or in any scenario. (These needs are not automatically addressed by any version of consolidation and, consequently, they are addressed with separate recommendations in Chapter 7.)
- **Intellectual/Innovation Capital**. An LSUHSC-Shreveport and LSU-Shreveport consolidation would not automatically result in growth of research and intellectual capital and innovation capacity. For example, as the programs of these two LSU institutions are not now duplicative, a consolidation would not free up faculty to pursue other innovation activities or research. Adding more faculty with capabilities in research or industry outreach still would be needed.

CONCLUSION

We therefore conclude that, absent significant new resources for new faculty and new program growth, this scenario does not do nearly enough to effectively meet the three specific forms of unmet needs defined in this report, and to which our response must be shaped.

CONSOLIDATION OF LSU-SHREVEPORT, LSU HEALTH SCIENCES CENTER-SHREVEPORT, AND LOUISIANA TECH UNIVERSITY

DISCUSSION

This idea was suggested to EKA once before, during the 2005 *Merger Concept Analysis* (LSU Health Sciences Center-Shreveport and LSU-Shreveport), and thus was mentioned in the report of that study. The same idea has been advanced again now in conversations with some interviewees for the present study.

This scenario is potentially very attractive in its potential to create the capacity by which to satisfy at least two of the three categories of unmet needs in Shreveport-Bossier (degree programs and innovation capacity), in that it might truly result in a much larger institution with comprehensive programs and capabilities, including both Medicine and Engineering. Many baccalaureate, master's, and doctoral level programs perceived to be needs do exist already in Louisiana Tech's program offerings. (As before, underserved populations still require expressly designed delivery strategies.)

Also, there are distinct precedents elsewhere of consolidations in which a freestanding academic health sciences center was merged with a comprehensive university. Two recent examples are:

- The 2006 consolidation of Medical University of Ohio with the University of Toledo
- The just-announced merger in Georgia of Augusta State University and Georgia Health Sciences University.

This scenario also hearkens to the example often cited in Shreveport-Bossier of the University of Alabama at Birmingham, which arose from a 1969 merger of programs of The University of Alabama, Medical College of Alabama, and other programs.

It is immediately obvious that there would be significant political difficulties attendant to advancing this scenario, not the least of which would be the question of in which system would it reside. Absent any formal analysis, an impressionistic answer would be that such an institution should logically reside in the LSU System. But, given current considerations, it is unclear whether there will or will not be an LSU System constituted as it is today, once the LSU System completes its reorganization considerations.

And, quite aside from the thorny structural/political questions, there are many complex substantive issues to be considered. Such analysis was, and is, well beyond the scope of the present study.

CONCLUSION

Therefore, it is our view that this idea, while radical, may have long-term merit, and could be considered; however, it is not within the scope of the present analysis and study being conducted by EKA to develop the analysis and a recommendation on the subject.

7—Conclusions and Recommendations

CONCLUSIONS

CHAPTER 1—INTRODUCTION

This study was co-sponsored by leadership organizations in Shreveport-Bossier and the Louisiana Board of Regents.

EKA and the study sponsors agreed to the important premise that the ***client*** for the study was not any institution or system, but rather the communities that the institutions and systems serve. Broad participation, within the schedule constraints, was sought. They further agreed that there was no agreed-upon conclusion and that EKA's conclusions and recommendations would be derived from the analysis and EKA's experience and judgment.

EKA undertook the study with prior knowledge of Shreveport-Bossier, North Louisiana, and the higher education institutions that serve them. The consultants were determined to:

(1) Make use of data and outcomes from prior studies (those done by EKA and by others)

(2) Take a fresh, comprehensive look at the issues—in the framework of this assignment.

It was essential to focus first on answering the question: ***What are the unmet higher education needs in Shreveport-Bossier for which we are seeking solutions?*** One cannot evaluate alternative solutions, without having a clear statement of what the problem or problems is/are that must be solved. (Chapters 2, 3, and 4 build this analysis regarding unmet needs.)

The analysis was difficult, incorporating both factual/statistical types of data and a large body of qualitative/opinion information from interviews. It is virtually impossible to rely solely on hard data to support conclusions about unmet needs; some judgment and knowledge of how higher education must perform in the *Global Knowledge Economy* are required.

Then, in evaluating alternative solutions for meeting unmet needs, it was necessary to weigh against our broader experience a multiplicity of stakeholder opinions and a degree of uncertainty about predicted versus actual outcomes.

Various *Analysis/Commentary* sections are included in foregoing chapters of this Report. A consolidated summary of *Conclusions* is presented here.

CHAPTER 2—THE SHREVEPORT-BOSSIER MSA

The Shreveport-Bossier MSA (Caddo, Bossier, and DeSoto parishes) is comprised of two cities with very different demographics, plus rural areas. The City of Shreveport now has an African-American majority population, at 54 percent, while Bossier City is about 75 percent white. Income disparities exist, too, between the two cities.

The MSA's population of approximately 400,000 makes it the third largest in Louisiana, representing 8.8 percent of the State's population. From its earlier history to the present, the area has serviced the oil/gas extraction industry and has been a major transportation hub. In the last two decades, considerable effort has been made to pursue "new economy" or "blue ocean" strategies. Progress has been uneven, but real.

EKA has worked for 25 years on strategies for the *nexus* between higher education and economic development, and has done so in many US states and abroad. We can say, based on considerable experience, that, when compared with metropolitan centers elsewhere, community leaders in Shreveport-Bossier were very early adopters of the idea that the MSA's future prosperity and welfare depend very critically on its higher education assets and educational attainment—and innovation capacity. That understanding is why Shreveport-Bossier's leadership has not been content to focus only on *current* workforce needs, but also to consider specific aspirations for creating the future.

CHAPTER 3—HIGHER EDUCATION CONTEXTS

Louisiana

Overall, Louisiana is still not a high performing state in educational attainment. While some advancement was made prior to the onset of the current fiscal crisis, much more remains to be done. As to what kind and how much educational attainment is needed, it appears that not all policymakers have been on the same page—particularly with respect to the value to the State of investments in baccalaureate and graduate education.

EKA reviewed recent commission reports and consultant studies to enable us to place our analyses within Louisiana's overall education context. Not unlike other parts of the Nation, the State is in a time of particularly active change for postsecondary education policy, structure, and funding. This coincides with major initiatives in pre-K to 12 education.

Change is being prompted by the need to use resources more productively, as well as to improve outcomes. The types of changes being implemented and considered—and the aims of achieving better value from investments and better results for citizens—are all to the good; it is necessary that 21st century higher education institutions evolve models that are sustainable, while achieving much higher participation and completion results.

More specifically, the recent transfer of The University of New Orleans and the very significant, current LSU Flagship Agenda were two particularly important context elements for EKA's assignment.

Shreveport-Bossier

Shreveport-Bossier institutions include LSU-Shreveport and Centenary College as baccalaureate institutions, and BPCC, SUSLA, and Northwest Louisiana Technical College offering associate and certificate programs. And, one of the State's two public, LSU Health Sciences Centers is in Shreveport.

More broadly, the I-20 / I-49 corridor is served by several UL System institutions, in addition to the LSU System institutions domiciled in Shreveport. UL System institutions have program presence in Shreveport, including NSU's Nursing programs, UL-M's Pharmacy (clinical) programs, and several Louisiana Tech programs. There also is activity from national/online and out-of-state providers.

In North Louisiana, collaboration and articulation relationships have been relatively strong. They include creation of CERT; many inter-institutional articulation agreements; and many attempts (not all successful) to mount joint programs. Those relationships notwithstanding, there also has been strong competition for Shreveport enrollments. This has been reinforced by the position argued by some, that if programs exist anywhere in the North Louisiana region, their availability for citizens of Shreveport-Bossier is adequate—a position with which we agree only partly.

EKA sought to understand the history of LSU-Shreveport in terms of what might have developed there, but did not. **Our purpose in studying the past, especially the last decade or so, was not to assign blame but, rather, to consider change that is needed now, in order for the University to be capable of meeting Shreveport-Bossier's needs in the future.**

It seems that this institution did not thrive for a number of convergent reasons, including:

- Deterioration in communications and differing perceptions among LSU-Shreveport, the LSU System and the BoR staff on matters related to the LSU-Shreveport's Role/Scope/Mission and to consideration of proposed programs
- Significant capacity in local two-year institutions and, thus, strong competition for first-time freshmen
- Enrollment limited to a commuter student population

- Self-inflicted wounds, including missed opportunities for program development/updating/advocacy; relatively weak branding/marketing; and insufficient attention to program delivery suited to adult and African-American student populations
- Strong competition from UL System institutions in the region, all with broader Roles/Scopes/ Missions.

CHAPTER 4—UNMET HIGHER EDUCATION NEEDS IN SHREVEPORT-BOSSIER

Both hard data and less formal observations show that the MSA is well-served and performing relatively well in degree attainment at the two year community and technical college levels—being served by BPCC, SUSLA, and the Shreveport campus of Northwest Louisiana Technical College.

But, based on data, extensive interviews, and application of judgments, EKA finds that there are three different ways in which the Shreveport-Bossier metro area remains underserved.

Program Deficiencies

The array of programs delivered in Shreveport-Bossier, sufficient at the two-year level, is inadequate at baccalaureate and graduate levels for this MSA, given its size, industry base, and economic development strategies for the future. Opinions vary about program priorities, but needs primarily fall in the areas of Engineering, Education, Business (specializations), Information Technologies (specializations), Health Professions, and graduate programs aimed at industry growth targets—energy (gas); digital media/film; hospitality; entrepreneurship; and advanced manufacturing.

Underserved Populations

An earlier study showed that many Bossier, Caddo, and DeSoto parish 18 year olds attend institutions elsewhere in the region and State. But, this fact is irrelevant to the needs of would-be students who cannot leave the metro area for access to higher education opportunities.

Place-bound students include working adults, adults with family responsibilities, and young people whose family or economic circumstances do not permit going away to college. They are of all races. Some are employed, but need more education to advance their careers. Others need a college degree in order to enter a chosen career field. Still others look for personal or professional fulfillment that comes with further studies. Expanding locally-delivered baccalaureate and graduate education is an essential step for increasing participation of these populations.

Intellectual Capital and Innovation Capacity

The most difficult type of unmet need to describe is that of growing the human/intellectual capital that constitutes ***innovation capacity***—a *sine qua non* for the *Global Knowledge Economy*. This category includes the pool of individual talents, scholarly resources, pragmatic know-how, entrepreneurial skills, and systematic outreach that higher education institutions can contribute in meeting the need for cultivating local entrepreneurs in new businesses and attracting business investment from elsewhere.

A necessary part of meeting that need is growth of selected research programs, but that is not all. It also includes having "lots of smart people" present and providing incentives for their engagement directly with business/industry in pragmatic collaborations for solving problems and for generating innovation—not all of which is derived from research.

Innovation capacity is the single most critical characteristic for future economic growth in the US overall and in regions and states. Faculty members in local institutions, who are rooted in the community and who develop and apply advanced knowledge, are core resources for expanding innovation capacity. Their impact is expanded further when they engage students in the kinds of problem-focused, experience-based learning that inculcates innovation skills.

In sum, meeting the need for greater intellectual capital and innovation capacity depends in part on growth in three dimensions:

- Research specifically—especially research that is prioritized to match economic strategies
- A university's comprehensive resources and capacity explicitly deployed to support economic development—with appropriate rewards and incentives for faculty who do so
- Recognition within and beyond the university of higher education's critical roles in advancing problem-focused innovation.

CHAPTER 5—OVERVIEW OF MODELS/ALTERNATIVES

A review of literature, national models, and examples suggested four basic approaches to expanding local higher education assets:

- **Growth in Place**. Historically, this is the prevalent way in which higher education institutions have grown—even if that growth took many decades. Contemporarily, the need to accelerate change and growth is making the grow-in-place model a less viable strategy for responding to demands and opportunities that come to an institution.
- **Partnerships—Program Collaboration**. In this model, two or more institutions actively engage in development and co-delivery of an academic degree program and/or research initiative. This model works best in circumstances in which the partners have complementary, but distinctly different, strengths. Motivation is required, since the obstacles are often difficult to surmount.
- **Partnerships—Program Importation**. Essentially, program importation involves a non-domiciled institution bringing a program to a host locale. This may occur on the campus of a domiciled institution. In other cases, a special-purpose facility, usually called a *university center,* is established apart from any existing campus. University center models often host degree programs from many different universities, one example being in Rapides Parish. This model has been proposed at times as a suitable way to meet needs in Shreveport-Bossier. At present, some engineering needs are met by importation from Louisiana Tech.
- **Consolidation**. Unlike in the private sector, mergers have been relatively infrequent in higher education; however, interest in the model has grown recently in several states. It is likely that financial and market demand factors will continue to prompt consideration of institutional consolidations. Often, consolidation is the response to institutional financial distress; in other cases, it is done to merge strengths or achieve scale.

CHAPTER 6—EVALUATION OF THE ALTERNATIVES FOR SHREVEPORT-BOSSIER

This report contains analyses of the above four alternative models in terms of their applicability to the situation in Shreveport-Bossier. At the end of Chapter 6, four additional scenarios of interest are reviewed (in lesser detail), because they were suggested by interviewees.

Structure of the Analysis

The structure for evaluation of the four principal models addresses **Advantages/** ***Requirements*** and ***Disadvantages / Mitigation*** of each model, i.e.:

- What are the potential *Advantages,* and what are the *Requirements* to make the *Advantages* real?
- What are the *Disadvantages*, and what *Mitigation* could be applied to minimize or eliminate those *Disadvantages*?

No Bulletproof Answer

The consultants found that no one of the alternatives considered can assure that all three categories of unmet needs in Shreveport-Bossier would be met. This is due to the diverse nature of the three unmet needs—variously centered on programs, people, and innovation capacity.

Further, all the possible strategies offer potential *Advantages,* but also distinct *Disadvantages* (or "risks"). The overriding criterion by which we evaluated each alternative was its potential to bring more, not fewer academic programs; more, not fewer, opportunities for underserved populations; and greater, not lesser, innovation capacity to Shreveport-Bossier.

EKA's evaluation of the alternative models led to the following conclusions.

Grow LSU-Shreveport—System Change

Recent, current, and potential changes in Louisiana's higher education structure were taken seriously into account, especially possible outcomes related to the goal of increasing concentration on research capacity and developing a more globally competitive flagship university/system—along with the LSU System's recent indications that it plans to continue studying possible reorganization and collaborations. Those potential changes—with outcomes unknown—and their implications led to a conclusion that a greater university presence in Shreveport-Bossier is likelier to be realized if the effort to "Grow LSU-Shreveport" is carried out in the UL System. The following considerations underlie that conclusion.

Better Fit by System Mission and Characteristics

LSU-Shreveport, over its history, has not thrived. That is not to say that the LSU System has, by design, discouraged the institution's growth and development. To the contrary, we are aware of at least some of the specific initiatives that the LSU System has undertaken to try to help LSU-Shreveport advance. There are undoubtedly many more. But, making no judgments, one observes that the LSU System's greater focus has been on its constituent institutions that have statewide (and national and global) missions and that are engaged intensively in research, and extensively in advanced graduate and professional education.

One cannot argue with the validity of that focus and a case can be made that an LSU System comprised of only land-grant, research-oriented, and nationally competitive university elements would be sensible. If a direction of this nature is followed, then a campus like LSU-Shreveport is not central to that mission and may even be a distraction. Most institutions in the UL System, on the other hand, are regional universities that, like LSU-Shreveport, are so designated by the BoR. It is, in short, reasonable to consider that the UL System would be a better fit for a small regional university that needs to achieve basic growth of programs and enrollments.

Different Views About Unmet Needs

The LSU System recently defined the Shreveport-Bossier region as comprising eight Northwest Louisiana parishes. Based on data related to the region's enrollment patterns, academic programs offered, and major employers, the System tentatively concluded that these data *"seem to indicate the region's public and private universities are substantially meeting the current educational needs of its students."*[25]

System executives also have expressed the judgment that unmet needs in Shreveport-Bossier, as perceived by community leaders there, are *"exaggerated."*[26]

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[25] *Preliminary Report of the LSU System Work Group on Organization and Collaboration: First Report on Maximizing Teaching, Research, and Outreach at LSU in Shreveport for the Shreveport-Bossier Region*, LSU System, November 2011

[26] Notes of Interview with LSU System Office Executive Staff, November 17, 2011.

EKA respectfully dissents from these conclusions. Our conclusions are elaborated in Chapter 4 of this report. EKA has posited that, while the entire region is relevant, there are, nonetheless, certain needs present in the metro area that are not adequately served by the presence of a program elsewhere in the eight-parish region. Some of these localized needs are generated by industry differences, and some by demographic differences.

Also, we are inclined to accord great importance to the community's desire to enhance its *innovation capacity*, in connection with several of the specific economic development strategies and industry targets described in Chapter 2. Based on EKA's work in this arena all over the US and internationally, EKA does not find this community's aspirations to be overstated.

Whether further consideration by the LSU System leadership might alter conclusions is unknown. However, these recent statements bring into question whether the LSU System agrees that there are unmet needs in Shreveport-Bossier. It would be difficult to conclude that, absent that belief, the aggressive and committed system-level leadership for meeting what we conclude are unmet needs in Shreveport-Bossier would be forthcoming.

Flagship Agenda and Possible Future Reorganization

The flagship agenda that is presently being pursued by LSU supporters is aimed at advancing LSU A&M in the ranks of peer state research universities nationwide.

As described to EKA, the focus is on the LSU System's health sciences, law, and agriculture institutions becoming part of LSUS A&M to form "One LSU." Reportedly, in some versions of the outcome, LSU-Shreveport and LSU-Alexandria (LSU-A) would be transferred to the UL System and LSU-Eunice (LSU-E) to the LCTC System. Alternatively, LSU-Shreveport, LSU-A, and LSU-E might become branch campuses of the unified "one LSU."

In addition, the LSU System indicates it will continue to study reorganization and collaboration. Whatever specific, proposed realignments might result, it seems certain that the basic tenets and objectives of the flagship agenda would influence strongly the System's future organization. It seems unlikely that LSU-Shreveport's future growth could figure prominently, if at all, in a future, proposed system reorganization.

