

PwC Charitable Foundation, Inc.

Phi Theta Kappa grant proposal: Achieving Equity Through Honors Education
September 30, 2022



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Due to my past, doors were not always open to me. Phi Theta Kappa changed that, and I became the first returning citizen elected to serve in the country's highest level of leadership for community college students. Because of Phi Theta Kappa, I found my activist voice and purpose in civic engagement and overcame mediocrity years ago.

– James Elliott, 2019 – 2020 International President of Phi Theta Kappa, 2020 All-USA Academic Team Member, PTK President's Award for Leadership Excellence (\$30K/Year), Aspiring Civil Rights Attorney at Columbia University, 2022 Truman Scholar



Organization overview: Phi Theta Kappa Honor Society

Mission:

- ✓ Founded in 1918, Phi Theta Kappa Honor Society (PTK) is recognized by the **American Association of Community Colleges** as the official honor society of community and technical colleges
- ✓ **PTK's mission** is to recognize the academic achievement of college students and to provide opportunities for them to grow as scholars and leaders

Charity evaluator ratings:

- ✓ Guidestar: Platinum
- ✓ Charity Navigator: 100

Geographies:

- ✓ 1,300 chapters in 11 nations (98% of US community college across all 50 states)
- ✓ National convention attendance (5,000+)

PwC Foundation prior support:

- ✓ No prior engagement

Key programs or specialties:

- ✓ **Honors in Action:** Research service learning program and competition; top chapters are published in *Civic Scholar*, PTK's journal of undergraduate research
- ✓ **Edge Programs:** Self-paced professional development courses focused on developing research skills, navigating the transfer and career readiness
- ✓ **Catalyst:** PTK's International Convention with world-class speakers; personal and professional development; and recognition of outstanding projects, chapters and individual members
- ✓ **Scholarships:** Transfer (\$246 million) and private corporate, foundation and endowed (\$1.5 million) awarded annually

How they are innovating:

- ✓ **Shaping the national conversation** about the work of community colleges through development and launch of CCsmart, a student-led national awareness and advocacy campaign
- ✓ **Expanding** scholarships, internships and job opportunities through strategic partnerships with business, industry and other nonprofit organizations, such as SkillsUSA

Success snapshot:

- ✓ **225,000 active members annually** and 3.8M alumni members
- ✓ **PTK members have a 91% overall student success rate – completion or transfer –** and the success rate of Black and Latinx students is 93%
- ✓ Over the past five years, **Black and Latinx students represented one-third of all student leadership roles**
- ✓ Over the past 5 years, **85% – 95% of Jack Kent Cooke Scholars** were PTK members (the community college equivalent of Rhodes Scholars)
- ✓ PTK received the **National Institute for the Study of Transfer Success (NISTS) Catalyst Award** in 2021
- ✓ PTK's **CEO was recently appointed to the board of directors for the American Association of Community Colleges** (2022 – 2025)

Grant summary: Phi Theta Kappa Honor Society

Opportunity: Support from the PwC Charitable Foundation will **enable PTK to provide over 11,000 Black and Latinx community college students access to life changing honors programming**, leadership development, peer networking, travel opportunities, scholarships, high-touch transfer/career coaching and increased faculty/staff engagement for **increasing their rates of completion and transfer**.

Why support PTK?

- **Student success happens when students move beyond the transactional behavior** of going to class and begin engaging with peers, instructors, the institution and leadership opportunities in a meaningful way; **community colleges fall short of providing** these experiences for students and financial barriers further restrict opportunities
- With national reach and established relationships with community colleges, PTK is **uniquely positioned to fill this gap and help high-achieving students develop** research skills, participate in a robust peer network and engage in activities that make them competitive for transferring to selective four-year colleges / entering the workforce

A grant to PTK will:

- **Establish and sustain honors programs at 17 community colleges across country** with 75%+ Black and Latinx student populations without access to honors courses
- **Support 11,000 Black and Latinx students** with access to a for-credit honors experience, and increase engagement and leadership opportunities, access to scholarships and pathways to four-year degrees
- **Expand institutional capacity and use of data** for student-tracking research (ROI), benefits of robust honors program experiences, understanding of research-based ways to improve student success and the need to sustain this work beyond the grant period
- **Increase completion and successful transfer** rate by 33% for participating students

Organization	Phi Theta Kappa Honor Society
Primary cause area	Education; Equipping Students
Grant amount	\$3,000,000
Grant period	3 Years; Jan 2023 – Dec 2025
% of FY23 Budget	12% of \$25M Initiative
Proposal Champion	Christine Freyermuth
Due diligence	Complete

Grant proposal

The challenge

Race should not be a strong predictor of one's success in college—but it is. Over the past 20 years, a significant amount of scholarly research verifies that this problem exists broadly in higher education, particularly in community colleges. In six-year completion rate studies, Black and Latinx students complete community college at 28% and 36%, and they also transfer to complete a bachelor's degree at 10% and 14%, respectively—the lowest rates of any other race or ethnic group.

