



Educating Illinois

ENVIRONMENTAL SCAN

Fall 2011



ILLINOIS STATE
UNIVERSITY

Illinois' first public university



Introduction

Purpose of Environmental Scan

This document explores the external and the internal environment and provides relevant information to help inform the revision of *Educating Illinois*. Specifically, the scan reviews external information in five sectors; the political, legislative, and regulatory sector, the economic sector, the social and demographic sector, the technological sector, and the educational sector. Internally, the scan presents information related to students, faculty and staff, university finances and financial aid, technology, facilities, and alumni perception and health and wellness.

Development of Environmental Scan

The development of the environmental scan was led by the Planning, Research, and Policy Analysis office, with assistance from staff in various departments across Illinois State University. Planning, Research, and Policy Analysis staff took lead responsibility to research, analyze, and present information related to particular data indicators. In addition to working with colleagues at Illinois State, staff utilized the internet and internal and external documents and reports to gather relevant information.

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External Scan

Political, Legislative, and Regulatory Summary

Highlights from this sector are dominated by growing national and state debt and liabilities and the election coming in November of 2012. Similar trends can be found at both the national and the state level and there are few signals that the challenges facing both will be solved in the near term.

Highlights

- The burgeoning national debt has been a focus for the President and Congress over the last year. After a considerable stalemate between parties, the President signed the Budget Control Act of 2011. A Super Committee was created to offer suggestions for ways to reduce the deficit however they were unable to reach agreement on recommendations.
- The election in November 2012 has also preoccupied the President and Congress. The election will also be significant for the state of Illinois as all State Senate and House of Representative seats are up for election.
- The statutory pension funding schedule that requires the state to make contributions to the state retirement systems so that total assets of the systems equal 90 percent of actuarial liabilities by fiscal year 2045 continues to be a major fiscal challenge.
- In 2009-2010, the state grant aid per full-time equivalent undergraduate student varied from \$7 in Wyoming to \$1,780 in South Carolina. Illinois was 16th highest in the nation, with \$727 awarded per undergraduate FTE.
- Given the state of the economy and the large debt load both on the federal level and for the state of Illinois, it may be difficult to sustain the current levels of financial aid.



Environmental Scan - External

Environmental Sector: Political, Legislative, and Regulatory

External Force/Issue: General Themes on Legislative Activity

Key Trends:

National

- The burgeoning national debt has been a focus for the President and Congress over the last year. After a considerable stalemate between parties, the President signed the Budget Control Act of 2011. The law raised the debt ceiling and requires a reduction in the Federal deficit by a projected \$2.2 - \$2.5 trillion over the next decade. A Super Committee was created to offer suggestions for ways to reduce the deficit. They were to report recommendations by November 23, 2011, however they were unable to reach agreement on recommendations.
- The election in November 2012 has also preoccupied the President and Congress. The economy is the single most important issue to voters and both parties are trying to sell their plans for improving the economy to the public. As of November, there is no clear favorite among the Republican candidates to challenge the President.
- The inability of the two political parties to reach agreement and consensus has and will continue to hamper solutions to the country's problems. Approval ratings for the President and members of Congress are low and there is a feeling of frustration and unrest among the public. How this plays out in the election and its aftermath will be something to watch.

State

- Highlights from the last session of the Illinois General Assembly include passage of bills that seek to improve teacher evaluation, discipline, and dismissal, performance based funding for higher education institutions, promoting college preparation for low- income and first-generation students, reforms in worker's compensation, and protection against identity theft. There continues to be strong interest in accountability and ensuring the state's resources are used to meet stated goals. The move toward performance-based funding and regulations for procurement highlight this effort.
- The statutory pension funding schedule that requires the state to make contributions to the state retirement systems so that total assets of the systems equal 90 percent of actuarial liabilities by fiscal year 2045 continues to be a major fiscal challenge. The amount certified by each of the systems for fiscal year 2013 total \$5.9 billion, which requires nearly a billion more dollars to be invested over fiscal year 2012.
- The state's operating budget for fiscal year 2012 is \$60.0 billion, \$6.5 billion over last year. Agencies getting the largest dollar increase are Revenue, Transportation, Aging, and the



Environmental Scan - External

Gaming Board. Agencies with the largest dollar reductions are Healthcare and Family Services, State Board of Education, Human Services, and Commerce and Economic Opportunity.

- Despite the tax increase approved in 2011, the state continues to have difficulty in paying its bills in a timely fashion. While dollars are being paid to public universities more quickly than in past years, private vendors and social service agencies are going for longer periods before payments are made to them.
 - The election in November 2012 will also be significant for the state of Illinois as all State Senate and House of Representatives seats are up for election.
-

Implications:

- The Federal deficit reduction will have implications potentially for both the state of Illinois and higher education. It is predicted that states will see reductions in Federal funding, which will stretch their limited general fund revenue even further. It is also possible that reductions could be seen in research funding, financial aid, and the Department of Education.
 - The state continues to face serious financial difficulties and will have to address them for years to come. Pension restructuring and reduced funding to higher education seem likely along with an increased interest in accountability and regulatory restrictions.
 - The Legislative response to the economy, both at the national and state level, will need to be monitored closely. Long-term structural changes could be the result of this latest 'Great Recession' and these could have either positive or negative impacts on higher education.
-

Sources:

- National Council of State Legislatures, Hot Topics, 2011.
- American Association of State Colleges and Universities, State Outlook, October 2011.
- Illinois General Assembly Legislative Research Unit, First Reading, Volume 25, No.1, September 2011.
- Illinois Commission on Government Forecasting and Accountability.



Environmental Scan - External

Environmental Sector: Political, Legislative, and Regulatory

External Force/Issue: Trends in Financial Aid

Key Trends- Grants:

- Nationally, students (undergraduate and graduate combined) received \$107.2 billion dollars in grants in 2010-11.
- The following table shows the grants received for selected years from 2000-01 to 2010-11 by source of grant.

(in millions)	<u>Constant 2010 Dollars</u>			<u>Percent</u>
	<u>2000-01</u>	<u>2005-06</u>	<u>2010-11</u>	<u>Change</u>
State Grants	\$6,013	\$7,627	\$9,207	53.1
Private and Employer Grants	\$7,380	\$10,520	\$10,840	46.9
Institutional Grants	\$20,490	\$26,600	\$38,110	86.0
Federal Grants	\$14,064	\$20,321	\$49,065	248.9
Total	\$47,947	\$65,068	\$107,222	123.6

- The largest percentage increase occurred in federal grants, with much of this growth occurring in the last two years. During this time, Pell Grants increased 92 percent and grants for veterans almost tripled in size. This increased the federal share of all grants from 33 percent in 2008-09 to 46 percent in 2010-11.
- While state grants provided only nine percent of all grants nationwide in 2010-11, the amount and types of grants that states award to students vary considerably.
- In 2009-2010, the state grant aid per full-time equivalent undergraduate student varied from \$7 in Wyoming to \$1,780 in South Carolina. Illinois was 16th highest in the nation, with \$727 awarded per undergraduate FTE.
- State grants also varied in whether they were primarily merit or need-based. In 2009-10, the percentage of state aid that considered need varied from 0 percent in Georgia to 100 percent in 14 states. In Illinois, 96 percent of the state grant aid was need-based.
- The following table shows the number of recipients and the average MAP grant (the major need based grant in Illinois) awarded by the Illinois State Assistance Commission (ISAC) in relationship to public university costs in Illinois for fiscal years 2006-2010.



Environmental Scan - External

	Fiscal Years					Percent
						Change
	2005-6	2006-7	2007-8	2008-9	2009-10	FY06-10
Number of MAP Awards	43,361	43,377	42,724	42,372	42,115	(2.9)
Average MAP Award	\$3,127	\$3,439	\$3,487	\$3,542	\$3,687	17.9
Statuary Maximum MAP Award ¹	\$4,968	\$4,968	\$4,968	\$4,968	\$4,968	--
Weighted Mean- Tuition & Fees	\$7,151	\$7,875	\$8,553	\$9,452	\$10,442	46.0
Weighted Mean- Total MAP College Budget ²	\$12,026	\$12,750	\$13,428	\$14,327	\$15,317	27.4

¹ In FY2012, the maximum MAP award was reduced to \$4,720.
² College Budget includes tuition and fees, room and board or an ISAC determined commuter allowance, and an ISAC determined personal allowance.

Key Trends- Loans:

- In 2010-11, nationally, students borrowed \$111.9 billion dollars to help finance their education. The following table shows the loans received for selected years from 2000-01 to 2010-11 by type of loan.

(in millions)	Constant 2010 Dollars			Percent
	2000-01	2005-06	2010-11	Change
Nonfederal Loans	\$6,420	\$19,850	\$7,870	22.6
Perkins and Other Federal Loans	\$1,589	\$1,953	\$1,101	-30.7
Grad PLUS Loans	\$0	\$0	\$6,697	
Parent PLUS Loans	\$4,657	\$9,130	\$10,416	123.7
Unsubsidized Stafford Loans	\$16,537	\$26,341	\$46,088	178.7
Subsidized Stafford Loans	\$20,669	\$27,268	\$39,692	92.0
Total	\$49,872	\$84,542	\$111,864	124.3

- In 2010-11, Subsidized Stafford loans and Perkins loans accounted for 36.5 percent of all loans. These are need-based loans and do not accrue interest while the student is at school.
- Unsubsidized Stafford loans and PLUS loans accounted for 56.5 percent of all loans. While these are not need-based and do accrue interest, they still carry a federal guarantee and interest rates are controlled by legislation. Also, many of these loans can be repaid using an income based repayment program.

Environmental Scan - External

- Nonfederal loans gained prominence in the mid 2000s, but since then have declined in importance. In 2010-11, they accounted for only seven percent of all loans.
-

Implications:

- Given the state of the economy and the large debt load both on the federal level and for the state of Illinois, it may be difficult to sustain the current levels of financial aid.
 - In 2010, the state of Illinois gave MAP grants (the major need based grant in Illinois) to fewer students than in 2006. The percentage of the average public university tuition and fees covered by the maximum MAP award also decreased from 100 percent in 2002 to 47 percent in 2010.
 - While tuition and fees continue to increase, the maximum MAP award was reduced from \$4,968 (the maximum since fiscal year 2002) to \$4,720 in 2011-2012, due to budgetary considerations.
 - To help alleviate this gap in coverage, Illinois State University has awarded MAP supplemental grants since fiscal year 2003. Total dollars awarded in supplemental grants by Illinois State University has risen from \$2,150,320 in fiscal year 2006 to \$7,065,476 in fiscal year 2011.
 - Several of the tuition waivers mandated by the state do not have sufficient appropriations, and consequently, the institutions have borne much of the cost. These include the Illinois Veteran Grant Program and the Illinois National Guard Grant Program.
 - Students are increasingly graduating with more debt. Nationwide, in 2009-10, about 55 percent of public four-year college students who graduated from the institutions at which they began graduated with debt; the average debt was \$22,000 (see also Internal – Debt Load).
-

Sources

- Trends in Student Aid 2011, CollegeBoard Advocacy & Policy Center
- Monetary Award Program (MAP) Program Evaluation, Illinois Student Assistance Commission, February 2011
- 2010 Data Book, Illinois Student Assistance Commission

Economic Summary

Although economists have declared that the last recession has ended, there continues to be concern among consumers and the economy has not shown any significant signs of improvement. All economic indicators examined in this environmental scan show that recovery to pre-recession levels will be slow and the effects of the recession will continue to be felt for at least two more years.

Highlights

- As of August 2011, the unemployment rate was 9.1 percent. The rate has remained relatively unchanged since the beginning of 2011 when it was 9.0 percent. The forecast for the next year shows a slight decrease in the unemployment rate to 8.6 percent by the end of 2012.
- The majority of the fastest growing occupations, both nationally and in Illinois, are related to the health care industry. These occupations require at least an Associate's degree for entry into the profession.
- Housing has been a major element in the continuing depressed level of consumer sentiment. Almost all housing indicators are down from a year ago and forecasts show modest, but positive, growth in 2012.
- Since 2000, when adjusted for inflation, median household income nationally has decreased from approximately \$53,000 to \$50,000. Although Illinois median household income remains above the United States at approximately \$53,000, the decrease has been more dramatic, a 13 percent decrease in Illinois versus a 7 percent decrease nationally.
- Annual wage growth for private sector workers in 2012 is not expected to exceed 2.0 percent, while improving from the 1.7 percent year-over-year gain reported by the Labor Department.
- Moody's Investor Service downgraded the State of Illinois credit rating in January 2012. Illinois now has the lowest credit rating of any state in the country by Moody's. Standard and Poors has left its rating of Illinois unchanged, but the service continues to rate the state below all but one other state (California).

Environmental Scan - External

Environmental Sector: Economic

External Force/Issue: Unemployment Rate

Key Trends:

National

- As of August 2011, the unemployment rate was 9.1 percent. The rate has remained relatively unchanged since the beginning of 2011 when it was 9.0 percent.
- The forecast for the next year shows a slight decrease in the unemployment rate to 8.6 percent by the end of 2012.
- Forecasted unemployment rates stay significantly above the rate prior to the last recession, which averaged 5 percent.
- One group particularly hard hit is teens and adults under the age of 24. The 16.7 percent unemployment rate for those in that group is more than twice the rate for workers 25 and older. College graduates age 24 and younger fare better with an unemployment rate of 7.7 percent.

State

- As of September 2011, the unemployment rate in Illinois was 10 percent.
 - The rate has varied throughout 2011 but has seen an upward trend since April when the rate was the lowest for the year at 8.7 percent.
 - Not only are more people out of work but they are out of work for a longer period of time. About one-third of the total unemployed were out of work for at least 52 weeks as of May 2011, 2.5 times the average percentage reported four years earlier.
 - The long-term unemployed are more likely to be older, male, black and previously employed in industries such as educational and health services, manufacturing and financial activities.
-

Implications:

- The long term projections for the unemployment rate do not show significant improvement and some experts point to a long term structural issue. This could have negative implications for current Illinois State students who graduate in the next several years as they will find it difficult to find employment. Students might find it more

Environmental Scan - External

desirable to stay in school longer or to attend a graduate program in hopes that the employment picture improves over time.

- Illinois State alumni of all ages could be experiencing significant difficulty staying employed and finding a job, particularly in the educational, health services, and financial activities sectors. This will limit their ability to give back to the University and fund raising efforts could see a sustained decline.
 - Parents of prospective students could be experiencing long-term unemployment, which will further limit their ability to pay for their child's education. Affordability could be a larger barrier to higher education for these students.
-

Sources:

- Bureau of Labor Statistics, Current Population Survey, August 2011.
- Illinois Department of Employment Security, Illinois Labor Market Review, August 2011.
- The Wall Street Journal, Generation Jobless: For Those Under 24, a Portrait in Crisis, Joe Light and Lauren Weber, November 7, 2011.

Environmental Scan - External

Environmental Sector: Economic

External Force/Issue: Employment Projections

Key Trends:

National

Fastest Growing Occupations in the United States, 2008 - projected 2018 (Numbers in thousands)				
Employment Title	Employment		Change	
	2008	2018	Number	Percent
Biomedical engineers	16.0	27.6	11.6	72.50%
Network, systems, and data communications analysis	292.0	447.8	155.8	53.36%
Home health aides	921.7	1382.6	460.9	50.01%
Personal and home care aides	817.2	1193.0	375.8	45.99%
Financial examiners	27.0	38.1	11.1	41.11%
Medical scientists	109.4	153.6	44.2	40.40%
Physician assistants	74.8	103.9	29.1	38.90%
Skin care specialists	38.8	53.5	14.7	37.89%
Biochemicals and biophysicists	23.2	31.9	8.7	37.50%
Athletic trainers	16.3	22.4	6.1	37.42%
Physical therapist aides	46.1	62.8	16.7	36.23%
Dental hygienists	174.1	237.0	62.9	36.13%
Veterinary technologists	79.6	108.1	28.5	35.80%
Dental assistants	295.3	400.9	105.6	35.76%
Computer software engineers	514.8	689.9	175.1	34.01%
Medical assistants	483.6	647.5	163.9	33.89%
Physical therapist assistants	63.8	85.0	21.2	33.23%
Veterinarians	59.7	79.4	19.7	33.00%

- Out of the fastest growing occupations listed above, 12 out of the 18 (67 percent) are related to the health care industry. This possibly reflects the reality of an aging population and the increasing demands on the health care system.
- The majority of these occupations require at least an associate's degree for entry into the profession.

Environmental Scan - External

State

State of Illinois				
Fastest Growing Occupations, 2008- projected 2018				
Employment Title	Employment		Change	
	2008	2018	Number	Percent
Biomedical Engineers	680	1,070	390	57.35%
Network Systems and Data Communications Analysts	8,260	12,030	3,770	45.64%
Preschool Teachers, Except Special Education	14,660	20,200	5,540	37.79%
Personal and Home Care Aides	25,710	34,460	8,750	34.03%
Aerospace Engineering and Operations Technicians	70	100	30	42.86%
Physician Assistants	2,090	2,760	670	32.06%
Skin Care Specialists	2,190	2,880	690	31.51%
Fitness Trainers and Aerobics Instructors	13,610	17,750	4,140	30.42%
Dental Assistants	12,400	16,020	3,620	29.19%
Dental Hygienists	7,360	9,540	2,180	29.62%
Mining and Geological Engineers	180	240	60	33.33%
Personal Financial Advisors	5,650	7,310	1,660	29.38%
Physical Therapist Assistants	2,830	3,660	830	29.33%
Physical Therapists	7,410	9,570	2,160	29.15%
Self-Enrichment Education Teachers	6,340	8,210	1,870	29.50%
Veterinarians	2,010	2,610	600	29.85%
Veterinary Technologists and Technicians	1,940	2,510	570	29.38%
Occupational Therapists	4,400	5,650	1,250	28.41%
Physical Therapist Aides	2,030	2,610	580	28.57%
Survey Researchers	760	980	220	28.95%

- The fastest growing occupations in Illinois mirror the United States with a few exceptions. Preschool teachers, aerospace engineering, fitness trainers, mining and geological engineers, personal financial advisors, physical therapists, occupational therapists, and survey researchers show a higher rate of growth in Illinois than in the United States.
- Like the United States, the fastest growing occupations in Illinois are related to health care and the majority of them require an associate's degree.

Implications:

- Although job growth is projected to be slow as we move out of the latest recession, there are a few bright spots in employment growth. Job growth will be particularly strong in fields related to the health care industry. This could have implications for the University's sciences programs and increased interest by students in careers in health care-related fields.
- For most of the fastest growing occupations an associate's degree, at a minimum, is required for entry to the profession. This will encourage high school students, and

Environmental Scan - External

potentially adults who have been displaced by shrinking industries, to seek higher education. These students could choose to attend a 2-year institution first and only look to gain the minimum degree required. The University may want to focus on attracting those students and encouraging them to continue their education and pursue a bachelor's degree. Establishing additional articulation agreements may help establish that pipeline.

Sources:

- Employment Projections Program, U.S. Department of Labor, U.S. Bureau of Labor Statistics.
- Projections Central, State Employment Projections, www.projectionscentral.com.

Environmental Scan - External

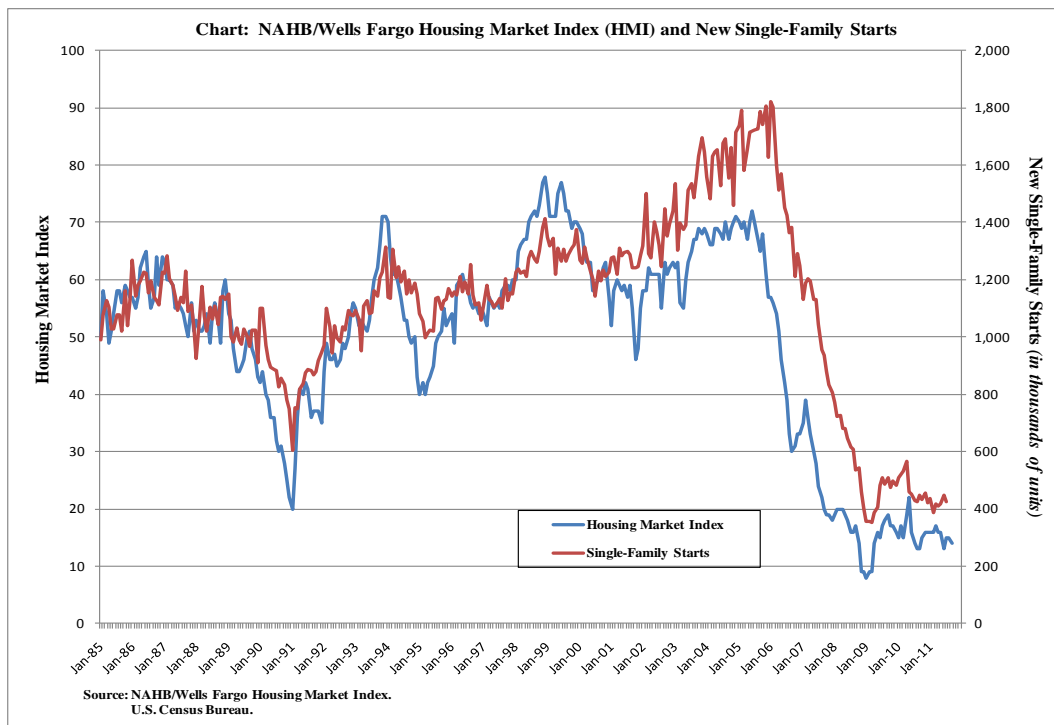
Environmental Sector: Economic

External Force/Issue: Housing Market

Key Trends:

National

- Housing has been a major element in the continuing depressed level of consumer sentiment. Housing is often the largest asset held by consumers, and since home prices have fallen sharply during the past recession and continue to weaken during the current recovery, consumers are pessimistic about the economy as a whole.
- Almost all housing indicators are down from a year ago. Existing home sales are down 12.3 percent and single-family units are down 13.7 percent.
- The chart below shows the historical trends in the Housing Market Index and Single-Family Starts. The effect of the recession on the market and the recent leveling-off of the indicators are evident.



Environmental Scan - External

- Forecasts show modest increases to housing indicators in 2011 and conservative, but positive, growth in 2012.

State

- Illinois has experienced much of the same trends as the nation.
 - Employment in the construction of residential buildings was 558,000 in July 2011, off of its recent peak of 1,022,000 recorded in July 2006.
 - Single-family building permits are down significantly from 2006 and have shown no change in the last three years.
 - Both home sales and median prices are down 16.3 percent and 11.7 percent respectively from a year ago.
 - There is little evidence that any significant improvement in the housing market is on the horizon. At best, it can be hoped that we have seen the end of the sharp deterioration in this economic sector.
-

Implications:

- Since the housing market figures so prominently in the minds of consumers, if this sector does not improve in the next several years, prospective students and their parents will have limited ability to cover the costs of higher education and affordability will be an issue. Students might be forced to choose a lower-cost alternative and/or stay closer to home.
 - The continued deterioration of this market may also impact the University's ability to recruit and retain quality faculty and staff, particularly those who have to move from markets in the United States who have been hit harder than Illinois (i.e. California, Florida, and Arizona).
-

Sources:

- NAHB/Wells Fargo Housing Market Index
- National Association of Realtors, U.S. Economic Outlook, October 2011
- Commission on Government Forecasting and Accountability, Monthly Briefing, July 2011

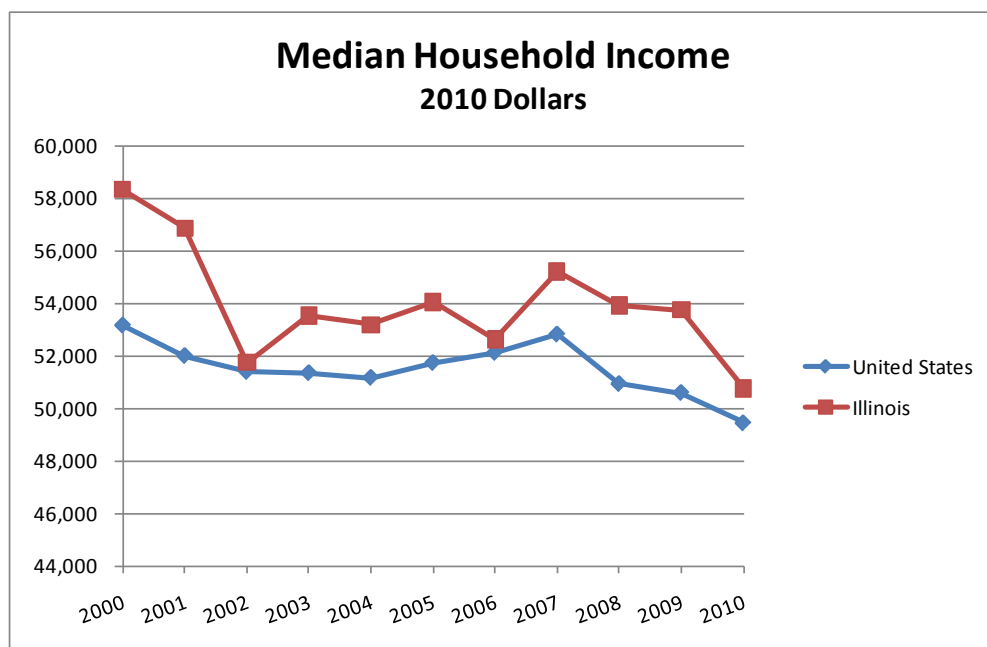
Environmental Scan - External

Environmental Sector: Economic

External Force/Issue: Median Household Income

Key Trends:

National/State



- Since 2000, when adjusted for inflation, median household income has decreased from approximately \$53,000 to \$50,000. Although Illinois median household income remains above the United States at approximately \$53,000, the decrease has been more dramatic, a 13 percent decrease in Illinois versus a 7 percent decrease nationally.
- Interestingly, the trend in decreasing household income started prior to the latest recession, which is reported to have begun in late 2006. Prior to 2000, median household income was rising for both Illinois and the United States. Following the first recession in the early 2000's, household income began to decline, slightly recovered mid-decade, and then fell sharply at the close of the decade.
- In current dollars, there has been a modest increase in household income over the same time period. In Illinois, median household income rose 10 percent from \$46,064 to \$50,761 and in the United States it increased 18 percent from \$41,990 to \$49,445.