Partnership Models Do Not Provide Comprehensive Solutions

Program Collaboration

This model can be the means by which to employ resources of multiple institutions in bringing more baccalaureate and graduate degree programs to Shreveport-Bossier. It is, however, a supplemental rather than a primary strategy for achieving that end. Formation of such partnerships depends upon mutual incentive, complementary assets, and willingness on the part of two (or more) institutions. Typically, such partnerships are discipline-specific and program-specific. Their on-going success and permanence depends upon commitment and cooperation among individual faculty members. While these conditions may be brought together for a particular program, collaboration does not offer a systematic, comprehensive approach to meeting program needs across a broad span of disciplines and over long time horizons.

Other types of program collaborations definitely are part of the solution set for Shreveport-Bossier. Two key examples are more extensive collaborations between the two-year and four-year institutions and creating avenues by which SUSLA can help increase baccalaureate participation of the metro area's black students.

Program Importation

Using this approach, an academic program can be put in place quickly, when a need for it is clearly established and terminated quickly if/when the need has been met. However, this model has two major shortcomings. First, a supplier's willingness to bring a program is predicated upon present demand and economic incentive. Consequently, importation is unlikely to provide programs that require time for relationships to develop with area high schools, community colleges, and employers and to generate sustaining enrollments.

Also, the necessary economic incentive usually means higher cost to students than would apply to resident institution programs.

Third, the talent that delivers an imported/exported program does not become embedded in the local area and, so, does not add to the intellectual capital that is present there to support innovation and economic development.

Although flawed as a primary strategy, program importation could be useful in responding to time-limited program needs or to provide a program on an interim basis while the local university develops its own. There also may be discrete program areas for which this specific solution makes sense as a long-term or permanent solution—added to a primary solution.

Narrowing the Options

The central choice, thus, came down to two alternatives:

Grow LSUS (but in the UL System)

Of the alternatives considered, growing LSU-Shreveport clearly would be least disruptive. The impact on the personnel, operating systems, and program array presently in place there would be minimized, certainly compared with a consolidation solution.

The controversy likeliest to arise from adopting this alternative would be associated with transferring LSUS to the UL System. For reasons earlier cited, EKA considers that transfer to be an essential step in moving past some constraints in LSUS's past and countering uncertainties about its future. Nevertheless, resistance to the transfer can be expected, and political consensus for it would have to be built.

The main drawback of this model, however, is that it offers, at best, a protracted approach to overcoming unmet needs in Shreveport-Bossier. Years must be spent building and demonstrating the institutional capacity and performance that are pre-requisites to gaining a broader Role/Scope/Mission—and, hence a broadened graduate program array. So, while pursuing this strategy might produce less disruption and controversy, it also is likely to produce incremental change, and that slowly.

In addition, transfer to the UL System would require an institutional name change—which itself is a complex matter that causes stress and controversy.

Consolidate LSU-Shreveport with Louisiana Tech

The foremost appeal of this model is that the combined institution would immediately operate with larger scale; with the broader program capacities and authorizations of Louisiana Tech; and under the existing Role/Scope/Mission presently assigned to Louisiana Tech, thereby removing constraints on program expansion imposed by LSU-Shreveport's present Role/Scope/Mission or its smaller scale.

Properly planned and implemented, consolidating the two institutions would give Louisiana Tech an urban campus and would give Shreveport-Bossier an institution classified by the BoR as a *statewide university* with baccalaureate, master's and doctoral degree authorizations permitted by that classification. What and when specific programs could be brought to Shreveport-Bossier would be determined by implementation logistics, further needs assessment,

and resource considerations. But, indications are that several high priority ones, including Engineering, would be early candidates.

Consolidation, like the other alternatives, is not without risk. Both institutions and their communities will need to have reasons to believe that their interests will not be compromised or subordinated in the process and outcome. Implementing this consolidation may be more disruptive, more work, and a greater political challenge.

Finally, while consolidating LSU-Shreveport and Louisiana Tech is a better and quicker strategy by which to establish a bigger, stronger university presence in Shreveport-Bossier, program collaboration and perhaps program importation may be useful, complementary strategies to address some specific unmet needs.

System Question for a Consolidation

In evaluating the advantages and disadvantages of a possible consolidation, the consultants also considered the question: *In which system would the consolidated institution be best placed?*

Initially, in the larger context of other changes that have been discussed in the State, EKA considered the possibility that an overall organizational design (by others) might emerge in which one higher education system (LSU) would comprise the State's research institutions and another (UL) would be made up of those classified by the BoR as mostly regional and some *statewide* universities.[27]

In such a hypothetical scenario for LSU and UL, a consolidated, enlarged Louisiana Tech would seem to fit most logically in the LSU System. Also, some informal inputs at the time suggested possible openness on the part of both Louisiana Tech and LSU to considering such transfer, no doubt inspired, at least in part, by the appeal and logic of revamping LSU as a "flagship and research university system."

Later, EKA became aware that there are some versions of possible reorganization under discussion in which LSU no longer would be a *system of institutions* but, rather, a *single institution*—"One LSU." In that version of the future, were it to come about, there would be no place for Louisiana Tech.

Other views expressed in the course of numerous interviews conducted for this study suggested that consolidating Louisiana Tech and LSU-Shreveport in the LSU System would not be a practicable or desirable course to pursue—as we originally had thought it would. We began to consider that the system question could have another answer.

Main points from the collective information and opinions are these: For Louisiana Tech, advantages of the consolidation could be offset by disadvantages of being a smaller research institution in a system of much larger ones. And, it became apparent that Louisiana Tech would face significant unknowns, if it were to move into the LSU System at a time when there is considerable uncertainty and possibly controversy about that System's future organization. Then, assuming consolidation, moving an enlarged Louisiana Tech from the UL System to the LSU System would add another layer of complexities and stress to an already inherently stressful situation. Finally, and significantly, the LSU System expressed to EKA its lack of interest in acquiring Louisiana Tech.

As a result of these several considerations, EKA concluded that, in the event that a consolidation occurs, the newly-formed institution would be better positioned to serve Shreveport-Bossier and all of North Louisiana if it were to reside in Louisiana Tech's current home, the UL System.

[27] For the specific purpose of this discussion, we are omitting comment on the other two systems—Southern and LCTCS.

Four Additional Scenarios of Interest

In addition to the above four models, four more scenarios were considered.

Of these, two were specific examples that had been mentioned by interviewees:

- The Biomedical Engineering alliance of Georgia Tech and Emory University (Program Collaboration)
- The unique merger and growth model of Indiana University-Purdue University in Indianapolis (IUPUI).

Finally, there were two additional specific scenarios that were not part of EKA's study scope, but which also were mentioned to the consultants by interviewees and were considered:

- Consolidation of LSU-Shreveport and LSUHSC-Shreveport
- Consolidation of LSU-Shreveport, LSUHSC-Shreveport, and Louisiana Tech University.

All four are discussed at the end of Chapter 6. Conclusions are summarized as follows:

- The **Georgia Tech-Emory University Department of Bioengineering** does represent a model of interest, specifically for inter-institutional collaborations in bioengineering. A recommendation further on in Chapter 7 describes an adaptation of this model.
- **IUPUI**, while an interesting example of a highly successful merger, arose from circumstances so unique that the model does not seem to be transferrable to the situation in Shreveport-Bossier.
- **Consolidating LSU-Shreveport and LSUHSC-Shreveport**, while perhaps easier to accomplish because the two institutions are in the same system, does not adequately address the three categories of unmet needs defined as the problems to be solved. Consolidating these two institutions does not automatically confer any broadening of the scope of programs beyond those presently authorized for LSU-Shreveport and for LSUHSC-Shreveport. Additional programs—for example graduate programs in Business or Education—still would require approvals and development, and resources with which to develop them.
- **Consolidating LSU-Shreveport, LSUHSC-Shreveport, and Louisiana Tech**—also not a new idea—is attractive in concept for its potential to create a much larger institution with comprehensive programs in Northwest Louisiana. The politics of such a change are challenging, with the system home being a key factor. Our impression, absent a study, is that an institution created by such three-way reorganization might fit best in the LSU system. But LSU's future organizational structure and emphasis make that premise uncertain. EKA concluded that, while this three-institution consolidation is an intriguing idea, and may merit study, it was well beyond the scope of this study to competently develop an opinion on this scenario.

RECOMMENDATIONS

Having weighed carefully the many complex considerations involved in the above two main choices, as well as corollary issues, the consultants make the following five recommendations, each with sub-parts.

MEETING CORE PROGRAM EXPANSION NEEDS

Recommendation #1: Consolidation

Consolidate LSU in Shreveport and Louisiana Tech University as a single, enlarged "new" Louisiana Tech in the UL System—a single university with a Ruston Campus and a Shreveport Campus

Discussion: The combined single institution would continue to be a Regents-designated *statewide university,* operating in two campuses of equal importance—rather than "main campus" in Ruston and "branch" campus in Shreveport. Its Role/Scope/Mission would be that presently assigned to Louisiana Tech. Some programs already taught at the **Ruston Campus** would be offered or expanded at the **Shreveport Campus**. Some new programs would be established for delivery at the **Shreveport Campus**. Students completing requirements would receive Louisiana Tech University diplomas—irrespective of which campus—Ruston or Shreveport—they attended.

#1A: *Consolidation Implementation Plan*

Require, develop, and approve a detailed *Consolidation Implementation Plan* prior to undertaking any of the formal transfer and consolidation measures

Discussion: In addition to addressing the many organizational, administrative, policy and procedural elements involved in the consolidation, this *Plan* should include a specific list of degree programs for early implementation. Possibilities identified earlier in this Report provide a starting point for determining programs and priorities that should, after further study, appear in a planned program strategy.

The *Plan* also should indicate leadership and "presence" requirements, e.g. a Shreveport campus executive, part-time presence in Shreveport of the Dean of Engineering; and, over time, expansion of resident faculty at the **Shreveport Campus**. It should include plans for future uses of Tech's Barksdale and Shreve Park locations.

The *Consolidation Implementation Plan* also must spell out application and phase-in of various matters that have critical and immediate impact on students. Examples include calendar, tuition, admission requirements, financial aid, and academic performance standards. It should establish enrollment growth targets for both Ruston and Shreveport. Joint and specialized marketing and recruitment programs would be required.

The *Plan* must include defined progress/success metrics, as a means of facilitating continuity of commitments, and it should require semi-annual reporting to the System, Regents and the communities for a period of a few years, or until the consolidation is essentially completed. Finally, the *Plan* must include cost estimates for carrying out one-time, consolidation implementation activities. This should be organized into those that reasonably can be borne within existing budgets versus those that are not reasonable to fund from existing resources. And the *Plan* should propose a funding strategy, from existing and new resources, for meeting those expenses. (See Recommendation #1.D)

#1B: Special, Interim Governance/Management

Establish a special governance structure to provide oversight for a period of 3 to 5 years, beginning with creation of the *Consolidation Implementation Plan* and continuing through the period of most critical implementation activities, and with the Board of Regents playing a special supporting role

Discussion: Even with a well-crafted *Consolidation Implementation Plan* (developed, for example, during a one-year period of thoughtful work, and with stakeholder participation), many expectations, promises, and unforeseen challenges will become issues in the course of implementing the proposed consolidation. These warrant, we believe, the attention of a special, *ad hoc Consolidation Committee* of the UL System board. A sub-set of that board would make up the *Committee* membership with the addition of a senior member of the Regents staff, serving in an *ex officio*, non-voting capacity. This *Committee* would provide oversight to ensure that the *Consolidation Implementation Plan* and actions to carry it out satisfy commitments made by the System Board, the Regents, the Legislature, and the Governor upon endorsing the consolidation, their intentions for its outcomes, and provisions of the legislation that enacted it. The Regents' staff representative would serve as liaison between the two Boards and facilitate coordination of policy matters requiring their sequential or joint, and prompt, attention.

#1C: Critical Leadership Continuity in the Early Years

Negotiate agreements with Drs. Daniel Reneau and Vincent Marsala to defer their retirements until after the early period of consolidation activities, to ensure their essential leadership in the most difficult transition years

Discussion: Dr. Reneau's leadership as CEO of the combined single institution would be essential for at least the first two years of planning and implementing the consolidation. His presence will serve to provide continuity between parties, events, and commitments leading up to the consolidation and implementation activities that follow. His administrative leadership will be needed in orchestrating the enormously complex tasks that will come with combining the two universities. Dr. Marsala's leadership and involvement likewise will be of critical importance in the planning and implementation phases of the consolidation. His continuous leadership for at least a one-year period is needed to work with Dr. Reneau in development of the *Consolidation Implementation Plan.* Thereafter, he might very valuably serve in a Special Advisor capacity for another year, when consolidation activities are underway.

It is a special circumstance that the long-tenure leaders of both institutions are planning retirements soon. But, the respect in which they are held in both Ruston and Shreveport-Bossier is needed, to help assure that the interests of both communities are recognized and addressed. It would be far less than ideal to undergo a change of this magnitude with entirely new leadership in place.

#1D: One-Time Special/Transition Funding.

Seek designated funding in an amount sufficient to cover non-recurring expenses associated with implementing the consolidation that are not reasonable to cover by reallocations within existing resources, with the amount to be determined in preparation of the *Consolidation Implementation Plan*

Discussion: The consultants were advised that new funding by the State likely would not be forthcoming to support any outcome of this study. That admonition notwithstanding, it is an inescapable fact that expenses will be incurred if consolidation of the two universities is undertaken. Hence, a non-recurring legislative appropriation or an allocation by the Governor of funds for this purpose is strongly recommended. It also is possible that private sector funds could be attracted on some matching basis in order to leverage the total support provided.

The consultant team is fully confident in concluding that significant expenses are incurred in merging two institutions (as discussed in Chapter 6.) It is more complex and more costly to merge senior institutions than two-year institutions. And, there are real complexities and costs added by the change from one system to another. However, the scope of the present study does not accommodate the research and analysis that would be needed to define and defend a *Consolidation Budget.* Therefore, a multi-year *Consolidation Budget* must be developed as part of the *Consolidation Implementation Plan* (above.) Some expenses may be incurred in developing the *Plan* itself.

Recommendation #2: Alternative to Recommendation #1—Transfer of LSU-Shreveport to the UL System (Without Consolidation)

In the event that Recommendation #1 is not supported locally and by the Regents, or that it is not enacted by the Louisiana Legislature and Governor, then transfer LSU in Shreveport from the LSU System to the UL System and seek a "fresh start" in growing the institution

Discussion: Although initial assumptions in this study were that the option of growing LSU-Shreveport where it is, within the LSU System, would be the most obvious, most straightforward, least disruptive, and, therefore, preferred solution, the collective body of data and dialogue acquired in the course of this study eventually led to an alternative conclusion—that being, that consolidation with Louisiana Tech would be the best way to achieve solutions for unmet needs.

However, if consolidation does not occur, past history, and present directions we understand are being pursued and evaluated for LSU's future, lead the consultants to recommend—as the alternative—transferring LSU-Shreveport, as a stand-alone institution, to the UL System. We view this as a better fit for LSU-Shreveport because most of the constituent institutions in the UL System are regional comprehensive universities. Second, as system-to-system collaborations have been difficult to achieve in the past, such a change also might facilitate intra-UL System program collaborations and importation, where those approaches make sense. This is a plausible expectation, since all the other statewide and comprehensive universities in the I-20 Corridor are UL System institutions. Ostensibly, the UL System as a whole might be better positioned to be attentive to meeting the postsecondary education needs (other than Health Sciences) in the largest metro area of the I-20 Corridor, because UL already has very significant program responsibilities in this Corridor. Finally, as Shreveport-Bossier's needs ultimately require an institution with enlarged Role/Scope/Mission, being in the UL System would not preclude LSU-Shreveport from growing into some doctoral programs and becoming classified as a *statewide* institution.

#2A: Name Change

Adopt a suitable, new name for LSU-Shreveport that is consistent with its transfer to the UL System

Discussion: It is self-evident that a new name would be required. What that name should be requires fuller consideration, but possibilities include "University of Shreveport-Bossier" or "University of Louisiana at Shreveport/Bossier."

#2B: Comprehensive Program Review and Updates

Set aside past disagreements about doctoral program aspirations and past program and Role/Scope/Mission proposals, to establish a "fresh start" that enables a productive focus on (1) meeting Shreveport-Bossier's program needs and (2) growing enrollments. The majority of the programs that would accomplish these ends are at baccalaureate and master's levels.

Discussion: The best way to create such a "fresh start" is to perform a comprehensive review of LSU-Shreveport's current baccalaureate and master's level programs. This can build on EKA's 2009 study, with the aim being to refresh degree programs and concentrations as extensively as that is found to be needed. The basis for this program review, again building on the 2009 work, would be a combination of (1) the history of enrollments and degrees granted in existing programs, (2) a fresh look at program priorities suggested by the economic development strategies, and (3) connecting inter-disciplinary relationships. Program lists in this Report present various possibilities, including LSU-Shreveport's recent suggestions; these should not be viewed as definitive or exhaustive lists, but provide a starting point.)

The results would be a combination of:

- Programs kept as they are
- Programs with content and titles revised and updated
- Programs with additional or different concentrations
- Programs re-structured on an inter-disciplinary basis
- Programs terminated or terminated and replaced
- New programs
- Overall, a much larger and more compelling set of baccalaureate options, with very clear articulation paths from BPCC and SUSLA programs where applicable
- A much larger array of master's programs, with a significant number based on the concepts of "the professional science master's" (PSM) and the "professional master of arts" (PMA) degrees.

#2C: Additional Program Strategies

Employ program collaboration and importation solutions to meet needs that cannot be met by LSU-Shreveport's current Role/Scope/Mission or program capacities

Discussion: As Role/Scope/Mission limitations would not be solved by transferring LSU-Shreveport to the UL System, under Recommendation #2, other means by which to bring limited, applied doctoral level education to the metro area still would be necessary. First priority would be to respond to the parish school systems' needs for educational leadership and applied counseling/psychology doctoral programs in the City. A baccalaureate program in Engineering would be an additional high priority.

