Texas State Environmental Scan 2014

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Introduction

The external environmental scan below is a collection of information obtained from major written reports, electronic media, and major publications. The information was initially collected using four categories, following the STEP research model (*social*, *technological*, *economic*, and *political* impacts). Sources were then reviewed and summarized, with direct Web links to the news sources. Once complete, the information was re-categorized by relevant subject matter using subheadings. This material was gathered for the purpose of identifying external trends that serve as potential opportunities and/or threats that may affect Texas State in the near future.

INCREASED FEDERAL/STATE REGULATORY DEMANDS

"Pressure on Accreditation Is Cause for Concern, Speaker Warns"

The Council for Higher Education Accreditation warns higher education officials of more federal oversight, increased regulation, and even proposals for government-run collegeratings systems as the reauthorization of the Higher Education Act begins to take shape.

"Lawmakers Plan Bill to Improve Oversight of Student-Visa System"

A proposed bill, drafted by a bipartisan group of U.S. senators, focuses on preventing fraud in the student-visa system and weeding out sham colleges that enroll foreign students.

"Homeland Security Dept. Moves to Tighten Rules on Student Visas"

Colleges will no longer be able to grant visa documents to degree-seeking foreign students who first need to brush up on their English skills.

<u>"Try it again, Uncle Sam: The 46th Annual PDK/Gallup Poll of the Public's Attitudes Toward the Public Schools"</u>

This poll shares Americans' opinions on the Common Core State Standards, student standardized testing, international comparisons, school governance, and school choice.

Title IX and Sexual Misconduct

"Colleges Face New Requirements in Proposed Rules on Campus sexual Assault"

The U.S. Department of Education has proposed new rules, amending the Clery Act, that would require colleges and universities to train students and employees on preventing sexual assault, dating violence, domestic violence, and stalking. These new rules also require campuses to track and maintain statistical data on all incidents of these types.

"Many Colleges Fail to Offer Training About Sexual Assault, Senator Says" According to a survey conducted by a U.S. Senator, 31 percent of colleges do not provide training to students about sexual assault, and one in five do not offer such training to faculty and staff members.

Affordable Care Act Impact

"Alabama limits graduate student workloads to avoid paying for their health insurance"

Higher education institutions across the United States are considering modifying the course loads of their adjunct faculty and the workloads of their graduate student assistants in an effort to avoid having to pay their employee benefits under the Affordable Care Act.

"Obamacare Revives an Old Question: Are Student Workers Employees?"

A number of colleges are scrambling to keep students workers—undergraduate and graduate—under the 30-hour threshold in order to avoid having to provide health insurance to them. This is greatly impacting students' ability to support themselves and their educational aspirations.

"ACE, Higher Education Groups Endorse Bills to Exempt Student Workers from Affordable Care Act"

ACE and a group of seven higher education associations are endorsing two bills that would exempt full-time students from the Affordable Care Act's (ACA) employer mandate, which requires large employers—including colleges and universities—to offer health insurance plans to employees working 30 hours a week or more.

HIGHER EDUCATION FUNDING

Federal Funding for Research

"Trends in Higher Education"

In a recent review, it was found that total state support for public research universities dropped 10 percent from 2002 to 2010 (inflation adjusted), with 75 percent of those universities receiving cuts.

<u>"Federal grant to boost high-impact graduate research in education at Standford center"</u>

The Institute of Education Sciences has awarded \$4 million for federal education research with the goal of accelerating the translation of research findings into practice by partnering universities and school districts.

Performance-based Funding

"The President's Plan for A Strong Middle Class & A Strong America"

The President is asking Congress to consider value, affordability, and student outcomes in making determinations about which colleges and universities receive access to federal student aid, either by incorporating measures of value and affordability into the existing accreditation system; or by establishing a new, alternative system of accreditation that would provide pathways for higher education models and colleges to receive federal student aid based on performance and results.

<u>"Renewing the Promise: State Policies to Improve Higher Education Performance"</u>

In a study of public policy and the performance of higher education institutions (including Texas) conducted by The Institute for Research on Higher Education, findings suggest that states need to develop policies in three general areas: using fiscal resources strategically; aligning educational opportunities to student needs; and easing student transitions between educational sectors. The report's intent was to highlight the critical role higher education plays in the future well-being of the nation.