Implications:

- This data points to another significant financial hurdle to accessing higher education for prospective students and families. Not only is the median household income declining, but the buying power of their income is also decreasing. Cost of living increases are rising faster than household income. Affordability will be an increasing concern for prospective students.
 - There will continue to be pressure to maintain faculty and staff salaries at a level that is competitive both within Illinois and nationally. To keep high quality faculty and staff, the University will need to try to keep pace with cost of living increases so as not to further erode the buying power of household income.
-

Source:

- U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplements.

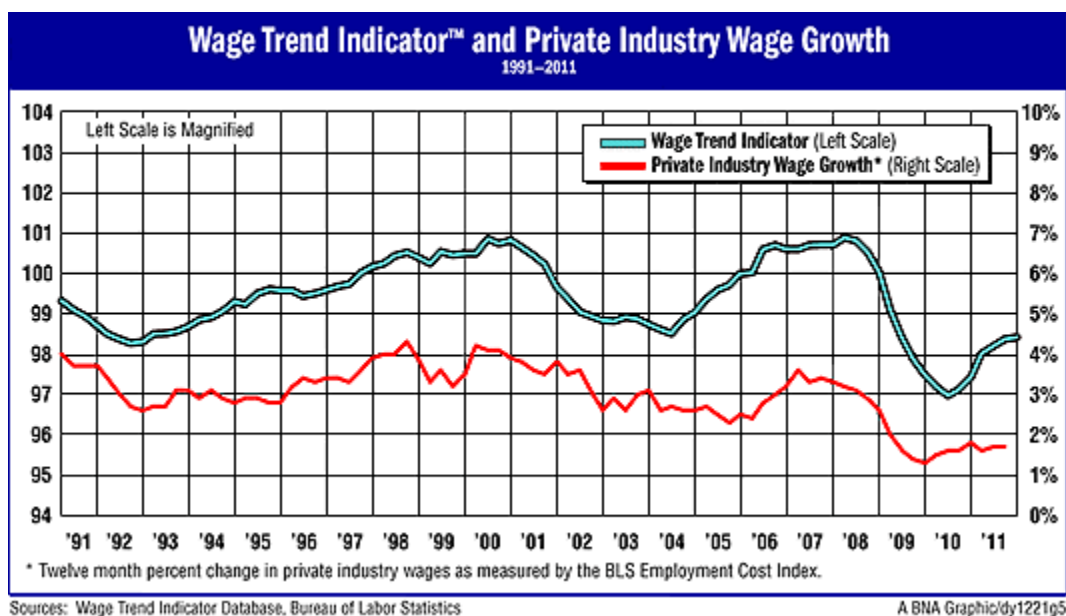
Environmental Scan - External

Environmental Sector: Economic

External Force/Issue: Wages

Key Trends:

National



- The Bureau of National Affairs' Wage Trend Indicator, a quarterly measure designed to detect changes in private industry wages and salaries, shows a modest upward trend in wages since mid-2009 and predicts modest growth in wages in early 2012.
- The latest indicator is signaling that improvements in the labor markets will put upward pressure on wages in the coming months.
- Annual wage growth for private sector workers is not expected to exceed 2.0 percent, while improving from the 1.7 percent year-over-year gain reported by the Labor Department.

Environmental Scan - External

Higher Education

- According to the latest CUPA-HR salary surveys, the median salary increase was 0 percent for administrators and faculty at public institutions in 2010-11 and was 2 percent for private institutions.
 - According to the Bureau of Labor Statistics, the annual Consumer Price Index increased 1.6 percent between 2009 and 2010. The median salary increase was less than inflation for members at public institutions and slightly higher than inflation for private institutions.
 - For public institutions, this reflects two straight years of no increases in the median salary.
-

Implications:

- Along with other economic indicators, wages took a hit during the last recession and are slow to recover. Most wage increases were less than inflation, which puts pressure on individuals and families who have to stretch their limited income even further.
 - Wages, like median family income, can impact the ability of potential students and families to pay for higher education and affordability becomes a major hurdle to access.
 - Compared to other public and private institutions, Illinois State has provided generous salary increases during this latest economic downturn. This has positioned the University well as it competes with other institutions for high quality faculty and staff. This will need to be maintained going forward as the economy begins to improve.
-

Sources:

- Bureau of National Affairs, Wage Trend Indicator, www.bna.com/wage-trend-indicator-pl2884902670/.
- Bureau of Labor Statistics, Consumer Price Index.
- College and University Professional Association for Human Resources, 2010-11 Administrative Compensation Survey, Executive Summary, page 15.
- College and University Professional Association for Human Resources, 2010-11 National Faculty Salary Survey, Executive Summary, page 11 -12.

Environmental Scan - External

Environmental Sector: Economic

External Force/Issue: Illinois Revenue Estimates

Key Trends:

- As of August 2011, Fiscal Year 2012 revenue receipts for individual income, corporate income, and sales taxes were \$3.55 billion, an increase of approximately \$1.1 billion above last year and \$90.1 million above the current forecast.
 - Individual income tax receipts are \$2.2 billion, which are \$903.4 million above last year and \$19.4 million below the current forecast.
 - Growth this year in individual income tax receipts is driven primarily by a tax rate increase that started in January 2011.
 - Revenue forecasts were conservative at the time they were developed and, given the pessimistic outlook for the economy, that conservative forecast is proving to be the right one.
-

Implications:

- In the short term, the State of Illinois will continue to have difficulty paying for its commitments. The University has already had to find other revenue sources to cover for the delay in receiving state funding and this will potentially continue or get worse if the revenue receipts do not substantially increase above forecasts.
 - In the long term, funding to the University from the state will continue to decline unless there is a significant change to the tax revenue base. This will continue to put pressure on the University to find alternative sources of revenue to supplement the loss of state funding.
-

Sources:

- Illinois Department of Revenue, Monthly Revenue Report, August 2011
- Commission on Government Forecasting and Accountability, Monthly Briefing, July 2011.

Social and Demographic Summary

Information gathered for this section of the scan point to both challenges and opportunities for the University as we look toward the future. Population growth is expected nationally, particularly for the Hispanic or Latino population, however growth is more modest in Illinois. Similarly, the number of high school graduates is expected to increase nationally but decrease in Illinois. On the positive side, record numbers of international students are enrolling in universities in the United States.

Highlights: National

- Nationwide, the projected population for 2020 is 341.4 million, a 10 percent increase from 2010. The Hispanic or Latino population is expected to increase to 66.4 million, an increase of 33.5 percent from 2010.
- From 2011-12 to 2021-22, the projected growth nationwide in the aggregate number of high school graduates is expected to be 4.2 percent.
- Nationally, the portion of population, 25 years old and over, with a bachelor's degree or over increased from 24.4 percent in 2000 to 27.5 percent in 2010.
- Since 2000-01, the number of international students in the United States has increased 32 percent, to a record high of 723,277 students in 2010-11.
- In 2010-11, the largest number of students came from China (157,548), followed by India (103,895), and South Korea (73,351).

Highlights: Illinois

- Expected population growth for Illinois is much lower than for the nation. Population projections for Illinois by the Census Bureau show a 2.5 percentage increase from 2010 to 2020.
- Projected growth in high school graduates for Illinois from 2011 to 2022 is expected to be negative, at -5.0 percent.
- In Illinois, the percentage of the population 25 years and over with a bachelor's degree or over increased from 26.1 percent in 2000 to 29.8 percent in 2010.

Environmental Scan - External

Environmental Sector: Social and Demographic

External Force/Issue: Population Growth Projections

Key Trends:

National

- Population projections based on 2010 data are not yet available. The following projections are based on 2000 census data.
- Nationwide, projected population for 2020 is 341,387,000, a 10 percent increase from 2010.
- The Hispanic or Latino population is expected to increase to 66,365,000, an increase of 33.5 percent from 2010. The Hispanic or Latino population is projected to represent 19 percent of population in 2020, compared to 16 percent in 2010.
- The following table shows the projected increase nationwide from 2010 to 2020 by racial/ethnic category. In these projections, Hispanic identification was given precedence when categorizing race-ethnicity. This precedence is also required when compiling statistics for the U.S. Department of Education.

<u>Racial-Ethnic Group</u>	<u>Projected Population for U.S.</u>		<u>Pct. Increase</u>
	<u>2010</u>	<u>2020</u>	<u>2010-2020</u>
American Indian or Alaskan Native	2,392,000	2,697,000	12.8
Black or African American	37,985,000	41,847,000	10.2
Asian	14,083,000	18,308,000	30.0
Native Hawaiian or Pacific Islander	452,000	541,000	19.7
Hispanic	49,726,000	66,365,000	33.5
Two or more races	4,743,000	6,374,000	34.4
White/Non-Hispanic	200,853,000	205,255,000	2.2
Total	310,234,000	341,387,000	100.0

Environmental Scan - External

State

- Expected population growth for Illinois is much lower than for the nation. Population projections for Illinois by the Census Bureau show a 2.5 percentage increase from 2010 to 2020.
 - Population projections by the Illinois Department of Commerce & Economic Opportunity show a 17.5 percent increase in Hispanics and a 38.8 percent increase in Asians for Illinois from 2010-2020.
-

Implications:

- While Illinois will experience slower population growth than the nation, minorities are projected to increase at a larger percentage than white or non-Hispanics, similar to what is projected nationwide.
 - On the University level, this may result in a need for more recruiting efforts geared towards minority students; more emphasis on having a diverse staff, representative of the general population; and curriculum changes, such as an increasing number of courses emphasizing multicultural and bilingual education.
 - For example, the number of students at Illinois State enrolled in the elementary education sequence emphasizing bilingual and bicultural education has increased from 56 students in fall 2005 to 104 students in fall 2011. As demand increases, this program may increase in size in the future.
-

Sources:

- U.S. Census Bureau, Population Division, NP2008-T4.
- U.S. Census Bureau, Population Division, Interim State Population Projections, 2005.
- Population projections, Illinois Department of Commerce and Economic Opportunity

Environmental Scan - External

Environmental Sector: Social and Demographic

External Force/Issue: High School Graduate Projections

Key Trends:

- The most recent estimates nationwide and by state were completed in 2008 by the Western Interstate Commission on Higher Education (WICHE). Actual high school graduate counts were available until 2004-05 and projections were made through 2021-22.
- From 1994-95 to 2004-05, the nation experienced a 22.9 percent growth in high school graduates. In Illinois, the growth for that period was 14.6 percent.
- From 2004-05 to 2011-12, the projected growth was 4.1 percent nationwide, 5 percent for Illinois.
- From 2011-12 to 2021-22, the projected growth nationwide in the aggregate is expected to be 4.2 percent. However, projected growth for Illinois during this time period is expected to be negative, at -5.0 percent.
- In the short term, the number of high school graduates are expected to increase for Illinois from 144,425 in 2010-2011 (most recent graduating class) to 144,806 in 2011-2012. It is not till 2013-2014, that graduations will dip down under 140,000.
- From 2004-05 to 2021-22, the minority composition of Illinois public high school graduates is expected to change. Hispanic and Asian high school graduates are expected to increase, while African American and White high school graduates are expected to decline. Projected numbers are as follows for public high school graduates: Hispanic, from 14,926 to 27,053; Asian, from 5,514 to 9,494; Black, non-Hispanic from 18,771 to 15,168; and White, non-Hispanic from 83,613 to 66,224. Given these projections, total minority representation will increase from 32 to 44 percent of public high school graduates with known race/ethnicity.

Implications:

- With a reduction in the number of high school graduates, enrollment goals for new beginning freshmen may be a little more difficult to obtain. In the past ten years Illinois State has exceeded or met its enrollment goals.
- Even at its lowest point (137,471 in 2019-20), projected high school graduates for Illinois will be similar to actual high school graduates in 2005. That year, high school graduates

Environmental Scan - External

statewide were 137,557; Illinois State's new beginning freshman class was 3,179, with an average ACT of 23.8.

- The current economic condition, if extended, will more likely affect enrollment goals than small fluctuations in high school graduations.
 - With minority representation increasing for high school graduates, Illinois State may need to increase its efforts to attract minority students.
-

Source:

- Knocking at the College Door, WICHE, 2008

Environmental Scan - External

Environmental Sector: Social and Demographic

External Force/Issue: Degree Attainment

Key Trends:

- Nationally, the portion of population, 25 years old and over, with a bachelor's degree or over increased from 24.4 percent in 2000 to 27.5 percent in 2010.
- In Illinois, the percentage of this age cohort with a bachelor's degree or over increased from 26.1 percent in 2000 to 29.8 percent in 2010. Illinois ranked 15 on this field nationally in 2000; ranking is not known for 2010.
- Nationally, postsecondary degree completion is expected to increase in the future. The following table shows the projected number of degrees by level and gender for the United States. The projected increase in postsecondary degree completion is larger than the projected population increase in high school graduates during this time.
- The table below also shows gender differences in educational attainment. Women earned the majority of degrees in 2007-2008 in all types of degrees, except first-professional. In 2019-20, their share of completed degrees is projected to be even larger, ranging from 51 percent of first-professional degrees to 66 percent of associate degrees.

<u>Degree Type</u>	<u>Actual 2007-8</u>		<u>Projected 2019-20</u>		<u>Percent Increase</u>	
	<u>Men</u>	<u>Women</u>	<u>Men</u>	<u>Women</u>	<u>Men</u>	<u>Women</u>
Associate Degree	282,521	467,643	334,000	641,000	18.2	37.1
Bachelor's Degree	667,928	895,141	809,000	1,117,000	21.1	24.8
Master's Degree	246,491	378,532	328,000	512,000	33.1	35.3
Doctoral Degree	31,215	32,497	43,400	54,500	39.0	67.7
First-Professional Degree	45,916	45,393	59,400	62,500	29.4	37.7

Source: National Center for Education Statistics, March 2011

Implications:

- While in the past, issues of gender equity in higher education have largely revolved on increasing the representation of women, attention may need to be shifted in the future to increasing the number of male college students.
 - There is a strong emphasis now, and it is expected to continue in the future, on degree completion and just providing access is not good enough. The Illinois board of Higher Education emphasized degree completion in their Public Agenda for College and Career Success and degree production could be included as an indicator in a performance funding model.
 - Illinois State can maintain enrollment targets and increase degrees by improving retention and graduation rates (see also Internal – Retention and Graduation Rates).
-

Sources:

- U.S. Census, 2000 and 2010
- National Center for Education Statistics, Projections of Education Statistics to 2010, March 2011. Illinois State University, Enrollment Management and Academic Services, FY11 Consolidated Annual Report and FY12 Planning Document.

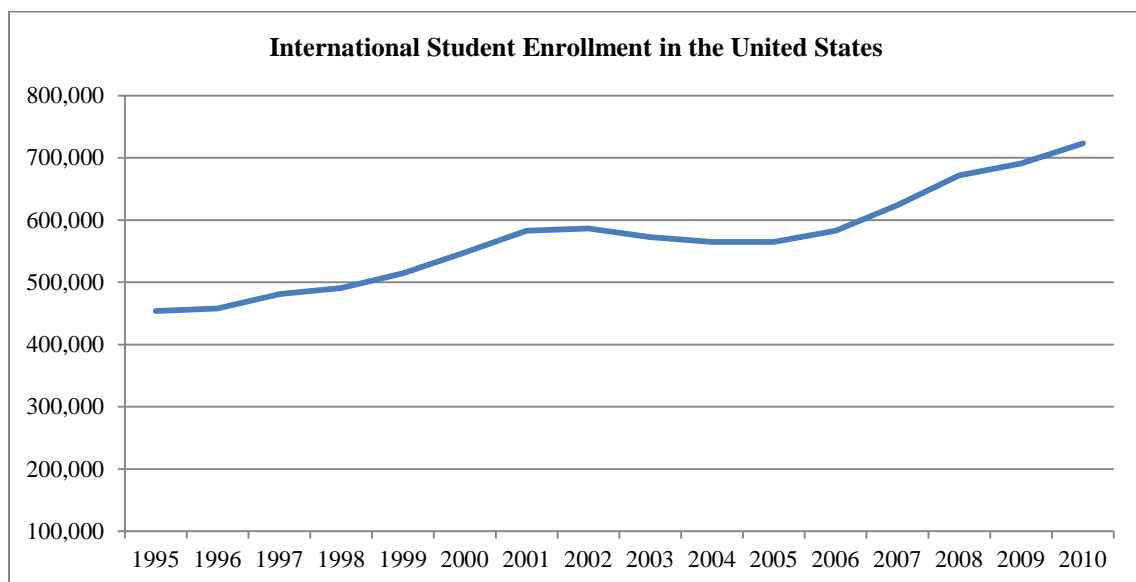
Environmental Scan - External

Environmental Sector: Social and Demographic

External Force/Issue: International Students

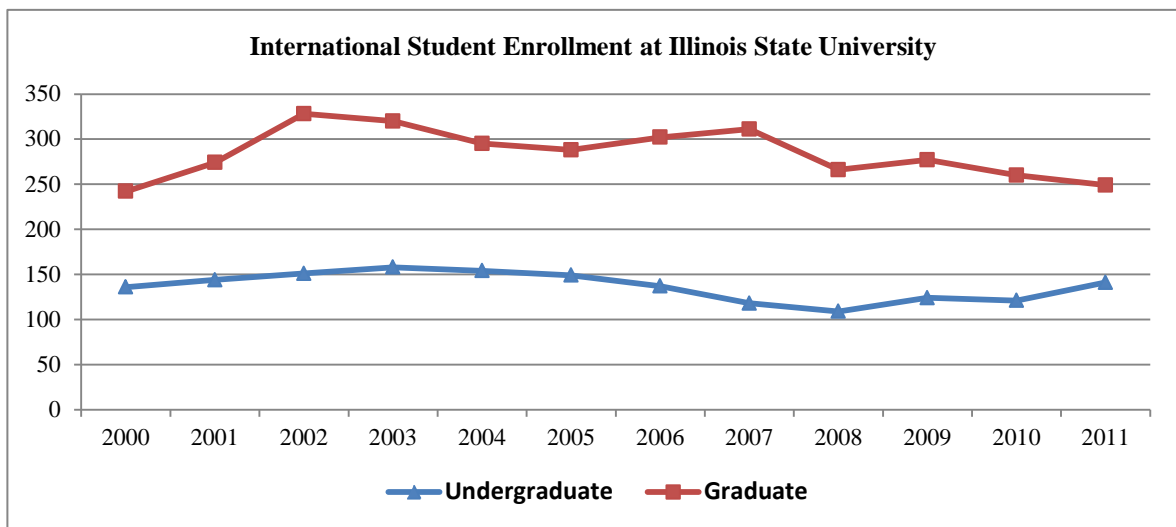
Key Trends:

- Since 2000-01, the number of international students in the United States has increased 32 percent, to a record high of 723,277 students in 2010-11.
- In 2010-11, the largest number of students came from China (157,548), followed by India (103,895), and South Korea (73,351).
- The top five U.S. states hosting international students in 2010-11 were California, New York, Texas, Massachusetts and Illinois.
- The top five U.S. universities in 2010-11 hosting international students were University of Southern California, University of Illinois at Urbana-Champaign, New York University, Purdue University-Main Campus, and Columbia University.
- International students were enrolled fairly equally in undergraduate (291,439) and graduate studies (296,439) in 2010-11.
- In Illinois, the universities with the highest number of international students were the University of Illinois at Urbana-Champaign, Illinois Institute of Technology, University of Chicago, Northwestern University, and the University of Illinois-Chicago.
- The following graph shows the trends in enrollment for international students in the United States from 1995 to 2010.



Environmental Scan - External

- While international student enrollment has increased nationally since 2000, enrollment of international students at Illinois State has fluctuated, with the highest number enrolled in fall 2002.
- In fall 2011, the largest number of international students at Illinois State came from India (76), followed by China (48).
- The following graph shows the international student enrollment at Illinois State from fall 2000-fall 2011.



Implications:

- Increasing the number of international students can also lead to increased revenue, increased campus diversity, and improved globalization experiences for native students, faculty and staff.
- The international student population at Illinois State has not increased as it has nationally, the University may want to explore whether and how best to attract more international students.

Sources:

- **opendoors** “Fast Facts”, Institute of International Education, published annually.
- Illinois State University Fact Book, published annually by Planning, Research, & Policy Analysis

Technological Summary

The changing landscape of technology provides challenges to Illinois State as the University continues to adapt and to ensure that the technology infrastructure meets the needs of its constituents. New technologies also provide opportunities for growth and new ways of teaching, learning, and working.

Highlights

- Mobile technologies were rated as the #1 issue that IT leaders in higher education felt had the potential to become more significant in the future. Smartphone adoption is on the rise, with college students accounting for the fastest-growing market segment. The success of Apple's iPad has led to the reinvention of the tablet computer and additional competitors.
- There is growing interest within the higher education community in cloud computing. The technology is improving and institutions are beginning to test which applications might be best provided in a cloud environment. For example, a number of institutions have moved student email to a cloud provider, such as Gmail or Microsoft's Live@Edu.
- IT infrastructure vendor services have become more comprehensive in the last several years and that is expected to continue going forward. Institutions used to have to contract with multiple vendors to provide services but now one vendor is able to provide an array of services.
- Social media has been used productively in higher education; particularly when the focus is on news or advice feeds, learning, and engagement.
- Faculty cited social media's flexibility, non-centralized form and content, ability to invite conversation and to exchange information as reasons for using the technology.

Environmental Scan - External

Environmental Sector: Technological

External Force/Issue: Trends in Higher Education

Key Trends:

- According to the 2011 EDUCAUSE Current Issues Survey, the top ten issues that Chief Information Officers (CIO) in higher education say are critical to the strategic success of IT operations include:
 1. Funding IT
 2. Administrative/ERP/Information Systems
 3. Teaching and Learning with Technology
 4. Security
 5. Mobile Technologies
 6. Agility/Adaptability/Responsiveness
 7. Governance, Portfolio/Project Management
 8. Infrastructure/Cyberinfrastructure
 9. Disaster Recovery/Business Continuity
 10. Strategic Planning
- The survey also pointed to the need for IT leaders to factor in the perspective of the campus community members and to show them the value of existing services and investments as well as the true cost of future decisions. This marks a shift in focus from just securing funding for IT.
- Mobile technologies were rated as the #1 issue that IT leaders felt had the potential to become more significant in the future. Smartphone adoption is on the rise, with college students accounting for the fastest-growing market segment. The success of Apple's iPad has led to the reinvention of the tablet computer and additional competitors.
- Similarly, a smaller survey of CIO's by Gartner in 2011 showed that the top five issues for strategic information technologies were 1) Cloud computing, 2) Virtualization, 3) Mobile technologies, 4) Technical infrastructure management and development, and 5) Networking, voice, data communications. The complete list and comparisons to prior years are in the table below.