#2D: Supportive Role of the Board of Regents

In this scenario, engage the Board of Regents in a collective commitment to this "fresh start," so that the Regents can help the UL System and institutional leadership accelerate the growth, particularly in expediting review and approval of program proposals

Discussion: For example, if/as the above major program review is undertaken and numerous proposals to establish and reorganize programs result from the review, it would be extremely helpful if the Regents could review and act on the entire program reorganization at one time, or act on batches of related or similar program changes at one time, rather than requiring discrete proposals to go through the process one at a time.

MEETING INTELLECTUAL CAPITAL, RESEARCH, AND INNOVATION NEEDS

Growth of *Intellectual Capital* can come about if LSU-Shreveport becomes the Shreveport-Bossier campus of Louisiana Tech. If the two institutions are not consolidated, some growth can occur as the result of updating LSU-Shreveport's existing program array and adding new ones in ways that lead to strong program/enrollment growth and, thereby, faculty growth. Still more growth of *innovation capacity* would be based on growth of the research, innovation, and outreach capacities of all three institutions, especially Louisiana Tech and LSUHSC-Shreveport, but also LSU-Shreveport.

Recommendation #3: Priority Accorded to Research / Innovation Capacity and Enhanced Institutional/Community Collaborations

Aggressively accelerate planning and actions to bring about growth in strategically selected areas of research and innovation support, matching the combined strengths of Louisiana Tech and LSU Health Sciences Center in Shreveport to the MSA/regional economic development industry targets

Discussion: This recommendation, with its two sub-recommendations, is aimed at responding to the third, critical unmet need—*Innovation Capacity*. Recommendation #3 and its sub-recommendations are largely independent of whether *Recommendation #1—Consolidation* or *Recommendation #2—Transfer of LSU-Shreveport to the UL System* is adopted.

#3A: Collaborative Biomedical Engineering Program

Ask Louisiana Tech and LSUHSC-Shreveport to undertake immediately joint development of a *Strategic Business Plan (SBP) for a Biomedical Engineering Department or Institute*, adapting applicable elements of the Georgia Tech-Emory University model

Discussion: Using the Georgia model as a platform of ideas, this *Plan* should articulate a large, long-term vision and the scale of what eventually is desired, even if it is a big "reach." The *Plan* should include specific niches for focus in Biomedical Engineering; plans for current and future faculty; and plans for how policy and operational matters will be accommodated. It also should include specific early implementation actions; funding and resource requirements for the first three to five years; and initial ideas for how resources will be acquired and generated—with a significant focus on sponsored grants and contracts. It would be reasonable to consider an aggressive plan for raising donor funds at the level of a naming gift—a feature of the Georgia program.

Once the new *Plan* for the Biomedical Engineering (initiative/institute/department) is created, the institutions and their community partners should immediately begin fundraising for early stages of program implementation, including joint grant submissions. More aggressive marketing of the MD/PhD program may be useful. Interim facilities where Tech's engineers and LSUHSC-Shreveport faculty can work together are needed at LSUHSC's campus or in the Biomedical Research Institute building. A new Bioengineering facility might be considered for inclusion in the longer-range ***Plan***.

#3B: Regional Strategic Research / Innovation Agenda

Undertake collaborative development of a *Regional Agenda (Plan) for Strategic Research and Innovation* that directly connects university research growth to economic development strategies

Discussion: The *Agenda* would consist simply of a few areas of strategic priority for research and innovation capacity growth that are closely aligned to current and planned industry segments—and a few tactics for how to develop these capabilities. The idea would be to clearly define a limited set of areas of technology that constitute regional priorities—confirm those already known and perhaps adding a few others

We envision that Louisiana Tech, LSUHSC-Shreveport, and LSU-Shreveport (if stand-alone) would collaborate with each other and with industry and economic development representatives. CERT, too, can play a role as convener and can contribute to workforce development strategies.

This recommendation is not intended to supplant internal institutional planning processes. Rather, it is aimed at creating a regional focus on priorities in ways that align the institutions, industry, and economic development leaders more closely.

#3C: Business/Industry Outreach and Problem-Solving

Create the Louisiana Tech Engineering Education and Extension Center, in Shreveport

Discussion: Borrowing and adapting elements of land grant university extension programs, this initiative would be a component of the ***Strategic Research and Innovation Agenda*** described above. The Center's mission would be to actively seek out business and industry partners and engage with them in problem-solving and innovation (not necessarily solely based on research). Logically, the home base for this Center would be the Louisiana Tech **Shreveport Campus**.

This very good idea was put forward by Louisiana Tech during the course of this study. It has great promise for being an important part of expanding *Intellectual Capital / Innovation Capacity*—currently found to be an unmet need in Shreveport-Bossier. A focused extension function would benefit Ruston, and the larger region as well. This idea is somewhat independent of whether *Recommendation #1* or *Recommendation #2* is adopted for meeting other unmet needs—but Louisiana Tech likely would be more motivated to create this Center in Shreveport, in the option of *Recommendation #1—Consolidation*.

MEETING NEEDS OF UNDERSERVED POPULATIONS AND IMPROVING EDUCATIONAL ATTAINMENT

More degree programs are only part of the solution for this need. Collaboration and outreach solutions should be employed to meet needs of underserved populations in the metro area.

Recommendation #4: Improved Delivery to Underserved Populations and Higher Baccalaureate Completion Rates

Evaluate all service delivery options and techniques typically used in large, successful urban universities and take concrete steps to further encourage and facilitate the two-year to four-year transition and completion for more learners

Discussion: Recommendation #4 is independent of whether *Recommendation #1—Consolidation* or *Recommendation #2—Transfer of LSU-Shreveport to the UL System* occurs. To avoid overcomplicating this text, we are referring to the *Shreveport Campus* to denote the LSU-Shreveport campus location—whether merged with Louisiana Tech, or not.

#4A: Adult/Place-Bound Baccalaureate Completions

To increase associate to baccalaureate transfers and make better use of campus facilities, begin delivering some BPCC and SUSLA programs directly at the Shreveport Campus and sharing advisory/support services—taking advantage of the Louisiana Transfer Degree Program and Guarantee

Discussion: As BPCC is nearing capacity utilization of its existing facilities and SUSLA, too, may have facility needs, this strategy can serve both to encourage four-year completion among currently underserved student populations and also make more efficient use of LSUS campus facilities, at least until upper division and graduate programs grow to require the now available space.

#4B: African-American Participation and Degree Completions

Engage SUSLA's active assistance and participation in redesigning and re-staffing support services at the Shreveport Campus for the black student population in ways that will help more of the black student population feel comfortable in moving to and through baccalaureate and graduate education in Shreveport

Discussion: The entire array of policies and procedures through which students must pass to transfer from SUSLA to LSUS should be critically evaluated, applying the criterion of "user friendliness" from the perspective of this student population, and revised as necessary. In addition, staff that conduct transition functions should be representative of appropriate diversity and coached in sensitivity that would help these students feel comfortable and welcome at the Shreveport Campus. Extending this diversity and sensitivity to the classroom would be desirable, and might be facilitated if SUSLA faculty could teach some of the courses these students would take at the Shreveport Campus.

#4C: Pragmatic Aspects of Delivery for Adults and All Place-Bound Students

Schedule courses and student support services to meet the needs of place-bound individuals, both working adults and those of traditional college-age

Discussion: Many would-be students want and need further education, but cannot be on campus between 8:00am and 5:00pm, Monday to Friday. Extensive evening and weekend scheduling is needed, and is what makes for-profit providers so successful. Because adults need speedy completion more than they need summer vacations, it also may be necessary to consider Summer as a real academic term (unless the quarter system is implemented as a result of adoption of Louisiana Tech's calendar). Making it possible to attend classes, access support services, and conduct business with the University at times convenient for working adults will encourage such students to enroll at the Shreveport Campus, thus better serving their needs and the community's interest in advancing educational attainment.

#4D: A New Professionally-Designed Marketing Program

Significantly improve (or update) institutional marketing efforts and materials, with messages that are engaging and especially directed to currently underserved populations

Discussion: Enhanced and updated marketing of the university in Shreveport is needed for greater effectiveness in engaging those who are presently underserved there. That need exists whether the university becomes part of Louisiana Tech or remains a separate institution in the UL System. In the latter case, lacking the branding already established for Louisiana Tech, more intensive and comprehensive marketing initiatives, with commensurately greater investment, will be required to build the public awareness and interest that is needed for growth of an independent UL System institution in Shreveport-Bossier.

#4E: Collaborations with Centenary College

Explore how Centenary College's program assets can be engaged directly with Louisiana Tech or an independent Shreveport-Bossier university in the UL System

Discussion: It is important to realize that all the recommendations in this report are ***aimed at increasing materially the total higher education enrollments in Shreveport-Bossier***—not aimed at merely re-distributing the level of enrollments that presently exists.

It is well beyond the scope of this study to develop specific program recommendations for Centenary's participation. Nonetheless, consideration of roles for Centenary in the changes is important. For example, a 3+2 Pre-Engineering / Engineering program could offer an attractive opportunity for collaboration between Centenary and Louisiana Tech. Centenary already has such programs with five universities, but none of these are in Louisiana. Similar opportunities might be found for undergraduate 3+2 programs in other disciplines and for 5-year bachelor's/master's programs. There might be circumstances in which students would find advantageous co-enrollment at Centenary and the public university in Shreveport, though tuition differentials that typically exist between public and private institutions can be a barrier.

In sum, it is in the community's interest to creatively consider ways by which Centenary's role in meeting local needs can be expanded—as the entire population served increases.

ACQUIRING COMMUNITY SUPPORT AND CONSENSUS

Finally, strong community support and effective leadership are essential conditions if LSU-Shreveport and Louisiana Tech are to become one university in the UL System, or, absent that, for LSU-Shreveport to move alone to the UL System. The following is recommended.

Recommendation #5: Communications and Consensus

Create and carry out a *Communications Plan*, to immediately engage constituents and stakeholders from Shreveport-Bossier, Ruston, and North Louisiana in understanding the issues at stake, and the proposed solutions

Discussion: Initial presentations of this Report would be the first steps in the early communications.

#5A: Support of Legislative Delegations

Work immediately and extensively with regional members of the Legislature to explain the study that has been done, the issues that have been analyzed, and the recommended courses of action that have resulted. Obtain their input and seek to develop their support for material change

Discussion: Support of the North Louisiana legislative delegations is essential if the recommendations presented here are to move forward for consideration by the Legislature. Their role is also critical longer-term in advocating for some special resources to cover one-time consolidation costs.

#5B: Statutory Language

Establish risk mitigation measures and protections in enabling legislation, including requirement of a BoR approved *Consolidation Implementation Plan* in the case of the consolidation option.

Discussion: As described in the Report, enabling legislation and memoranda of understanding are two of three means to mitigate risks. Recommendation #1A addresses the third and critically important tool—the *Consolidation Implementation Plan*.

A statute introduced to consolidate LSU-Shreveport and Louisiana Tech should authorize the consolidation to be carried out upon acceptance by the UL Board and the Regents of the detailed *Consolidation Implementation Plan* described above. The statute also should embed as much as possible, "requirements" or safeguards needed to mitigate risks of the consolidation. Some of these are discussed in Chapter 6 of this report; more can and should emerge as consideration of the consolidation option moves forward.

If the outcome is not to consolidate but, rather, to transfer LSU-Shreveport to the UL System, the language of the 2011 statute that authorized transfer of the University of New Orleans to the UL System provides a model and starting point. Exhibit 7.1 provides a reference copy of that legislation.

8—Exhibits

EXHIBIT 1.1—CONSULTANT BIOS

Eva Klein

Ms. Eva Klein is president of Eva Klein & Associates—a consulting practice devoted to higher education strategy, and also a Managing Member of IDEA Partnerships, LLC (IDEA), a niche university real estate development firm that she co-founded with William C. Morlok, following their two decades of work together on *knowledge-based economic development* strategies.

Ms. Klein has 35 years of experience with universities, public agencies, and not-for-profits. She is known as an expert in higher education strategic planning, capital facilities planning, and capital financing strategies, as well as for her international leadership in defining strategies for ***university engagement*** in *economic development* and *regional innovation systems*.

Ms. Klein has led studies in organization, governance, strategic planning, facilities planning, capital finance, administrative operations, and financial management for many public and private colleges and universities. Her clients for strategic or business planning for research parks, incubators, technology development/innovation strategies, and regional economic development initiatives include universities, local/state governments, and special-purpose economic development agencies and regional alliance organizations in the US and abroad.

Ms. Klein is the only US consultant who has focused, for 25 years, on the emerging challenges that higher education institutions face, as they are required to become core resources in regional and state economies. These interests arose from Ms. Klein's entire career experience in higher education strategy, management, and finance—in consulting, investment banking, and university administration.

Prior to forming EKA in 1990, Ms. Klein was vice president for corporate development of a Sallie Mae subsidiary, where she was responsible for liaison activities with higher education institutions. From 1987 to 1989, as vice president/group manager of higher education finance at Chemical Bank (now JP Morgan/Chase), Ms. Klein was responsible for public finance (bond issuance) services for university clients. Earlier, she was senior manager in the Higher Education Consulting Group, KPMG Peat Marwick, New York (now Bearing Point). Prior to her private sector career, Ms. Klein served for eight years in the administration at American University (Washington, DC).

Ms. Klein served several terms on the boards of directors and as vice president of the Association of University Research Parks (AURP) and the International Economic Development Council (IEDC), formerly CUED. Ms. Klein has been an invited speaker at major conferences of the Association of University Technology Managers (AUTM); National Association of College and University Business Officers (NACUBO); Association of Physical Plant Administrators (APPA); International Economic Development Council (IEDC, formerly CUED); Society for College and University Planning (SCUP); Association of University Research Parks (AURP); International Association of Science Parks (IASP); and the National Business Incubation Association (NBIA).

Ms. Klein's publications cover a range of topics, including strategic planning, capital finance, research parks/incubators, commercialization of university research, real estate asset utilization, and the roles of higher education in knowledge-based economic development. Her two recent publications (listed at left) are about *university engagement* and *capital facilities planning* in higher education.

Internationally, Ms. Klein has provided consulting services to university and government clients in six countries. She has given invited keynote addresses and major conference presentations in Canada, France, Italy, Brazil, Russia, Hungary, Czech Republic, Uzbekistan, Senegal, and the People's Republic of China.

Education

AB, French/Liberal Arts
Douglass College
Rutgers University

MA, French Literature
New York University and
Université de Paris—Sorbonne

MS, Education
Graduate School of Education
University of Pennsylvania

MBA, Strategic Planning/Finance
The Wharton School
University of Pennsylvania

AURP Award

In October 2009, the Association of University Research Parks honored Ms. Klein with its **Appreciation Award** for her two decades of service in promoting the success of university-affiliated research/ technology parks.

Recent Books

Ms. Klein is co-author of two books published in April 2010:

- *The Relevant University: Making Community and Economic Engagement Matter* (with Lloyd A. Jacobs), The University of Toledo
- *Strategic Capital Development: The New Model for Campus Investment* (with Harvey H. Kaiser), Association of Physical Plant Administrators (APPA)

C. Joseph Carter, PhD

Education
AB, English
Wofford College

MA, Higher Education
Florida State University

PhD, College/University Administration
Florida State University

Awards
Distinguished Business Officer, National Association of College and University Business Officers (NACUBO), 2000

Distinguished Service Award, Southern Association of College and University Business Officers (SACUBO), 1999

C. Joseph Carter is a Senior Consulting Associate of EKA. His recent work for EKA includes:

- *Capital Needs Assessment and Capital Projects Plan for a Comprehensive Campus Master Plan*, East Carolina University
- *Strategic Master Plan* for College of Coastal Georgia
- *Academic Program Strategy* for LSU in Shreveport
- *Strategic Plan* for New Jersey City University
- *Strategic Merger Analysis* for LSU Health Sciences Center in Shreveport and LSU in Shreveport
- *Space Capacity Analysis* for The University of New Mexico
- *Strategic Capital Program* for the Board of Higher Education of The Commonwealth of Massachusetts (24 institutions).

In a career spanning more than 40 years, Dr. Carter has held senior positions in business, academic, and student personnel administration at higher education institutions of diverse sizes and missions. He also has served on the staff of the governing board for a major state university system (Florida). Dr. Carter was Vice Chancellor for Business Affairs at Western Carolina University, a constituent institution of The University of North Carolina, until retiring after 23 years of service. Since then, as a consultant, speaker, writer, and advisor, he has assisted numerous institutions in addressing a broad array of issues related to strategic planning, capital planning, financial management, and business services.

Dr. Carter is highly regarded for exemplary business operations that he instituted and maintained at the University where he long served as chief financial officer. Beyond his own campus, through leadership roles in the National and Southern Associations of College and University Business Officers (NACUBO and SACUBO,) Dr. Carter has contributed significantly to advancing good practice in higher education financial management. He is a past chairman of the Board of Directors of NACUBO and a past President of SACUBO.

Dr. Carter was a major client participant in EKA's *Capital Equity/Adequacy Study and 10-Year Capital Plan*, as well as in prior studies EKA conducted for The University of North Carolina Board of Governors.

Dr. Carter brings to EKA engagements the broad perspective of a business officer with public system level policy and budget experience and with many years of comprehensive business and financial management experience at the campus level.

EXHIBIT 1.2—INTERVIEWEES AND KEY MEETING PARTICIPANTS

INTERVIEWEES—SHREVEPORT-BOSSIER HIGHER EDUCATION

Louisiana State University in Shreveport

Vice Chancellors and Deans

Larry Anderson, Dean, Arts and Sciences

Johnette McCrery Magner, Interim Vice Chancellor, Development

Gloria Raines, Vice Chancellor, Student Affairs

Paul Sisson, Vice Chancellor, Academic Affairs and Provost

Vincent Marsala, Chancellor

Dalton Gossett, Associate Dean, Arts and Sciences

Douglas S. Bible, Associate Dean, College of Business

Michael T. Ferrell, Vice Chancellor, Business Affairs

David Gustavson, Dean, College of Business, Education, and Human Development

Faculty/Staff Group

Julie Bergeron, Associate Professor

Lonnie McCray, Institute of English

Helen Wise, Associate Professor, Sociology and Program Director, MSHSA

Bill Bigla (SP?), Associate Professor and Program Director, MBA Programs

Ruth Ray Jackson, Associate Professor and Chair, Education

Katie Simpson, Assistant Director, Admissions and Chair, Staff Senate

Mary Jarzabek, President, Faculty Senate

Cynthia Sisson, Chair, Department of Chemistry and Physics

Biran Salvatore, Associate Professor

Marjan Trutschl, Associate Professor

Kevin Jones, Associate Professor

Carl Smolinski, Associate Professor, Accounting

Harvey Rubin, Professor

LSUS Foundation and Alumni Group

Harold Turner, Red River Bank

Bob Fitzgerald, CEO, Fitzgerald Contractors, LLC and Past President, LSUS Foundation

Glenda Erwin, LSUS Foundation

Michael H. Woods, Woods Operating Co.