"Professor Obama Grades U.S. Colleges, Finds it Tests Him"

The U.S. Department of Education has been charged to develop a plan tying financial aid allocations for colleges based on ratings, such as graduation rates, student debt and other outcomes, through the reauthorization of the Higher Education Act. These ratings should be in place before the 2015 academic year.

"Search Still On for Higher Ed Performance-Funding Model"

Legislators, in partnership with the Texas Higher Education Coordinating Board, are working to develop a funding model that will require at least 10 percent of state funding allocations to be based on outcomes including the number of graduates, while accounting for the missions of different types of institutions.

State Funding Formula

"Lawmakers approved an increase in formula funding for higher education"

During its last session, the Legislature increased the state's funding formula for higher education, which is largely based on enrollment. However, community colleges will now see 10 percent of their funding tied to student success metrics. It is anticipated that 4-year institutions will soon follow suit.

"2 lawmakers predict changes in higher education funding"

The legislature, at its next session, could approve a plan to hinge 10 percent of base funding for public universities on outcomes such as graduation rates, the number of degrees awarded, and other so-called student outcomes. Additionally, two key state lawmakers agree that the Legislature should pay for a major round of construction and renovation projects on campuses.

Tuition Revenue

"Trends in Higher Education"

Institutional finances are of ever-growing concern in today's economy. According to Moody's Investors Service's tuition survey, one-third of U.S. colleges and universities expect net tuition revenue to either decline or grow at a rate below inflation. State support for U.S. colleges fell 7.6 percent in the 2012 fiscal year.

"18 Million Undergraduates Enrolled in Fall 2012, and Other New Data"

The National Center for Education Statistics released IPEDS data providing a fresh look at enrollment, graduation rates, finances, and employment in 2012-2013.

"Average cost of four-year university up 15%"

The U.S. Department of Education reports that average tuition at a four-year public university climbed 15% between 2008 and 2010 as a result of state budget cuts for higher education.

TECHNOLOGY PLATFORMS

"Where Did Your Graduate Students End Up? LinkedIn Knows"

Social media is an excellent means of keeping track of alumni and former graduate students and their chosen career paths. Social networking sites like Google +, LinkedIn, and Facebook provide a cost- and time-effective alternative to traditional alumni surveys in maintaining contact with former students.

"Colleges turn to social media blitzes to raise money"

Colleges are turning to social media using one-day blitzes to drum up donations from their youngest alums in the hopes that one donation will turn into a lifetime of giving.

"Digital and Web in Higher Ed"

According a study conducted by Google, sequential and simultaneous uses of multiple devices are rising. In response to this type of multiplicity, higher education institutions need to focus on designing and building content that can have multiple purposes, and whose meaning can stay intact through multiple contexts.

"Trends in Higher Education"

With the exploding trend of mobile computing, information technology departments will have to plan for wireless deployment when users have multiple Wi-Fi devices that will require ensuring that systems offer ubiquitous coverage, sufficient signal strength for tablets and smart phones, and that networks provide coverage for both 2.4GHz and 5 GHz devices.

"Digital and Web in Higher Ed"

A growing trend in technology involves the intense growth of the visual web, as demonstrated by the fascination with Instagram, Pinterest, and other infographics.

"Digital and Web in Higher Ed"

There has been marked interest in the role of analytics in the higher education environment. Learning analytics, business analytics, IT analytics, and enrollment and marketing analytics are now on the radar of higher education readers.

"NMC Horizon Report: 2014 Library Edition"

This report identifies and describes emerging technologies likely to have a large impact over the coming five years by examining key trends, significant challenges, and emerging technologies for their potential impact on academic and research libraries worldwide.

"Trends Report: Snapshots of a Turbulent World"

This report by the American Library Association is intended to stimulate discussion about and ultimately inform a national policy agenda for the U.S. library community.

"Door by Door, Colleges Install Systems for Online Control of Building Access"

A growing trend in colleges and universities is the use of online access systems for both internal and external doors. With greater accessibility, administrators are able to monitor and control individual doors through the use of their smart phones or other mobile devices.

"UT-Austin creating two-tier computer network to curb overuse"

With bandwidth availability becoming a growing problem, the University of Texas at Austin has created a split campus computer network with fast and slow lanes, with plans to push students and faculty into the second-class network if they exceed their weekly allotment of bandwidth use. In addition, those students who live off campus will have to use the slow lane unless they purchase a data plan.