While many blame academic preparedness as the primary reason for these outcomes, investigations of Black and Latinx college dropouts point to "other reasons" more frequently than academics. Black and Latinx students, particularly males, face a primary challenge in creating stronger identities as college learners. Other studies show that Black and Latinx students benefit from higher expectations and subsequent validation of meeting those expectations.

Community colleges are more focused on transactional learning rather than transformational environments. Community colleges know that engagement causes higher student success, but they have struggled to provide environments encouraging engagement. Engagement comes from opportunities for students to make personal connections on campus by providing ways to build strong relationships with peers and faculty. Colleges must structure high expectations—no one rises to low expectations. PTK works in several ways to validate students as college learners, helps them engage with their college experience and increases their efficacy towards completion and transfer.

Community colleges are underfunded. The defunding of community colleges for the past decade has left community colleges less able to provide robust co-curricular experiences to students who are disproportionately minority, first-generation and low-income. Additionally, community colleges lack the institutional research capacity to write and receive grants, track and study student success and provide professional development of institutional and staff behaviors needed to improve the success of all students.



Grant proposal

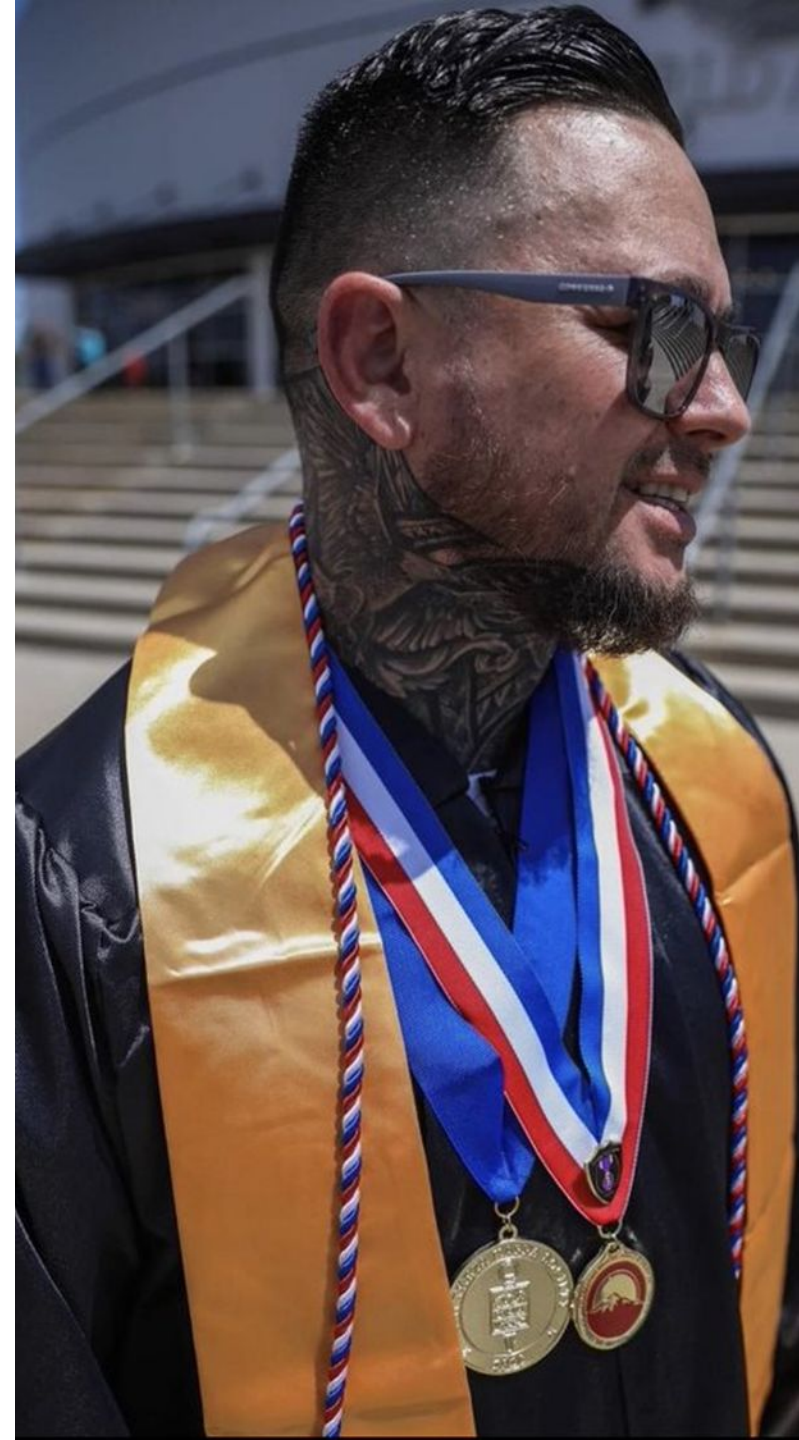
The opportunity

For 104 years, Phi Theta Kappa has provided recognition of academic achievement for community college students as early as possible and often after the student's first semester in college. In three separate cohort studies tracking randomly selected members of PTK for six years, members were found to have a **91% overall success rate**. More importantly, outcomes were consistent across race, ethnicity and socioeconomic backgrounds. Members were 33% more likely to complete college when compared with students who had the GPA to be a part of PTK but didn't join.

While jobs are plentiful in the United States, we know that good jobs—the ones with increased pay and benefits – require a college degree and the more, the better. PTK has been proven to increase students' efficacy to transfer and complete a four-year degree. Nearly 80% of students entering a community college have a goal of completing a bachelor's degree, but only 16% achieve it. **At PTK, over 70% of members successfully transfer.**

PTK attributes its high rates of student success in large part to providing experiences and support for students to build their self-efficacy, supporting financial pathways to transfer and helping students deepen their connections with the institution, its faculty and each other. Student success happens when students move beyond the transactional behavior of going to class and begin engaging with their college experience in a meaningful way—a transformational way.