Environmental Scan - External

Higher Education CIO Strategic Information Technologies in 2011 Compared to 2010, 2009 and 2008

Ranking	2011	Change	2010	2009	2008
Cloud computing	1	↑	2		
Virtualization	2	↓	1	1	3
Mobile technologies	3	↑	4		
Technical infrastructure management and development (IT management)	4	↑	9	6	4
Networking, voice, data communications (includes VoIP)	5	↓	3	4	1
Business intelligence (BI)	6	↑	7	2	6
Enterprise applications	7	↑		3	2
Collaboration technologies	8	↑		7	7
Social computing (Web 2.0, AJAX technologies)	9	↓	5	8	
Other	10	↑			
Security technologies (access control, authentication, etc.)		↓	6	5	5
Data storage and management		↓	8		
Service-oriented applications and architecture (SOA, SOBA)		↓	10		10
Legacy application modernization, upgrade or replacement		↓		9	9
Document management		↓		10	8

CRM = customer relationship management; ERP = enterprise resource planning; SOA = service-oriented architecture; SOBA = service-oriented business application; VoIP = voice over Internet Protocol

Implications

- It is important to note that the IT maturity of the institution must be taken into consideration when comparing the priorities included in these surveys to potential priorities for Illinois State. For example, Illinois State lags behind other institutions in the area of administrative systems; we have a student system that is over 30 years old, which is rare in higher education. Therefore, other institutions might not rank implementing and updating business applications as high as Illinois State would.
- Even with that in mind, the emergence of mobile technologies and their potential use might be something to pay attention to in the coming years. Mobile technologies present opportunities to transform instruction, in the classroom and remotely, by providing access to educational resources anytime, anywhere.

Environmental Scan - External

-
- The adoption of the IT Strategic Plan and the development of an action plan will help to determine the priorities of IT as Illinois State.
-

Sources

- EDUCAUSE Top Ten IT Issues, 2011, EDUCAUSEreview, May/June 2011, pages 25-40.
- Gartner Research Portal. <http://search.illinoisstate.edu/atoz/?show=G>

Environmental Scan - External

Environmental Sector: **Technological**

External Force/Issue: **Infrastructure Trends**

Key Trends:

- There is growing interest within the higher education community in cloud computing. The technology is improving and institutions are beginning to test which applications might be best provided in a cloud environment. For example, a number of institutions have moved student email to a cloud provider, such as Gmail or Microsoft's Live@Edu.
 - IT infrastructure vendor services have become more comprehensive in the last several years and that is expected to continue going forward. Institutions used to have to contract with multiple vendors to provide services but now one vendor is able to provide an array of services.
 - The trends for data centers are consolidation and downsizing. Maintaining the centers and having disaster recovery to meet customer needs is growing more complex and expensive.
 - IT infrastructure and operations will be the next large-scale segment of IT to begin outsourcing efforts.
 - Higher education organizations will be slow to adopt a strategic path to outsourcing IT services; instead early efforts will be carried out at a distributed level, resulting in a wide variety of contracts, service levels, and disparate solutions.
 - Server virtualization went from creation to commonplace in 5 years; desktop virtualization is next.
 - Consumer demand for IT will continue to increase and the line between devices that are used for personal and work computing will blur and then disappear.
-

Implications

- The use of cloud services requires an increased awareness of system and data integration since different vendors provide different services. Coordination of these services is important to ensure successful application.
- Moving to a cloud environment might require IT staff to learn new skills as they shift from one kind of programming to another.
- Since the options for vendors and services is changing, institutions should design and implement a formal Enterprise Architecture framework that will provide a comprehensive

Environmental Scan - External

approach for designing, planning, implementing, and governance of an enterprise information architecture.

Sources

- Administrative Technologies
- Campus Technology Support Group
- Educause: <http://net.educause.edu/ir/library/pdf/PUB4003.pdf>
- Educause: <http://www.educause.edu/Resources/Browse/Cloud+Computing/27148>
- EduCause: <http://net.educause.edu/ir/library/pdf/ERB0919.pdf>
- University Business, Oct 2011: <http://www.universitybusiness.com/article/cloud-email-good-bad-and-uptime>
- Educause: Evolving Technologies: A View to Tomorrow, Molly Tamarkin, Shelley Rodrigo, and the 2011 EDUCAUSE Evolving Technologies Committee, <http://www.educause.edu/EDUCAUSE+Review/EDUCAUSEReviewMagazineVolume46/EvolvingTechnologiesAViewtoTom/238392>

Environmental Scan - External

Environmental Sector: **Technological**

External Force/Issue: **Trends in Social Media**

Key Trends:

- Social media has been used productively in higher education; particularly when the focus is on news or advice feeds, learning, and engagement.
- Recent permission changes in Facebook allow students to use Facebook to interact with faculty and other institutional representatives while protecting personal content.
- The topic “Social Media in Higher Education” is covered differently by sponsoring organizations. The Council for Advancement and Support of Higher Education (CASE) received 951 responses to their Social Media Survey and found the following top 10 reasons for social media engagement in higher education:

To what degree does each of these motivate the implementation of social media at your institution (mean rating)? Need to sustain and protect our brand (3.7); Demand from alumni or other constituents (3.4); Use of social media by peer institutions (3.3); Strong support from an institutional champion (3.1); Success stories at conferences and conventions (3.0); Potential financial advantages (3.0); Media coverage of social media success (2.9).

- Faculty cited social media’s flexibility, noncentralized form and content, ability to invite conversation and to exchange information as reasons for using the technology.
-

Implications:

- Social media, like Twitter, are useful venues for providing news feeds. However, it is important to manage multi-modal information streams in order to avoid “in” and “out” crowds. For example, some alumni Tweet, but not all do and information that you intend to share to a broad audience may be missed by important members who are not using Twitter.
- Social media can be good at communicating/ projecting an institutional personality. Institutions should be aware that in social media, the control is in the public, not the institution. You may be projecting as many negative impressions as positive ones.
- Using social media in teaching and learning may require changes in instructional methods and the need to move beyond only content sharing in order to make it successful.

Environmental Scan - External

Sources:

- CollegeSurfing's Web 2.0 College Olympics; 50 Social Media Innovators in Higher Education. <http://www.collegesurfing.com/content/web-20-colleges/>
- The Chronicle of Higher Education, Jeffrey R. Young
<http://chronicle.com/blogs/wiredcampus/when-professors-create-social-networks-for-classes-some-students-see-a-creepy-treehouse/4176>
- CASE Social Media Survey, April 2011.
<http://www.case.org/Documents/AboutCASE/Newsroom/CASE-2011-Social-Media-Survey-Findings.pdf>
- Pearson Learning Solutions. Teaching, Learning and Sharing: How Today's Higher Education Faculty Use Social Media, April 2011.
<http://www.pearsonlearningsolutions.com/educators/pearson-social-media-survey-2011-bw.pdf>
- London School of Economics and Political Science, Dr Sarah-Louise Quinnell
<http://blogs.lse.ac.uk/impactofsocialsciences/2011/08/01/social-media-higher-education-positive-step-digital-divide-compounding-exclusion/>

Educational Summary

Illinois State University works and competes for students within a large, diverse educational landscape. As the number of high school graduates decreases, the economy struggles and increases affordability concerns, and new educational providers emerge, maintaining student enrollment becomes more difficult. The type and number of competitors are changing as community college enrollment surges, online education becomes more readily available, and proprietary (for-profit) providers increase.

Highlights: National

- President Obama has challenged community colleges to educate an additional 5 million students with degrees, certificates, or other credentials by 2020.
- The economic recession had a dramatic and unforeseen impact on community colleges. The number of full time students who enrolled in credit-bearing courses at community colleges increased 24.1 percent in a 2-year time period from fall 2007 to fall 2009.
- The rate of growth of online enrollments has slowed in recent years but continues to be far in excess of the rate of growth for the total higher education student population. Over 6.1 million students took at least one online course during the fall 2010, an increase of 560,000 students over the previous year and a 10 percent growth rate.
- The Illinois Board of Higher Education's Public Agenda for College and Career Success lays out four goals that are intended to create a pathway for all Illinois residents to have affordable access to high-quality educational opportunities that prepare them for the jobs of the present and the future.

Highlights: Illinois

- Competition from community colleges has increased over the last several years, likely due to the ability of two-year institutions to offer a lower tuition rate along with giving students the option of saving on room and board because they can live at home due to the proximity of the institution to their residence.



Environmental Scan - External

Environmental Sector: Educational

External Force/Issue: Competition

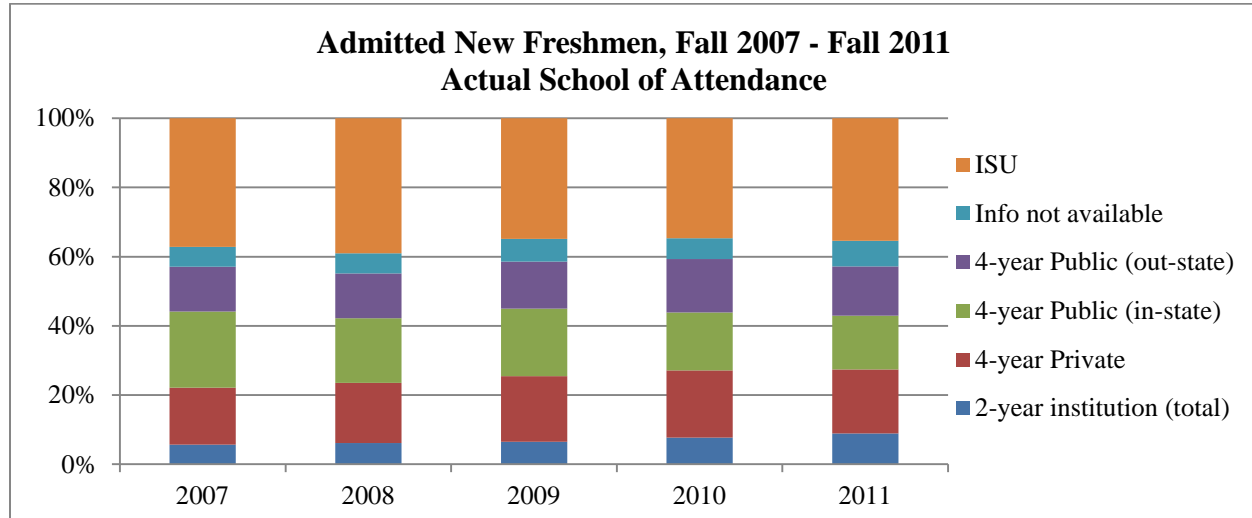
Key Trends:

The table below represents top institutions identified by the National Student Clearinghouse of students who had applied and were admitted to ISU, but enrolled at another institution.

Admitted New Freshmen - Actual School of Attendance (Fall 2007 – Fall 2011)

<u>Institution</u>	<u>School Type</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2011 rank</u>	<u>1-yr change</u>	<u>5-yr change</u>
University of Illinois	4-year Public in-state	911	818	836	706	701	1	-1%	-23%
University of Iowa	4-year Public out-state	268	268	290	334	283	2	-15%	6%
University of IL - Chicago	4-year Public in-state	245	232	248	253	274	3	8%	12%
University of Missouri	4-year Public out-state	47	68	98	140	166	4	19%	253%
DePaul	4-year Private in-state	129	164	167	151	159	5	5%	23%
Bradley University	4-year Private in-state	165	139	181	192	155	6	-19%	-6%
Eastern IL University	4-year Public in-state	167	166	166	134	148	7	10%	-11%
Western IL University	4-year Public in-state	69	73	71	84	103	8	23%	49%
College of DuPage	2-year Public in-state	61	45	71	75	99	9	32%	62%
Southern IL Carbondale	4-year Public in-state	97	97	83	79	94	10	19%	-3%
Marquette University	4-year Private out-state	78	79	98	99	92	11	-7%	18%
Loyola - Chicago	4-year Private in-state	86	78	102	95	89	12	-6%	3%
Southern IL Edwardsville	4-year Public in-state	74	62	76	58	89	12	53%	20%
Indiana University - Bloomington	4-year Public out-state	163	143	128	94	79	14	-16%	-52%
Illinois Wesleyan	4-year Private in-state	70	89	83	88	71	15	-19%	1%
Joliet Junior College	2-year Public in-state	29	38	34	59	70	16	19%	141%
WR Harper College	2-year Public in-state	40	53	54	58	67	17	16%	68%
Lewis University	4-year Private in-state	33	35	33	42	67	17	60%	103%
Augustana	4-year Private in-state	91	95	70	103	66	19	-36%	-27%
Purdue University	4-year Public out-state	99	118	83	79	66	19	-16%	-33%
Elmhurst College	4-year Private in-state	44	72	48	44	65	21	48%	48%

Environmental Scan - External



- The University of Illinois at Urbana-Champaign continues to be Illinois State's top competitor as far as where Illinois State's admitted students enroll in; however it has decreased by 23 percent over the last five years. A number of other institutions have experienced significant increases over the last five years: University of Missouri (253 percent), Joliet Junior College (141 percent), Lewis University (103 percent), WR Harper College (68 percent), and College of DuPage (62 percent).
 - Students and their families are attracted to Illinois State by its:
 - Academic reputation
 - Location and physical attractiveness
 - Customer service
 - Value for an education
-

Implications:

- Illinois State's competition with two-year institutions has increased over the last several years, likely due to the ability of two-year institutions offering a lower tuition rate along with students having the option of saving on room and board because they can live at home due to the proximity of the institution to their residence.
- Illinois State has created a strong market position by offering a high-quality undergraduate education at a good value. It is imperative that the University maintain that

Environmental Scan - External

position by continuing to attract highly-qualified applicants in the face of increasing competition as well as understand the price sensitivity and value perceptions of Illinois families.

- Five-Year Enrollment Plan recommendations
 - Increase prospect pool and expand recruitment communication
 - Shift undergraduate enrollment modestly and gradually toward transfer students
 - Remain competitive on price given regional competition
 - Continue to enhance institutional gift aid
 - Increase retention programming to meet demand
 - Further involve University community in outreach, recruitment, and retention
-

Sources:

- National Student Clearinghouse (data was corrected to exclude dual-credit and summer enrollment in community colleges; Northern Illinois University data was not available beginning in fall 2011)
- Enrollment Management and Academic Services
- Illinois State University's Enrollment Committee, which developed the Five-Year Enrollment Plan.

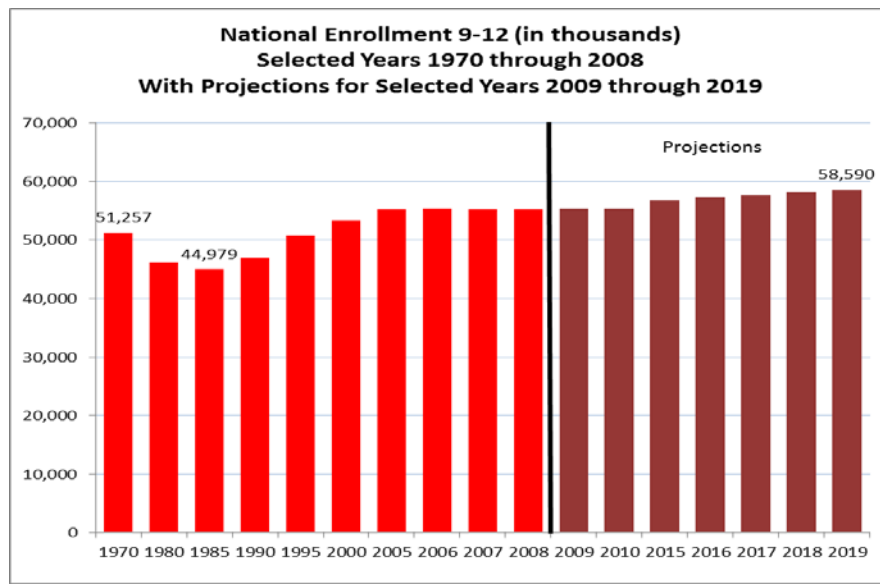
Environmental Scan - External

Environmental Sector: Educational

External Force/Issue: K-12 Sector Enrollments

Key Trends:

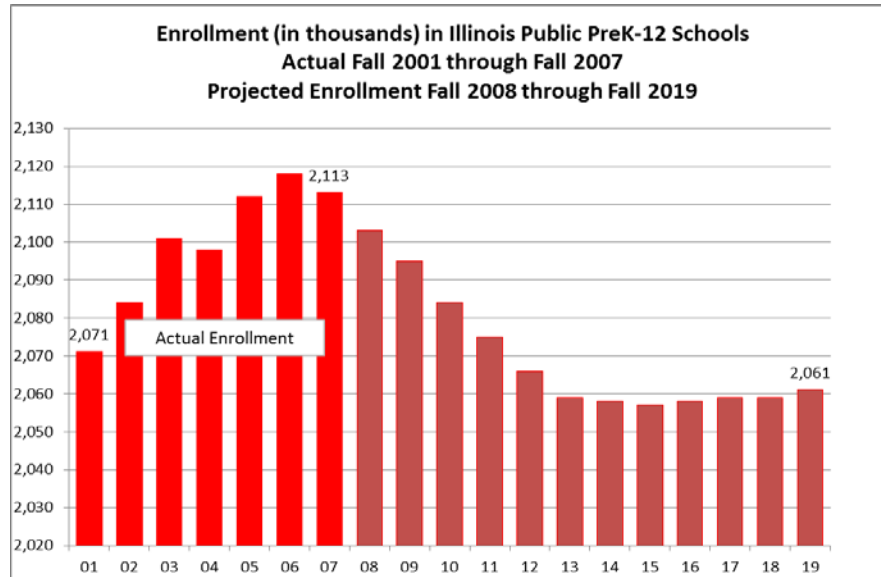
National and Midwest



- Projected enrollment in grades 9-12 (public and private schools) will increase slightly from 2010 to 2019.
- In the Midwest, projected enrollment in PreK-12 (public schools only) shows a decrease of approximately 2.5 percent from 2001 through 2019.

Environmental Scan - External

State



- Illinois projections for PreK-12 (public schools only) enrollment show a 2.5 percent decrease from the actual enrollment in 2007 to the projected enrollment in 2019.
- Enrollments in 2019 will be comparable to enrollments in 2001 and are only a 0.5 percent decrease from 2001.

Implications:

- Enrollments in the K-12 sector, along with high school graduation projections, are important indicators for the University to evaluate. These students are the pipeline to the institution and fluctuations in enrollment and graduation patterns can signal increased competition for students.
- Although the decline in K-12 enrollment is larger for the state of Illinois than for the nation, the projected enrollment in 2019 is comparable to enrollments in 2001.

Sources:

- <http://nces.ed.gov/fastfacts/display.asp?id=65>
- http://www.isbe.net/research/pdfs/public_school_enrollment.pdf
- NCES enrollment projections pg 38.pdf

Environmental Scan - External

Environmental Sector: **Educational**

External Force/Issue: **Community Colleges**

Key Trends:

National

“Community colleges aren’t just the key to the future of their students. They’re also one of the keys to the future of our country. We are in a global competition to lead in the growth industries of the 21st century. And that leadership depends on a well-educated, highly skilled workforce. We know, for example, that in the coming years, jobs requiring at least an associate degree are going to grow twice as fast as jobs that don’t require college. We will not fill those jobs – or keep those jobs on our shores – without community colleges.” – President Obama, White House Summit on Community Colleges, October 5, 2010.

- President Obama has challenged community colleges to educate an additional 5 million students with degrees, certificates or other credentials by 2020.
- The economic recession had a dramatic and unforeseen impact on community colleges. The number of full time students who enrolled in credit-bearing courses at community colleges increased 24.1 percent in a 2-year time period from fall 2007 to fall 2009.
- These enrollment increases were coupled with widespread funding reductions.
- Community colleges are focusing their attention on ensuring student success. Educational attainment for all populations at community colleges is increasing and over the past 20 years, the percent increase in credentials awarded has been double the percent increase in enrollment.
- In June 2011, a new national commission to help reshape the future of community colleges was announced. The 21st Century Commission on the Future of Community Colleges will take a look at the broad and continuously evolving mission of community colleges to ensure it is aligned with national needs and the changing times.

State

- Mirroring the national trends, enrollment in Illinois community colleges has increased in the last several years. In Fall 2011, both headcount and full-time equivalent enrollments were at their third highest level in more than 25 years, registering 372,000 students.

Environmental Scan - External

- According to Illinois Community College Board's Student Enrollment and Completions Report, the median age of credit-generating students was 25.4 in 2010, a slight decrease from the previous year. The average age decreased to 30.5 years.
 - Baccalaureate/transfer programs are the largest credit instructional program area and enrolled 40.4 percent of 2010 students. However, only 34 percent of all students indicated intent to transfer.
 - A total of 56,884 degrees and certificates were awarded in fiscal year 2010 and represented the highest number ever reported.
-

Implications:

- Community college enrollment is growing and the number of degrees and certificates are also increasing. Community college graduates are potential transfer students and a sizeable number of students indicate an interest in transferring to a four year institution.
 - Community colleges can also increase the competition for recent high school graduates. They present a lower cost alternative, provide access, and are close to home for students who are not ready to attend a larger four year university. The College of DuPage is one of the universities biggest competitors and is currently ranked #3 out of the top ten competitors. Five years ago it was ranked 10th (see also External – Competition).
 - The University may want to explore transfer articulation agreements with community colleges and other avenues for working more closely with community colleges, and increase the recruitment of transfer students to help maintain enrollment in the future.
 - The University should also continue to focus on maintaining costs and increasing financial aid in order to compete with community colleges from an affordability perspective.
-

Sources:

- American Association of Community Colleges, New National Commission to Help Reshape the Future of Community Colleges Press Release, June 30, 2011.
- American Association of Community Colleges, The Road Ahead: A Look at Trends in the Educational Attainment of Community College Students, Executive Summary.
- American Association of Community Colleges, Community College Enrollment Surge: An Analysis of Estimated Fall 2009 Headcount Enrollments at Community Colleges, Executive Summary.
- Illinois Community College Board, Fall 2011 Enrollments Press Release.
- ICCB, Annual Student Enrollments and Completions Report Fiscal Year 2010, Executive Summary.

Environmental Scan - External

Environmental Sector: Educational

External Force/Issue: For-Profit and Online Education

Key Trends:

- New student enrollments in for-profit colleges have decreased, in some cases by more than 45 percent, in the last year.
 - This enrollment decrease reflects two factors: companies have pulled back on aggressive recruiting practices amid criticism over high student loan default rates and many would-be students are questioning the value for degrees that can cost considerably more than public higher education.
 - State and federal investigators began pressuring for-profit colleges last year as default rates on federally backed student loans began to climb. Default rates at for-profit colleges was 11.6 percent in 2008, more than double the rate of public colleges.
 - The rate of growth of online enrollments has slowed in recent years but continues to be far in excess of the rate of growth for the total higher education student population.
 - Over 6.1 million students took at least one online course during the fall 2010, an increase of 560,000 students over the previous year and a 10 percent growth rate.
 - The 10 percent growth rate exceeds the less than 1 percent growth of the overall student population.
 - In a recent survey of academic leaders, 65 percent of reporting institutions said that online learning was a critical part of their long-term strategy.
-

Implications:

- The recent declines in new student enrollment in for-profit institutions may be good news for institutions like Illinois State. In this highly competitive student recruitment market, the negative publicity that the for-profit institutions have taken may encourage prospective students to look to the public institutions as a more affordable option.
 - The recent decline in proprietary sector enrollment should be watched closely going forward. As the for-profit institutions adjust to new recruiting rules and they continue to aggressively market to potential students, enrollments could begin to increase again.
 - Although growth in online course enrollments has slowed in recent years, there is still a demand for online education from students. Growth in online enrollments is outpacing the growth in traditional enrollments.
-

Environmental Scan - External

Sources:

- Going the Distance: Online Education in the United States, 2011, I.Elaine Allen and Jeff Seaman, Executive Summary.
- Party Ends at For-Profit Schools, Melissa Korn, The Wall Street Journal, August 23, 2011.
- Analyst: Worst soon over at for-profit schools, The Associated Press, August 25, 2011.