FACULTY ISSUES

Tenure-track Versus Non-tenure Track and Adjunct Faculty

"The Future of Learning: Twelve Views on Emerging Trends in Higher Education"

With the fall of the economy and the shrinking of investments and retirement savings, senior faculty are less and less able to retire. This may cause disruption on college campuses by diminishing prospects for promotion among eligible younger faculty, reducing the number of new hires with the potential to bring revitalized energy to academic departments, and increasing labor costs.

"Making Tracks: Using nontenure faculty tracks to attract skilled professionals and boost job satisfaction"

More and more faculty are seeking non-tenure track positions in higher education, as evidenced by a series of surveys conducted by the American Council on Education. Many colleges and universities are accommodating this growing trend in order to attract more skilled scientists, researchers, and professionals, while boosting job satisfaction levels at the same time.

"18 Million Undergraduates Enrolled in Fall 2012, and Other New Data"

Data released at the beginning of the year by the National Center for Education Statistics based on IPEDS information point out that of the 1.5 million postsecondary teachers (professors and other instruction, research, and public-service staff members), about half were employed part-time.

"Adjunct leaders consider strategies to force change"

Research on adjunct working conditions describes inequality between them and their tenure-track counterparts, despite the fact that adjunct faculty make up the majority of the higher education workforce.

Pedagogical Changes

"The Future of Learning: Twelve Views on Emerging Trends in Higher Education"

The demand for more experiential, outside learning opportunities will require faculty to respond thoughtfully and proactively. This latest generation of students is accustomed to the digital mode of communication. They prefer informal small-group discussion, often through text messaging or e-mail, as a means to gain an understanding of curriculum content.

"More than a Major"

Results from a survey by the Association of American Colleges and Universities suggest that business executives care more about their new hires' thinking, communication and problem-solving skills than they do about their undergraduate majors.

"The Uncertain Future of Academic Work"

The higher education environment is changing, especially when it comes to faculty. Because of the ever-increasing demands being placed on colleges and universities regarding the value of a college degree, faculty and their teaching methods and overall productivity are facing more scrutiny. Flexibility is key to their continued success.

OUTSOURCING OF SERVICES

Support Services by Private Business

"Outsourcing Plus"

Arizona State University plans to outsource with a private company to manage parts of their online education operations in order to grow their online enrollments.

"Outsourced vs on campus services: what's the best model?"

Colleges and universities are turning to outsourcing certain campus services, such as catering and facilities management, due to rising costs and decreased funding.

R & D by Industry

"Collaborative R&D: How Effective Is It?"

R&D collaboration among industry, government, and universities is increasing and is making important contributions to the technological and economic well-being of U.S. citizens.

Workforce Needs

"Data: the Link Between Higher Education and the Workforce We Need"

While it is recognized that there is a need for more people to have college degrees, workforce experts and business leaders agree that there is a skills gap where people with a college degree are unable to fill jobs that are available or find employment consistent with their degrees.

STUDENT APPLICANT POOLS

Demographic Trends in Texas

"College-Enrollment Growth Will Slow Through 2022, Report Projects"

As reported in *Projections of Education Statistics to 2022*, a forecast study by the U.S. Department of Education, it is projected that the number of students enrolled in college will grow by 14 percent from the fall of 2011 to the fall of 2022."

"18 Million Undergraduates Enrolled in Fall 2012, and Other New Data"

Data released at the beginning of the year by the National Center for Education Statistics based on IPEDS information point out that total enrollment in higher education fell about 2 percent from 2011 to 2012.

Student Diversity

"U.S. Public Schools Become Majority Minority"

The National Center for Education Statistics reports that for the first time, a majority of students in the U.S. public schools will not be White. In 2014, there are 49.8% White students, 15.4% Black, 25.8% Latino, 5.2% Asian, and 3.9% other.

<u>"Population Change in Texas: Implications for Education and the Socioeconomic Future of Texas"</u>

From an educational viewpoint, Texas ranked second in total student enrollment in 2010-2011 with 4.9 million students; first in total student enrollment growth of 806,781 from 1998-99 to 2008-09; and first in Hispanic student enrollment growth of 752,272 from 1998-99 to 2008-09.