Bob Hamm, CEO, Hamm Mechanical, LLC

Dalton Cloud, Professor Emeritus and LSUS Foundation

Gayle Flowers, Caddo Parish Public Schools

Brian Bond, Vice President, SWEPCO

Bill Altimus, Bossier Parish

Stephen R. Yancey, Cook, Yancey, King & Galloway

Louisiana Tech University

Administrative Council

Ken Rea, Vice President, Academic Affairs

Stan Napper, Dean, Engineering and Science

James Lumpkin, Dean, College of Business

Les Guice, Vice President, Research and Development

Joseph R. Thomas, Jr, Vice President, Finance and Administration

Bruce Van De Velde, Director, Athletics

Michael DiCarlo, Dean, Library Services

Jim King, Vice President, Student Affairs

Don Kaczvinsky, Dean, Liberal Arts

David Gullatt, Dean, Education

Susan Rasbury, Executive Assistant to the President and Coordinator, Title IX Compliance

Corre Stegall, Vice President, University Advancement

Terry McConathy, Executive Vice President and Dean, Graduate School

Clint Carlisle, President, Student Government Association

David Szymanski, President, University Senate

Pamela Ford, Dean, Enrollment Management

Dave Guerin, Director, Marketing and Public Relations

James Liberatos, Dean, Applied and Natural Science

University Senate

David Szymanski, Associate Professor, Exercise Physiology and Chair, University Senate

Daniel Bates, Librarian

Heath Tims, Assistant Professor, Mechanical Engineering

Larry H. Jarrell, Instructor, College of Business

Kimberly Kimbell-Lopex, Professor

Jeff Yule, Assistant Professor, Biology

Marilyn Robinson, Assistant to Executive Vice President and Dean, Graduate School

Latoya Pierce, Assistant Professor, Psychology and Behavioral Sciences

Kathleen Johnston, Professor

Saul Zalesch, Associate Professor, Art History

Research Faculty Group

Eric J. Guilbeau, Watson Professor and Director, Biomedical Engineering/Rehabilitation Science

B. Ramu Ramuchandran, Associate Dean for Research and Professor, Chemistry

Yuri Lvov, Professor, Chemistry, Endowed Chair in Nanotechnology, Institute for Micromanufacturing

Mark A. DeCoster, Associate Professor, Biomedical Engineering

Les Guice, Vice President for Research and Development

Sumeet Dua, Associate Professor, Computer Science

Stan Napper, Dean, College of Engineering and Science

Louisiana State University Health Sciences Center in Shreveport

Dr. Robert Barish, Chancellor

Dr. Andrew Chesson, Dean, School of Medicine

Dr. Hugh Mighty, Vice Chancellor for Clinical Affairs

Mr. John Dailey, JD, Vice Chancellor for Administration

Dr. Joe McCulloch, Dean, School of Allied Health

Dr. Sandra Roerig, Dean, School of Graduate Studies

Ms. Mimi Hedgcock, Dir. Governmental Affairs

Other Higher Education Leaders

Ray Belton, Chancellor, Southern University in Shreveport

David Rowe, President, Centenary College

Steve Horton, Associate Provost & Dean of The Graduate School, Northwestern State University

Jim Henderson, Chancellor, Bossier Parish Community College (telephone interview)

Patti Trudell, Executive Director, Consortium for Education, Research, and Technology of North LA

INTERVIEWEES—LOCAL/REGIONAL BUSINESS, COMMUNITY, GOVERNMENT LEADERS

State Legislators—Local Members Group

State Senator Sherri Cheek, District 38

State Senator Barrow Peacock, District 37

State Representative Alan Seabaugh, District 5

The Community Foundation Board of Directors

Bobby E. Jelks, President, Franks Management Company, LLC

Michael A. Alost, Partner, Slack Alost Development Services

Edward J. Crawford, III, Partner, Atco Investment Company

Janie D. Richardson, Community Volunteer

Joe N. Averett, Jr., Retired President, Crystal Oil

Don E. Jones, President, Jones Brothers, Inc.

Paula Hickman, JD, Executive Director

Business and Community Leaders Group I

Murray Viser, President, Barksdale Forward, Inc.

Jerry Jones, Attorney, Bradley Murchison Firm

Vernon Chance, Executive Director, Committee of 100

Don Walter

Ogbonnaya John Nwoha, Assistant Professor, Head of Department, AEIS, Grambling State University

Craig Cochran, Shreveport Green

Donna Curtis, Shreveport Green

Don Updegraff, Northwestern Mutual

C. Stewart Slack, Slack Alost Development Services

Michael Alost, Slack Alost Development Services

John Hubbard, AEP Swepco

Janice Sneed, Southern University

The Hon. Lorenz ("Lo") Walker, Mayor of Bossier City

Business and Community Leaders Group II

David Aubrey, Managing Director, Strategic Action Council

Billy Montgomery, Bossier Parish Police Jury

Lisa Johnson, President, Bossier Chamber of Commerce

Ashley Busada, Government Relations, Bossier Chamber of Commerce

Robert Dean, Heard McElroy & Vestal

Taylor Robertson McDonald, Heard McElroy & Vestal

Malcolm S. Murchison, Bradley Murchison Kelly & Shea

Tommy Williams, President, Williams Financial Advisors

S. Kent Rogers, Executive Director, North Louisiana Council of Governments

L. Frank Moore

Jack Sharp, Biomedical Research Foundation of NW Louisiana

Troy Bain

Chris Anderson, Rockwell Collins

Markey Pierre, SSG-NLA

Attended Both Sessions

Lindy Broderick, Executive Vice President, Greater Shreveport Chamber of Commerce

Dick Bremer, President, Greater Shreveport Chamber of Commerce

Tim Magner

Johnette McCrery Magner, LSU in Shreveport

Phillip, Rozeman, MD, Cardiovascular Consultants and S-B Imperative for Higher Education

INTERVIEWEES—HIGHER EDUCATION GOVERNANCE AND MANAGEMENT BOARDS

University of Louisiana System

Staff

Randy Moffett, President, University of Louisiana System

Brad O'Hara, Provost and Vice President for Academic and Student Affairs

Bea Baldwin, Vice President for Research & Performance Assessment

Robbie Robinson, CPA, Vice President for Business and Finance

Board of Supervisors

Wayne Parker, Chair-Designate, University of Louisiana System Board of Supervisors

Louisiana State University System

Staff

John Lombardi, President

Carolyn H. Hargrave, Vice President for Academic Affairs and Technology Transfer

Michael Gargano, Chief of Staff and Vice President, Student & Academic Support

Wendy Simoneaux, Chief Financial Officer / Assistant Vice President for Budget & Finance

Board of Supervisors

John George, MD (group interview meeting in Shreveport, October 19)

Flagship Coalition

Sean Reilly, CEO, Lamar Advertising (telephone interview)

Louisiana Board of Regents

Jim Purcell, Commissioner of Higher Education

Karen Denby, Associate Commissioner for Academic Affairs

Larry Tremblay, Interim Deputy Commissioner for Academic and Student Affairs

Meg Casper, Associate Commissioner for Public Affairs

Kim Hunter-Reed, Chief of Staff

Todd Barre, Deputy Commissioner for Finance and Administration

Kerry Davidson, Deputy Commissioner for Sponsored Programs

Uma Subramanian, General Counsel

Governance Commission Members/Representatives

Barry Erwin, President, Council for a Better Louisiana (CABL)

Greg Davis, Director, Cajun Dome and Board member, CABL

Interviewee—Office of the Governor

Stafford Palmieri, Policy Advisor, Education

Other Key Meetings and Telcon Meetings/Follow-Ups

Sponsor Leadership Group Initial Meeting—October 19, 2011

Vernon Chance, Executive Director, The Committee of 100

Paula Hickman, Executive Director, The Community Foundation of North Louisiana

Bob Levy, Chair, Louisiana Board of Regents

Bubba Rasberry, Louisiana Board of Regents

Phillip Rozeman, MD, Shreveport-Bossier Higher Education Imperative

Jack Sharp, The Committee of 100 and Biomedical Research Foundation

Telcon Follow-Ups / Meetings (December 2011-Early January 2012)

Robert W. (Bob) Levy, Chair, Louisiana Board of Regents

Vincent Marsala, Chancellor, Louisiana State University in Shreveport

Randy Moffett, President, University of Louisiana System

Daniel Reneau, President, Louisiana Tech University

January 12, 2012 Review Discussion Meetings

Legislators Group—Caddo-Bossier Members

Representative Thomas Carmody, District 6

Representative Alan Seabaugh, District 5

Senator Sherri Smith Buffington, District 38 (and Staff Member, Elaine T. King)

Senator Barrow Peacock, District 37

Legislators Group—Ruston/Lincoln Parish Members

Senator Robert W. (Bob) Kostelka, District 35

Senator Rick Gallot, District 29

Representative-Elect Patrick O. Jefferson, District 11

Representative-Elect Rob Shadoin, District 12

Local Sponsor Organization Representatives

Vernon Chance, Executive Director, The Committee of 100

Paula Hickman, Executive Director, The Community Foundation of North Louisiana

Phillip Rozeman, MD, Shreveport-Bossier Higher Education Imperative

Jack Sharp, The Committee of 100 and Biomedical Research Foundation

Markey Pierre, SSG-NLA

Dick Bremer, Executive Director, Greater Shreveport Chamber of Commerce

Louisiana Board of Regents

Bob Levy, Chair, Louisiana Board of Regents

Chris Gorman, Louisiana Board of Regents

Bubba Rasberry, Louisiana Board of Regents

Jim Purcell, Commissioner of Higher Education

Kim Hunter-Reed, Chief of Staff, Louisiana Board of Regents

Larry Tremblay, Interim Deputy Commissioner for Academic and Student Affairs, Louisiana Board of Regents

Louisiana State University in Shreveport Group/Representatives

Vincent Marsala, Chancellor

Paul Sisson, Vice Chancellor for Academic Affairs/Provost

Michael H. Woods, Woods Operating Co. and LSUS Foundation

James Elrod, CEO, Willis-Knighton Health System

Louisiana Tech University Group/Representatives

Daniel Reneau, President

Kenneth Rea, Vice President, Academic Affairs

Stanley Napper, Dean, Engineering and Science

Les Guice, Vice President, Research and Development

Wayne Parker, Chair-Designate, University of Louisiana System Board of Supervisors

Louisiana State University Health Sciences Center in Shreveport

Robert Barish, MD, Chancellor

Mr. John Dailey, Vice Chancellor for Administration

EXHIBIT 1.3—BIBLIOGRAPHY

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SHREVEPORT-BOSSIER AND REGION

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HIGHER EDUCATION IN SHREVEPORT-BOSSIER

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EXHIBIT 2.1—INTERTECH SCIENCE PARK IN SHREVEPORT

This is a comprehensive strategy to develop Biosciences as an industry in Shreveport-Bossier, using the Health Care strengths as a point of departure. It has been led by the Biomedical Research Foundation of NW Louisiana and its development partners since the 1990s.

The InterTech strategy has truly been a locally-supported initiative. The residents of Caddo Parish have graciously provided InterTech Science Park a long term commitment by approving a tax millage to support Park development. The commitment extends through 2017. It also has benefited from state support and private support.

The location is a large area of Shreveport that is anchored by the LSU Health Sciences Center in Shreveport, Willis-Knighton Medical Center, and Christus-Schumpert Medical Center. The Biomedical Research Institute (BRI) and other facilities are essentially co-located with the LSU Health Sciences Center campus.

OVERVIEW

- Eight facilities (some new; some older) totaling 376,000 SF
- Currently have leased 351,000 SF
- 23 tenants
- 350 employees
- Estimated annual payroll of tenants=$18 million a year
- Average salary of tenant employees= $50,000 a year.

TENANTS

Biomedical Research Foundation. An independent, technology-based economic development and research organization with 46 employees. *www.biomed.org*

BRF Positron Emission Tomography (PET) Imaging Center. A clinical and research-based PET Imaging Center treating patients with cancer and other diseases and helping to advance research and clinical trials on metabolic processes. *www.biomed.org*

Blade Studios. A full service production studio for music and film services. *bladestudios.com*

Calosyn Pharma, Inc. A biopharmaceutical company, developing intra-articular therapeutics for osteoarthritis. *www.privco.com*

Cedar Pharmaceuticals, LLC. A virtual pharmaceutical company whose primary target products are niche generic prescription drugs. *www.cedarpharma.com*

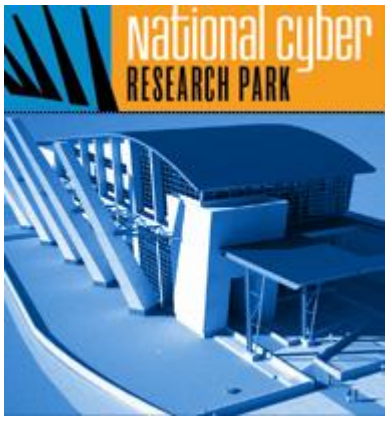
CRM Studios Louisiana. A full service broadcast production company. *www.crmstudios.tv*

Embera Neurotherapeutics, Inc. A development stage, pharmaceutical company focused on treating a broad range of addictions and obesity. *www.emberaneuro.com*

Dudley Worldwide. This is a medical and laboratory distribution company that serves healthcare markets, life science, clinical laboratories, industry, and the general public. *www.dudleyworldwide.com*

Growth Factor Recovery, LLC. A biotechnology company looking into the use of cytokines and growth factors for different therapies for wound care.

EXHIBIT 2.2—NATIONAL CYBER RESEARCH PARK, BOSSIER CITY



The following is copied from http://www.cyberinnovationcenter.org/digital-media-center-planned-for-cyber-research-park/ and http://www.cyberinnovationcenter.org/plan-for-second-building-in-research-park/.

DIGITAL MEDIA CENTER PLANNED FOR CYBER RESEARCH PARK

Posted on December 1, 2011

Bossier City is on its way to seeing a digital media center develop at the national Cyber Research Park.

But before the $26 million facility becomes a reality, the city must first match 25 percent of a $500,000 state contribution. The city council will consider using $166,667 in riverboat gaming money to match state funds for the Center of Creative Digital Media during its regular Tuesday council meeting.

The center, to be on the upper right side of the park's 64-acre initial phase, would house companies such as those in the interactive software design and film industries, as well as education programs. It would additionally provide space for digital media training.

Earlier this year, Bossier City was awarded the state funds to design the building. The city requested an additional $1 million in state funding this month for engineering. The project's estimated total cost to the city is $5 million, special projects coordinator Pam Glorioso said.

Bossier City would be reimbursed for its expenses through the sale of bonds to construct the 80,000-square-foot building. The amount of bonds needed for construction has yet to be determined, Cyber Innovation Center Vice President G.B. Cazes said.

The CIC, the nonprofit corporation overseeing the research park, is working to secure potential tenants. Leases would be used to determine the amount of bond money that could be obtained, Cazes said. And once the building is complete, income from those leases would pay down bond debt.

Details about the potential economic impact of the center were unavailable. But Glorioso said the center would provide space for small companies enticed to do post-production film work in Louisiana through the state's digital media tax credit. The 25 percent tax credit extends to qualified interactive software productions in not only film, but also health care and engineering industries.

The center also would work with education programs at area colleges to help connect students to industry training and jobs, Mayor Lorenz "Lo" Walker said.

The concept of a digital media center first surfaced in 2009 and was initially associated with a Southern American museum planned near the Louisiana Boardwalk. Because of a lack of communication with museum developers, the city asked the state to divert the funds to this new project.

Although some project details are still being ironed out, city officials say the center will be a big plus for the community.

PLANS FOR SECOND BUILDING IN RESEARCH PARK

Posted on December 8, 2011

The Cyber Innovation Center is in the process of designing a second building to be located within the National Cyber Research Park (NCRP). This multi-use collaborative facility is expected to be five stories and approximately 100,000 gross square feet. Initial plans include

Class A office space, computer labs, classrooms and a Center for Creative Digital Media. The facility will be located at the northwest corner of Phase 1 within the NCRP.

The purpose of this new facility is two-fold. First, it will support the growing demands of the Cyber Innovation Center and National Cyber Research Park. Second, it will serve as a physical location to foster collaboration among industry, government and academia by being a central location for training and workforce development. This new facility will allow academia and industry to leverage the facility to conduct new, innovative courses and state-of-the-art training programs while building a 21st Century workforce to support continued growth.

The new facility is estimated to cost between $25 million and $30 million. The Cyber Innovation Center is currently negotiating with potential tenants and will use these executed leases to obtain bond funding. "We look for this facility to further expand and develop the educational programs jointly developed by Louisiana Tech and the CIC. This will continue to set our region apart as leaders in cyber innovation and creativity with demonstrable success," said Craig Spohn, Executive Director of the Cyber Innovation Center. "It is this success that multiple federal government agencies want to exploit and use as a model around the nation."

Debt on those bonds would be paid down with lease revenue. The State of Louisiana plans to contribute $500,000 to design the new building and the Center for Creative Digital Media but requires a 25 percent match from the city. To support the effort, Bossier City has passed an ordinance that will allow the use of $166,667 in riverboat gaming money to cover this match. Bossier City will be reimbursed for its contributions through bonds sold to construct the digital media center.

"This facility will provide new opportunities for students of Bossier Parish Schools," said G.B. Cazes, Director of the CIC's Academic Outreach and Workforce Development Programs. The CIC has been working very closely with Bossier Parish Schools, Bossier Parish Community College (BPCC), and Louisiana Tech University to develop new and innovative courses for students. These courses integrate with informal education opportunities (i.e., Regional Autonomous Robotics Circuit, Cyber Discovery, Shell Eco-Marathon) and dynamic professional development to create a new model in education. This model has been recognized nationally and is now being funded through numerous grants to ensure delivery of the Cyber Discovery Model nationwide. "By housing some of the new learning environments and 21st century classrooms in our new facility, every student in Bossier will have an opportunity to participate in engaging and challenging courses," said Cazes.