Environmental Scan - External

Environmental Sector: Educational

External Force/Issue: IBHE Public Agenda for College and Career Success

Key Trends:

- In spring 2007, the Illinois General Assembly adopted House Joint Resolution 69, directing the Illinois Board of Higher Education (IBHE) to develop a Public Agenda for higher education and the state.
 - On December 9, 2008, the IBHE unanimously approved The Illinois Public Agenda for College and Career Success.
 - The Public Agenda lays out four goals that intended to create a pathway for all Illinois residents to have affordable access to high-quality educational opportunities that prepare them for the jobs of the present and the future.
 - The four goals are; 1) Increase educational attainment to match the best-performing states, 2) Ensure college affordability for students, families, and taxpayers, 3) Increase the number of high-quality post-secondary credentials to meet the demands of the economy and an increasingly global society, and 4) Better integrate Illinois' educational, research, and innovation assets to meet economic needs of the state and its regions.
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Implications:

- It is important for the University to monitor and understand the direction that the IBHE is headed.
-

Source:

- The Illinois Public Agenda for College and Career Success, <http://www.illinois.org/>



ILLINOIS STATE
UNIVERSITY
Illinois' first public university

Internal Scan

Students Summary

Illinois State University has maintained a steady overall enrollment over the past 20 years through strong enrollment management.

Following the adoption of the first *Educating Illinois Action Plan (2000-2007)*, the University worked to increase representation of minority students, to increase and enroll more academically talented and motivated students, and to increase student retention and graduation rates.

Highlights

- Since 1992, the proportion of students from racial/ethnic designations other than white has increased and reached a record high 14.7 percent in fall 2011.
- The retention rate has continued to increase since 1992 and in the fall 2010, hit a record high of 85.1 percent. This represented an 11.6 percent increase over fall 1992.
- Retention rates for minority students also showed improvement in the last twenty years. Black or African American students' retention rate increased 32.3 percent from 43.9 percent in 1992 to 76.2 percent in 2011. Hispanic students' retention rate increased 26.9 percent over this time period from 53.8 percent to 80.7 percent.
- Similar to retention rates, six-year graduation rates have also increased since 1992 and hit a record high of 70.4 percent for the fall 2004 cohort. Since 1992, the graduation rate has increased 17.2 percent.
- ACT composite scores have increased steadily from a 20-year low of 21.7 in 1995 to a high of 24.3 in 2009 – the average decreased slightly the last two years to 23.9 in 2011.

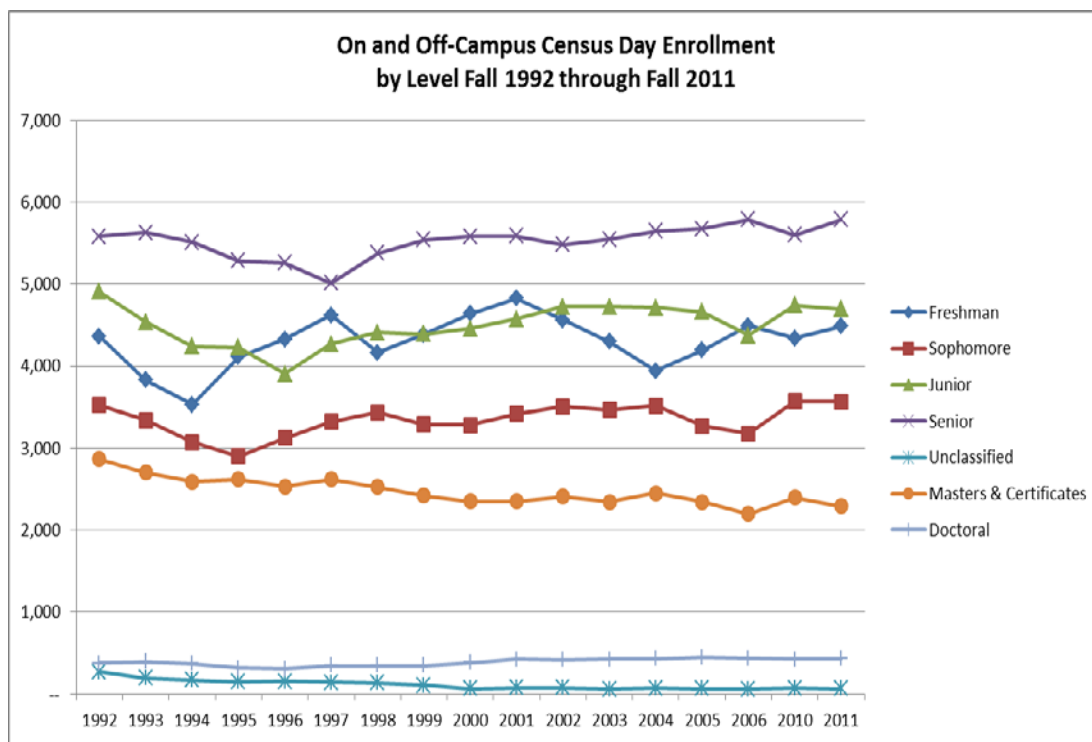
Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Trends in Enrollment

Key Trends:

Total Enrollment by Level

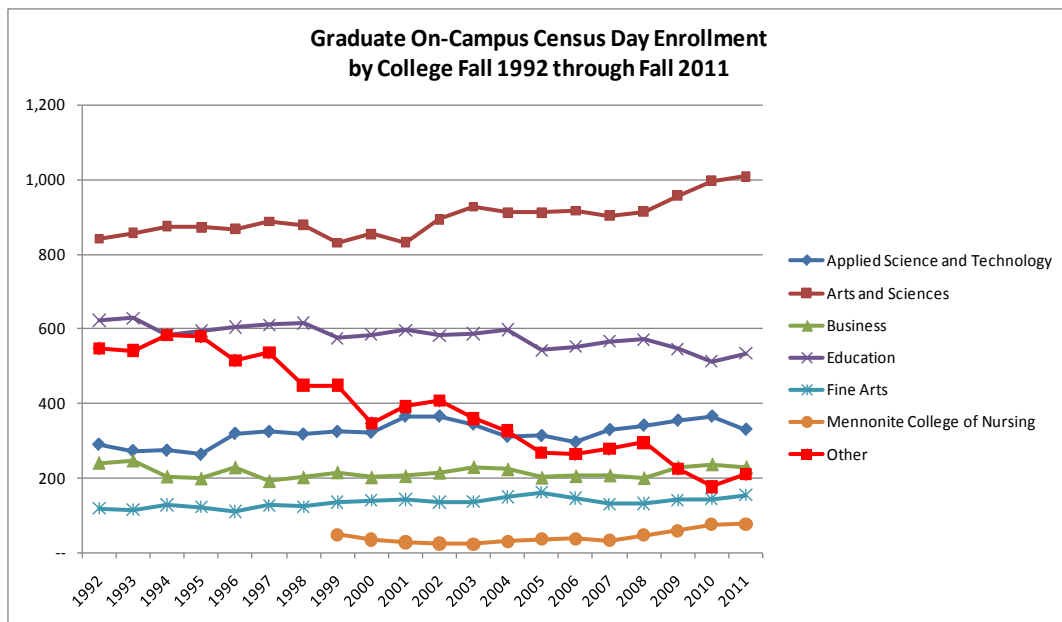
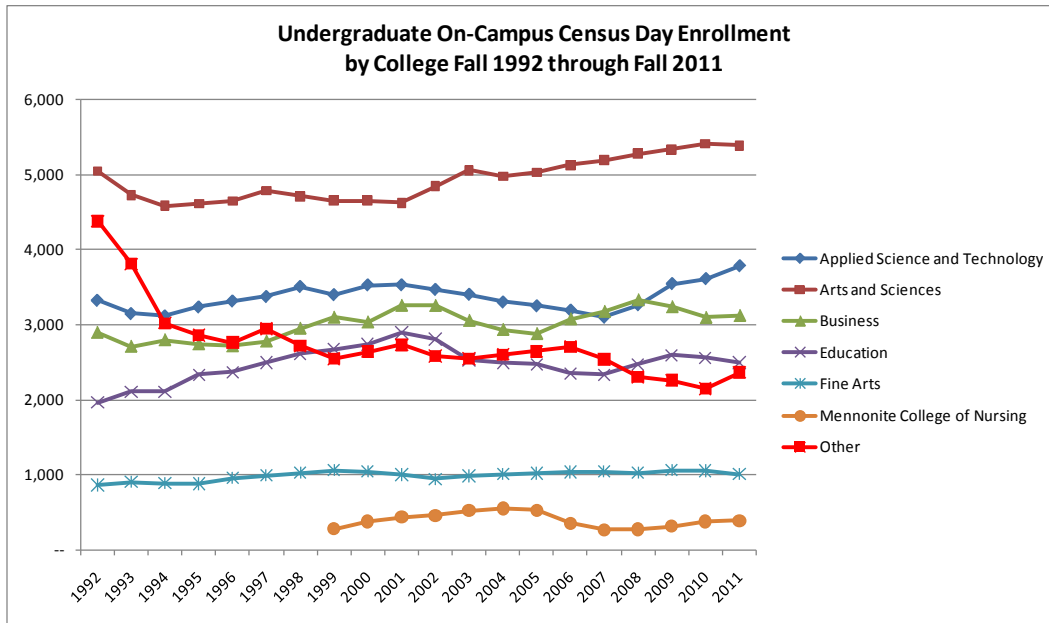


- Since 1992, the University has experienced fairly steady enrollment at all levels.
- Some factors to consider when looking at this trend:
 - Enrollment reductions in the early 1990's were a planned effort.
 - Freshmen level includes continuing freshmen.
 - Heartland Community College campus opened in Normal in fall 2000.
 - Guaranteed tuition was enacted in fall 2003.



Environmental Scan - Internal

Enrollment by College



- Enrollment for both undergraduate and graduate students has been steady in most colleges. The highest rate of growth has been experienced in both the College of Arts and Sciences and the College of Applied Science and Technology.

Environmental Scan - Internal

- An effort in the early 1990's moved many undergraduate students out of "Other" and into a particular college.
 - Prior to 1999, the Undergraduate "Other" category included Pre-Nursing.
 - Graduate enrollments in non-IBHE approved certificate programs moved from the "Other" category and into colleges starting in 2002.
 - National Board Certifications moved graduate students from the "Other" category to the College of Education in the late 1990's.
-

Implications:

- Enrollments at Illinois State have stayed steady and strong for the last twenty years. This enables the campus to maintain a healthy resource base and the ability to meet student needs.
 - Maintaining enrollments may become increasingly difficult in the near future as competition for students increases with shrinking numbers of high school graduates and a weak economy.
-

Sources

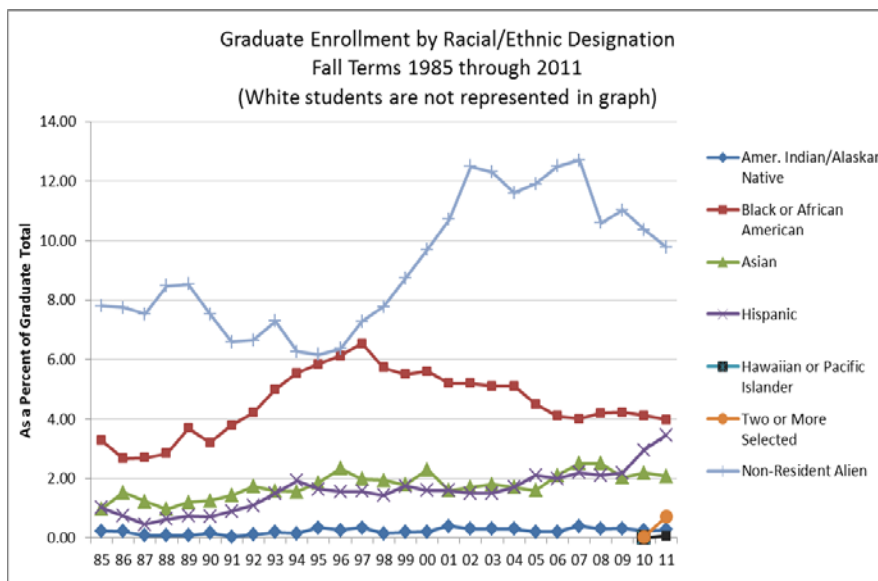
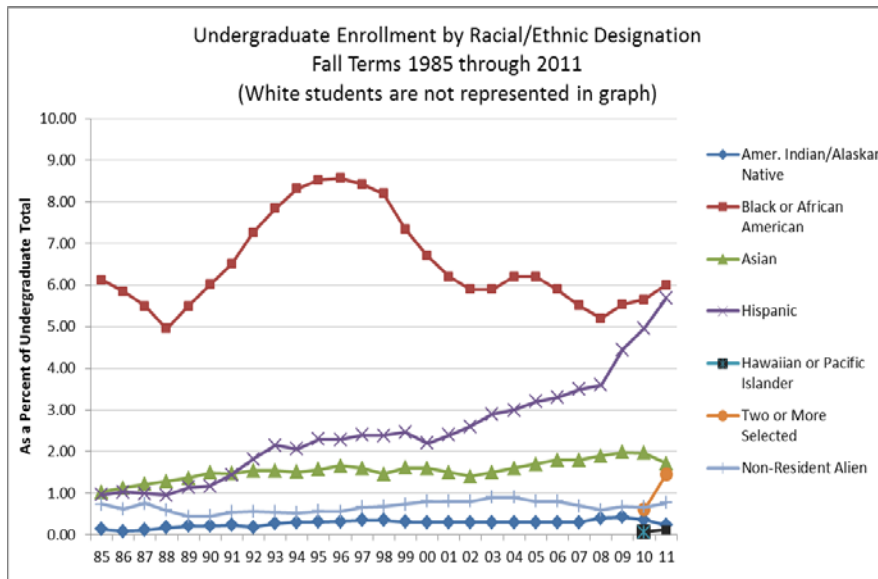
- Illinois State University FactBook – On-and off-campus enrollment
- Illinois State University FactBook – Enrollment by college

Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Race/Ethnicity Profile

Key Trends:



- Since 1992, the proportion of students from racial/ethnic designations other than white has increased and reached a record high 14.7 percent in fall 2011.

Environmental Scan - Internal

- Looking at specific races/ethnicities, the largest increases were seen with Hispanic students. In 1992, Hispanics were 1 percent of all undergraduates and compared to 5.7 percent in 2011, almost equal to Black or African American students.
- The proportion of undergraduates who are Black or African American has fluctuated in the last twenty years and reached a high point in 1997. The percent of all undergraduates rate of 6 percent in fall 2011 is roughly equal to the rate in 1992.
- For graduate enrollment, the largest increases were seen with Non-Resident Alien students. Their proportion of all graduate students increased from approximately 8 percent in 1992 to 10 percent in 2011.

Comparison Data:

National Center for Educational Statistics: Undergraduate and graduate minority enrollment at higher learning institutions:

- In 1990 minority enrollment was 19.6% of the total enrollment.
- In 2009 minority enrollment was 34.3% of the total enrollment.

Census data for the state of Illinois, McLean County, and the town of Normal report for white residents in 2010:

- 62.7% of the state of Illinois residents.
 - 81.9% of McLean County residents.
 - 82.5% of Normal residents.
 - 81.9% of Illinois State students.
-

Implications:

- It might be worthwhile to investigate and understand the changes in enrollment patterns for various racial and ethnic groups. Clearly, there are differences in the enrollment patterns of these groups.
 - It will be important for the University to enhance and increase recruitment of diverse students to coincide with the change in projected student demographics (see also Social and Demographic – High School Graduates).
-

Sources:

- Illinois State University Fact Book
- <http://nces.ed.gov/fastfacts/display.asp?id=98>
- <http://quickfacts.census.gov/qfd/states/17/1753234.html>

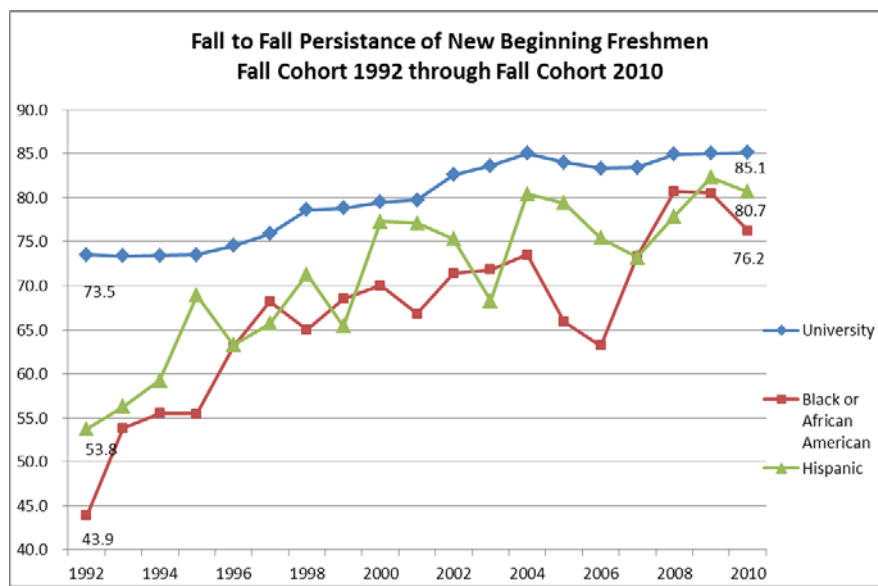
Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Retention and Graduation Rates

Key Trends:

Retention



- The retention rate has continued to increase since 1992 and in the fall 2010, hit a record high of 85.1 percent. This represented an 11.6 percentage point increase over fall 1992.
- Retention rates for minority students also showed improvement in the last twenty years. Black or African American students' retention rate in fall 2010 was 76.2 percent, down from the record high of 80.7 percent in 2008. However, the total increase from fall 1992 was 32.3 percent.
- Hispanic students' retention rate in fall 2010 was 80.7 percent, down from a record high 82.3 percent in 2009. When compared to fall 1992, retention rates increased 26.9 percent over this time period.



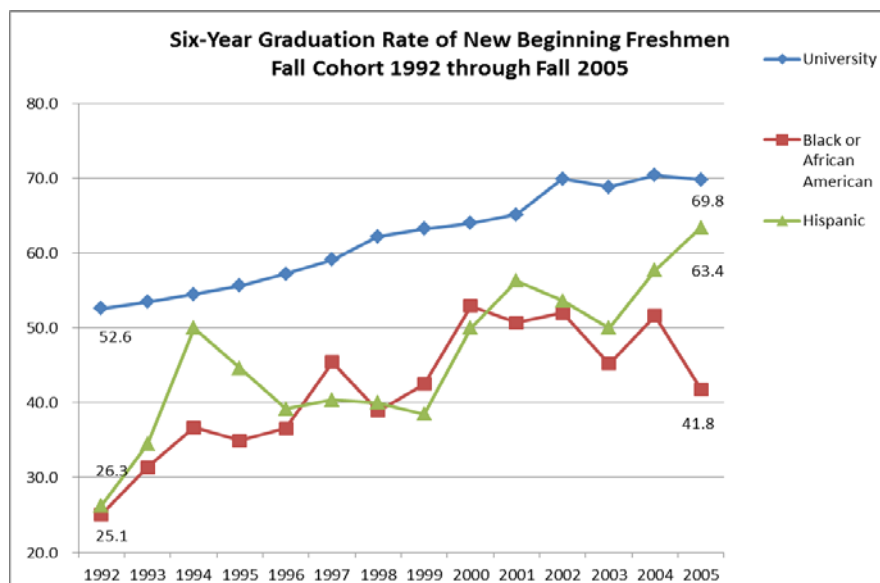
Environmental Scan - Internal

- Fall 2010 comparison rates:

Retention rate for 4-Year Public Institutions offering all degree levels

Selective Institutions (ISU's group)	82.9%
Highly Selective Institutions	89.5%
All 4-Year Public Institutions	77.0%

Graduation Rates



- Similar to retention rates, six-year graduation rates have also increased since 1992 and hit a record high of 70.4 percent for the fall 2004 cohort. Since 1992, the graduation rate has increased 17.2 percent.
- Six-year graduation rates for minority students also increased since 1992. Black or African American students' graduation rate for the fall 2005 cohort was 41.8 percent, down from record high of 52.9 percent in 2000. Overall, the increase from the fall 1992 cohort was 16.7 percent over this time period.
- Hispanic students' six-year graduation rate for the fall 2010 cohort was 63.4percent, a record high. Since 1992, the six-year graduation rate for Hispanic students increased 37.1 percent and is nearly equal to the University total.

Environmental Scan - Internal

- Fall 2010 comparison rates:

Six-Year Graduation rate for 4-Year Public Institutions offering all degree levels

Selective Institutions (ISU's group)	59.8%
Highly Selective Institutions	81.6%
All 4-Year Public Institutions	54.2%

Implications:

- Strong retention and graduation rates indicate that students are progressing toward a degree and graduating in a timely fashion. Illinois State exceeds its comparison group on both indicators.
 - Illinois State should be very proud of the progression of minority students and the huge gains that have been made in the last twenty years. Some work remains to increase the six-year graduation rate for Black or African American students and close the gap between those students and the University as a whole.
 - Continued attention and support should be given to maintaining and increasing retention and graduate rates in the future. With the external focus on performance and degree attainment, these rates are the measurements that may likely matter the most as the state looks to implementing performance funding.
-

Sources:

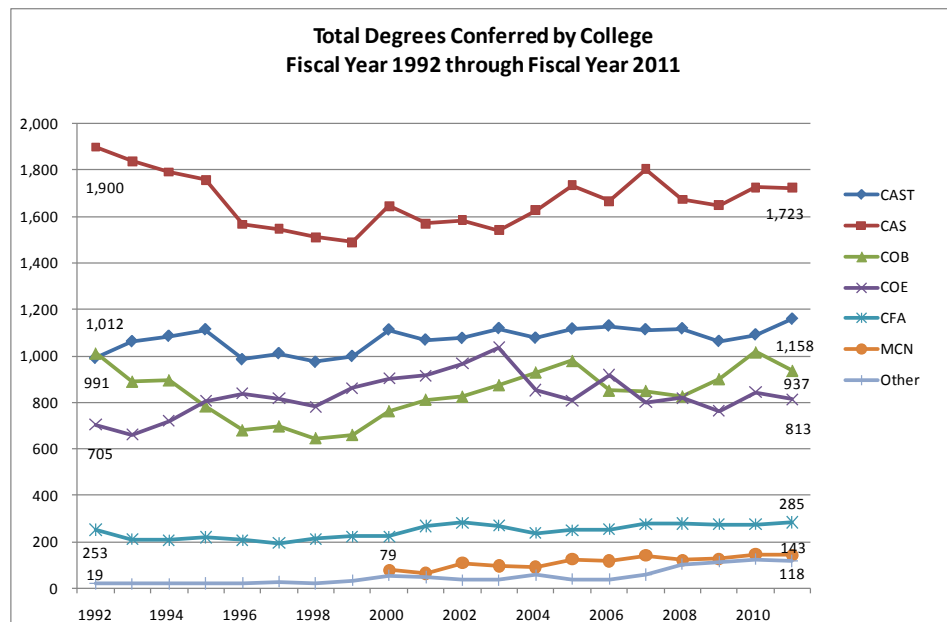
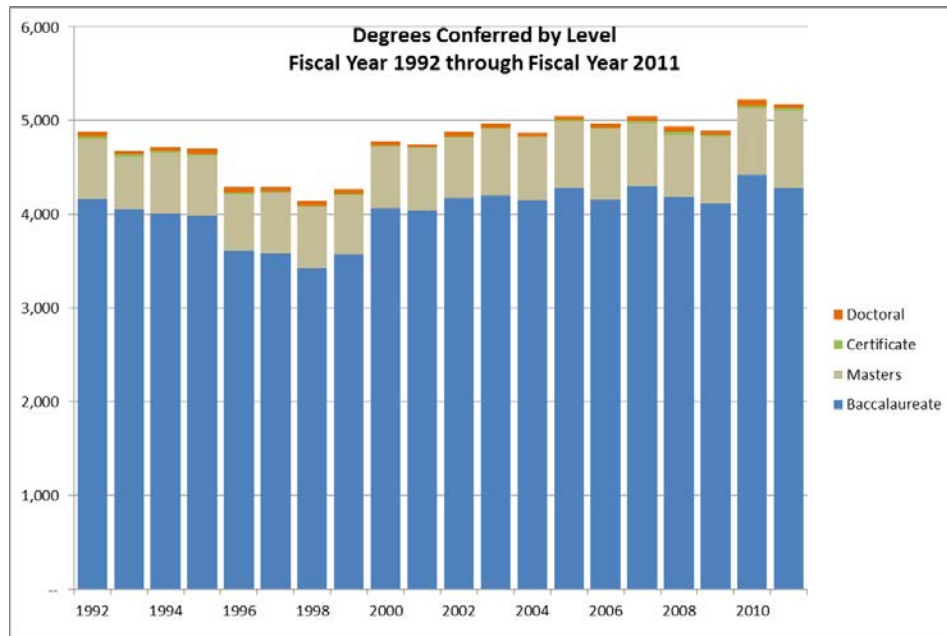
- Illinois State University FactBook – Retention
- <http://www.act.org/research/policymakers/pdf/droptables/PublicFour-YrColleges.pdf>
- http://www.act.org/research/policymakers/pdf/retain_2011.pdf