"The Future of Learning: Twelve Views on Emerging Trends in Higher Education"

The fundamental age distribution of our population is changing at a brisk pace. In 1900, only 13 percent of the population was aged 50 or over. In 2000, it was over 27 percent." As a result, colleges and universities must respond to these changing demographics.

"Fact Sheet, Hispanic Higher Education and HSIs – 2014"

Hispanic Serving Institutions (HSIs) enroll 18.2% of all students and 57.1% of all Hispanic students. In Texas, 34% of all undergraduate students are Hispanic, with 68 HSIs available to serve them.

GLOBALIZATION

"The Future of Learning: Twelve Views on Emerging Trends in Higher Education" Globalization will continue to influence all aspects of teaching and learning as over 2.9 million students are seeking an education outside their home country.

"Survey shows increase in international applications to U.S. grad schools, but mix of applicants by country is shifting"

The number of applications to U.S. graduate schools, from prospective international students, climbed by 7 percent this year; but shifts in the countries from which applicants are coming raise questions about the stability of international enrollments.

"Experts: Undocumented students could fill bilingual teacher shortage"

With the executive order by President Obama allowing children of undocumented immigrants to work in the U.S., the shortage of bilingual and ESL teachers could become a thing of the past. Undocumented graduates have the necessary training and skills to fill this gap.

COMMUNITY COLLEGES AWARDING BACCALAUREATE DEGREES

"Renewed push to let community colleges award bachelor's degrees"

Twenty-one states currently allow community colleges to confer baccalaureate degrees and more are jumping on board.

CREDENTIAL SHIFTS IN THE MARKET PLACE

STEM

<u>"Where are the STEM Students? What are their Career Interests? Where are the STEM Jobs?"</u>

According to a national report, nearly 28% of high school freshmen declare interest in a STEM-related field – around 1,000,000 students each year. Of these students, over 57% will lose interest in STEM by the time they graduate from high school.

<u>"THECB commissioner addresses the State of Higher Education in Texas and outlines game-changing strategies to address challenges"</u>

Texas continues to lag the nation in technology-related fields of study, awarding only 18,000 science, technology, engineering, and mathematics undergraduate degrees and credentials in 2012.

"Who is Minding the Gap?"

The retention and persistence of women in STEM fields at the baccalaureate level is heavily dependent upon the number of women faculty represented at all professorial levels in STEM fields.

Shifts in Disciplines

"NIH Warns of Imminent Drop in Number of Physician-Scientists"

In a study done by the National Institutes of Health, findings suggest that the U.S. is facing a shortage of researchers trained as both physicians and scientists.

"The 15 most valuable college majors"

In an analysis completed by PayScale comparing its national compensation database to data from the U.S. Bureau of Labor Statistics, the current fifteen most valuable and well-paid majors were identified.

"Hot jobs, careers defy sluggish economy"

An NBC News data analysis predicts the hottest job opportunities over the next decade will remain in the health care industry. Technology, business, retail and service industries rank among the other fast-growing careers.

"Doctor shortage looms; more primary care physicians needed"

There is a severe shortage of primary care physicians in the U.S. according to the Association of American Medical Colleges. With the recent changes to the insurance industry, this trend could become a major issue for concern.

STUDENT SUCCESS

Competency-based Credit

"Feds give nudge to competency-based education"

The U.S. Department of Education has endorsed the shift to degree programs that don't rely on the traditional credit hour to measure student learning.

Student Support Programs

"Bridge Programs for Underprepared Adults Could Improve College Completion"

According to a study conducted by the Workforce Strategy Center, "Bridge" programs that help adult students acquire the skills necessary to succeed in postsecondary

education are gaining momentum and could play a vital role in fulfilling the nation's degree-completion agenda.

"Obama plan aims to improve odds for minority boys"

President Obama has launched the "My Brother's Keeper" initiative that focuses on creating more opportunities for young minority men and breaking down social conditions that keep them impoverished and imprisoned in disproportionate numbers.

Student Preparation

"US teens lag in global education rankings as Asian countries rise to the top"

American teens scored below the international average in math and roughly average in science and reading, when compared against dozens of other countries that participated in the Program for International Student Assessment (PISA).

Retention and Graduation

"Fewer students returning after their first year: How to bring them back"

The number of U.S. college students returning after their first years has fallen 1.2 percentage points since 2009. It is suspected that these students are leaving for employment reasons, with the recovering economy.