In addition, BPCC will also be able to leverage the classrooms, labs and training facility in the new facility. The Cyber Innovation Center has been working with BPCC to design a new Technology Tract for Bossier students. High school juniors and seniors will be able to earn college level credit in the area of Digital Forensics, Web Design, Computer Programming, Networking and Cyber Security. These courses will not only map to BPCC's Associate Degree in Cyber Information Technology but also nationally recognized industry certifications. "Students will have an opportunity to graduate high school with industry specific skills while jump starting their college careers," said Cazes.

As the workforce of the future is learning new skills, industry will be developing new technologies in the same building just on another floor. By co-locating industry and academia, new partnership opportunities will emerge and create a bridge that not only connects students to future employers but also provides a context for the content they learn in the classroom.

The Center will also help bridge the gap between industries. Digital Media is not just for movies and entertainment but also Defense and Commercial sectors as well. By locating the Digital Media Center within the National Cyber Research Park, proximity to related companies and other cyber initiatives will create greater synergies for growth and expansion.

EXHIBIT 3.1—EMPLOYMENT OUTCOMES REPORT, 2011, LOUISIANA BOARD OF REGENTS

EXECUTIVE SUMMARY

This report analyzes employment data for completers of Louisiana public colleges and universities six months and eighteen months after graduation for the graduating classes of 2006-07, 2007-08, and 2008-09. A snapshot of employment status for the same time frame is shown for the graduating classes of 2006-07, 2007-08, and 2008-09.

Specifically, the 2011 Louisiana Employment Outcomes Report will share findings on Employment Rate Comparisons; Employment by Field of Study; Employment by Residency Status; and Average Salary Comparisons. Also, Employment Rate Comparisons for Louisiana and non-Louisiana residents are provided. Below are selected findings in each of those areas:

Employment Rate Comparison (All Completers, Louisiana and Non-Louisiana Residents)

- Eighteen months after graduation, 59.5 percent of the 2008-09 bachelor's degree completers were found employed in the Louisiana UI Wage System. The 2008-09 associate degree completers were found employed at a rate of 72.5%. The employment rates for masters, doctorate and professional degree completers were 60.5%, 38.3% and 50.4% respectively.

Employment by Field of Study (All Completers, Louisiana and Non-Louisiana Residents)

- Of all 2008-09 completers in the healthcare professions field of study, 70 percent were found employed in the Louisiana UI Wage System after eighteen months. Associate degree completers in the healthcare professions field of study were found employed in the Louisiana UI Wage System at higher rates than bachelor's degree completers in the healthcare professions field of study, 83 percent to 70 percent, respectively.
- Of the 2008-09 bachelor's degree completers, the following fields of study (with at least 10 completers) had the highest Louisiana UI Wage System employment rates after eighteen months:
  - Healthcare professions (70 percent)
  - Education (69 percent)
  - Engineering technologies (68 percent)
  - Family and consumer sciences (67 percent)
  - Public administration (66.8 percent).

Employment by Residency Status (All Completers, Louisiana and Non-Louisiana Residents)

- Bachelor's degree recipients represent 57 percent of all postsecondary completers from 2006-07, 2007-08 and 2008-09. Nearly two out of every three (63.8%) Louisiana resident bachelor's degree recipients were found employed in the Louisiana Wage System eighteen months after their graduation. Comparatively, just over 1 out of every 5 (22.5%) non-resident bachelor degree recipients were found employed in the Louisiana UI Wage System eighteen months after graduation.

Average Salary Comparison (All Completers, Louisiana and Non-Louisiana Residents)

- Eighteen months after graduation, 2008-09 bachelor's degree completers found employed in the Louisiana UI Wage System earned an average calculated annual salary of $32,742, compared to $35,544 for associate degree completers, 8.6 percent more than bachelor's degree completers. However, the most recent employment data (2006-07, 2007-08, 2008-09) reveal the largest earnings growth (18.7 percent) from six months to eighteen months occurs for bachelor's degree completers.
- At 18 months after graduation, associate degree recipients, on average, had higher initial incomes than those with bachelor's degrees. Data from studies in other state affirm this pattern, but also indicate that by the fifth year post-graduation, bachelor's recipients will have higher income. This current study of Louisiana employment outcomes does not track beyond 18 months.
- Of the 2008-09 completers, the following fields of study had the highest average calculated salaries: Engineering ($56,853) ranked first in average calculated salaries among 2008-09 bachelor's degree completers, followed by completers of health professions ($46,537); engineering technologies ($43,787); education ($37,639); natural resources and conservation ($34,605); and computer and information sciences ($34,238).
- At all degree levels, the average calculated annual salary for Louisiana residents after eighteen months was higher than after six months. The most recent employment data (2006-07, 2007-08, 2008-09) reveal the largest earnings growth (18.7 percent) from six months to eighteen months occurs for bachelor's degree completers, followed by professional degree completers (13.5 percent). Certificate and associate degree completers show the next largest growth in salaries from six months to eighteen months, with a 12.4 percent difference for certificate degree completers and a 12.2 percent difference for associate degree completers.
- The smallest earnings growth appeared at the diploma (10.2 percent), master's (9.7 percent) and doctoral (5.6 percent) levels.

Employment Rate Comparison (Louisiana Residents Only)

- Eighteen months after graduation, 64.4 percent of the 2008-09 Louisiana Resident bachelor's degree completers were found employed in the Louisiana UI Wage System. A higher percentage of diploma (68.3 percent), associate (73.7 percent), and master's degree completers (72 percent) were found in the Louisiana UI Wage System, while fewer certificate, doctoral, and professional degree completers (56.9, 62.2, and 54.4 percent, respectively) were employed.

Employment Rate Comparison (Non-Louisiana Residents Only)

- Of the 17,820 bachelor's degree completers in 2008-09, 12.4 percent (2,209) were not Louisiana residents. Eighteen months after graduation, 24.4 percent of these non-residents were found employed in the Louisiana UI Wage System. The same percentage of non-residents diploma completers (24.4 percent) was also found employed in the Louisiana UI Wage System. Doctoral and professional degree non-resident completers were found employed in the Louisiana UI Wage System at lower levels, 16.6 percent and 23.1 percent, respectively. Non-resident completers at other degree levels were found employed in the Louisiana UI Wage System at slightly higher rates: certificate (28.2 percent), associate (27.8 percent), and master's (25 percent).

EXHIBIT 3.2—CERT INITIATIVES

Since its inception in 1996 as a regional higher education intermediary, the Consortium for Education, Research and Technology of North Louisiana (CERT) has served in diverse roles. CERT gleaned modest funding from a wide range of sources—from foundations to NSF and state/local government. In 2011, CERT focused on partnering with industry and community on:

- **Workforce partnerships** in health care and energy that respond directly to employer needs, initially targeting frontline, low-income and under-credentialed workers;
- **Promotion of career pathways** through summer energy camps and youth engagement;
- Partnering with foundations, industry and government to **address community needs**.

WORKFORCE PARTNERSHIPS

National Fund for Workforce Solutions/Social Innovation Fund Grant

CERT partnered with Community Foundation of North Louisiana to secure roughly $1 million for a two-year National Fund for Workforce Solutions grant to create workforce partnerships in high demand economic sectors. "Workforce Innovations of Northwest Louisiana," initially focuses on health care and energy. Next sectors under consideration include transportation and logistics. Philanthropy partners in the new workforce funding collaborative range from Capital One, JPMorgan Chase and Foundation for Louisiana to government funders Caddo Parish Commission, City of Shreveport, and N LA Council of Governments. Community partners include Greater Shreveport Chamber of Commerce, United Way and Workforce Investment Boards (WIBs). Higher education partners include Bossier Parish Community College, Southern University at Shreveport, and NW LA Technical College.

Demonstration Workforce Partnership

To illustrate the novel partnering relationship, CERT is piloting a health care partnership funded by Community Foundation and led by Willis-Knighton Health Systems. The partnership is enrolling low-income, under-credentialed workers in high-demand health care training (for example, medical coding and practical nursing). Nonprofits Interfaith and Goodwill Industries are providing intensive learner supports to ensure that adult participants complete the training, gain soft skills, find employment, and advance in sustaining wage jobs. CERT has conducted a series of "practicum" sessions hosted by Willis-Knighton to train partnering staffs.

CAREER PATHWAYS

Summer Energy Camps for High School

CERT is garnering resources and making plans to expand Energy Camp Louisiana for its third year to five one-week summer camps taught by high school science teachers. The camps offer area high school students hands-on, lab-based learning and field trips around energy sources and conservation. Industry (including platinum sponsors Encana and Shell) helps fund the camps, and provides learning aids and guest speakers, from geologists and engineers to safety techs. "Teacher observers" from participating schools gain curriculum and experience in project based learning. CERT assisted New Orleans in adapting the energy camp concept to their region's energy career pathways.

Energy Instruction for Out-of-School Youth

In a novel partnership, two area Workforce Investment Boards, City of Shreveport #71 and Coordinating and Development Corporation #70, teamed with CERT and 10 NW Louisiana parishes to offer energy instruction to area youth. United Way and AEP Foundation contributed funds. Eighty young people and their instructors from Bienville, Bossier, Caddo, DeSoto, Natchitoches, Red River and Sabine parishes met in April at Sci-Port: LA's Science Center. Area youth programs have accessed CERT funds for follow-up youth work-based energy activities.

COMMUNITY DEVELOPMENT

"We Care University" / Choice Neighborhoods Grant

In NW Louisiana, higher education institutions are increasingly engaged with communities, reaching out to improve life prospects for all citizens. In partnership with Community Renewal International, area campuses including Centenary College, Bossier Parish Community College, NSU and SUSLA have launched "We Care" initiatives patterning efforts after TCU's pilot "We Care University."

CERT and Community Renewal also serve as partners with North Louisiana Council on Governments, Community Foundation and City of Shreveport on "Choice Neighborhoods" project.

EXHIBIT 3.3—EARLY HISTORY OF LSUS—CONSTRAINTS ON GROWTH

The history of LSUS is replete with obstructions and opposition to growth. The following material is based on earlier material compiled by EKA (with LSUS's assistance for historical documentation) and was included in EKA's report to LSUS and the LSU System, *Academic Program Strategy*, 2009.

Early Advocacy to Create LSUS and Duplication of "White" and "Black" Institutions

The initial attempt to establish a public four-year university in the Shreveport/Bossier area took place on October 15, 1936 when the Caddo Police Jury passed a resolution to establish a branch of LSU in Shreveport. Governor Richard Leche rejected the proposal in 1937.

Legislative attempts to establish a branch of LSU in Shreveport were attempted in 1956 but also failed. However, House Concurrent Resolution No. 32 by Rep. Frank Fulco of Shreveport was passed in 1956 which called for a study by the State Department of Education to determine the need for a public college in Shreveport, the second largest city in the State. This study entitled, *Survey of the Need for a State-Supported Four-Year College for the Education of White People of Louisiana in the Caddo Parish Area* was complete in 1958. This study was based on a questionnaire sent to 4,765 junior and senior high school students in white public and private schools within a 45 mile radius of Shreveport and showed overwhelming support for a four-year public university for Shreveport offering Liberal Arts, Teacher-training, Business Administration and Engineering with dormitories. However, this study alone could not overcome the opposition of the local private college and representatives of regional public colleges to the establishment of a public university in Shreveport.

Additional legislative attempts to create an LSU in Shreveport were tried in 1962 and 1963 but also failed. Finally, in 1964, the Shreveport/Bossier delegation was successful in the passage of House Bill 87 (Act 41) in the House and Senate to create a two-year branch of LSU in Shreveport. At the same time, the Legislature enacted Act 42 to create Southern University at Shreveport, a unit of the Southern University System. The House Education Committee held a hearing on the two college bills which proposed a branch of LSU for white students and a branch of Southern University for black students. A significant number of black leaders in Shreveport supported the established of Southern University in Shreveport as they felt that black students would have a more equitable chance at receiving a college education. Governor-elect John McKeithen met with the Shreveport delegation which supported both colleges and he agreed to support the creation of two colleges in Shreveport. He kept his word and on June 27, 1964, he signed both Act 41, creating LSU in Shreveport and Act 42, creating Southern University at Shreveport. This dual system of higher education was accomplished in spite of the fact that the issue of segregation had been settled by the federal government. It should be noted that no student was denied admission to either institution because of their race after they opened in 1967.

Creation of Bossier Parish Community College

Shortly, thereafter the political leadership of Bossier City was successful in adding 13th and 14th grades at Airline High School, which soon became Bossier Parish Community College. Now there were three two-year schools in the Shreveport-Bossier metro area. This triplication of higher education programs at the two-year level ensured that state resources for higher education in Shreveport-Bossier City would be "watered down," without any one institution receiving adequate funding to develop and meet the needs of the citizens of the metro area.

Approval of Baccalaureate Degree-Granting Status

However, among local leaders, there was no intention for LSUS to remain a two-year college and the movement began immediately to secure four-year status. In 1972, a bill was introduced for four-year degree-granting status and, once again, there was intense opposition from area institutions, which feared loss of student enrollment to a four-year degree institution in the largest MSA in North Louisiana. The opposition attempted to kill the bill, by securing an opinion from the Attorney General that approval of the four-year bill would require a two-thirds vote rather than a simple majority. The opposition also succeeded in attaching an amendment to the four-year bill which *prohibited the building of dormitories on the LSUS campus.* The purpose of the opposition was to force debate on the House floor and, hopefully, to stall the four-year degree bill. However, LSUS supporters did not object (to prohibition of dormitories) as their primary goal was to secure passage of the four-year degree-granting authority bill. More importantly, newly-elected Governor Edwin Edwards had made a campaign promise to support the four-year bill for LSUS, and he actively supported the legislation by appearing in the legislative chambers. His actions assured its passage and on June 22, 1972, Governor Edwards signed Act 66 and LSUS became a four-year commuter university.

Prohibition of Residential Students

The 1972 Act that granted baccalaureate degree granting authority included the restriction that the LSU Board of Supervisors *"shall not construct or authorize the construction of dormitories or other student housing facilities."* The restriction of LSUS ensured that enrollment and growth would be limited to a local commuter population. The restriction lasted for 19 years and was finally repealed through the leadership of Senator Foster Campbell who introduced Act 14 of 1991 to repeal the restriction. Governor Buddy Roemer signed this bill into law on June 13, 1991. By this time, LSUS feels it was "branded" as a "commuter college." For a variety of reasons, in the last 20 years, a residential program never was developed.

Programs of NSU and LA Tech in Shreveport

LSUS's growth of capacities was, and is, further complicated by the NSU School of Nursing in Shreveport and the LA Tech programs at Barksdale Air Force Base. The result is that five public institutions offer credit courses and programs in the metro area.

LSUS remained at a competitive disadvantage with two community colleges offering equivalent courses for lower division programs at a lower cost than LSUS and a lack of a sufficiently large enrollment and funding base for LSUS to expand as the metro area's senior regional university. This situation continues to stifle enrollment and development at LSUS as 13,000+ students are enrolled at these five institutions, with LSUS serving approximately one-third of that population.

A Self-Inflicted Limitation

In the 1970s, LSUS was authorized to offer several Allied Health programs. Due to lack of funding and lack of faculty interest (College of Sciences faculty), this opportunity was not acted upon. In retrospect, this is viewed as a major strategic error on the part of the institution itself.

Impact of Federal Consent Decree

In 1981, as a result of the Federal Consent Decree, a panel of outside experts was appointed to study one and two-year programs at predominantly black and white public institutions in Shreveport-Bossier. One year later, the panel seeking to *"increase other-race enrollment in all institutions"* recommended that LSUS terminate its three associate degrees in Criminal Justice, General Studies and Office Administration, because of the proximity of LSUS to Southern University-Shreveport. These terminated programs had enrolled 100+ students. It is interesting to note that other regional white institutions in close proximity to historically black institutions were allowed to maintain their associate degrees.

EXHIBIT 3.4—REGENTS' ADMISSIONS STANDARDS FOR 2012

Louisiana Board of Regents: Office of Academic & Student Affairs

MINIMUM ADMISSION STANDARDS for FIRST-TIME FRESHMEN, 4-YEAR

Admission* to 4-Year Universities Current: 2009-10 thru 2011-12		Admission* to 4-Year Universities **Effective: Fall 2012**	
High School Curriculum	Regents' Core: 17½ units *(see table on back)*	*High School Curriculum*	Regents' Core: 19 units (from Core 4 Curriculum) *(following page, adopted by Regents in 2008)*
	AND		*AND*
Minimum HS GPA	Minimum overall HS GPA: 2.0 Flagship & Statewide	*Minimum HS GPA*	Minimum overall HS GPA: 2.0 ***NEW*** Flagship, Statewide **& Regional**
	AND		*AND*
Developmental Courses Needed	Developmental Courses Needed: Flagship : 0 Statewide & Regional : ≤1	***NO Developmental Courses Needed***	Minimum ACT subscore: English ≥ 18; Math ≥ 19 Flagship & **Statewide effective 2012, Regional effective 2014** ***NEW*** *Students meeting minimum admission standards except for the need for developmental courses may enroll in the summer and upon successful completion of the developmental courses be admitted for the fall.*
	AND ONE of the FOLLOWING		*AND ONE of the FOLLOWING*
HS Overall GPA	Overall HS GPA – 3.0 – Flagship Overall HS GPA – 2.5 – Statewide Overall HS GPA – 2.0 – Regional	*HS Core GPA*	GPA on the ***CORE*** —3.0 – Flagship GPA on the ***CORE*** —2.5 – Statewide ***NEW*** GPA on the ***CORE*** —2.0 – Regional
Or	*OR*	*Or*	*OR*
ACT	ACT Composite—25 – Flagship ACT Composite—23 – Statewide ACT Composite—20 – Regional	*ACT*	ACT Composite—25 – Flagship ACT Composite—23 – Statewide ACT Composite—20 – Regional
Or	*OR*		
Rank in Class	HS Grad Rank—10%--Flagship HS Grad Rank—25%-- Statewide HS Grad Rank—50%-- Regional		**Rank in Class no longer a consideration** ***NEW***
% Admission Exceptions Allowed	Flagship—5%; Statewide—7%; Regional—10% calculated from the entering freshman class	*% Admission Exceptions Allowed*	**Flagship—4%; Statewide—6%; Regional—8%** ***NEW*** calculated from the ***previous year's*** entering freshman class

Flagship: LSU. Statewide: LA Tech, ULL, UNO. Regional: Grambling, LSU-A, LSU-S, McNeese, Nicholls, NSU, SLU, SU, SUNO, ULM.