Environmental Scan - Internal

Environmental Sector: **Students**

Internal Force/Issue: **Degrees Conferred**

Key Trends:



Environmental Scan - Internal

- Since 1992, the total number of degrees conferred increased 6 percent from 4,880 in 1992 to 5,177 in 2011.
 - The number of baccalaureate degrees conferred has fluctuated over the last twenty years and hit a record high in 2010 with 4,424 degrees awarded.
 - The number of Master's degrees conferred increased by over 30 percent and in 2011, 193 additional degrees were awarded above the 1992 level.
 - Doctoral degrees conferred have fluctuated from a low of 32 in 2001 to a high of 65 in 2010.
 - Although the College of Arts and Sciences enrollment increased by 8.7 percent over the last twenty years, the number of degrees conferred decreased by 9.3 percent.
-

Implications:

- Degrees awarded, in addition to retention and graduation rates, will be critical indicators to measure educational attainment. With increased interest on performance funding, degrees awarded will play a significant role.
-

Source:

- Illinois State University Fact Book

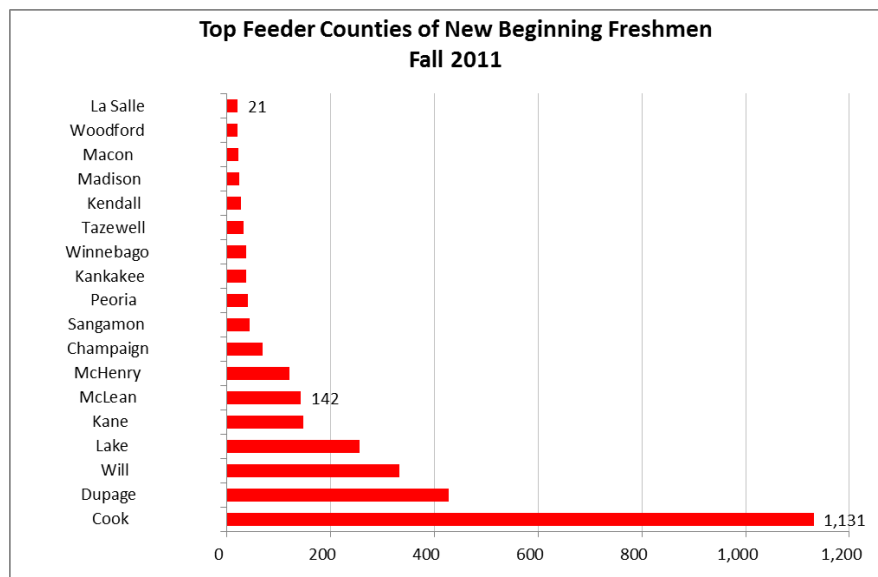
Environmental Scan - Internal

Environmental Sector: **Students**

Internal Force/Issue: **Freshmen Profile**

Key Trends:

- Illinois State continues to accept quality students with high ACT composite scores.
- ACT composite scores have increased steadily from a 20-year low of 21.7 in 1995 to a high of 24.3 in 2009 – the average decreased slightly the last two years to 23.9 in 2011.
- Illinois State’s average ACT has stayed well above both the state of Illinois and the National average.
- The number of new, beginning freshman applications has increased by almost 30 percent in the last 20 years.
- The Office of Enrollment Management attempts to maintain a new freshman class of approximately 3,200 students.
- Since 1992, minority applications have increased by 60 percent while non-minority applications have increased by 11 percent and are down from 10,289 in 2009 to 8,825 in 2011.
- Minority acceptances increased 51 percent while non-minority acceptances have increased 8 percent in the last 20 years.
- Minority new freshmen that enrolled at Illinois State increased 31 percent and non-minority enrollment increased by 8 percent since 1992.



Environmental Scan - Internal

- Approximately one-third of the fall 2011 new beginning freshmen are from Cook County. In the fall of 2006, 30 percent of the new freshmen were from Cook County.
 - Another one-third of the new freshmen are from collar counties in the Chicago area. Approximately 39 percent of the fall 2006 new freshmen came from Chicago collar county high schools.
 - Close to one-third of the population of Illinois live in Cook County.
-

Implications:

- The University has been able to improve the academic profile of new, beginning freshmen over the last twenty years. However, with a shrinking high school graduate population and increased competition, it may be much harder to maintain and/or improve the quality profile going forward.
 - Special attention should continue to be paid to enhancing recruitment and marketing efforts to ensure that the University maintains its competitive edge.
-

Sources:

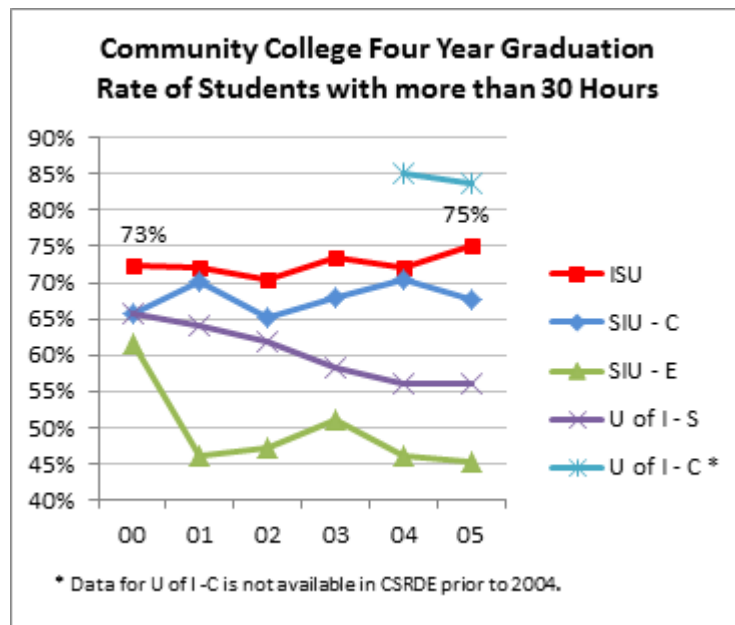
- Illinois State University Fact Book
- <http://www.usnews.com/education/articles/2009/01/26/most-popular-colleges-national-universities>
- <http://www.pewsocialtrends.org/2010/06/16/minorities-and-the-recession-era-college-enrollment-boom/>
- Illinois State University Fact Book
- <http://quickfacts.census.gov/qfd/states/17000.html>

Environmental Scan - Internal

Environmental Sector: Students

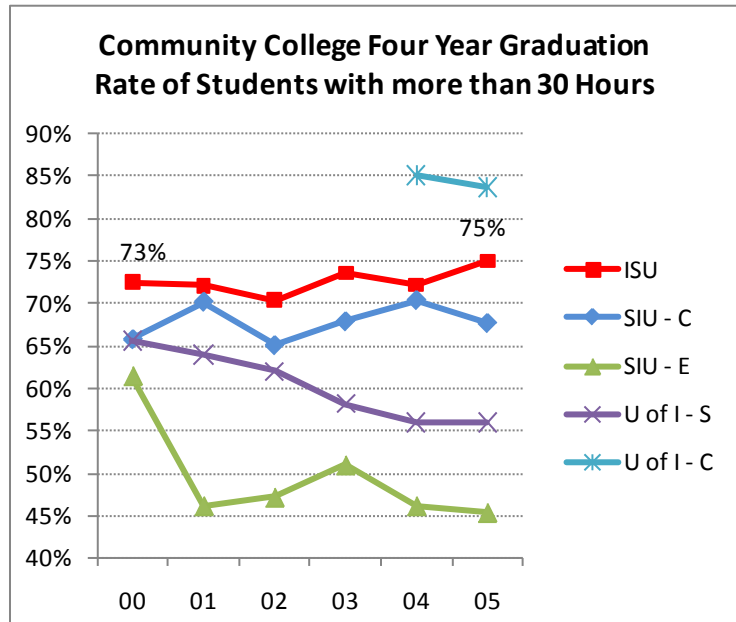
Internal Force/Issue: Transfer Student Profile

Key Trends:



- Illinois State enrolled approximately the same number of transfer students from each institution type in fall 2011 as enrolled in fall 1999.
- The number of transfer students that enrolled with an associate degree increased by over 25 percent, from 628 in 1999 to 858 in 2011.
- The average number of hours students transfer into Illinois State has ranged from a low of 50.4 hours in 2007 to a high of 54.7 hours in 2004. The fall 2011 class transferred an average of 52.0 hours.
- The average transfer grade point average has increased from 2.69 in 1999 to 3.12 in 2008. The fall 2011 class entering GPA was 3.08.

Environmental Scan - Internal



- Illinois State has maintained a higher 4-year graduation rate for community college transfer students who transfer with 30 hours or more compared to most Illinois public peer institutions (with the exception of the University of Illinois at Urbana-Champaign).
- Illinois State also enrolled the highest number of community college transfer students compared to peer institutions every year since 2000.

Implications:

- Transfer students will play an increasingly important role in our overall enrollment mix in the future. The Five Year Enrollment Plan recommended increasing the number of transfer students.
- Students who transfer to Illinois State are very successful compared to our peer institutions in Illinois. This presents an opportunity to market these success rates and improve quality student enrollment.

Sources:

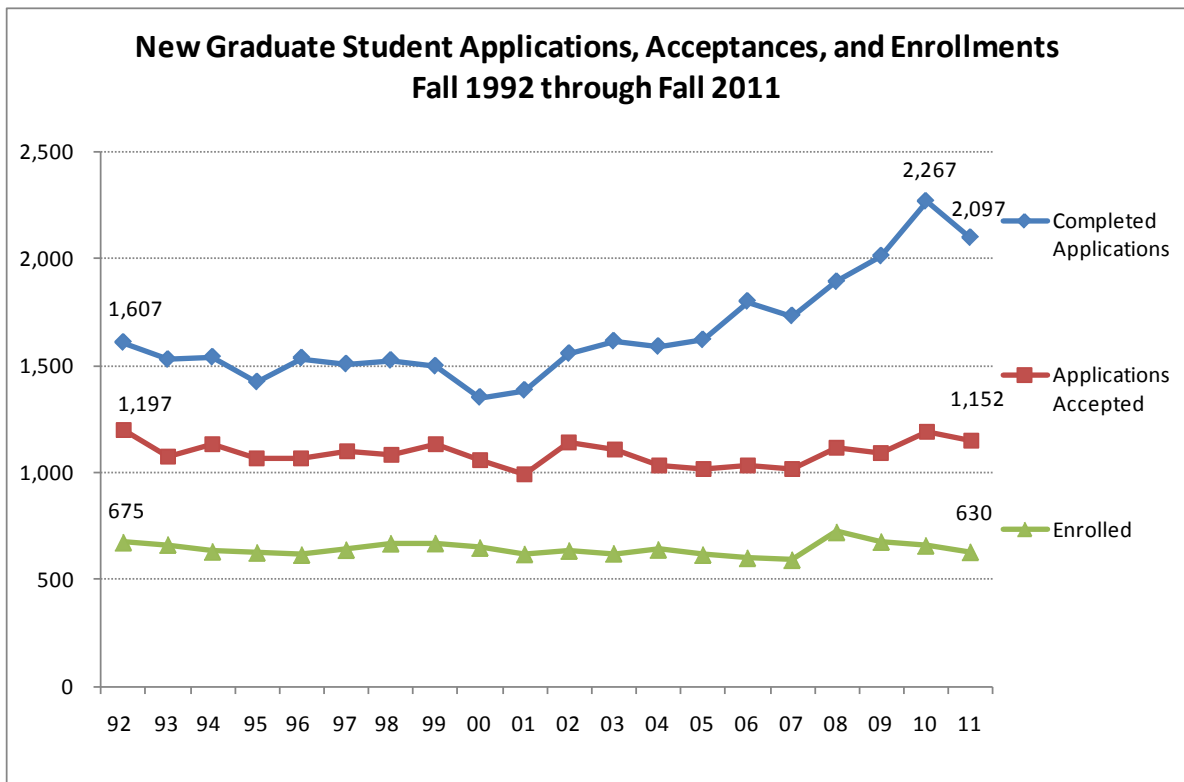
- Illinois State University Fact Book
- <http://centereducationpolicy.illinoisstate.edu/publications/fspubpresentations/navigatingtransfersystem.pdf>
- <http://chronicle.com/blogs/innovations/a-welcome-mat-for-community-college-transfer-students/29866>
- CSRDE Transfer Student Peer Comparison Report

Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Graduate Student Profile

Key Trends:



- The number of applications for the Graduate School has increased by over 23 percent since 1992. However, the number of students accepted into Graduate School has remained constant.
- The number of new students who enrolled also remained relatively constant over the same time period.
- The yield rate (the number of accepted applications to total applications) has dropped significantly from 74.5 percent to 54.9 percent.
- The show rate (the number who enrolled to the number accepted) has remained fairly constant over the 20 year period at 54.7 percent.

Environmental Scan - Internal

Implications:

- The increase in the number of graduate applications could signal an increase in demand for our programs. Since the number of accepted and enrolled has stayed relatively constant there could be some potential to grow this segment of the population if resources are available.
 - The increase in the number of graduate applications could also be due to the economy and the inability of graduates with a Bachelor's degree to find employment or displaced workers seeking to improve their skills.
 - The improvement in the yield rate typically signals an increase in the quality of the students in the cohort as the institution accepts a lower number of applications.
 - Some further investigation into the program demand and the reasons for the application increase could further inform whether an increase to the graduate cohort is desirable.
-

Sources:

- Illinois State University Fact Book
- Illinois State University Graduate DataBook
http://prpa.illinoisstate.edu/downloads/graduate_databook/ISUGraduateDatabook11.pdf

Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Participation in Extra- and Co-curricular Activities

Key Trends:

The following are some examples of student participation in extra- and co-curricular activities; however, it is not an all-encompassing list.

- The Dean of Students Office provides a wide variety of opportunities for students to participate.
 - The Student Involvement Center supports students who are interested in getting involved on campus as well as in a Registered Student Organization (RSO). During fiscal year 2011, there were 319 RSOs covering a wide-range of purposes; such as, academic and departmental, governing body, professional, religious, service, social fraternity/sorority, honorary, and social issues.
 - The Leadership and Service Office offers many opportunities for students to participate in service projects, including Alternative Breaks which lead students in community service in local, national, and global settings during their winter and spring breaks. Approximately 1,000 students have participated during the last decade. The office also provides students opportunities to participate in LeaderShape (60 students participated in a six-day series of self-discovery exercises and practical experiences that build leadership concepts and abilities) and Bring it Back to Normal (45 students worked on projects at homes near campus in spring 2011 totaling 180 hours of service work).
 - Intercollegiate Athletics includes 19 sports with approximately 420 student athletes.
 - Campus Recreation offers a number of recreation activities for students to participate in; such as, intramural sports, sport clubs, the Student Fitness Center, and the Outdoor Adventure program.
-

Implications:

- It is important for students to be active both on and off campus in order to receive an enriched education and experience beyond the classroom.
- Competition for employment has become stronger, particularly during the recession, and students who participate in a variety of activities may become more competitive in the job market.
- Service learning activities are also important for students to engage in, particularly with civic engagement being one of the University's five core values. The American Democracy Project at Illinois State promotes civic engagement on the part of students and encouraged all forms of engagement activity.

Environmental Scan - Internal

Sources:

- Dean of Students Office
- Intercollegiate Athletics
- Campus Recreation
- American Democracy Project, <http://americandemocracy.illinoisstate.edu/>

Environmental Scan - Internal

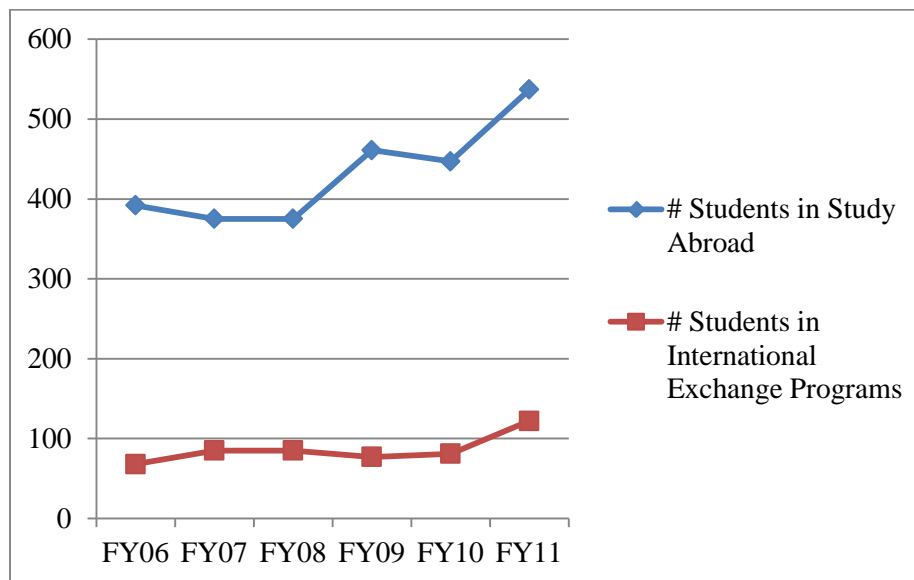
Environmental Sector: Students

Internal Force/Issue: Participation in Study Abroad

Key Trends:

Number of Students in Study Abroad and International Exchange Programs

	<u>FY06</u>	<u>FY07</u>	<u>FY08</u>	<u>FY09</u>	<u>FY10</u>	<u>FY11</u>
# Students in Study Abroad	392	375	375	461	447	537
# Students in International Exchange Programs	68	85	85	77	81	122



- Student participation in study broad programs at Illinois State has increased by 37 percent since fiscal year 2006.
- Student participation in international exchange programs at Illinois has increased by 79 percent since fiscal year 2006.
- The University has agreements with 22 countries for exchange programs and 16 countries for one-way study and third-party affiliates.

Environmental Scan - Internal

- Faculty are also involved in the study abroad experience: during fiscal year 2011, 18 faculty were involved in the implementation of exchange programs, 27 faculty in implementation of non-exchange study abroad programs, 24 faculty led study abroad programs, and there were 118 international visiting scholars.
 - Nationally, the number of U.S. students studying abroad has steadily increased. In fiscal year 1986, approximately 50,000 students studied abroad while 206,000 did in fiscal year 2005.
 - A recent survey projects that study abroad participation will increase five percent in 2011-2012 over 2010-2011.
 - Data show that students are seeking destinations that offer linguistic, cultural, and professional experience in emerging global markets.
-

Implications:

- It is important for students to have valuable knowledge on an international level and it is increasingly becoming more important for success. The Institute of International Education is working towards increasing the amount of American students studying abroad.
 - Illinois State may want to examine whether an effort to increase the number is reasonable and identify which programs would benefit from international experience.
-

Sources:

- Office of International Studies and Programs
- “Current Trends in U.S. Study Abroad and the Impact of Strategic Diversity Initiatives” May 2007: http://www.iie.org/en/Research-and-Publications/Research-Projects/~media/Files/Corporate/Membership/StudyAbroad_WhitePaper1.ashx
- “Annual Survey Reveals Study Abroad Trends at U.S. Higher Education Institutions” September 21, 2011: https://www.iesabroad.org/IES/About_IES/IES_News/Articles/newsArticle0180.html



Environmental Scan - Internal

Environmental Sector: Students

Internal Force/Issue: Student Engagement

Key Trends:

- Two surveys measure student engagement:
 - The National Survey of Student Engagement (NSSE) is administered to first-year and senior students; last administered in 2010 with a 22 percent response rate. The NSSE measures how engaged students are in academic, co-curricular, and social activities.
 - The Beginning College Survey of Student Engagement (BCSSE) is administered to incoming students the summer prior to their first day of classes; last administered in 2009 with an 80 percent response rate. BCSSE asks questions which compliment the NSSE and provides information on incoming students' activities in high school as well as their expectations of their first college year.