- Support from PwCCF would increase completion and transfer outcomes and academic experiences for 11,000 high-achieving Black and Latinx students at 17 community colleges, all serving student populations over 75% Black and Latinx.
- Open access to PTK to all eligible students by providing a for-credit honors college experience, travel opportunities, leadership development, team-building experiences, academic peer network, service learning, research and curriculum that teaches advocacy, life skills, transfer and career preparation.
- This grant will level the playing field for these students—students who have lacked access to honors programming, career and transfer coaching and the faculty and peer engagement needed to encourage completion of their two-year degree, bachelor's and higher.



Objectives, outcomes and impact: Phi Theta Kappa

1

Infrastructure and capacity building

Activities

- Coordinate with colleges' chief academic officer to facilitate for-credit honors colleges using PTK programs
- Advisor/faculty and career/transfer coach training (ongoing)
- Consult, develop and/or train college Institutional Effectiveness/Research staff for assessment of program outcomes; how to demonstrate ROI
- Identify/contract part-time career and transfer coaching staff
- Set up 17 – 20 colleges for credit honors college; assessment plan for tracking students; training advisors and other faculty. (Year 1: 10 Colleges Year 2: 7 – 10 Colleges.)

Outputs and outcomes

- 11,000 eligible students (GPA 3.5 or higher + min.12 credit hours) at 17 colleges will be automatically awarded PTK membership. Year 1: 5,500 (baseline 500). Year 2: 3,000; Year 3: 3,000
- At least 50% of students will take advantage of career, transfer or scholarship coaching
- 100% of chapter advisors will complete PTK's advisor certification and 1-on-1 training
- Robust honors programming will sustain beyond the funding period
- Through capacity-building, increase fundraising, CBO partnership contributions and grant-making capacity by at least 10% each year

2

Student engagement and support

Activities

- Advisors and students will use the Chapter Leaders Guide to achieve and sustain chapter excellence (5-star level)
- Webinars provided for transfer opportunities, scholarship development, transfer fairs, career readiness
- Ongoing 1-on-1 career and transfer coaching
- Travel experiences to conventions and the Black and Latinx Leader summit (pre-convention experience) (Year 1: 60. Year 2: 102; Year 3: 102)

Outputs and outcomes

- By end of year 3 (evaluated annually) 100% of chapters will be 5-star status, and at least 50% of members (5,000+) will be engaged in PTK Edge programs. Current baseline is a median 1-star chapter level and 8% of members (39)
- Scholarship applications and awards will increase annually; by 200% at the end of year 3.
- Honors Project evaluation scores will improve over time and score above average performance of all chapters
- Increase persistence/retention rates above institutional baselines by 15% ultimately increasing the completion/transfer rate by 33% for participating students.