** NOTE: The freshmen and transfer requirements listed on these pages are the Board of Regents' minimum standards for regular admission to a four-year (Flagship; Statewide; or Regional) university approved on April 22,2010. Students should check with the specific institution for additional information, as some have adopted or may choose to adopt additional requirements for admission. Two-Year institutions are open admission for freshmen students with: a diploma from a BESE-approved high school, or GED or its equivalent, or appropriate score on an Ability to Benefit test.* *June 18, 2010*

Admission* to 4-Year Universities, Current [Regents & TOPS High School Core]		**Admission* to 4-Year Universities, 2012** [Regents High School Core**, Fall 2012]	
4 ENGLISH	- English I, II, III, and IV	4 ENGLISH	- English I, II, III, and IV
3 MATH	- Algebra I/Applied Algebra1A & 1B - Algebra II - Geometry/Trigonometry/Calculus or an approved advanced math	**4** MATH	- Algebra I/Applied Algebra I/Algebra I-Pt. 2 - Geometry/Applied Geometry - Algebra II - Financial Math/Math Essentials/Advanced: Pre-Calculus/Advanced: Functions & Statistics/Pre-Calculus/Calculus/Probability and Statistics/Discrete Math/apprvd elec.
3 NATURAL SCIENCE	- Biology - Chemistry - Earth Science/Environmental Science/Physical Science/Biology II/Chemistry II/Physics/Physics II/Physics for Technology/Agriscience I&II	**4** SCIENCE	- Biology - Chemistry - 2 units from: Physical Science/Integrated Science/Physics I/Physics of Technology I/ Aerospace Science/Biology II/Chemistry II/Earth Science/Environmental Science/ Physics II/Physics of Technology II/Agriscience II/Anatomy and Physiology/approved elective(including approved IBC-related course)
1 ADVANCED MATH/SCI	- Additional unit of advanced math/advanced science from: Geometry/Calculus/PreCalculus/Algebra II/ Probability & Statistics/ Discrete Mathematics/Applied Mathematics III /Advanced Mathematics I or II/Integrated Mathematics III/Biology II/Chemistry II/Physics/Physics II		
3 SOCIAL SCIENCE	- American History - World History/World Geography/Western Civilization - Civics & Free Enterprise (one unit combined)/Civics (one unit)	**4** SOCIAL STUDIES	- Civics/AP American Government + Free Enterprise (½ unit each) - American History - World History/World Geography/Western Civilization/AP European History - World History/World Geography/Western Civilization/AP European History/ Law Studies/Psychology/Sociology/Civics (2nd sem, ½ unit)/African American Studies/approved IBC-related course/(Religion I,II,III,IV for nonpublic schools)
2 FOREIGN LANGUAGE	- 2 units from single language	2 FOREIGN LANGUAGE	- 2 units from same language or 2 Speech courses
1 FINE ARTS SURVEY	- Fine Arts Survey/Performance Art (2 units)/one elective unit from among core courses	1 ARTS	- Fine Arts Survey or 1 unit: Art/Dance/Music/Theatre Arts/Applied Arts/approved IBC-related course
½ COMPUTER LITERACY	- Computer Science/Computer Literacy/Business Computer Applications/½ elective unit from among the core courses		
17.5 UNITS		***19 UNITS***	

Minimum Admission Requirements (see previous page):
- ** Completion of the Regents' High School Core defined as 19 units from the Core 4 Curriculum listed in Bulletin741 – Louisiana Handbook for School Administrators and Nonpublic School Administrators
- High School Core GPA –*or*– ACT Composite Score
- Limited or No Development Courses Needed

** Institutions establish their own admission requirements, but the Board of Regents establishes minimum standards for admission to Flagship, Statewide, and Regional universities.*

Flagship: LSU. Statewide: LA Tech, ULL, UNO. Regional: Grambling, LSU-A, LSU-S, McNeese, Nicholls, NSU, SLU, SU, SUNO, ULM.

Louisiana Board of Regents: Office of Academic & Student Affairs

MINIMUM ADMISSION STANDARDS for TRANSFER or ADULT STUDENTS, 4-YEAR

Admission* to 4-Year Universities Current: 2009-10 thru 2011-12		Admission* to 4-Year Universities **Effective: Fall 2012**	
TRANSFER Students		***TRANSFER Students***	
Minimum College-Level Hours Earned	*24 Flagship* *18 Statewide* *12 Regional*	*Minimum College-Level Hours Earned*	***30*** *Flagship* ***24*** *Statewide* ****NEW**** ***18*** *Regional*
	Developmental Courses Needed: Flagship & Statewide: 0 Regional: ≤ 1		**Student must have completed a college-level English and Mathematics course designed to fulfill general education requirements. *NEW***
Minimum GPA on College-Level Courses	*2.50 Flagship* *2.25 Statewide* *2.00 Regional*	*Minimum GPA on College-Level Courses*	*2.50 Flagship* *2.25 Statewide* *2.00 Regional*
% Admission Exceptions Allowed	Flagship—5%; Statewide—7%; Regional—10% calculated from the entering transfer class	*% Admission Exceptions Allowed*	**Flagship—4%; Statewide—6%; Regional—8% *NEW*** calculated from the ***previous year's*** entering transfer class

ADULT Students		***ADULT Students***	
Age 21-24	a- Admit by exception, or b- Admit as non-matriculating, and then by BoR transfer admission standards; or c- Admit as matriculating, part-time, with enrollment limited until meet BoR transfer admission standards.	***Age < 25***	**Freshman: Meet BoR minimum freshman admission standards in place at the time of graduation from high school. *NEW*** Transfer: Meet BoR minimum transfer admission standards.
Age ≥ 25	University's freshman admission requirements (waive BoR minimum for freshman); Meet BoR minimum transfer admission standards.	*Age ≥ 25*	Freshman: Meet University's adult admission requirements **and not require developmental coursework. *NEW*** **Flagship & Statewide effective 2012;** **Regional effective 2014** Transfer: Meet BoR minimum transfer admission standards.

Flagship: LSU. Statewide: LA Tech, ULL, UNO. Regional: Grambling, LSU-A, LSU-S, McNeese, Nicholls, NSU, SLU, SU, SUNO, ULM.

EXHIBIT 3.5—CADDO PARISH LETTER TO LSUS REGARDING EDD

In November 2011, LSUS and Caddo Parish Schools met to discuss the school system's expressions of need for an applied doctorate in Educational Leadership. This letter dates from November 2011.

CADDO PARISH SCHOOL BOARD
POST OFFICE BOX 32000 • 1961 MIDWAY STREET • SHREVEPORT, LOUISIANA 71130-2000
AREA CODE 318 • TELEPHONE 603-6300 • FAX 631-5241

Gerald D. Dawkins, Ed. D.
Superintendent

November 16, 2011

Dr. Paul Sisson
Provost and Vice Chancellor for Academic Affairs
LSU Shreveport
One University Place
Shreveport, LA 71115

Dear Dr. Sisson:

Thank you for your proposal to offer a doctoral studies program in the Caddo-Bossier area, likely in Educational Leadership. Though the need has existed for many years, interested professionals are still required to travel great distances or to enroll in extremely costly on-line programs of study to earn a terminal degree. Caddo is extremely interested in producing its own pipeline of future school leaders, providing the professional development platforms needed to prepare them and forming partnerships that will assure readiness.

In early October I polled Caddo administrators on their interest in meeting to discuss a doctoral program in our area and the response was immediate. Forty-eight Caddo employees responded with interest to meet and thirty-nine actually attended a meeting held on October 19th. I was excited to see so many of our employees interested in furthering their education, in addition to numerous calls to register conflicting schedules but wanting to go "on the record" as definitely interested. Family, employment responsibilities and schedules present real challenges, but those attending the meeting were committal, had identified support systems and are willing to make sacrifices. There was interest expressed in weekend course offerings and certainly with being able to actually "complete" a program of studies locally. It would be greatly appealing if some classes could convene on selected Caddo school campuses. I would certainly be amenable to exploring the feasibility for the benefit of Caddo and area educators.

This administration supports the vision of Louisiana State University Shreveport's Chancellor Marsala and the administrative team to offer this opportunity to educators.

Caddo educators are poised; ready to enroll in the first and future cohorts. Caddo pledges its support and looks forward to hearing from you regarding next steps in this endeavor.

Respectfully,

Dr. Gerald D. Dawkins
Superintendent of Schools

GDD/mnr

Offering Equal Opportunity in Employment and Educational Programs

EXHIBIT 3.6—SOCIAL INNOVATION FUND GRANT

Following is an abbreviated version of a press release announcing five communities in the US to receive these grants. Shreveport-Bossier was one of the five selected nationally.

Five Communities Nationwide to Receive $2.1 Million, Strengthening Innovation to Help Workers, Jobseekers Build Careers

AWARDS REPRESENT DISTRIBUTION FROM FEDERAL GOVERNMENT'S SOCIAL INNOVATION FUND

Boston, MA (October 6, 2011) – The National Fund for Workforce Solutions today announced grants totaling $2.1 million to five communities to bolster regional collaboratives that support local, employer-led workforce partnerships. The awards represent the third round of funding supported by the federal Social Innovation Fund grant awarded to the National Fund and its implementation partner, *Jobs for the Future.*

"The National Fund model is locally driven, and unique to every region and every industry sector," said Damian Thorman, National Program Director at the John S. and James L. Knight Foundation, and Chair of the National Fund. *"But all of our sites are built upon a similar strategy: implement job training and career support programs in close partnership with employers, ensuring that businesses benefit from a skilled workforce and employees get the skills and certifications that lead to sustainable careers."*

The awards represent a combination of federal funding from the Corporation for National and Community Service's ***Social Innovation Fund*** and an equal amount of matching funds raised by the National Fund from private donors. The *Social Innovation Fund* is an innovative federal program that addresses major challenges confronting communities by growing high-impact nonprofit organizations delivering proven solutions.

"The grants announced today will allow five of these sites to expand their efforts into new industry sectors or strengthen current work with local employers," said Thorman. Each of these grants was awarded through a competitive process. They are:

> Central Iowa Works Funding Collaborative, Des Moines, IA: $600,000 over two years. Contact: Jane Fogg, 515-246-6605
>
> Workforce Solutions Collaborative of Metro Hartford, Hartford, CT: $300,000 over two years. Contact: Kim Oliver, 860-493-6831
>
> Bay Area Workforce Funding Collaborative, San Francisco, CA: $600,000 over two years. Contact: Jessica Pitt, 415-733-8560
>
> Dan River Collaborative, Danville, VA: $300,000 over two years. Contact: Julie Brown, Ph.D., 434-836-5674
>
> **Workforce Innovations in Northwest Louisiana, Shreveport, LA: $300,000 over two years. Contact: Paula Hickman, 318-221-0582 (emphasis added)**

WORKFORCE INNOVATIONS IN NORTHWEST LOUISIANA, SHREVEPORT, LA

$300,000 over two years. Contact: Paula Hickman, 318-221-0582

This Social Innovation Fund award will allow Workforce Innovations in Northwest Louisiana (WINLA) to expand its existing workforce partnership in health care and to create a new partnership in the energy sector. The WINLA collaborative was a result of civic leaders responding to the mission of the National Fund and the opportunity presented by the Social

Innovation Fund. WINLA leadership members have been working for over a year to strengthen the funding collaborative, attract matching funds and formalize the existing health care workforce partnership. They now have a collaborative of impressive breadth led by the Community Foundation of North Louisiana. The Consortium for Education, Research and Technology of North Louisiana (CERT) is managing the health care partnership. Other partners include Willis-Knighton Health System, and Northern and Central Louisiana Interfaith. Together the WINLA project plans to serve 150 job seekers, 198 incumbent workers.

BACKGROUND INFORMATION ON THE FUNDING/FUNDERS

The grants being announced today are the third stage in awards made by the National Fund as part of the *Social Innovation Fund*. In late 2010, the National Fund awarded two-year grants to a number of current National Fund sites. Earlier this year, grants were awarded to fund six new sites in communities in the South and Southwest.

About National Fund for Workforce Solutions

The National Fund for Workforce Solutions is an award-winning national initiative focused on helping low-wage workers obtain good careers while at the same time ensuring that employers have the high-quality skills that will enable them to succeed in this highly competitive economy. Since 2008, the National Fund has raised nearly $24 million to support 30 communities that have contributed an additional $104 million in locally-raised resources from 216 different funding sources, including community foundations, United Ways, corporate foundations, workforce investment boards, chambers of commerce and state agencies. Each of these communities has created local funding collaboratives that are collectively investing in more than 80 sectoral workforce partnerships. The addition of these six new sites brings the total number of communities where the National Fund is working to 30.

About Jobs for the Future

Jobs for the Future develops, implements, and promotes new education and workforce strategies that help communities, states, and the nation compete in a global economy. In 200 communities in 41 states, JFF improves the pathways leading from high school to college to family-sustaining careers.

About the Corporation for National and Community Service (CNCS) and the Social Innovation Fund

The Corporation for National and Community Service is a federal agency that engages more than five million Americans in service through Senior Corps, AmeriCorps, and Learn and Serve America, and leads President Obama's national call to service initiative, United We Serve. The Social Innovation Fund is an initiative of the Corporation that improves the lives of people in low-income U.S. communities. Through an innovative public-private partnership, the Social Innovation Fund and selected local and national grant makers co-invest in programs that increase the scale of community-based solutions that have evidence of real impact in the areas of youth development, economic opportunity or healthy futures. Every Federal dollar invested is matched with private funds, and all programs are rigorously evaluated. As a result, the most effective approaches can be expanded to reach more people in need and key lessons can be captured and broadly shared. For more information, visit NationalService.gov.

EXHIBIT 3.7—ARTICULATION AGREEMENTS IN NW LOUISIANA

Bossier Parish Community College	
Area of Articulation	**Most Recent Update**
BPCC AA in General Studies to LSUS Bac. In General Studies	2006
BPCC AST {Grades 1-5} to all four-year Colleges of Education	2007
BPCC AAS in Criminal Justice to NSU-Bac. Of Criminal Justice 2+2	2008
BPCC AAS EMT: Paramedic to NSU-Bac. Unified Public Safety Administration concentration 2+2	2008
BPCC AAS in Film Studies to LSUS Bac. in Film Studies	2008
BPCC AAS in Telecommunications to LSUS Bac. In Telecommunications	2008
BPCC AAS in Business Administration to LSUS Bac. in Business Administration 2+2	2008
BPCC AAS in Telecommunications to Grambling Bac. in Film Studies 2+2	2008
BPCC AAS in Business Administration to NSU Bac. in Business Administration 2+2	2009
BPCC AAS in Telecommunications to NSU Bac. In Journalism 2+2	2009
BPCC AA in Music to NSU Bac. In Music	2009
BPCC AA in Theatre to NSU Bac. In Theatre	2009
BPCC AAS in Industrial Control Systems to NSU Bac. In Electronics Engineering Technology	2009
BPCC AGS (Art Concentration) to NSU Bac. in Fine Arts	2009
BPCC AAS in Healthcare Management to ULM Bachelor of Science in Health Studies (Healthcare Management/Marketing Option) 2+2	2010
BPCC AAS in Business Administration to University of Phoenix BS in Business: Admin. Concentration; BPCC AAS in Criminal Justice-Legal Systems Concentration to University of Phoenix BS in Criminal Justice Admin.	2010
BPCC AAS Medical Asst. to University of Phoenix BS in Management; BPCC AAS in CIS with a Concentration in Computer Programming to University of Phoenix BS in Information Technology Software Engineering;	2010
BPCC AAS in Criminal Justice-Legal Systems Concentration to University of Phoenix BS in Criminal Justice Administration - Management Concentration	2010

Southern University – Shreveport			
Division (SUSLA)	**Program (SUSLA)**	**Institution of Transfer Articulation**	**Program of Transfer Articulation**
Allied Health	Health Information Technology	Louisiana Tech University	Health Information Technology
	Medical Laboratory Technician	Univ. of Louisiana at Monroe	Medical Technology (Clinical Laboratory Science)
	Technology (Clinical Laboratory Science)	LSUHSC-Shreveport	Respiratory Therapy
	Cardiopulmonary Science	LSUHSC-Shreveport	
Science & Technology	Electronics Technology	Grambling State University	Electronic Engineering Technology
	Engineering Technology	Southern Univ. at Baton Rouge	Electronic Engineering Technology
Behavioral Sciences	Human Services	Northwestern State University	Psychology
	Criminal Justice	LSU-Shreveport	Criminal Justice
Business	Business Management	Wiley College	Business Management
	Accounting	Wiley College	Accounting

Northwestern State University	
Area of Articulation	**Most Recent Update**
AAS in General Studies from Baton Rouge Community College to BA in Criminal Justice at NSU 2+2	2008
AAS in Criminal Justice from Bossier Parish Community College to BA in Criminal Justice at NSU 2+2	2009
AAS in Telecommunications from Bossier Parish Community College to BS in Journalism at NSU 2+2	2009
AAS in EMT Paramedic from Bossier Parish Community College to BS in Unified Public Safety Administration at NSU 2+2	2008
BPCC at NSU (intent to transfer)	2001
AAS in Criminal Justice from Columbia Basin College to BA in Criminal Justice at NSU 2+2	2009
Defense Information School to NSU (intent to transfer)	2009
Delgado Community College to NSU (intent to transfer)	2001
Louisiana School for Math, Science, and the Arts agreement to accept credits at NSU	2004
AAS in Care and Development of Young Children from Louisiana Delta Community College to BS in Family and Consumer Science at NSU 2+2	2009
Associate of General Studies from Louisiana Delta Community College to BA in Criminal Justice at NSU 2+2	2009
Memorandum of Understanding between Louisiana Delta Community College and NSU	2009
AAS in Criminal Justice from Louisiana Technical College Technical System Region 6-Oakdale and Region 9 – North Shore Florida Parishes to BA in Criminal Justice at NSU 2+2	2010
AS in Criminal Justice from LSU-Eunice to BA in Criminal Justice at NSU 2+2	2006
Nunez Community College to NSU (intent to transfer)	2001
River Parishes Community College to NSU (intent to transfer)	2001
AAS in Mental Health Technology Drug/Alcohol Abuse Counseling from San Antonio College to BS in Addiction Studies at NSU 2+2	2006
AAS in Emergency Medical Technology Paramedic at South Louisiana Community College to BS in Unified Public Safety Administration at NSU 2+2	2008
AS in Criminal Justice (Law Enforcement concentration) at South Louisiana Community College to BS in Unified Public Safety Administration at NSU 2+2	2008
South Louisiana Community College to NSU (intent to transfer)	2001
AS in Human Services concentration in Substance Abuse Counseling at Southern University Shreveport to BS in Addiction Studies at NSU 2+2	2006
AAS in Criminal Justice at SOWELA Technical Community College to BA in Criminal Justice at NSU 2+2	2006
AAS in Criminal Justice from Yakima Valley Community College to BA in Criminal Justice at NSU 2+2	2009
Pole Universitaire Leonard de Vinci (PULV) agrees to a reciprocal exchange of faculty, staff, and/or students with NSU.	2009

Grambling State University	
Area of Articulation/Partnership	**Most Recent Update**
GSU modified inverted 2 + 2 program with BPCC AAS in Telecommunications. GSU degree in Film Studies	2008
GSU dual admissions for 2+2 degree programs with Louisiana Delta Community College	2008
GSU Bridge program in Science, Technology, Engineering, and Math (STEM) disciplines with SUSLA	2009
GSU general transfer agreement with Dallas County Community College District	2007
Ed. D programs in Educational Leadership and Curriculum and Instruction offered collaboratively by GSU, Louisiana Tech, and ULM which are all members of the Louisiana Education Consortium	Started 1995; Revised April 2010

Louisiana State University–Shreveport Articulation Agreement

LSU-Shreveport basic agreement governing 2+2 programs provides the student with automatic admission upon attainment of an Associate's degree and a minimum GPA of 2.0, except for the BS in Elementary Education which requires a minimum of 2.5 GPA. All relevant courses transfer up to a maximum of 64 hours.