BCSSE Overall Results (on a 10-point scale)	
<u>Scale</u>	<u>ISU Mean</u>
Expected Academic Difficulty	5.0
High School Academic Engagement	5.1
Expected Academic Engagement	5.7
Expected Academic Perseverance	6.9
Perceived Academic Preparation	7.2
Importance of Campus Environment	7.3

NSSE Overall Results – First-Year Students (on a 100-point scale)		
<u>Scale</u>	<u>ISU Mean</u>	<u>Benchmark Mean</u>
Enriching Educational Experiences	25.5	29.1
Student-Faculty Interaction	33.5	36.1
Active and Collaborative Learning	42.0	44.9
Level of Academic Challenge	52.2	55.4
Supportive Campus Environment	62.4	61.8

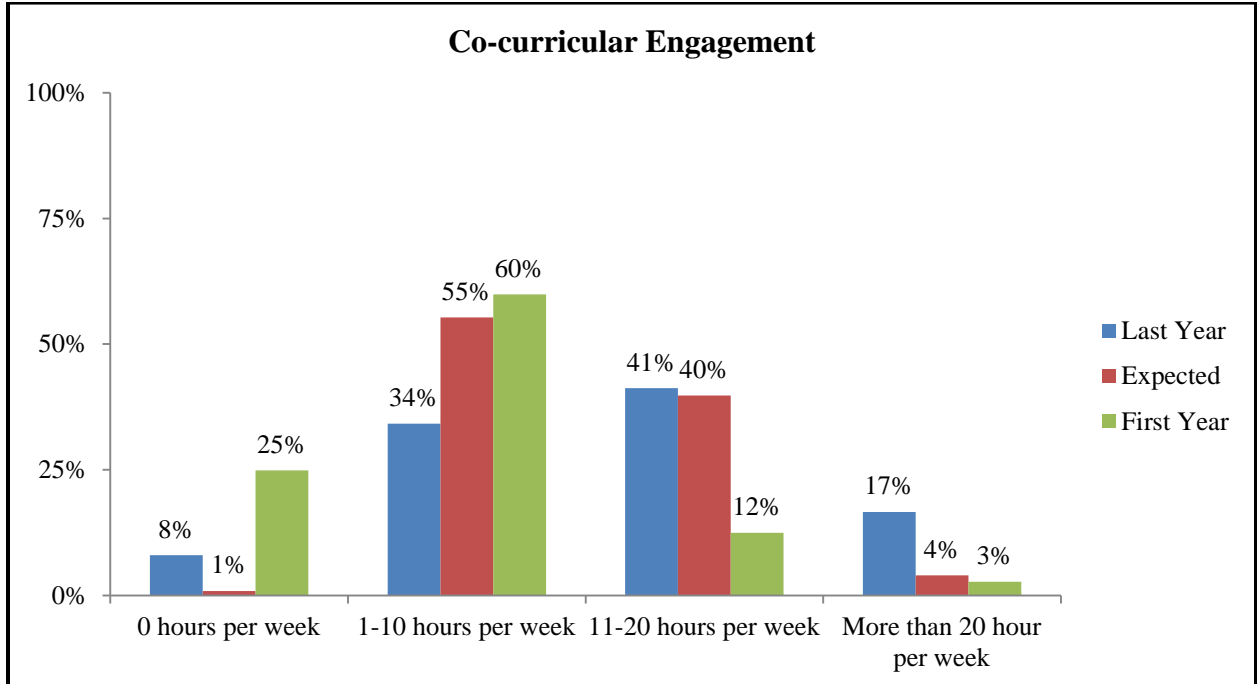
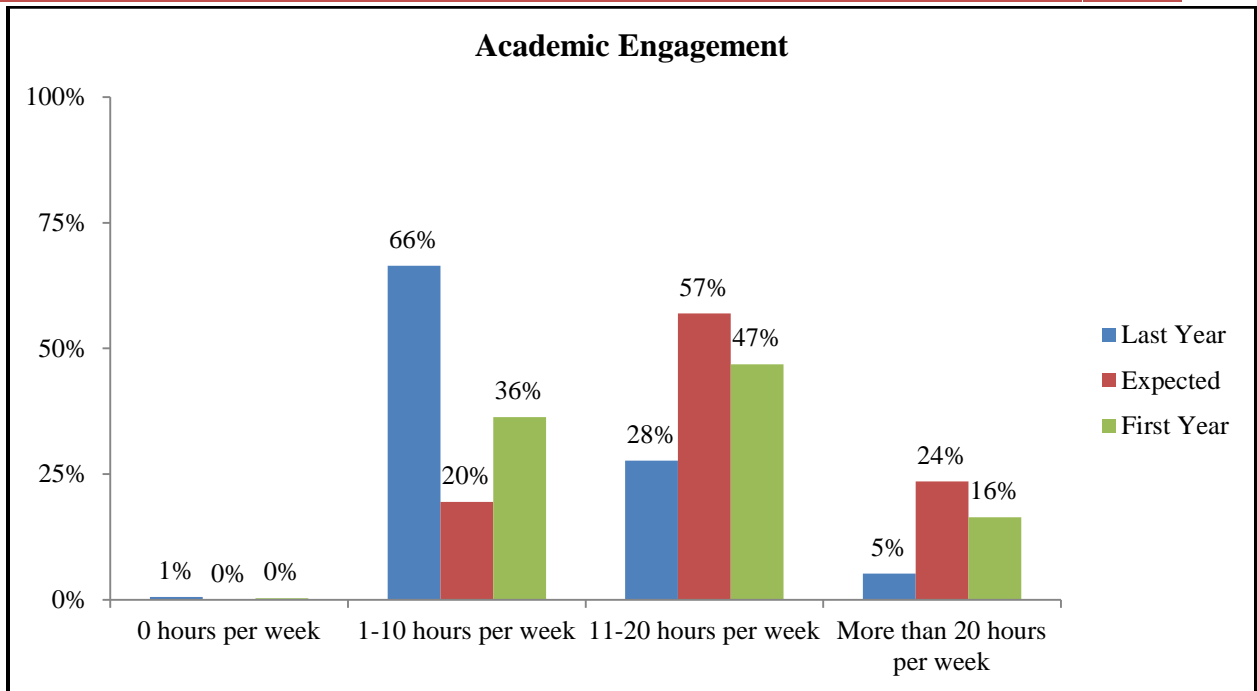
Environmental Scan - Internal

NSSE Overall Results – Senior Students (on a 100-point scale)		
Scale	ISU Mean	Benchmark Mean
Enriching Educational Experiences	40.2	42.1
Student-Faculty Interaction	43.3	43.8
Active and Collaborative Learning	51.8	52.9
Level of Academic Challenge	57.6	59.1
Supportive Campus Environment	60.9	59.6

- Comparing Illinois State NSSE results to the benchmark group (2005 Basic Carnegie Classification institutions), Illinois State is slightly below the benchmark data in all but one category (Supportive Campus Environment) for the first-year and senior student results.
- When you compare first-year students' responses to senior students at Illinois State, the mean scores improved from each of the categories except Supportive Campus Environment, which mirrors the benchmark data as well.
- There are no benchmark results available for the BCSSE survey.
- A sample of 325 students was pulled from those completing both the NSSE and BCSSE. The following represents the comparisons to both academic engagement (number of hours spent in a seven-day week preparing for class) and co-curricular engagement (number of hours in a seven-day week spent participating in co-curricular activities).



Environmental Scan - Internal



Environmental Scan - Internal

Implications:

- The NSSE and BCSSE results provide a valuable tool in measuring and understanding engagement students partake in both prior to enrollment at the University and during their tenure at the institution.
 - The sample of students that completed both surveys yields an interesting perspective on whether their expectations are being met by the University. The places where gaps exist should be examined further to see what the causes of those gaps are and what the University may be able to do to more closely match expectations.
-

Sources:

- University Assessment Services
- National Survey of Student Engagement
- Beginning College Survey of Student Engagement

Faculty and Staff Summary

Illinois State University's internal staffing dynamics over the past 10 years are characterized by relative stability in concert with the planned enrollment stability. Faculty salaries, for some ranks, continue to lag their peers.

Highlights

- Overall, total staff FTE has increased only one percent since fall 2001. Total full time faculty increased 2 percent, part-time faculty increased 7.4 percent, administrative/professional staff increased 16 percent, and civil service staff decreased by 6 percent from fall 2001 to fall 2011.
- Student to faculty ratios have remained at approximately 19 to 1 since fall 2001.
- Minority representation increased for all appointment types at Illinois State, except administrative/professionals, between fall 2001 and fall 2011.
- Female representation for all appointment types increased most significantly for tenured/tenure track faculty from fall 2001 to fall 2011, from 36.6 to 42.5 percent.
- Salaries of full professors and associate professors are below the median of the IBHE salary comparison group. Assistant professors are 2.9 percent above the median. Administrative/ professionals and civil service staff salaries were above their respective comparison groups.
- Nearly 700 faculty and staff at the University meet retirement eligibility requirements, representing 21 percent of all employees. Projecting retirements is difficult: whether and when to actually retire is a personal decision. Furthermore, as the State University Retirement System has reciprocal relationships with other systems, there may be employees who have years of service with other entities that the University data system does not capture at this time.

Environmental Scan - Internal

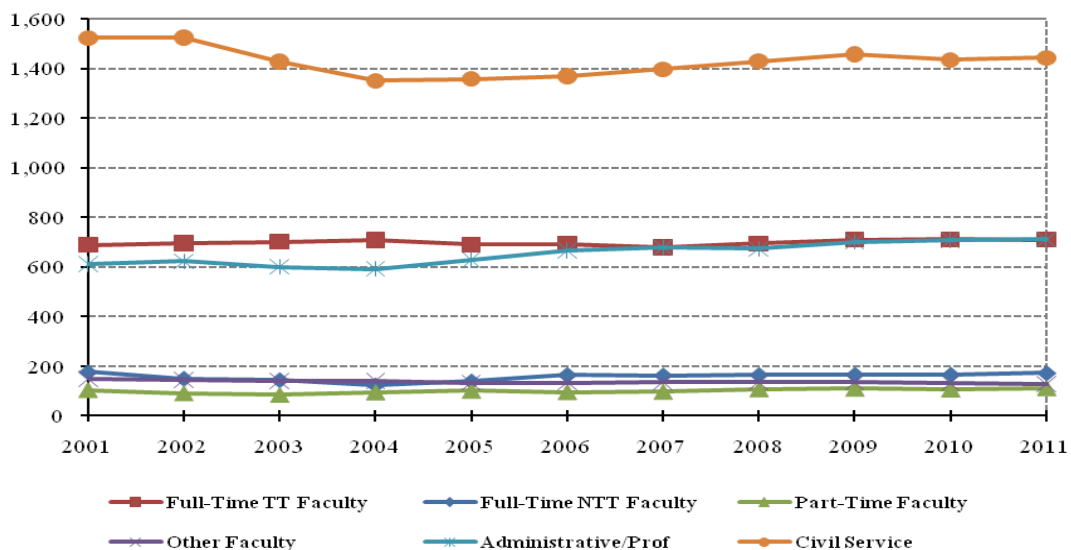
Environmental Sector: Faculty and Staff

Internal Force/Issue: Faculty/Staff by Rank and Classification

Key Trends:

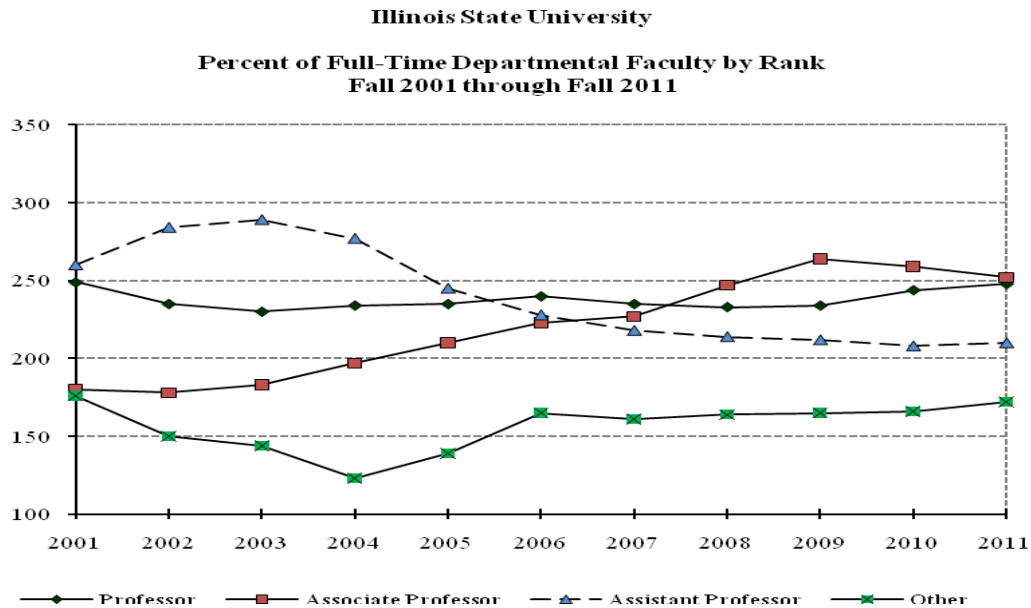
- Total full-time faculty at Illinois State has increased from 865 in fall 2001 to 882 in fall 2011, a two percent increase overall. Tenured/tenure track faculty represents approximately 80 percent of the full-time faculty (689 in fall 2001, 710 in fall 2011).
- While the number of full-time tenured/tenure track faculty has increased 3 percent during this time, there has been a 40 percent increase in associate professors and a 19 percent decrease in assistant professors.
- Total part-time faculty FTE (full-time equivalent) has increased overall from 103.5 in fall 2001 to 111.2 in fall 2011.
- Administrative/Professionals have increased 16 percent from 640 in fall 2001 to 739 in fall 2011.
- Civil Service employees have decreased 6 percent in the same time from 1,544 to 1,454.
- Overall, total staff FTE has increased only one percent since fall 2001.
- Student/faculty ratios have remained at approximately 19 to 1 during this time.
- The following graph shows trends in staff growth by major appointment types.

**Illinois State University
 Staff FTE by Major Appointment Types
 Fall 2001-2011**



Environmental Scan - Internal

Note: Other Faculty include non-departmental faculty, lab school faculty, and library faculty.



Implications:

- Faculty growth appears to be aligned with student growth, as the student/faculty ratios have remained fairly constant from 2001-2011.
- Tenured/tenure track faculty also appears to have maintained a consistent share of total staff, representing approximately 21-22 percent of the total number of employees.
- The fairly large increase in associate professors and corresponding decrease in assistant professors may indicate longevity in maintaining tenured/tenure track faculty.
- While the FTE of part-time faculty increased somewhat, part-time faculty FTE remained approximately 11 percent of total faculty FTE during this time. This also appears to be in contrast to often cited national trends of part-time faculty becoming an increasingly larger share of total faculty.

Sources:

- Census staff files maintained by Planning, Research, and Policy Analysis
- Student census staff files maintained by Administrative Technologies
- <http://www.aaup.org/AAUP/issues/contingent/resources.htm>

Environmental Scan - Internal

Environmental Sector: Faculty and Staff

Internal Force/Issue: Race/Ethnicity and Gender Profile

Key Trends:

- Minority representation increased for all appointment types at Illinois State, except administrative/ professionals, between fall 2001 and fall 2011.
- Overall, minority representation increased from 10.5 to 12.6 percent for full-time staff during this time period.
- Female representation increased most significantly for tenured/tenure track faculty during this time period, from 36.6 to 42.5 percent.
- Overall, females have increased from 51.4 to 53 percent for full-time staff.
- The following tables show percent minority and female by major appointment types.

Illinois State University

Percent Minority by Appointment Type ¹

<u>Appointment Type</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
TT Faculty	12.0	11.9	11.5	11.3	12.4	13.6	13.2	13.8	14.9	15.2	15.9
Full-Time NTT Faculty	7.4	4.7	4.9	5.6	5.0	7.3	6.1	6.1	7.2	8.4	9.9
Part-Time NTT Faculty	5.0	4.4	3.8	6.3	4.8	4.3	6.5	6.8	6.6	7.5	6.2
Other Faculty ²	3.9	4.7	4.1	5.6	5.8	5.4	6.0	3.9	5.6	5.9	6.5
Administrative/ Prof	13.0	11.6	11.6	11.1	9.3	9.5	10.0	10.8	11.0	11.3	11.8
Civil Service	9.8	9.9	9.7	9.6	10.2	10.8	11.4	11.3	10.8	11.0	12.0
Total (Unduplicated)	10.1	9.7	9.6	9.7	9.7	10.2	10.5	10.8	10.9	11.2	11.8
Total Full-Time Only	10.5	10.3	10.3	10.2	10.3	10.8	11.0	11.3	11.5	11.8	12.6

Environmental Scan - Internal

Percent Female by Appointment Type ¹

	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
TT Faculty	36.6	38.2	37.9	38.9	39.3	39.8	40.4	41.6	42.3	42.6	42.5
Full-Time NTT Faculty	61.9	64.7	65.3	70.2	66.2	66.7	65.6	69.1	72.9	72.3	68.6
Part-Time NTT Faculty	59.4	58.3	55.3	57.3	52.9	55.6	56.3	56.8	53.0	57.5	56.3
Other Faculty ²	69.3	70.5	67.1	70.1	68.8	67.8	69.5	71.6	69.6	68.4	68.0
Administrative/Prof	55.9	55.1	54.7	54.7	55.7	56.5	55.6	56.1	56.9	57.1	57.1
Civil Service	55.4	55.9	55.8	55.2	55.4	55.1	55.3	55.1	54.9	53.9	54.0
Total (Unduplicated)	53.0	53.2	52.7	52.9	53.0	53.4	53.7	54.3	54.2	54.1	54.0
Total Full-Time Only	51.4	52.0	51.4	51.6	51.9	52.2	52.4	53.1	53.3	53.2	53.0

1 Minority includes American Indian, Black, Asian, Hispanic and Two or more racial/ethnic groups. Non-resident aliens and unknown are included in non-minority counts.

2 Other faculty include non-departmental faculty (such as in University College), library faculty and lab school faculty.

Implications:

- The Office of Equal Opportunity, Ethics, and Access performs a workforce analysis annually to determine the underrepresentation of minorities and females in full-time positions at Illinois State. Both the availability of minorities and women with the requisite skills and the availability of promotable and trainable minorities within the University are considered.
- Despite the increase in minority representation, in its fall 2010 report, the Office did find significant underutilization for selected minority groups for most major job categories. This was not true for females.

Sources:

- Census staff files, maintained by Planning, Research and Policy Analysis
- Illinois State University Affirmative Action Plan, 2011

Environmental Scan - Internal

Environmental Sector: Faculty and Staff

Internal Force/Issue: Retirement Eligibility

Key Trends:

- Under the SURS retirement system, an employee, hired before January 1, 2011, can retire if one of the following conditions are met: age 62, with 5 or more years of service; age 55 with 8 or more years of service; or any age with 30 or more years of service.
- Under the traditional or portable plan, an employee's pension is determined: (1) by a combination of years of service and age, or (2) by the money purchase formula, whichever provides the greatest benefit for the employee. In order to use the money purchase formula option, the employee must have been hired before July 1, 2005.
- On July 2, 2012, the money purchase formula will be revised, so that if an employee retires after that date, it will essentially take another year of employment for that employee to receive the same retirement benefits he/she would have received on July 1.
- The state legislature is considering legislation that would double the percentage an employee pays toward his/her pension, if he/she stays in the traditional or portable plan, effective July 2013. If the employee goes into a self-managed plan, his contribution would stay at eight percent.
- The following table shows the number of current full-time staff by employee type with: (1) 35 years of service (no age requirement); (2) 30-34 years of service (no age requirement); (3) age 60 or over, with 25-29 years of service (under 30 years of service, there is a reduction in premiums for staff younger than 60); and (4) minimal requirements for retirement.

	<u>TT Faculty</u>	<u>Other Faculty</u>	<u>Admin/Prof</u>	<u>Civil Service</u>	<u>Total</u>
35+ years of service	9	1	0	9	19
30-34 years of service	16	3	7	30	56
Age 60+, 25-29 years of service	21	0	6	19	46
Meet retirement qualifications	195	57	86	342	680
Average Age	48.8	45.8	42.6	46.6	46.2
Average Years of Service	11.7	8.4	8.9	11.0	10.5

Environmental Scan - Internal

Implications:

- The upcoming change in the money purchase formula may accelerate retirement for employees who may have otherwise waited another year.
 - Projecting retirements past FY 2012 is very difficult. If legislation is passed that increases the employee's portion to the retirement system, as has been proposed, there may be many more retirements than expected in 2012-2013.
 - Tenured/tenure track faculty may be affected more by these changes than other groups, as they are on average older and have more years of service than other employee groups.
 - As the state considers various changes and the unfunded liability of the system, it may affect recruitment of future faculty and staff.
-

Sources:

- Census staff files, maintained by Planning, Research and Policy Analysis
- State University Retirement System of Illinois

Environmental Scan - Internal

Environmental Sector: Faculty and Staff

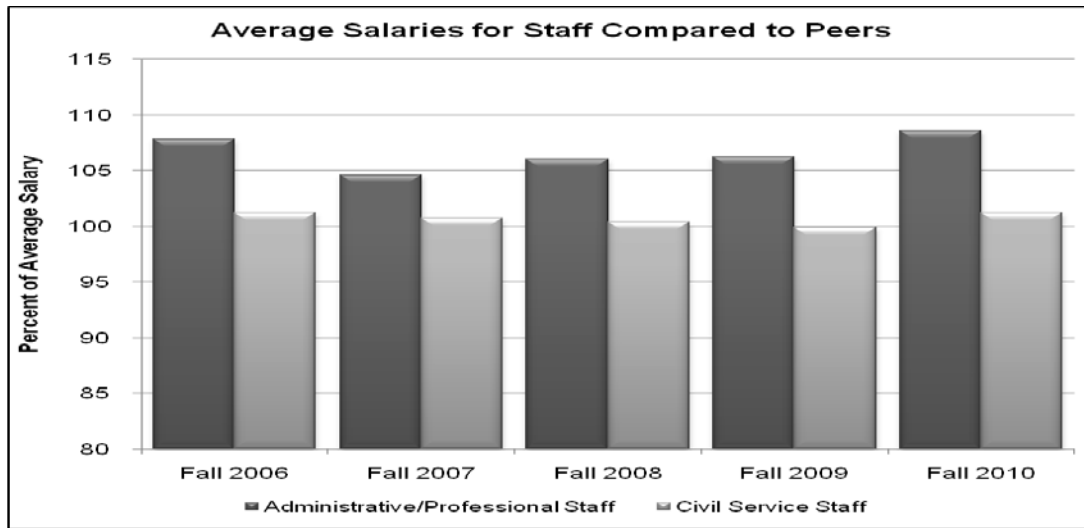
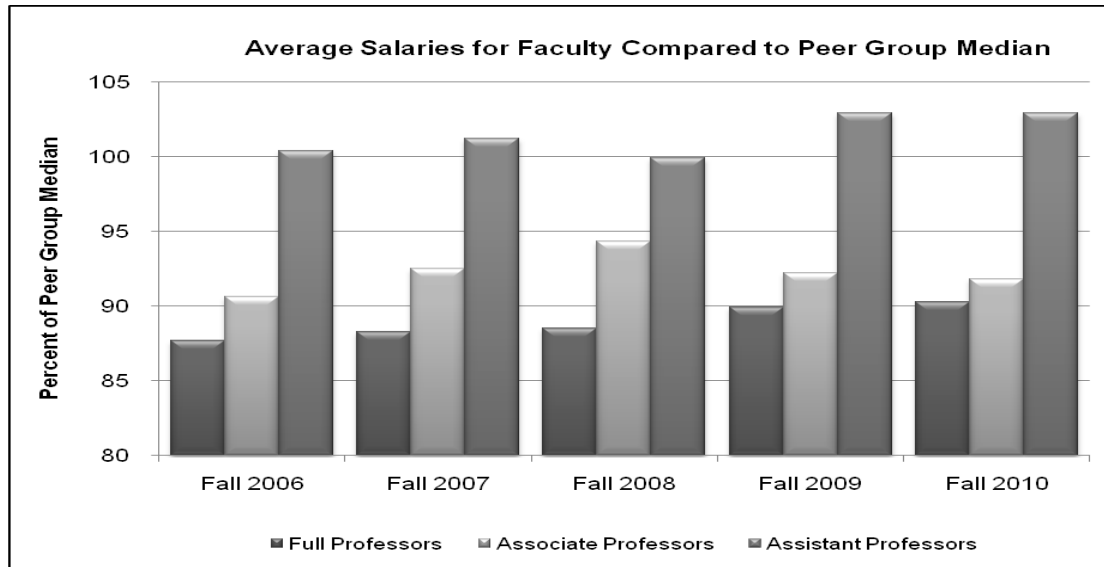
Internal Force/Issue: Salary Compared to Peers

Key Trends:

- Average yearly salaries at Illinois State in fall 2010:
 - Full professors- \$91,026
 - Associate professors- \$68,393
 - Assistant professors- \$64,487
 - Administrative/Professionals- \$64,786
 - Civil Service- \$41,246
- Comparison to Peer Groups in Fall 2010
 - Full professors were 9.7 percent below the median of the IBHE salary comparison group.
 - Associate professors were 8.2 percent below the median of the IBHE salary comparison group.
 - Assistant professors were 2.9 percent above the median of the IBHE salary comparison group.
 - Administrative/professionals were 8.6 percent above the average of Public research intensive universities, Illinois State's Carnegie classification for many years.
 - Civil service salaries were 1.2 percent above the average of all other Illinois public universities, when similar job classifications were compared. If all job classifications are considered, then Illinois State is 5 percent below the average.

Environmental Scan - Internal

- Trends over the last five years (displayed in graphs below)



Implications:

- While some progress has been made, average faculty salaries continue to lag behind peer groups medians for full and associate professors.