"Texas colleges making gradual improvement in 4-year graduation rates"

Only 59 percent of Texas students earn degrees in six years, and even fewer finish in four.

POPULATION DEMOGRAPHIC CHANGES

<u>"Population Change in Texas: Implications for Education and the Socioeconomic Future of Texas"</u>

In an analysis of the U.S. population in 2010 compared to 2012 national projections through 2060, presented by the Hobby Center for the Study of Texas, there appears to be a continuous pattern shift between the number of Whites and Hispanics.

"2014 Fact Sheet, Hispanic Higher Education and HSIs"

In 2012, there were 53 million Hispanics in the U.S. (17% of U.S. population) with more than 50% living in California, Florida and Texas.

EDUCATION DELIVERY SYSTEMS

Online/MOOCs and the Competitive Environment

"Survey finds online enrollments slow but continue to grow"

More than 6.7 million, or roughly a third, of all students enrolled in postsecondary education took an online course for credit in fall 2011, up from 6.1 million in 2010.

"Trends in Higher Education"

Online enrollments have risen from less than 10 percent of the total enrollment in 2002 to slightly over 30 percent of all U.S. college enrollments.

"Online Courses Could Widen Achievement Gaps Among Students"

Findings from a study conducted regarding online courses suggest that all students who take more online courses, no matter the demographic, are less likely to attain a degree.

"Outsourcing Plus"

Arizona State University plans to outsource with a private company to manage parts of their online education operations in order to grow their online enrollments.

Distance Education

"Trends in U.S. Study Abroad"

The number of students studying abroad represents about 1 percent of all U.S. students enrolled at institutions of higher education in the U.S.

"Open Doors 2013: International Students in the United States and Study Abroad by American Students are at All-Time High"

The number of international students at colleges and universities in the U.S. increased by 7 percent in the 2012-2013 academic year, while U.S. students studying abroad increased by 3 percent.

VALUE OF A COLLEGE DEGREE

"Professor Obama Grades U.S. Colleges, Finds it Tests Him"

A proposed new U.S. College rating system through the reauthorization of the Higher Education Act will be focused on the affordability and value to college students.

"Is College Worth It? Clearly, New Data Say"

Americans with four-year college degrees made 98 percent more an hour on average in 2013 than people without a degree.

"The Rising Cost of Not Going to College"

Millennial college graduates ages 25 to 32 who are working full-time earn about \$17,500 more annually than employed young adults holding only a high school diploma.

"Texas' pay gap between college, high school grads No. 2 nationwide"

In Texas, the typical adult with a bachelor's degree earned 90.26 percent more than the median for residents with only a high school diploma.

"Fewer people see college as good financial investment"

Nearly 57 percent of people think college is a good financial investment for young adults these days. While this might sound good, these numbers have decreased dramatically from four years ago when 81 percent thought college was a good investment.

"More High School Grads Decide College Isn't Worth It"

Less than 66 percent of the class of 2013 was enrolled in college last fall, the lowest share of new graduates since 2006. Speculated reasons for this decrease include the rising cost of higher education and the improving job market.

"Trends in Higher Education"

Among the wealthiest families in the U.S., 19 percent don't believe college is worth the investment.

"The Reality of Student Debt is Different From the Clichés"

Despite the perception that students are graduating from college with a mountain of debt, the reality is that many are incurring the student loan debt and not graduating from college at all.

"How much is your degree worth? New pressure on colleges to disclose grads' earnings"

Colleges and universities are facing increasing pressure to disclose the earnings of their graduates. The data could eventually put substantial pressure on colleges and universities whose poor rates of return cost them applicants and state support in favor of institutions with the best results.

"Half of new college graduates are jobless or underemployed"

Median wages for those with bachelor's degrees are down from 2000, hit by technological changes that are eliminating midlevel jobs. Additionally, about 53.6 percent of bachelor's degree-holders under the age of 25 last year were jobless or underemployed, the highest share in at least 11 years.

"260,000 graduates in minimum wage jobs"

About 260,000 people who had a college or professional degree made at or below the federal minimum wage of \$7.25 per hour last year, with 58 percent of jobs created during the economic recovery being low-wage positions.