LSU-Shreveport has formal 2+2 program agreements with Bossier Parish Community College. The specific degree programs are:

- Bachelor of Science in General Business Administration
- Bachelor of Science in Elementary Education
- Bachelor of Arts in Speech-Theater Concentration
- Bachelor of Arts in Mass Communications-Broadcast Journalism
- Bachelor of Science in Community Health

Louisiana Tech University	
Articulation Agreements	**Most Recent Update**
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Business Administration	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Business Economics	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Finance	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Computer Information Systems	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Management-Business Management and Entrepreneurship	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Management – Human Resources Management	2008
BPCC Associate of Applied Science in Business Administration to Bachelor of Science in Marketing	2008
Tech-LSU-S MOU: M.A. English; M.A. History -- Twelve (12) hours accepted by Tech from LSU-S toward Tech's M.A. in History & English	
Joint MD/PhD in Biomedical Engineering with LSU-Health Sciences Center	

LSU Health Sciences Center in Shreveport	
Collaborative and Articulation Agreements	
UL-Monroe	Core of COBRE grant to LSUHSC-S
	Co-authors on research manuscripts
	Scientific research agreement
LSU-S	Core of COBRE grant to LSUHSC-S
	Cooperative MS and MPH program
	Collaboration MOU shared technology
LA Tech	MD/PhD program
	Co-authors on research manuscripts
	Collaboration MOU shared technology
	Orthopedic Research

EXHIBIT 5.1—LIST OF MERGERS IN US HIGHER EDUCATION

Following is a list of mergers or consolidations of colleges and universities in the US since approximately the 1830s.[28] They are listed alphabetically.

Many are mergers or absorptions among private institutions, but several involve public institutions. Included in the list are institutions that, today, are major public research universities that were formed, in part, by a merger at some time in their history.

A few that may be particularly interesting are highlighted in BLUE.

- Alliant International University, merger of California School of Professional Psychology and United States International University, 2001
- American Sentinel University, merger of American College of Computer & Information Sciences and American Graduate School of Management
- Argosy University, merger of American Schools of Professional Psychology, the University of Sarasota and the Medical Institute of Minnesota, 2001
- Azusa Pacific College, absorbed Arlington College, 1968
- Azusa Pacific College, merger of Azusa College and Los Angeles Pacific College, 1965
- University of Baltimore, absorbed Eastern College, 1970
- Benedictine College, merger of Mount Saint Scholastica College and St. Benedict's College, 1971
- Birmingham–Southern College, merger of Southern University (Alabama) and Birmingham College, 1918
- Boston University School of Medicine, absorbed Boston Female Medical School, 1874
- Brevard College, merger of Brevard Institute, Weaverville College, and Rutherford College, 1934
- University of California, Berkeley, merger of the College of California and the Agricultural, Mining, and Mechanical Arts College, 1853
- Carson-Newman College, merger of Carson College and Newman College for Women, 1889
- Case Western Reserve University, merger of Case Tech and Western Reserve, 1971–72
- The Catholic University of America, absorbed Columbus University, 1954
- Central Nazarene College, absorbed Nazarene Bible Institute (1911)
- Chicago College of Performing Arts, absorbed Roosevelt University School of Music, 1954
- University of Cincinnati, absorbed Medical College of Ohio 1896; Cincinnati Law School, absorbed 1896; Cincinnati College of Pharmacy, 1954; Cincinnati College-Conservatory of Music, absorbed in 1962
- Cincinnati College-Conservatory of Music, formed by merger of Cincinnati Conservatory of Music and the College of Music of Cincinnati, 1955
- Cincinnati Law School absorbed Cincinnati College in the late 1830s
- Clark Atlanta University, merger of Clark College and Atlanta University, 1988
- Cleveland State University, absorbed Cleveland-Marshall College of Law, 1969
- Carnegie Mellon University, formed by the merger of Carnegie Institute of Technology and the Mellon Institute of Industrial Research
- Davenport University, merger of Davenport College, Detroit College of Business, and Great Lakes College, 2000

[28] List of university and college mergers in the United States, Wikipedia.

- University of Delaware, merger of Newark College and Women's College of Delaware, 1921
- DePaul University, absorbed Barat College, 2001
- University of Denver, absorbed Colorado Women's College, 1982
- University of Detroit Mercy, merger of University of Detroit and Mercy College, 1990
- Dillard University, merger of Straight University and New Orleans University, 1934
- Erskine College, absorbed Due West Female College, 1927
- Fordham University, absorbed Marymount College, 2002
- Gannon University, absorbed Villa Marie College, 1989
- The George Washington University, absorbed Mount Vernon College for Women, 1999; absorbed Benjamin Franklin University, 1987; absorbed National University, 1954
- Gordon College (Massachusetts), absorbed Barrington College (1985)
- Hamilton College, absorbed Kirkland College, 1978
- Hannibal-LaGrange College (now Hannibal-LaGrange University), merger of LaGrange College and Hannibal College, 1928
- University of Hartford, merger of Hartford Art School, Hartt College of Music, and Hillyer College, 1957
- Hendrix College, absorbed Henderson-Brown College, 1929; absorbed Galloway Women's College, 1933
- University of Houston–Downtown, assets were acquired from South Texas Junior College, 1974
- Houghton College, absorbed United Wesleyan College, 1989
- Illinois Institute of Technology, absorbed Midwest College of Engineering, 1991
- Kansas State University, absorbed Kansas College of Technology, 1991
- University of Kentucky, absorbed the Louisville College of Pharmacy in 1947
- University of La Verne, absorbed San Fernando Valley College of Law, 1983
- Lawson State Community College, absorbed Bessemer State Technical College, 2005
- Luther College, absorbed Decorah College for Women, 1936
- Loyola University Chicago, absorbed Mundelein College, Chicago, 1991
- Loyola Marymount University, merger of Marymount College and Loyola University, 1973
- Loyola University Maryland, absorbed Mount Saint Agnes College, 1971
- Loyola University New Orleans, absorbed College of the Immaculate Conception, 1911; absorbed New Orleans College of Pharmacy, 1919
- Mannes College of Music, absorbed Chatham Square Music School
- Martin Luther College, merger of Dr. Martin Luther College and Northwestern College (Wisconsin), 1995
- University of Maryland, Baltimore, absorbed Baltimore College, 1830
- University of Massachusetts Boston, absorbed Boston State College, 1982
- University of Massachusetts Dartmouth, merger of Bradford Durfee College of Technology and New Bedford Institute of Technology, 1964; absorbed Southern New England School of Law, 2010
- University of Massachusetts Lowell, merger of Lowell State College and Lowell Technological Institute, 1975–76
- Mercer University, absorbed Tift College, 1986
- Miami University, absorbed Oxford College of Music and Art, 1928; absorbed Western College, 1974

- Middlebury College - affiliated then acquired the Monterey Institute of International Studies (MIIS), now a graduate school, 2010
- Millsaps College, absorbed Grenada College, 1950; absorbed Whitworth College, 1938
- Morningside College, absorbed Charles City College, 1914
- National College, acquired Kentucky College of Business and absorbed Fugazzi College
- The New School (then the New School for Social Research), absorbed Parsons School of Design in 1970; absorbed Mannes College of Music in 1989
- New York University, acquired New York College of Dentistry in 1925; acquired Mount Sinai School of Medicine in 1999; acquired Polytechnic University of Brooklyn, 2008
- Northeastern University, absorbed Bouve College, 1964
- Nova Southeastern University, merger of Nova University and Southeastern University of the Health Sciences, 1994
- Pace University, absorbed Briarcliff College, 1977; merged with College of White Plains (formerly Good Counsel College), 1975
- Pennsylvania State University, absorbed Dickinson School of Law, 2000
- Phillips Community College of the University of Arkansas, absorbed the Rice Belt Technical Institute, 1996
- University of Portland, absorbed Multnomah College, 1969
- Rich Mountain Community College, formed by the merger of Rich Mountain Vocational-Technical School and the off-campus program of Henderson State University, 1983
- Rutgers University, absorbed University of Newark, 1947
- College of St. Catherine, absorbed St. Mary's Junior College, 1986
- University of San Diego, absorbed San Diego College for Women, 1972
- South Arkansas Community College, merger of Southern Arkansas University, El Dorado Branch and Oil Belt Technical College, 1992
- Southern Benedictine College, merger of Saint's Bernard College and Cullman College, 1976
- Southern Nazarene University, absorbed Peniel College,1920, Central Nazarene College, 1929, Arkansas Holiness College,1931, Bresee Theological College, 1940
- St. John's University (New York City) College of Business, absorbed the College of Insurance, 2001
- Southwestern University, merger of Rutersville College, Wesleyan College, McKenzie College, and Soule University, 1873
- University of Tennessee at Chattanooga, merger of the University of Chattanooga, University of Tennessee, and Chattanooga City College, 1969
- Tennessee State University, absorbed University of Tennessee at Nashville, 1979
- University of Toledo, merger with Medical University of Ohio, 2006
- Transylvania University, merged with Kentucky University, 1865, adopting the latter school's name (Transylvania name restored in 1908); absorbed Hamilton College (Kentucky), 1903
- Trenholm State Technical College, formed by a merger between H. Council Treholm State Technical College and John M. Patterson State Technical College, 2002/2003
- Trinity University (Texas), absorbed University of San Antonio, 1942
- Union College (Kentucky), absorbed Sue Bennett College, 1997
- Vanderbilt University, absorbed Peabody College, 1979
- Virginia Commonwealth University, merger of Richmond Professional Institute and Medical College of Virginia
- Virginia Union University, absorbed Hartshorn Memorial College, 1932

- Washington & Jefferson College, merger of Washington College in Washington, Pennsylvania and Jefferson College in Canonsburg, Pennsylvania, 1865
- Wayne University (now Wayne State University), formed by the merger of Detroit City College, Detroit Teachers College and Detroit Medical College
- University of West Los Angeles, absorbed the San Fernando Valley College of Law, 2002
- Xavier University (Cincinnati), absorbed Edgecliff College in 1980

EXHIBIT 5.2—A HISTORY OF INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS

A Brief History of IUPUI (1891-1971)

Ralph D. Gray, Professor Emeritus of History

http://iport.iupui.edu/iupui/history/

It all began rather inauspiciously. Upon an invitation in 1891 from a number of college graduates living in Indianapolis, Indiana University sent a young professor to offer a class in economics. Accordingly Jeremiah W. Jenks, then a newcomer to Bloomington who went on to a distinguished career in New York, traveled to the capital city weekly to present about a dozen lectures to his class on Friday evenings. For those enrollees seeking university credit (two hours) for the course, there was also a required quiz and discussion session the following morning.

Jenks's pioneering course led to others--in history, sociology, English--as Indiana participated in the phenomenon known as the "extension movement." Pioneered by Cambridge University in England in the 1860s, it reached the United States in the 1880s and was discussed at a national conference in Philadelphia in 1892, which at least one Indiana University professor attended. The movement in Indiana, however, nearly became just a momentary fad, for the "extended" professors soon tired of their long hours of difficult travel and extra weekend work. Moreover, as Bloomington campus teaching duties grew in the early years of this century, the travels stopped and extension courses evolved into correspondence courses. This activity eventually fell under the purview of an Extension Division, established in 1912 and based in Bloomington, and soon thereafter "in person" credit courses began to be offered in Indianapolis again. Then, in response to a request (and modest financial support) from the Indianapolis Chamber of Commerce, Indiana University established its first Extension Center in the capital city in 1916.

Utilizing free accommodations on the tenth floor of the Merchants Bank Building, then, at sixteen stories, the city's tallest building, the Extension Center began offering both credit and non-credit courses. Usually these classes were held in the late afternoon or evening, most often in classrooms at Shortridge High School, still at its downtown location, and in meeting rooms of the public library. Ray S. Trent (1916-1918) was the first head of the center, and he was succeeded by Robert E. Cavanaugh (1918-1921), a former superintendent of schools in Salem, Indiana.

When Cavanaugh moved up to replace John J. Pettijohn as Director of the entire Extension Division, he kept his office in Indianapolis. At that time, Mary B. Orvis (1921-1945) became the actual head of the Indianapolis Center in everything but the title, for she was referred to as the "officer in charge." Orvis had come to Indiana University in 1916 to work in the Extension Division as a secretary, moved on in the same capacity to Indianapolis in 1918, and began teaching there in 1920. She was named an assistant professor of journalism in 1921, when she also assumed her administrative post. Despite her lack of title recognition in both capacities, Orvis proved to be an effective teacher and "officer in charge." The author of The Art of Writing Fiction, Orvis counted among her students the highly successful novelist and playwright, Joseph Hayes, who is best known for The Desperate Hours, a thriller as both a novel and a play that was set in Indianapolis.

The Indianapolis Extension Center, officially termed the "Indianapolis Center" in the 1920s and unofficially simply as the Downtown Center or Downtown Campus, had many homes during its first dozen years. In 1920 the Center's offices moved from the bank building into a medical building used by the IU School of Medicine prior to its move to the west side in 1919. But Cavanaugh and the others found the building, located behind (to the west of) the State Capitol to be inadequate and unsatisfactory. There less than a full year, the Center next occupied space in a more centrally located building at 319 North Pennsylvania.

Finally, in 1928, the Downtown Center came by its first permanent home, one owned by the university, in a most unusual fashion. Construction of the magnificent Indiana World War Memorial Hall on space between Meridian and Pennsylvania streets in the latter 1920s forced the removal of as many as forty-five buildings. One of them, a sturdy five-story structure that housed the Bobbs-

Merrill Company, a well-known publishing house, was vacated by the company shortly before the building was moved around the corner to a site at 122 East Michigan Street. Indiana University purchased it in 1928 for both its Indianapolis Center headquarters and a place to hold classes. Subsequently known as the E Building for it housed the education department for many years, its acquisition marked the beginning of the development of a quite substantial "campus" near the intersection of East Michigan and North Delaware streets.

The major addition came in 1948 when the university acquired a second, even larger building nearby. Known as the A (for administration) Building, the 8-story structure was the former home of the national headquarters of the Lumberman"s Union. Located at 518 North Delaware, the A Building also housed the library on the 5th, 7th, and 8th floors--administrative offices occupied the 6th floor. The lower floors, in addition to providing classrooms, were also used for a bookstore, a food service (Hanna's), and various student activity offices, such as, eventually, a quirky campus newspaper named Onomatopoeia. Interestingly, the library included the collections of both the Downtown Campus and the Graduate School of Social Service, now the School of Social Work. But the two collections used different cataloging systems--Dewey Decimal for the Social Service books, Library of Congress for the others. Neither "side" would give in to the other, so this anomaly continued until after the move to a new library on the west side campus.

Eventually the campus expanded eastward along Michigan Street. In 1963 the university leased the C Building, probably so-called because the solid four-story building had formerly been the national headquarters of the Carpenter's Union. This building at 222 East Michigan Street is the sole survivor of the Downtown Campus's "Big Three" cluster near the intersection of Michigan and Delaware. It now serves as an adjunct to the Barton Nursing Home, a corner building that had always separated the C from the A and E buildings. Lastly, the Downtown Campus also included a building at 902 North Meridian Street.

This building, originally the home of the Hoosier Athletic Club, had been purchased for Purdue University by George Marott in 1943. Purdue had started its Indianapolis extension programs in 1940 from offices in Indiana University's E Building and then three other downtown locations before getting its own building. But it soon outgrew the limited, poorly suited accommodations at the Marott Building, which the academic programs had to share with agricultural extension services personnel (and chickens, sometimes). Fortunately, an additional, timely benefaction enabled Purdue to move its Indianapolis operations to new facilities on East 38th Street in 1961, when the Krannert Building was ready for use. Indiana University then occupied the Marott Building, referred to as the M Building, which it purchased in 1967.