Environmental Scan - Internal

- Assistant professors have remained above the median of the IBHE comparison group for the last five years, indicating that Illinois State is competitive when attracting new faculty.
 - Administrative/professionals and civil service salaries are above the average for their comparators, although the civil service salaries are only slightly above.
-

Sources:

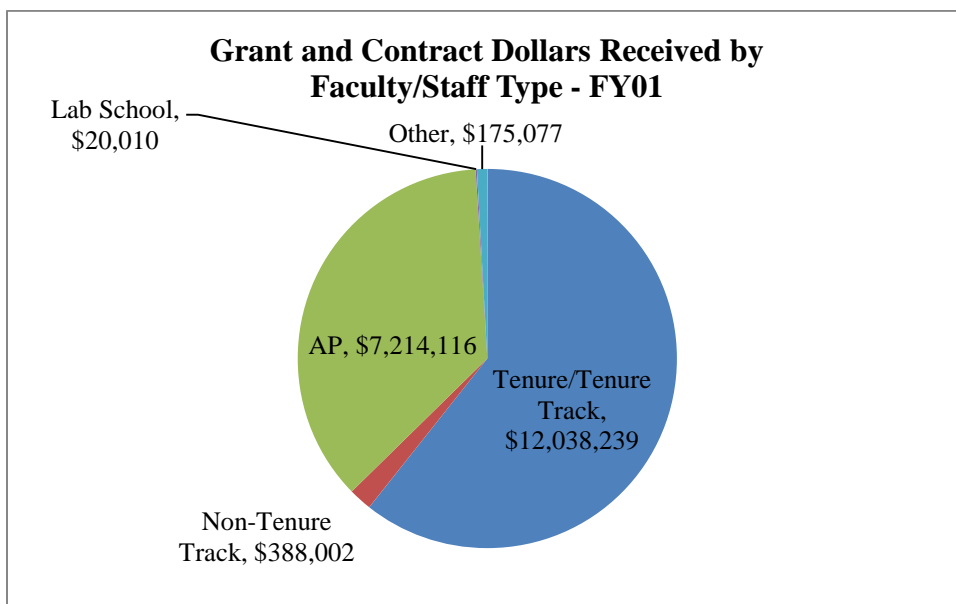
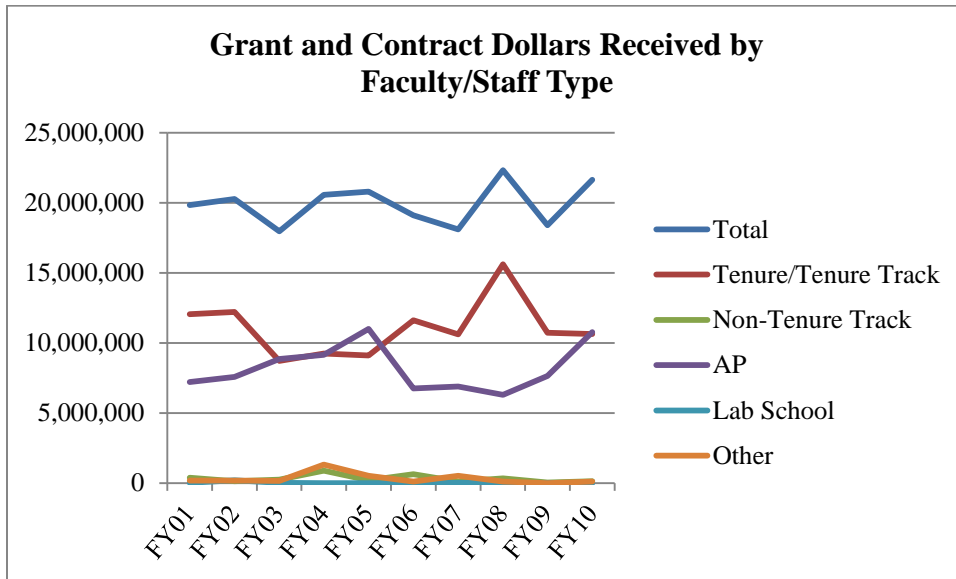
- AAUP faculty survey, fall 2005-2010
- CUPA administrative and mid-level surveys, fall 2005-2010. Data on demand, a data service of CUPA, provided salaries for ISU's comparator group. Not all AP positions had direct comparisons. Positions, without direct comparisons, were compared to similar job classifications by salary range and title.
- NIU survey of civil service positions in Illinois. The data are available by job classification and university several times during the year.

Environmental Scan - Internal

Environmental Sector: Faculty and Staff

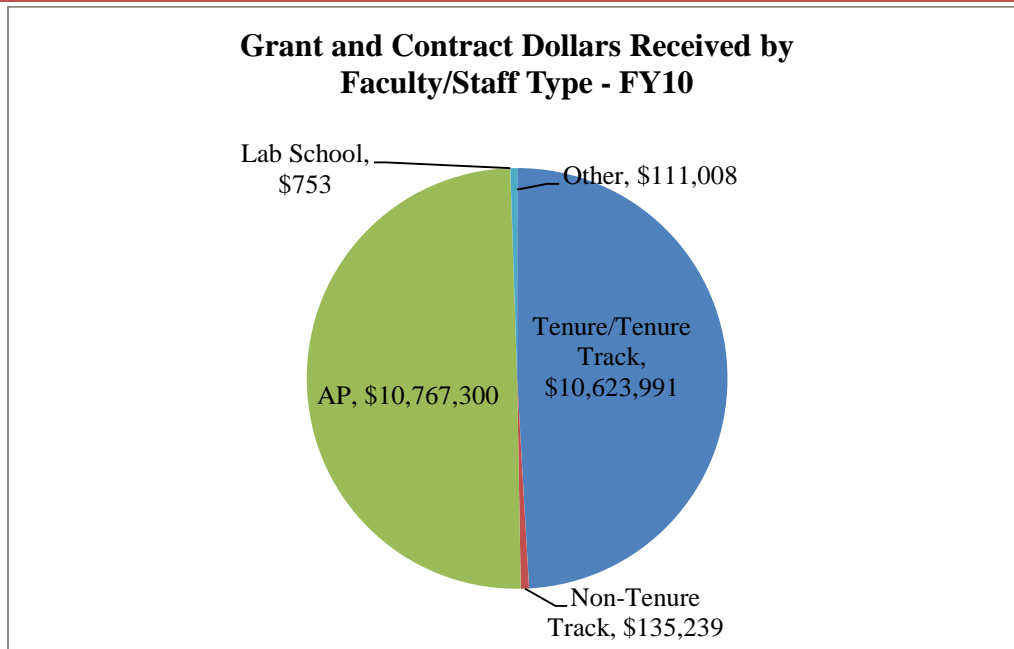
Internal Force/Issue: Grant and Contract Activity

Key Trends:





Environmental Scan - Internal



- Grant and contract activity at the University has averaged around \$20,000,000 over the fiscal years 2001 and 2010. Fiscal year 2011 (not represented in above data) experienced a record amount of dollars awarded (\$37,000,000) in large part due to a major grant allocated to the Central Illinois Regional Broadband project.
- Over the last ten fiscal years, the proportion of awards granted to Administrative/Professional represented half of all awards received.
- The University has offered several programs to faculty and staff over the last few years that assist them in the grant submission procedure along with a program that assists faculty and staff in learning why a grant submission was not accepted in an effort to improve success in the future.
- Although research grant funding has increased over the years, the rate of increase is leveling out, which leads to greater competition for the dollars available. An example is the National Institutes of Health funding trends. Funding in fiscal year 1995 was approximately \$6 million and \$15 million in fiscal year 2011; however, it has only increased by \$1 million since fiscal year 2005. Regarding National Science Foundation awards, the number of awards in fiscal year 2010 (approximately \$9 million) was a decrease from fiscal year 2009 (\$10 million).
- In fiscal year 2010, the breakdown of grants and contract received by agency type is as follows: federal flow through (19.3 percent), federal (16.7 percent), state (16.7 percent), foundation (4.2 percent), corporate (2.3 percent), federal earmark (1.6 percent), and all other (39.2 percent).

Environmental Scan - Internal

Implications:

- As alternative funding becomes increasing more critical to the University, it is important that the University continue to focus on supporting and encouraging faculty and staff in securing grant funding.
-

Sources:

- Research and Sponsored Programs
- NIH Research Funding Trends FY1995-2012: <http://www.faseb.org/Policy-and-Government-Affairs/Data-Compilations/NIH-Research-Funding-Trends.aspx>
- Report to the National Science Board on the National Science Foundation's Merit Review Process Fiscal Year 2010:
<http://www.nsf.gov/nsb/publications/2011/nsb1141.pdf>

Environmental Scan - Internal

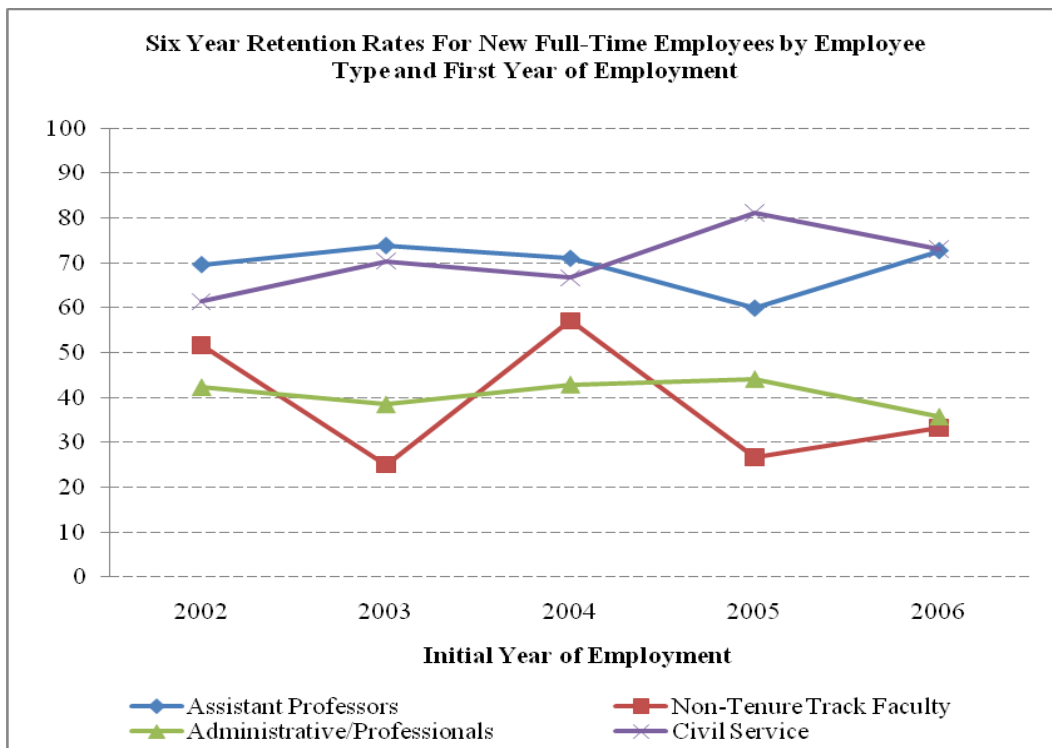
Environmental Sector: Faculty and Staff

Internal Force/Issue: Retention

Key Trends:

- The following data reflect retention rates of those employees returning for a sixth fall.

Six Year Retention Rates for New Full-Time Employees External Hires					
Selected Employee Types					
	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>
Assistant Professors	69.6	73.8	71.0	60.0	72.7
Non-Tenure Track Faculty	51.6	25.0	57.1	26.7	33.3
Administrative/Professionals	42.3	38.5	42.9	44.1	35.8
Civil Service	61.4	70.4	66.7	81.1	73.1





Environmental Scan - Internal

- The retention rates of each of the four employee types reflect fluctuations without any clear trends. Assistant professors and civil service employees have higher retention rates than non-tenure track faculty and administrative/professionals.
 - The President has made it a top priority over the past several years to raise faculty and staff salaries closer to peer group medians and offer modest merit-based salary increases when possible as a means of enhancing salary competitiveness.
 - Other programs have been put into place in order to promote retention of faculty and staff, for example, the Leadership Initiative (led by the Provost's Office) and programming and services offered through the Center for Teaching, Learning and Technology.
-

Implications:

- Retaining faculty and staff is important to maintain quality programs and departments. Retaining employees also provides continuity and enhancements to the work produced both inside and outside of the classroom.
 - Retaining faculty and staff also saves the University resources through savings in training new employees and through recruitment efforts.
-

Sources:

- Planning, Research, and Policy Analysis

Financial Summary

The University's finances, despite declining state appropriations, are strong. Sound financial management has allowed the University to allocate resources to achieve the goals of *Educating Illinois*. However, due to the reliance on tuition increases to cover the loss of state funding, affordability is a growing concern for students.

Highlights

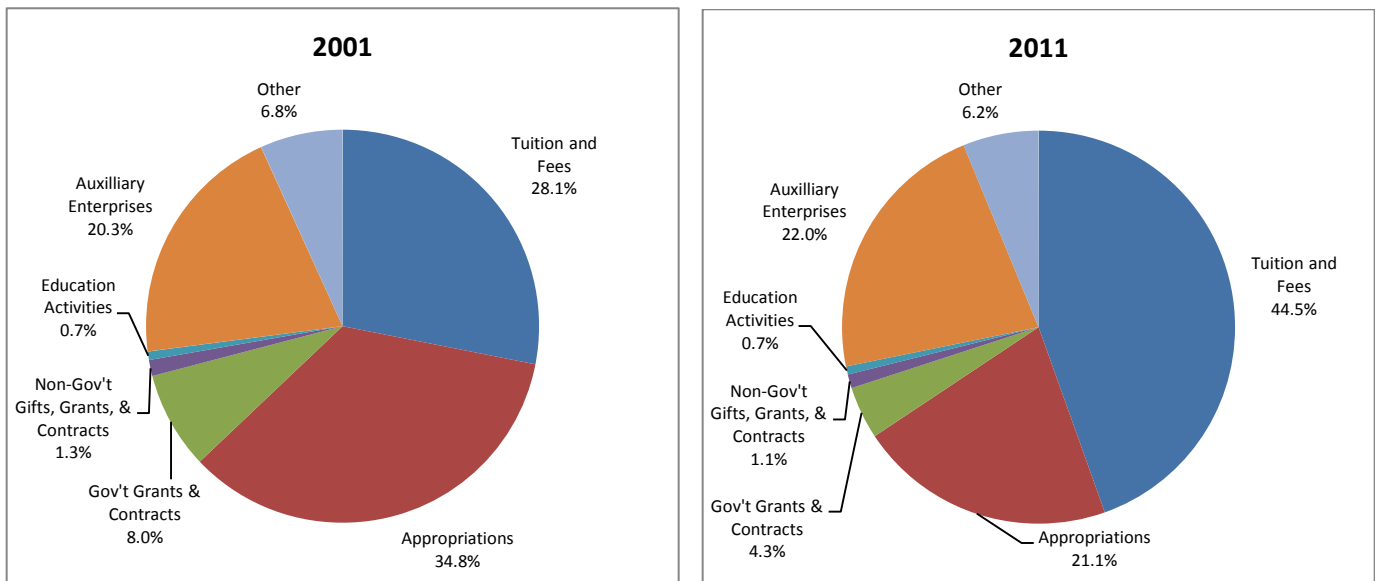
- The proportion of the University's budget that comes from state appropriations has decreased 13.7 percent since 2001. State funding represented 21.1 percent of the overall budget in fiscal year 2011, compared to nearly 35 percent in fiscal year 2001. Over that same time period, tuition and fee revenue has increased 16.4 percent from 28.1 percent to 44.5 percent.
- Sixty-seven percent of the University's expenditures directly support students through instruction, academic support, and student services.
- Since 2001, dollars borrowed by students from alternative and private loans increased from \$696,092 in 2001-02 to \$12,683,303 in 2010-11.
- Since the fall of 2006, both the amount of financial need met and the percent of students whose need was fully met have decreased. In the fall of 2010, 35 percent of Illinois State students' need was fully met. This is a decrease of 7.7 percent from the fall of 2006 when 42.7 percent of students' need was fully met.
- Since 2006, the average debt at graduation for undergraduate students increased 34 percent, from \$17,015 to \$22,847.

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: University Revenue Sources

Key Trends:



- The proportion of the University’s budget that comes from state appropriations has decreased 13.7 percent since 2001.
- Over that same time period, the proportion of the budget that comes from tuition and fee revenue has increased 16.4 percent.
- Other revenue sources stayed fairly constant, except for Government Grants and Contracts, which decreased 3.7 percent.

Implications:

- The shift of funding from state appropriations to tuition and fees is a common trend among public higher education institutions. Without corresponding increases for financial aid for students from low and middle income families, rising tuition and fees can be a hurdle to accessing higher education.
- The ability to continue to raise tuition to cover the loss of state funding will become increasingly difficult in the future, particularly if the economy does not improve.

Environmental Scan - Internal

-
- The other revenue sources, beyond state appropriations and tuition, will need to become a larger proportion of the revenue sources in the future if the University is to achieve its goals.
-

Sources:

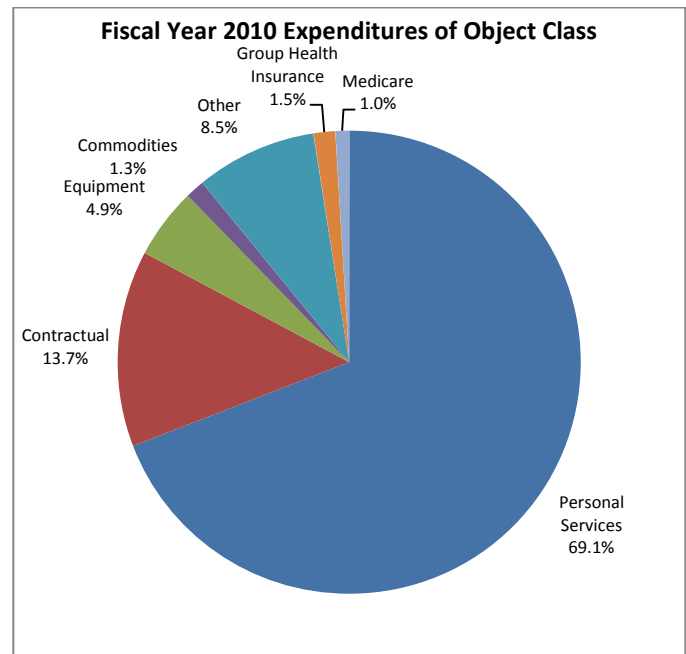
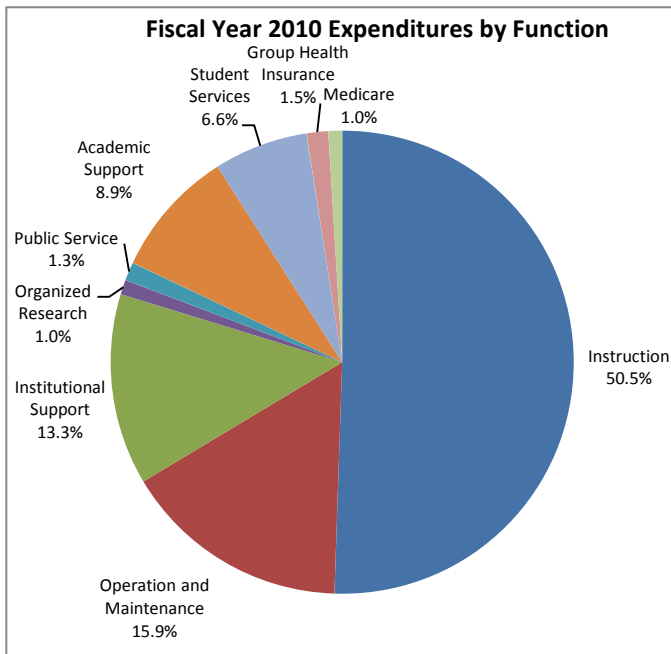
- Illinois State University Fact Book

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: University Expenditures

Key Trends:



- A little over half of the University's budget is spent on activities related to direct instruction of students. When funding for instruction, academic support, and student services are combined, 67 percent of the budget directly supports students.
- Expenditures by function have stayed relatively constant in the last ten years. In 2001, 70 percent of the budget funded instruction, academic support, and student services functions.
- When you look at expenditures by object class, the majority of funding is spent on people through personal services expenditures.
- Since 2001, the proportion of expenditures on personal services has decreased from 76 percent to 69 percent. Other object class expenditures have remained fairly constant in the last ten years.

Environmental Scan - Internal

Implications:

- There has been a slight decrease in the proportion of the University's budget devoted to direct support of students. Further decreases in these areas could negatively impact the quality educational experiences of ISU students.

Sources:

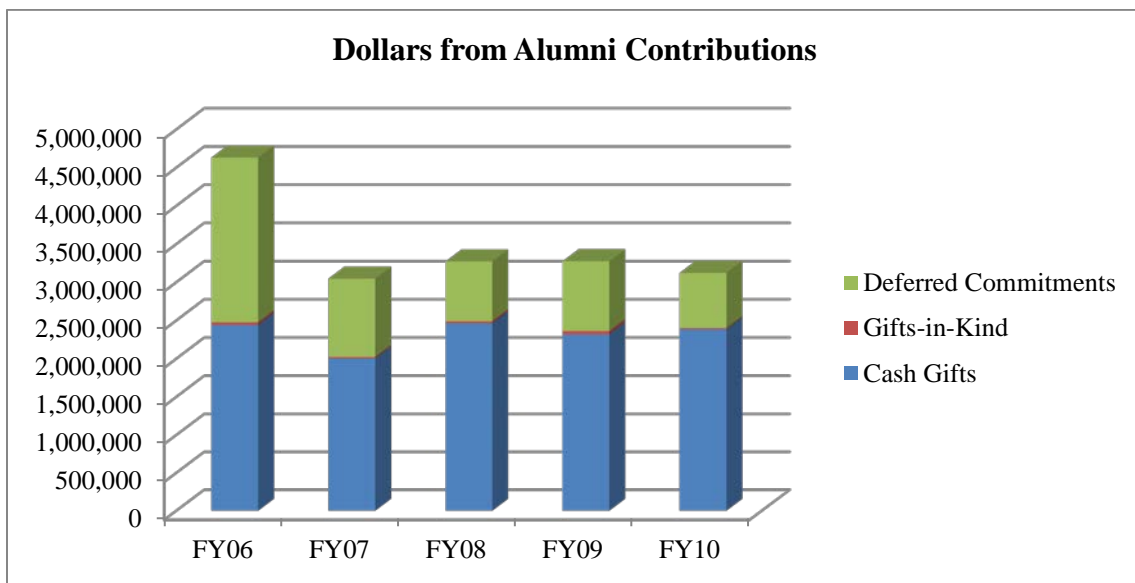
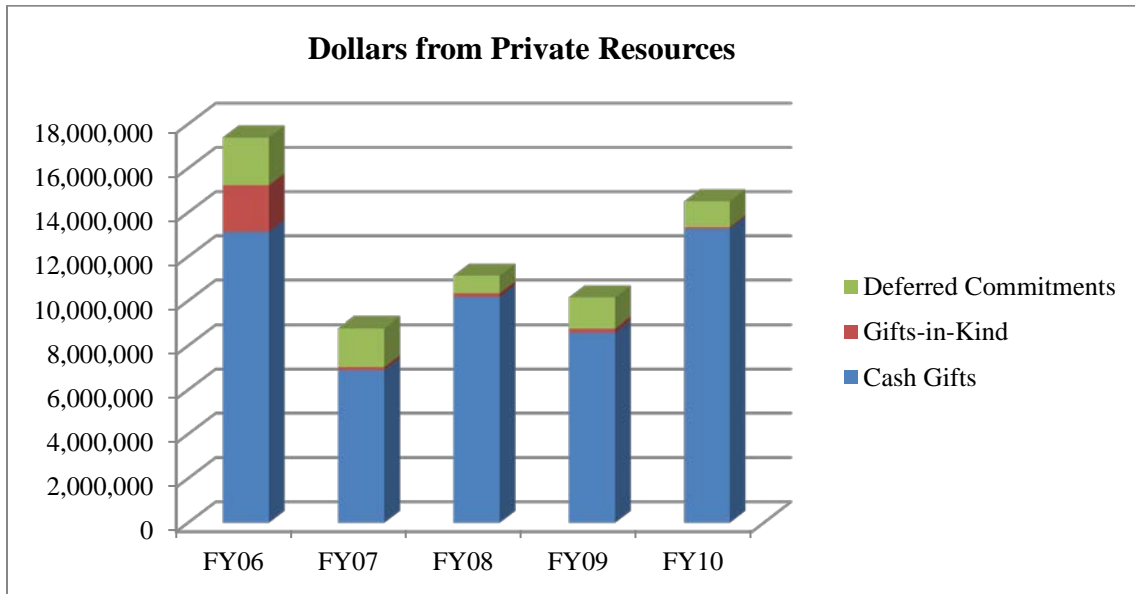
- Illinois State University Fact Book

Environmental Scan - Internal

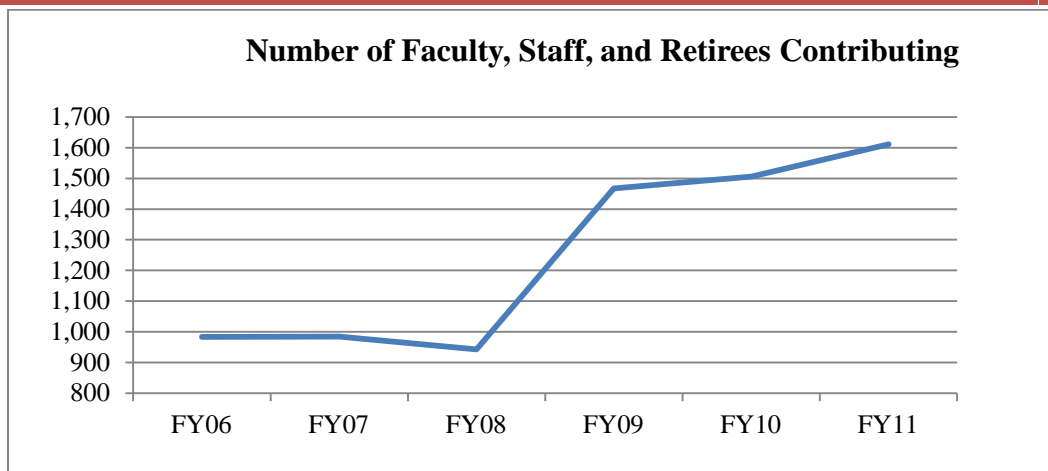
Environmental Sector: Financial

Internal Force/Issue: Private Giving

Key Trends:



Environmental Scan - Internal



- State funding as percentage of Illinois State’s total expenditures has fallen to a little over 21 percent, which is significantly lower than it was 10 years ago in 2001 at 34.8 percent.
- Dependency on private giving is ever more critical during these difficult economic times.
- Overall giving to colleges and nonprofit organizations declined in 2008 around the time the recession gained footing. Fundraising in 2011 will begin an upward trend.
- Illinois State followed this trend, as evidenced by the decline in both giving from private resources and alumni contributions beginning in fiscal year 2007. Giving to private resources increased from fiscal year 2007 to fiscal year 2010 by 65 percent. Despite the fluctuations in alumni giving, the percent of alumni contributing has been fairly steady at about seven percent over the last five years.
- The Gladly We Give campaign, which focuses on faculty, staff, and retiree giving, has yielded measurable results. The percentage of those contributing increased by 64 percent from fiscal year 2006 to fiscal year 2011.