Scaling the work of creating equity pathways to completion, transfer and employment for Black and Latinx community college students.

Program budget summary: Phi Theta Kappa Honor Society

	1/1/2023	1/1/2024	1/1/2025
Description	Budgeted	Budgeted	Budgeted
Annual Allocation			
Total Expenses			
Remaining Balance	\$ -	\$ -	\$ -
Expenses:			
Salaries (PTK)	\$ 348,500.00	\$ 340,000.00	\$ 246,000.00
Travel (PTK)	\$ 35,000.00	\$ 38,000.00	\$ 10,000.00
Contracted Transfer / Career Coaching Salaries	\$ 150,000.00	\$ 255,000.00	\$ 255,000.00
Convention	\$ 321,000.00	\$ 478,500.00	\$ 497,000.00
Materials (students)	\$ 6,000.00	\$ 10,000.00	\$ 10,000.00
Total Expenses	\$ 860,500.00	\$ 1,121,500.00	\$ 1,018,000.00
Variance	\$ (860,500.00)	\$ (1,121,500.00)	\$ (1,018,000.00)

Appendix

Snapshot of PTK

Phi Theta Kappa by the numbers

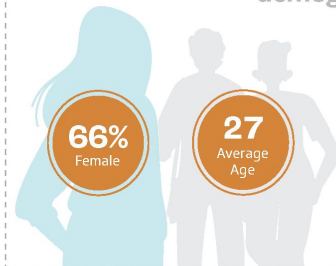
about ptk

PTK recognizes high-achieving college students and is the nation's largest source of scholarships for students attending two-year colleges by awarding over **\$246 million in transfer scholarships** through its 843 four-year college and university partners. PTK also awards over **\$1.5 million annually** in competitive scholarships through its endowments, corporate partners, and donors.

Our Members



demographics



1.0%	American Indian/ Alaska Native
6.8%	Asian
11%	Black/African American
16%	Hispanic/Latino
1.0%	Native Hawaiian/ Pacific Islander
1.4%	Other
55.6%	White

Phi Theta Kappa is
44% minority-serving

38%

First-Generation
College Students

41%

Pell Grant
Recipients

U.S. average is 31%

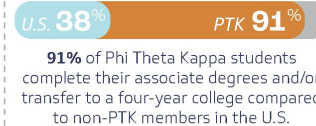
top majors

	24%	Business, Political Science, Agriculture <i>Annual Salary: \$75,329</i>
	19%	Nursing Pharmacy All Healthcare <i>Annual Salary: \$66,620</i>
	17%	Science, Technology, Engineering, Math <i>Annual Salary: \$77,994</i>
	12%	Liberal Arts <i>Annual Salary: \$64,391</i>
	11%	English, Psychology, Social Sciences <i>Annual Salary: \$82,829</i>

Phi Theta Kappa by the numbers



student success



68%
complete a
bachelor's degree
or higher

2
average number
of degrees
earned

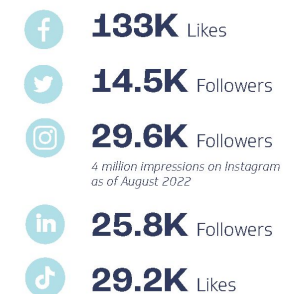
\$71K
average mid-level
salary

Our Influence

influencers



media reach



ptk.org | 800.946.9995 | Est. 1918

Data sources: Phi Theta Kappa Member Database; National Student Clearinghouse Degree Completion/Transfer Verification; National Student Clearinghouse Current Term Enrollment Report; Bureau of Labor Statistics May 2016 State Occupational Employment and Wage Estimates (Median Salary); U.S. Department of Education, National Center for Education Statistics; 2012/17 Beginning Postsecondary Students Longitudinal Study (BPS: 12/17).