Despite the inadequacies of its scattered physical properties, not one of which had been designed for academic use, and chronic underfunding of its activities, the Downtown Campus survived its shaky start and the challenges of the depression and another world war. Enrollments rose steadily, from about 450 in 1920 and 1,100 in 1924 (including 63 graduate students in history, education, and English) to more than 3,000 in 1936 and just over 5,000 in 1968.

A sizable collection of bulletins from the Extension Center/Downtown Campus in the university archives reveals many interesting things about it during the early years. Distinguished professors from Bloomington and the Medical Center, rather than simply graduate students trying to make ends meet, often taught in Indianapolis, as did some prominent, well-placed individuals in the city, whose generic title was that of Extension Instructors. The former group included Dr. Charles P. Emerson, dean of the Medical School, folklorist Stith Thompson, poet Samuel Yellin, dramatist Lee Norvelle, and mathematician Kenneth P. Williams, who also made his mark as a Civil War historian and author of the influential Lincoln Finds a General. The latter group of local talented people included W. G. Gingery, head of the mathematics department at Shortridge High who offered a course in astronomy; Ray S. Trent, director of Industrial Research for the Indianapolis Chamber of Commerce (as well as the first director of the Extension Center), and Herman B Wells, then with the Indiana Department of Financial Institutions, who in 1935 taught economics to undergraduates. Wells, later of course the legendary president and then chancellor of the university, was so little known to the IU family that his name was misspelled in the bulletin.

An interesting feature of virtually every semester during the 1930s was the presentation of what were billed as "Popular Lectures." That must have been an accurate label, for they were repeated regularly. The topics differed and came to have great relevancy to the changing world situation. This series began in the fall of 1930 with twelve lectures, every Thursday evening on the fifth floor of the Center's main building, on "Great Men in History." The "great men" included some from antiquity, moved on to Napoleon and finally to Woodrow Wilson. Future Pulitzer Prize-winning historian R. C. Buley, then just a lowly assistant professor, was the one who spoke on the Democratic president who led the nation through World War I but not into the League of Nations. In the next series on "Great Men of Letters," President William Lowe Bryan lectured on Mark Twain.

The fee for these lectures, carried as a credit course for those who wished to pick up an extra credit, was $5.00; for those who simply audited the lectures, the fee was $3.00. Subsequent "popular lecture" series topics included Public Welfare and Social Security (1936), China and Japan Today (1938), and Our Friends and Enemies in the Far East (1942). Other specially publicized courses were on interior decoration, music and art appreciation, and even one on "how to dress." Another series that might cause wonderment to us in this day of ubiquitous music and videos was the "Free Victrola Concerts" offered in the spring of 1936. Arranged by Mary B. Orvis, the series was intended to familiarize the students with good classical music, such as works by Bach, Beethoven, Brahms, Haydn, Mozart, and others.

In 1945, just in time to meet the enormous onslaught of new students largely occasioned by the G. I. Bill of Rights, Roy E. Feik replaced Orvis as head of the Indianapolis Center. During Director Feik's ten-year tenure in office, the center's enrollment doubled again, both its part-time and full-time faculty also doubled, and its physical facilities tripled. Growth continued under Virgil Hunt, a former small college president and director of IU's Kokomo Campus who also, like Feik, served as director of the Indianapolis campus for ten years. One of his most significant steps during that time was hiring Dr. Joseph T. Taylor, then at the Flanner House, first to teach sociology at the campus, and then to join him in its administration.

The story of the development of the west side campus is too complex for adequate summary here, but gradually, over the course of more than ten years, the university acquired some 2,000 individual pieces of property--houses, stores, churches, industries and industrial sites, and more. Designated the University Quarter, land between West Street and the White River (east to west) and Washington Street to 10th Street or Fall Creek (south to north) was destined to become the home of a unique, new university, awkwardly but perhaps unavoidably named Indiana University-Purdue University at Indianapolis.

Of course there were concerns and objections to this plan by many of the area residents. Essentially a black neighborhood near famed Indiana Avenue and its once lively center of restaurants, shops, and halls for outstanding jazz musicians, the area was also adjacent to the equally famed and revered Lockefield Gardens, one of the nation's first public housing projects of the New Deal era. But both "the Avenue" and Lockefield had fallen on hard times, the neighborhood was in decline, and by 1960 had become a priority within the city administration as a site for urban renewal. The university's approach in acquiring the designated land and properties was both fair and firm--independent appraisals fixed the prices, and no one was forced to sell or leave his or her property without relocation assistance both in finding acceptable housing elsewhere and in meeting the expenses of moving. But the pressure for action was inexorable and often, quite understandably, deeply resented.

An unwieldy amalgamation of the regional campuses in Indianapolis operated separately by Indiana and Purdue University occurred in 1969. Originally planned, as in Fort Wayne, to be simply a physical merger—placing both operations on a single site near the Medical Center, the merger suddenly and still inexplicably became complete and comprehensive. This melding of two operations into an unprecedented, seemingly impossible single unit managed by one university--Indiana—but offering the programs and degrees of both has succeeded beyond the wildest dreams of all involved.

At the time of the merger, an attempt at rationalizing the organization of the undergraduate faculty involved the creation—by 1973—of at least three new schools: the Downtown Campus of Indiana University, its departments augmented by former Purdue University faculty in the same fields, became the School of Liberal Arts, and Purdue University programs, with a few former IU faculty joining Purdue mission departments, evolved into the Schools of Science and Engineering and Technology. Earlier, certain programs administered by the Downtown Campus, such as in business, education, and nursing, had joined other schools or divisions, so the School of Liberal Arts consisted, for the most part, of programs in the traditional arts and humanities.

The first dean of the new School of Liberal Arts was Dr. Taylor, a revered and honored community leader, especially among the African American community. He headed the Downtown Campus, and then the SLA, for twelve, highly significant years, 1966-1978. Thus he played a large role in working out the details of the merger as IU-I and PU-I became IUPUI. Ably assisted by Dr. James R. East, Taylor also coordinated planning for the school's new home on the west side in a building appropriately named for Dr. Cavanaugh, the long-time director from Indianapolis of IU"s Extension Division. Besides, the school had already had a C (for classrooms) building. Adjacent to Cavanaugh Hall were a much needed new library and a modern, state-of-the-art lecture hall, known generically as the Library and the Lecture Hall, not by just letters. Two of these buildings were ready for use beginning in January 1971; the third, the Lecture Hall was ready by that summer.

Not only were the faculty and curricular mergers completed, as planned, slightly before the mandated date of July 1, 1971, but also administrative and staff personnel and student organizations at both institutions became part of single units. IUPUI, the shortened designation of the new institution, had one registrar, one bursar, one student newspaper, and eventually one undergraduate library. The overall head of the new university, a chancellor, was Dr. Maynard K. Hine. The former dean of the School of Dentistry, Hine appointed as his first vice chancellor the former head of Purdue's Indianapolis campus, Dr. Jack Ryder. Soon thereafter, Dr. Hine appointed a second vice chancellor, Dr. John (Jack) C. Buhner, who came to Indianapolis from his post as director of the IU campus in Gary. This, as Dr. Hine never tired of saying, gave him "two Jacks for openers" in his negotiations with others.

In the meantime, Dr. Taylor, who noted that the former Downtown Campus faculty was "in limbo" for a time after the merger, having no formal school designation or organization, presided over impressive growth of the school despite continued neglect, lack of funding, and the frequent loss of badly needed classrooms in Cavanaugh to various central administration offices. His successors, in turn Martha Francois, William Plater, John Barlow, and now Herman Saatkamp, have each furthered and broadened the school's mission and its role within the university and the metropolitan community. The body that numbered only 13 1/2 full-time faculty when Dr. Taylor first joined it in 1958, is now over 180 members strong.

EXHIBIT 7.1—ACT 419 TRANSFER OF UNIVERSITY OF NEW ORLEANS

Regular Session, 2011 **ENROLLED**

ACT 419

SENATE BILL NO. 266 (Substitute of Senate Bill No. 183 by Senator Appel)

BY SENATORS APPEL AND MURRAY AND REPRESENTATIVES ARNOLD, BOBBY BADON, BILLIOT, BROSSETT, HENRY BURNS, TIM BURNS, CARTER, HARDY, HINES, HOWARD, LIGI, LORUSSO, POPE, RICHARDSON, SEABAUGH, SMILEY, JANE SMITH, TEMPLET, TUCKER AND WILLMOTT

AN ACT

To amend and reenact R.S. 17:3217, to enact R.S. 17:3230 and Part III-A of Chapter 26 of Title 17 of the Louisiana Revised Statutes of 1950, to be comprised of R.S. 17:3241, and to repeal R.S. 17:3215(2), relative to postsecondary education; to provide for the transfer of the University of New Orleans to the University of Louisiana System; to provide relative to the transfer of the facilities, resources, funds, obligations, and functions of the institution and related foundations; to provide for the transition responsibilities of the impacted institution and management boards and the division of administration; to provide for cooperative agreements; to provide relative to accreditation issues; to provide relative to funding; to provide relative to employees; to provide for effectiveness; and to provide for related matters.

Be it enacted by the Legislature of Louisiana:

Section 1. R.S. 17:3217 is hereby amended and reenacted and R.S. 17:3230 and Part III-A of Chapter 26 of Title 17 of the Louisiana Revised Statutes of 1950, to be comprised of R.S. 17:3241, are hereby enacted to read as follows:

§3217. University of Louisiana System
The University of Louisiana System is composed of the institutions under the supervision and management of the Board of Supervisors for the University of Louisiana System as follows:
(1) Grambling State University at Grambling.
(2) Louisiana Tech University at Ruston.
(3) McNeese State University at Lake Charles.
(4) Nicholls State University at Thibodaux.
(5) Northwestern State University of Louisiana at Natchitoches.
(6) Southeastern Louisiana University at Hammond.
(7) The University of Louisiana at Lafayette.
(8) The University of Louisiana at Monroe.
(9) The University of New Orleans.
(10) Any other college, university, school, institution or program now or hereafter under the supervision and management Board of Supervisors for the University of Louisiana System.

* * *

§3230. The University of New Orleans; transfer to the University of Louisiana System

A. (1) Not later than August 1, 2011, the chancellor of the University of New Orleans shall submit a letter to the president of the Southern Association for Colleges and Schools, Commission on Colleges, stating his intent for a change in governance for the institution from

the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College to the Board of Supervisors for the University of Louisiana System.
(2) The chancellor, faculty, and administration of the University of New Orleans shall take every action necessary to efficiently and expeditiously comply with all established timelines, requirements, and procedures to ensure that the requested change of governance may be effected immediately upon receipt of commission approval.
B.(1) Pursuant to the authority granted to the legislature by Article VIII, Section 1 5(D)(3) of the Constitution of Louisiana to transfer an institution from one board to another by law enacted by two-thirds of the elected members of each house, the University of New Orleans, and the assets, funds, obligations, liabilities, programs, and functions related thereto, are hereby transferred to the University of Louisiana System, and shall be under the management and supervision of the Board of Supervisors for the University of Louisiana System.
(2) The provisions of this Subsection shall become effective immediately upon receipt of approval from the Southern Association for Colleges and Schools, Commission on Colleges, for the requested change in governance.
C. The Board of Supervisors for the University of Louisiana System shall develop policies and procedures to resolve issues related to the status and tenure of employees of the University of New Orleans which may arise from the transfer of the institution to the University of Louisiana System.
D. The Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall:
(1) Continue to exercise its authority to supervise and manage the University of New Orleans until such time as the Southern Association for Colleges and Schools, Commission on Colleges, grants approval for the requested change in governance and transfer of the University of New Orleans to the University of Louisiana System.
(2)(a) Work cooperatively and collaboratively with the Board of Supervisors for the University of Louisiana System to ensure that the requested transfer may be effected immediately upon receipt of commission approval for the change in governance.
(b) Prior to receipt of such approval, enter into agreements to transfer as many administrative and supervisory functions as possible with respect to the University of New Orleans to the University of Louisiana System, without adversely impacting the accreditation status of the institution.
(3) Upon receipt of such approval, immediately transfer all assets, funds, facilities, property, obligations, liabilities, programs, and functions relative to the University of New Orleans to the University of Louisiana System.
E. The Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall not:
(1) Interfere with, or impede in any way, the processes to transfer the University of New Orleans to the University of Louisiana System.
(2) Sell, transfer, or otherwise remove any asset or thing of value, movable or immovable, tangible or intangible, attributable to or owned by the University of New Orleans, or owned, leased by, or operated by any foundation related to such institution. In addition, access to any asset leased to any foundation related to the University of New Orleans shall not be restricted or denied.
(3) Incur, transfer or assign any debt or other responsibility or obligation to the University of New Orleans that is not properly attributable to the institution.
(4)(a) Disproportionately reduce or reallocate the level of funding that would otherwise be allocated to the University of New Orleans pursuant to the postsecondary education funding formula.
(b) Until such time as the University of New Orleans is transferred to the University of Louisiana System, impose any budget reductions or changes in funding allocations upon the institution without prior review and approval from the Joint Legislative Committee on the Budget.

(5) Take any personnel action with regard to any instructional or administrative employee of the University of New Orleans without the prior approval of the Board of Supervisors for the University of Louisiana System.
F. The commissioner of administration shall ensure that sufficient funds and resources are available to fully effect the transfer of the University of New Orleans to the University of Louisiana System. Such funding and resources shall not impact the Board of Regents' formula for the equitable distribution of funds to institutions of postsecondary education.
G.(1) The University of New Orleans, pursuant to their agreement with the University of New Orleans Foundation, shall reimburse the state for the purchase of available insurance for indemnification and costs which may arise from the transfer; provided however, that the state of Louisiana shall indemnify and hold harmless the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College and the Board of Supervisors for the University of Louisiana System for any liability and costs which may result from the transfer of existing contracts, financing, or immovable property.
(2) Effective beginning with the 2011-2012 Fiscal Year, any and all funds previously paid by the University of New Orleans to the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall be paid instead to the Board of Supervisors for the University of Louisiana System; however, the total amount of such payments shall not be less than that paid during the 2010-2011 Fiscal Year.
H. The legislature shall appropriate sufficient funds to the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College and the Board of Supervisors for the University of Louisiana System to fully effect the transfer of the University of New Orleans to the University of Louisiana System.

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PART III-A. POSTSECONDARY EDUCATION DELIVERY SYSTEM FOR THE NEW ORLEANS REGION
§3241. Legislative intent; goals

A. It is the intent of the legislature that a comprehensive, integrated regional delivery system be provided for the delivery of public postsecondary education services in the New Orleans region which system will:
(1) Provide a world class educational environment that will meet the academic needs and interests of every student, while providing each student with the support, assistance, and guidance necessary to attain his or her educational goals and aspirations.
(2) Ensure that students who are academically unprepared are provided the educational resources they need to have a reasonable chance for success in their academic pursuits.
(3) Raise the educational attainment of the population, improve the quality of life, and contribute to the economic well being of the New Orleans region.
(4) Make optimal use of facilities, faculties, and other academic and fiscal resources associated with the public postsecondary institutions in the region.
B. The legislature finds that these goals will best be accomplished through the following actions: (1) The Board of Regents shall adopt by not later than February 1, 2012, a written plan of action including timelines, deadlines, requirements, and procedures for achieving the goals specified in Subsection A of this Section as such goals relate to the powers, duties, functions, and responsibilities of the board provided by Article VIII, Section 5, of the Constitution of Louisiana and other applicable law. The board shall submit copies of the adopted action plan to the House Committee on Education and the Senate Committee on Education.
(2) The Board of Supervisors of Southern University and Agricultural and Mechanical College, the Board of Supervisors for the University of Louisiana System, and the Board of Supervisors of Community and Technical Colleges each shall adopt by not later than February 1, 2012, a written plan of action including timelines, deadlines, requirements, and procedures for achieving the goals specified in Subsection A of this Section as they relate to the powers, duties,

functions, and responsibilities of the boards provided by Article VIII, Section 5(E), of the Constitution of Louisiana and other applicable law. Each board also shall submit copies of its adopted action plan to the House Committee on Education and the Senate Committee on Education.

Section 2. R.S. 17:3215(2) is hereby repealed.

Section 3.(A) This Act is not intended to nor shall it be construed to impair the contractual or other obligations of any agency, office, board, commission, department, or political subdivision, or of the state as a result of the transfers of obligations in accordance with this Act. Upon the effective date of the transfer of the University of New Orleans, all such obligations of the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College related to the University of New Orleans shall be deemed to be obligations of the Board of Supervisors for the University of Louisiana System to the same extent as if originally incurred by it.
(B) All funds and revenues previously dedicate by authority of the constitution and laws of this state to the payment of any bonds related to the University of New Orleans shall continue to be collected and dedicated to such payments unless and until other provision is made for such payments in accordance with law. Upon the effective date of the transfer of the University of New Orleans, all acts relating to such bonds by the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall be deemed to be the acts of the Board of Supervisors for the University of Louisiana System in the same manner and to the same extent as if originally so done.
(C) No provision of this Act shall preclude a Memorandum of Understanding (MOU) under which a bonded indebtedness obligation of the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College existing on the effective date of this Act would remain in force after an agreement that the Board of Supervisors for the University of Louisiana System would be responsible for all payments, costs, and other covenants contained in said bonded indebtedness. If the maintenance of bonded indebtedness by the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College for properties or assets to be transferred to the Board of Supervisors for the University of Louisiana System is advantageous to the state of Louisiana, then the Board of Supervisors of Louisiana State University and Agricultural and Mechanical College shall make every effort to maintain such bonded indebtedness under a Memorandum of Understanding as described herein.
(D) The provisions of this Section shall have the full force and effect of law.
Section 4. This Act shall become effective upon signature by the governor or, if not signed by the governor, upon expiration of the time for bills to become law without signature by the governor, as provided by Article III, Section 18 of the Constitution of Louisiana. If vetoed by the governor and subsequently approved by the legislature, this Act shall become effective on the day following such approval.

PRESIDENT OF THE SENATE signed June 22, 2011

SPEAKER OF THE HOUSE OF REPRESENTATIVES signed June 22, 2011

GOVERNOR OF THE STATE OF LOUISIANA
APPROVED: July 11, 2011

Bossier City riverfront, with Red River and Shreveport in background

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