"In Oil Country, Enrollments Slow Amid a Gusher of Jobs"

In Texas, the trend of high paying oil and gas jobs due to the recent boom has many colleges and universities seeing a noticeable slowdown in enrollment. Once this boom crashes, there will be a limited number of educated people.

"For nursing jobs, new grads need not apply"

There has been a dramatic increase in enrollment in nursing programs due to the perceived shortage a decade ago, yet, once they graduate, these students are having a

difficult time finding jobs. More and more job postings for nurses now have a requirement stipulating that new graduates need not apply.

STUDENT DEBT

Veterans' Benefits Including Tuition/Fee Mandates

"Why Veterans Will Soon Save Thousands on College"

Beginning in the fall of 2015, veterans and their dependents will be able to pay low instate tuition at any public university in the country.

Loan Default Rates

"Half of Federal Student Loan Borrowers Not Paying On Time"

Data released by the U.S. Department of Education shows that less than half of borrowers with the most common type of federal student loan are repaying their debts on time.

"Student loan defaults hit highest level since 1995"

Data released by the Education Department indicate that one in ten borrowers across the country who entered repayment status during FY11 had defaulted by the following year, for a 9.1% increase over the cohort before them.

Cost of Degrees/Attendance

"How America Pays for College 2014"

In an annual survey conducted by Sallie Mae, information is provided about how American families invest in an undergraduate's education and their attitudes towards attending and paying for college.

"Trends in Higher Education"

Student loan debt is increasing exponentially (a 25 percent increase over the last decade), with the majority of student loan borrowers convinced that they will never be able to pay off this debt.

"The President's Plan for A Strong Middle Class & A Strong America"

Part of the President's plan presented in his 2013 State of the Union address, involves equipping Americans with the skills they need. This includes lowering college costs for families by providing incentives to quality schools that try to make higher education more affordable.

<u>"FACT SHEET on the President's Plan to Make College More Affordable: A Better Bargain for the Middle Class"</u>

In his plan to make college more affordable, the President laid out a plan that highlights paying for performance, promoting innovation and competition, and ensuring that student debt remains affordable.

"Perception of public higher ed does not match facts"

With all of the media hype about student loan debt being out of control because of high tuition costs, the reality is that the average undergraduate student owes less than \$25,000 at graduation, with some owing less than \$10,000.

E-textbooks and the Cost of Textbooks

"Textbook prices still crippling students, report says"

The rising costs of textbooks are hurting students financially, to the point that they are not willing to take certain classes because of the expense of the required materials.

"To Save Students Money, Colleges May Force a Switch to E-Textbooks"

Colleges are proposing requiring students to pay a course-materials fee, to be used for buying e-books for all of them, in an effort to control costs and increase affordability.

STUDENT MENTAL HEALTH

"More college students seeking help for mental health issues"

More and more college students today are facing mental health issues. Additionally, 91 percent of counseling center directors are seeing more severe mental health cases at their colleges.

UT MEDICAL SCHOOL

"UT Austin Launches Construction of New Dell Medical School"

The University of Texas at Austin has launched construction of the new Dell Medical School, becoming the first tier-one university in the U.S. in decades to establish a medical school.

"UT med school classes will grow as demand increases, dean says"

The proposed program will begin with 50 spots for students, but the new dean anticipates that class size will expand over time.

NCAA ENVIRONMENT

"For Wealthy NCAA Programs, Autonomy Is Not a Panacea"

The NCAA has approved a new governance system allowing the largest five athletic conferences more operating freedom. In essence, this will allow the wealthier programs to offer thousands of dollars a year in additional scholarship assistance, allow coaches

more contact with recruits, and give players increased access to agents and career advisers.

"Federal Judge: NCAA violates antitrust law"

In response to recent regulation changes approved by the NCAA, a federal judge has determined that some of these rules are in violation of federal antitrust law. As a result, an injunction has been issued blocking those roles. The NCAA is planning to appeal this ruling.

<u>"Executive Committee Statement on Sexual Violence Prevention and Complaint Resolution"</u>

The NCAA recently issued a statement to affirm that athletic departments must cooperate with but not manage, direct, control or interfere with college or university investigations into allegations of sexual violence. The statement makes it very clear that all student-athletes, coaches and staff will receive education on prevention and reporting procedures for sexual misconduct incidents, but are not responsible for managing investigations.