Description of programs

PTK programs are administered in two ways:

- **Directly to Students:** These programs are available free to students through online learning platforms. While students can access them without a PTK Advisor, robust engagement occurs on campuses where the advisor is well trained by HQ staff.
- **Advisor Coaching at the Chapter Level:** These programs take place at the chapter level and include collaboration between the PTK Advisor and students. Well-trained PTK Advisors are essential to these programs.

Programs delivered directly to students:

- **Transfer Edge** is an interactive online course to prepare students to transfer from a two-year college to a four-year college successfully.
- **Employment Edge** is a professional development course primarily focused on preparing participants to successfully enter the workforce.
- **Competitive Edge** is an online professional development course that teaches students essential workplace skills.
- **Healthcare Edge** is a professional development course that prepares students for a successful transition from their specific academic healthcare program to employment in the healthcare field.
- **Research Edge** is a self-paced, interactive curriculum that teaches students the basics of academic research. The course also prepares students and advisors to begin work on Honors in Action projects.
- **Leadership Development Studies** is an interdisciplinary course that teaches students to develop their leadership philosophy, explore best practices in leadership studies and rigorously examine leadership case studies.

Programs delivered by advisor coaching at the chapter level:

- **College Project** is designed to engage students in leadership and service that support their college's mission and establish a positive rapport with the college administration. The process of completing the College Project fosters student growth and helps fulfill our mission to provide college students opportunities to grow as scholars and leaders.
- **Honors in Action** is designed to engage students in informed action that fosters student success and helps fulfill our mission to provide college students opportunities to grow as scholars and leaders. Achievement of these learning outcomes builds the analytic and collaborative problem-solving and leadership skills necessary and valued in advanced academic pursuits, workplaces, and communities.

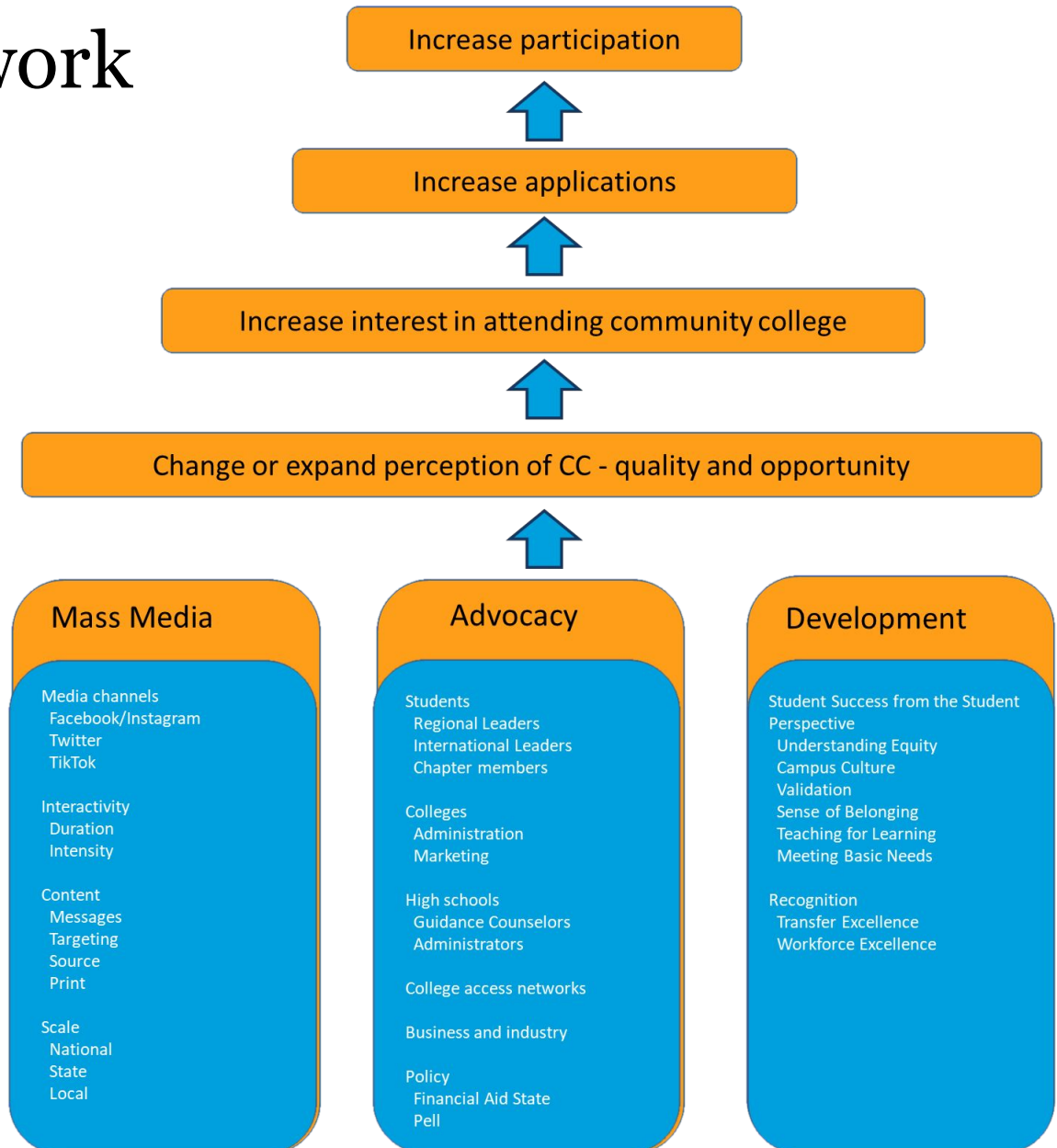
CCsmart description and framework



CCsmart, or Community College Smart, is a grassroots awareness and advocacy campaign to showcase the work of community colleges. The goal of the effort is to change the conversation about community colleges, promote student-led advocacy of community colleges and provide reliable information to the public about community college opportunities—making the choice to go there a smart start to your career and your life.

PTK chapters are being encouraged to participate as their College Projects. Media toolkits have been provided to colleges and students.

Visit CCsmart.org for more information.



List of 17 target colleges

COLLEGE	ENROLL	LATINX	BLACK	PCT BLK/LATINX	CHAPTER	ESTABLISHED	HONORS?	EST BLACK/LATINX IMPACT
Texas Southmost College	8,777	8,340	12	95%	Alpha Mu	1930	N	835
City Colleges of Chicago-Olive-Harvey College	1,955	474	1,354	94%	Lambda Iota	1961	N	183
City Colleges of Chicago-Kennedy-King College	1,878	293	1,453	93%	Lambda Rho	1962	N	175
Imperial Valley College	7,123	6,505	85	93%	Beta Chi Kappa	2017	N	659
Coahoma Community College	1,612	14	1,475	92%	Alpha Omicron Pi	1989	N	149
Southern University at Shreveport	3,013	54	2,708	92%	Beta Beta Nu	1995	N	276
Southwest Texas Junior College	6,480	5,610	32	87%	Beta Lambda Gamma	2002	N	564
Luna Community College	720	585	8	82%	Beta Mu Nu	2003	N	59
Baltimore City Community College	4,181	154	3,216	81%	Theta Alpha	1951	N	337
Porterville College	3,964	3,119	46	80%	Alpha Chi Mu	1992	N	317
Coastal Bend College	4,105	3,089	101	78%	Rho Lambda	1968	N	319
Southeast Arkansas College	1,113	232	628	77%	Beta Gamma Mu	1996	N	86
Denmark Technical College	491	5	369	76%	Alpha Epsilon Psi	1980	N	37
College of the Desert	10,982	8,066	257	76%	Beta Rho Iota	2008	N	832
Wallace State Community College-Selma	1,316	11	990	76%	Alpha Eta Tau	1982	N	100
New Mexico State University-Dona Ana	7,028	5,196	105	75%	Alpha Omega Tau	1994	N	530
CUNY Stella and Charles Guttman CC	1,021	590	251	82%	Beta Phi Gamma	1985	N	84
Total (first year)	65,709	42,337	13,090					5,543

Assessment strategies



Tracking student professional development: **PTK Edge courses** are offered in PTK's Learning Management System (LMS). The LMS is integrated with PTK's member database, and tracking students within chapters and colleges allows for assessment of participation. Edge courses are divided into levels, and tracking progress through the courses is also possible.

Scholarship searching and PTK Foundation scholarships: PTK created **PTK Connect**, which is integrated with PTK's member database. We can track student logins, their activity such as searching for colleges and scholarships and the search criteria students use. PTK's scholarship application software is also integrated with our member database making tracking of applications and progress within the applications very easy.

Transfer rates and scholarships: Through an MOU with each partner-PwCCF grantee institution, rates may be established by tracking students using the institution's national student clearinghouse account. For colleges without clearinghouse access, PTK will use its clearinghouse account to track the students. Once students are shown to be successfully transferred, determine the number and amount of scholarships awarded by gathering student-level information via advisor-reported data, surveys to students or by contacting the student directly.

Honors project assessment: Each spring, PTK staff (8) and a group of national volunteers (67) provide a multiple reader rubric assessment for submission of PTK's honors projects (Honors in Action and College Project). Approximately half of all chapters participate. Each chapter's history of rubric scores and awards is stored in PTK's database. Project completion and quality baselines are easily established. High-performing projects are awarded and recognized at PTK's annual convention, PTK Catalyst. For the top 15 in each category, chapter projects are published in PTK's journals for undergraduate research (*Civic Scholar*) and leadership (*Changemakers*).

Retention rates: The MOU with each partner PwCCF grantee institution will allow term-to-term retention and tracking. Baselines may be established by queries of institutional history of students with GPAs eligible to join PTK but did not.

Completion rates: The MOU with each partner PwCCF grantee institution, the national student clearinghouse and college databases are used to determine tracking of students into the categories of 1.) completed, 2.) transfer still enrolled, 3.) still enrolled and 4.) stopped out. Students are tracked in cohorts for over six years.

Impact reading list

How One Sketchy Class Changed My Life:

An article by a member who took PTK's programs as a credit course.

Black History Month: Work that Inspires Us

An article by PTK's CEO with contributions by the entire PTK staff.

Five Reasons to Attend PTK Catalyst

A blog post about why attending Catalyst is important to student development.

Helping Students Explore Transfer: How Phi Theta Kappa's Transfer Honor Roll Can Help

An article published by the American Council of Education containing a summary of all our transfer programming.

Low Income, High Graduation Rate

PTK's first study on completion rates published by Inside Higher Ed.

I AM PTK: James Elliott

James' story in his words.

Competitive analysis

Organization	Mission	Geographic Reach/Scale	Major Donors	Pros	Cons
National Technical Honor Society	To honor student achievement and leadership in career and technical education, promote educational excellence, award scholarships, and enhance career opportunities for the NTHS membership.	Primarily the United States of America	Unknown	The organization provides career training opportunities for college students and funds scholarships for those focused on career and technical education.	The organization does not provide undergraduate research programs or focus heavily on the transfer experience of college students.
National Society of Leadership and Success	To provide a life-changing leadership program to help students achieve personal growth.	Primarily the United States of America	Unknown	This organization emphasizes leadership growth by college students. It is present on many of the same campuses as Phi Theta Kappa.	The organization does not emphasize undergraduate research and does not cater specifically to community college students.

Other donors and sponsors

Major Donors	Total Giving	Giving Period
Coca-Cola Scholars Foundation	\$5,771,523.54	2008 - present
GEICO	\$5,049,867.50	2008 - 2022
The Bill and Melinda Gates Foundation	\$2,998,612.00	2011 - 2012
Hites Family Community College Scholarship Corporation	\$1,664,975.73	2009 - 2011
Follett Higher Education Group	\$1,175,830.00	2010 - 2020
The Andrew W. Mellon Foundation	\$1,100,000.00	2019 - 2022
American Association of Community Colleges	\$988,979.15	1996 - present
Woodward Hines Education Foundation	\$965,297.55	2016 - present
The Coca-Cola Foundation	\$876,250.00	2008 - present
National Endowment For the Humanities	\$691,000.00	1995
Worldstrides	\$452,433.93	2008 - present
Pearson Higher Education	\$437,300.00	2012 - 2019
Cengage	\$394,150.00	2013 - present
Michael and Susan Dell Foundation	\$367,000.00	2018
Oberndorf Family Foundation	\$326,150.00	2012 - present
Trustmark National Bank	\$127,500.00	1994 - present
BetterHelp	\$100,000.00	2002-present
Jack Kent Cooke Foundation	\$98,402.65	2007 - present
International Public Safety Leadership and Ethics Institute	\$90,819.00	2013 - present
American Cancer Society	\$89,050.00	2007 - 2018
The Phil M Hardin Foundation	\$80,000.00	1994
Walgreens Co.	\$75,000.00	2019 - present

Thank you!

www.pwc.com