Implications:

- Illinois State must continue to make progress in securing resource funding from private giving in order to help compensate for the loss of state funding and to help offset the necessity of tuition increases.
- The University must maintain positive relations with its alumni base and seek to understand how each generation differs and how they would prefer to interact with the University.
- The University should also continue to positively market itself so potential donors will believe that their giving would greatly benefit the institution as well as show how past donations have been used to yield positive results.

Environmental Scan - Internal

Sources:

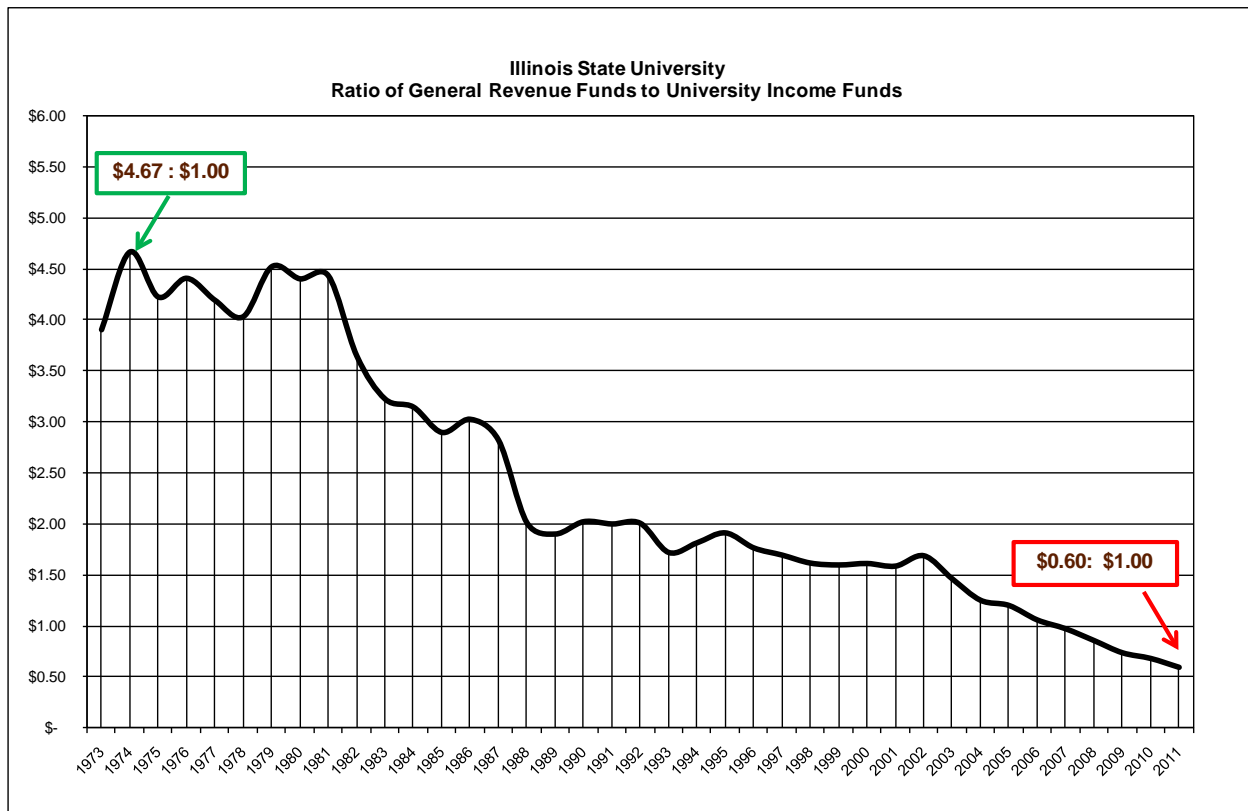
- University Advancement
- “Top Fund-Raising Organizations Expect an Uptick in Giving but Still Face Struggles” *The Chronicle*, October 16, 2011
- “Millennial Alumni in the Recession: How to Reach Them” *Higher Ed Impact: Weekly Analysis from Academic Impressions*, September 22, 2011

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: State Funding and Tuition

Key Trend:



- In 1974, the University received \$4.67 in state funding for every \$1.00 received from tuition.
- The ratio of state funding to tuition has steadily declined since 1981 and has hit the current low point of 60 cents of state funding for every dollar received in tuition.

Implications:

- It is expected that the downward trend indicated in the chart will continue in the future and the ability for the University to continue to raise tuition to cover the loss of state funding may become more difficult.

Environmental Scan - Internal

-
- Other sources of revenue will need to be increased in order for the University to continue to provide a high quality educational experience for students and to compete for the best and brightest students, faculty, and staff.
-

Sources:

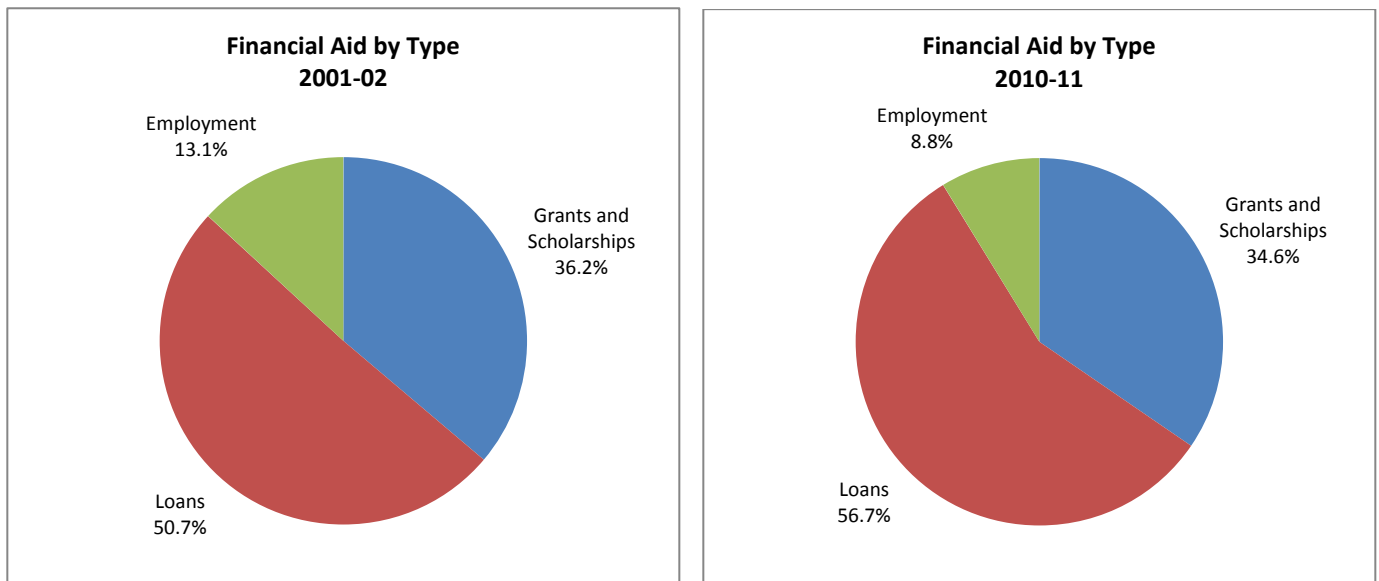
- Budget Office

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: Financial Aid by Type

Key Trends:



- Since 2001-02, there has been a slight decrease in the percent of financial aid from grants and scholarships, 36.2 percent to 34.6 percent.
- The largest shift can be seen in the decrease in the percent of aid from employment (-4.3 percent) and the increase in the percent from loans (6 percent).

Implications:

- With grant aid holding steady and a decrease in employment, the amount of financial aid that students have to repay after graduation has increased. This leaves graduates with higher levels of debt at graduation (see also Environmental Scan indicator on Debt Load).

Environmental Scan - Internal

- In a competitive student recruitment environment, the proportion of aid coming from grants and scholarships might need to increase from current levels.
-

Sources:

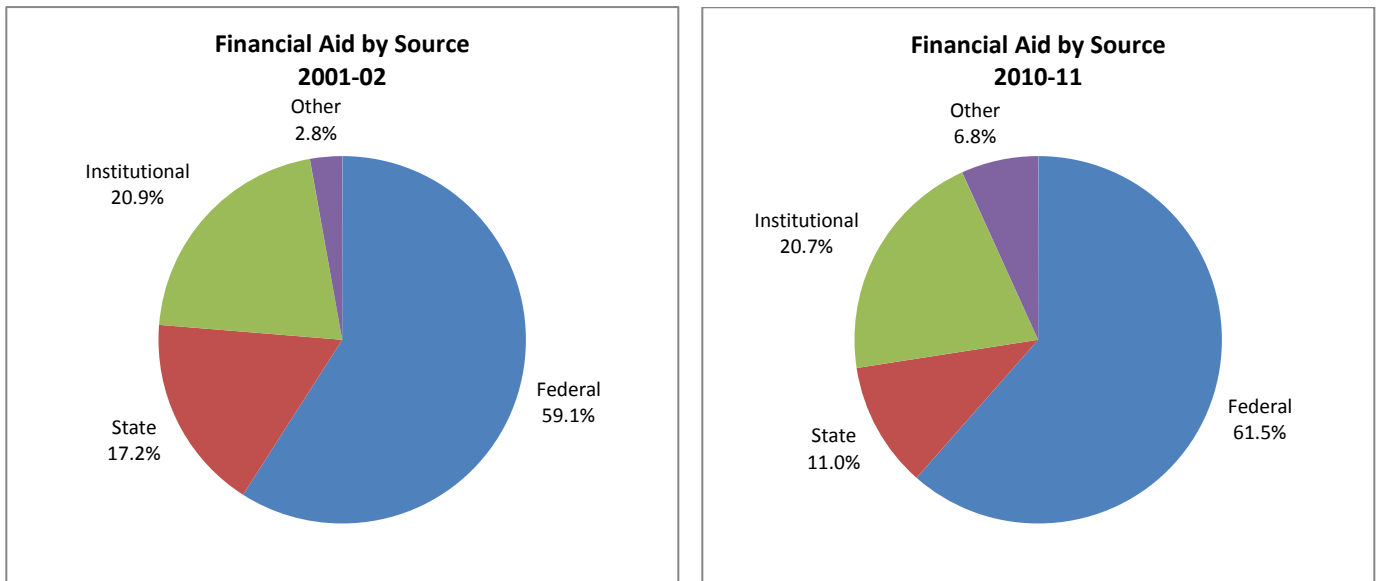
- Illinois State University Financial Aid Office
- Illinois State University Fact Book

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: Financial Aid by Source

Key Trends:



- The proportion of financial aid from Federal and Institutional sources has remained fairly constant since 2001-02. The largest shift can be seen in the decrease in the amount from State sources and the increase in funding from “Other” sources.
- The majority of increase in the “Other” category can be attributed to the growth in alternative and private loans that began in 2003. Dollars borrowed from “Other” sources increased from \$696,092 in 2001-02 to \$12,683,303 in 2010-11.
- Although the proportion of aid from Institutional sources remained constant, total dollars almost doubled from \$22,913,697 in 2001-02 to \$44,911,511 in 2010-11. The majority of this increase was in Grant and Scholarship aid.

Environmental Scan - Internal

Implications:

- The growth in alternative and private loans has moderated since the last recession. However, this growth might signal a need for financial assistance that is not being met by other sources. Unless banks begin to loosen their standards and lend again at rates similar to those before the recession, there is potential for an increase to students' unmet need (see also Financial-Unmet Need).
 - As the Federal government looks to reduce its deficit, reductions to Federal aid and/or changes to eligibility need to be monitored closely.
 - Likewise, given the financial situation the State of Illinois is in, further reductions in state financial aid are possible.
 - In order to maintain affordability, financial aid from institutional sources will need to increase more substantially in the future given the relatively unstable environments for the other sources of financial aid.
-

Sources:

- Financial Aid Office
- Illinois State University Fact Book

Environmental Scan – Internal

Environmental Sector: Financial

Internal Force/Issue: Unmet Financial Need

Key Trends:

Full Time Undergraduate Students						
	Fall 2010	Fall 2009	Fall 2008	Fall 2007	Fall 2006	Change
Percentage of need met for students awarded need-based aid						
ISU	77.7%	79.3%	82.4%	80.6%	82.3%	-4.6%
UI -CU	68.0%	69.0%	70.0%	72.0%	87.0%	-19.0%
Percent of students whose need was fully met						
ISU	35.0%	37.9%	45.7%	38.8%	42.7%	-7.7%
UI -CU	28.8%	44.2%	27.4%	43.6%	43.2%	-14.4%

- Since the fall of 2006, both the amount of need met and the percent of students whose need was fully met has decreased.
- When compared to the University of Illinois at Urbana-Champaign, the decrease in the amount of need met for Illinois State students has not been as high.

Implications:

- Both of these indicators show a troubling trend for our financially neediest students. Unmet need can present a financial hurdle to accessing higher education for low income students. If their financial needs are not met, many students give up and retention and persistence can become an issue.
- Students with unmet need could also look to outside employment to help cover the costs of education. Some employment by students (20 hours a week or less) has been shown to improve retention rates, but a higher number of hours worked has the opposite effect.
- A high rate of unmet need could also negatively impact the recruitment of students. Students often shop around for the best financial aid package and a large amount of unmet need might cause a potential student to look elsewhere.

Sources:

- Common Data Set, Illinois State University

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: Net Price

Key Trends:

<u>Full-time beginning undergraduate students who paid the in-state or in-district tuition rate and were awarded grant or scholarship aid from federal, state or local governments, or the institution.</u>						
Average Net Price						
Year	Illinois State University		University of Illinois- CU		Northern Illinois University	
2009-2010	\$13,757		\$15,024		\$14,393	
2008-2009	\$12,202		\$14,844		\$13,357	
2007-2008	\$11,569		\$13,866		\$11,213	

<u>Full-time beginning undergraduate students who paid the in-state or in-district tuition rate and were awarded Title IV aid by income.</u>						
Average net price by Income	Illinois State University		University of Illinois- CU		Northern Illinois University	
	2008-2009	2009-2010	2008-2009	2009-2010	2008-2009	2009-2010
\$0 – \$30,000	\$7,068	\$8,578	\$6,569	\$6,118	\$10,748	\$12,278
\$30,001 – \$48,000	\$10,050	\$10,897	\$10,286	\$10,420	\$13,063	\$13,881
\$48,001 – \$75,000	\$17,362	\$17,352	\$17,063	\$16,868	\$18,409	\$18,979
\$75,001 – \$110,000	\$20,603	\$21,435	\$21,512	\$22,442	\$20,657	\$22,224
\$110,001 and more	\$20,729	\$22,066	\$22,991	\$23,800	\$20,728	\$22,617

- Average net price is calculated by subtracting the average amount of federal, state/local government, or institutional grant or scholarship aid from the total cost of attendance (tuition and fees, books and supplies, room and board, and other expenses).
- Since 2007-08, the average net price for Illinois State students has increased 18.9 percent. This is less than the 28 percent increase for Northern Illinois students, but more than the 8 percent increase for University of Illinois at Urbana-Champaign students.
- The average net price is lower for students from low income families and increases as you move up income ranges. This reflects the impact of need-based financial aid programs.
- The average net price for Illinois State students is lower than the comparison institutions for the top two income ranges but is not for the lowest three income ranges. The University of Illinois at Urbana-Champaign has a lower net price for those students.

Environmental Scan - Internal

Implications:

- Net price is what students and families have to pay after grant or scholarship aid is factored in. In a highly competitive student recruitment environment, the net price can become a key tool in attracting and retaining prospective students. Private higher education institutions are able to charge higher tuition rates and still maintain enrollment levels because the net price that students pay is competitive with public institutions due to the amount of financial assistance they provide to students.
 - In order to maintain affordability as the cost of attendance increases, grant and scholarship aid must increase. The net price reflects what is left for a student to cover from loans and/or employment. If grant and scholarship aid does not increase at the same rate as costs, students are left to increase the amount of loan debt and/or work more hours.
-

Sources:

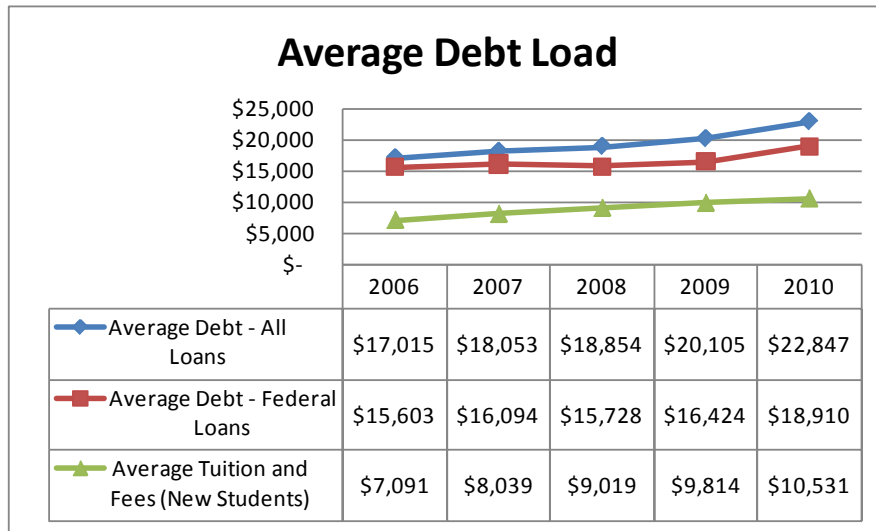
- College Navigator, National Center for Education Statistics

Environmental Scan - Internal

Environmental Sector: Financial

Internal Force/Issue: Debt Load of Graduates

Key Trends:



- Average debt load of undergraduate students increased steadily in the last five years. Since 2006, average debt at graduation for all loans increased 34 percent. The most substantial increase occurred between 2009 and 2010, when average debt increased by \$2,742 and 13.6 percent.
- When looking only at average debt of Federal loans, the same trend can be seen. Since 2006, average Federal loan debt increased 21 percent, with the largest increase occurring between 2009 and 2010 when average loan debt increased \$2,486 and 15 percent.
- Average tuition and fees for new students also increased during this time period and at a higher rate. Since 2006, average tuition and fees increased 48.5 percent and averaged 9.7 percent a year.

Implications:

- Illinois State graduates are leaving the University with higher levels of debt, which can impact graduates for years after graduation. It can delay the purchase of a home, impact the ability to start a family, impact the desire to continue educational pursuits beyond a baccalaureate degree, and decrease ability to give back to their alma mater.

Environmental Scan - Internal

- Efforts should be focused on increasing the amount of financial aid from sources other than loans to help students manage cost increases and, more importantly, set them off on the right foot financially after graduation.
 - There is a connection between rising tuition and fees and increases in debt load. Consideration of debt load and its impact should be part of future discussions of tuition increases.
-

Sources:

- Common Data Set, Illinois State University
- Financial Aid Office

Technology Summary

Illinois State University's IT Policy and Planning Council created the *Information Technology Strategic Plan 2011-2013*, which was endorsed by the President's Cabinet June, 10 2011. This plan addresses four broad Goals for IT service delivery:

- Provide information technology infrastructure, services, and enterprise applications that help the entire university attain distinctiveness and excellence.
- Base IT service decisions in collaborative planning and data-informed assessment.
- Establish a model for the optimum combination of IT organizational structure and governance.
- Provide reliable, secure, scalable, and capable network and server access.

The 42 action items represent a blueprint for addressing the IT needs of the University both inside and outside of the classroom.

- According to the Educause Core Data survey, IT expenditures and staffing at Illinois State compared to other public four-year institutions appear to exceed the average in several areas. However, comparisons with other institutions are difficult given the various organizational and implementation patterns for technology.
- At Illinois State University, 12 instructional buildings carrying 66 percent of the semesters credit load have 100 percent wireless coverage. Additionally, the residence halls, Milner Library, and the Alumni Center have 100 percent wireless coverage.

Environmental Scan - Internal

Environmental Sector: Technology

Internal Force/Issue: IT Expenses

Key Trends:

The Educause Core Data survey asks Universities to report various metrics on IT organization and operation. Illinois State University is compared with the set of public 4-year and higher institutions with student FTEs (full-time equivalent) between 15,000 and 24,000 students.

IT Expenses - Educause Core Data Survey

	FY 2009-2010	
	Illinois State University	Public 4-yr comparison
Central Operations		
Training, seminars, conferences	\$ 100,314	\$ 98,849
Travel	114,646	94,061
Office supplies	310,798	212,231
Equipment	3,157,282	3,040,338
Equipment maintenance	827,747	900,587
Software, expensed	3,567,410	2,503,138
Rent	22,739	112,605
Utilities	-	29,308
Institutional administrative costs	522,209	349,863
Other	43,365	3,226,945
Total	\$ 8,666,510	\$ 10,567,924
Distributed IT Expenses	\$ 4,044,664	\$ 12,728,164
Central Staff		
Staff	\$ 8,977,840	\$ 9,285,856
Salaries or benefits paid from another institutional budget	-	557,037
Students	577,052	417,521
Consultants	1,210,828	113,999
Other		265,105
Total	\$ 10,765,720	\$ 10,639,518
Distributed Staff	\$ 4,406,852	\$ 13,755,180
Data, voice, video communications	\$ 397,832	\$ 2,089,708

Environmental Scan - Internal

Implications:

- It is difficult to fully capture the nuances of different organizational and implementation patterns for technology. Information technology operations are structured different from campus to campus within the comparison group. There can be differences in the way expenses are captured and defined.
 - It does appear that while Illinois State's central IT operation is roughly funded at the same level as the aggregate of other similar institutions, the distributed operations and staffing appear to be markedly different. This difference could be due to the mixed operational structures (distributed vs. centralized) present in the comparative institutions.
-

Sources:

- www.educause.edu/coredata

Environmental Scan - Internal

Environmental Sector: Technology

Internal Force/Issue: IT Staffing

Key Trends:

The EDUCAUSE CORE DATA SERVICE (CDS) is a benchmarking service used by colleges and universities since 2002 to inform their IT strategic planning and management. Individuals at eligible colleges and universities were surveyed on the configuration of their IT staffing in 10 categories. A follow-up question is asked for the FTE (full-time equivalent) of IT staff outside the central organization.

	<u>Staff</u>		<u>Student</u>	
	<u>ISU</u>	<u>Public 4-yr Comparison</u>	<u>ISU</u>	<u>Public 4-yr Comparison</u>
Office of the CIO*	34	16	-	1
Information Systems/ ERP	24	26	-	1
Support Services	30	21	36	15
Educational Technology	17	19	11	17
Communication Infrastructure	28	20	2	3
Data Center	6	10	-	1
Enterprise infrastructure and services; identity management	19	11	-	0
Research technology services	-	2	-	0
Web support services	12	4	2	0
Other	-	8	-	2
Total	170	135	51	41
FTE IT personnel outside central IT	89	100		

* For ISU, the combined administrative staff for Administrative Technologies and Campus Technology Support Group.

Implications:

- Illinois State's staffing patterns exceed the average of the comparison group in 5 areas; including office of the CIO, support services, communication infrastructure, enterprise infrastructure and services, and web support services.
- Like the IT expenditures data, average group comparisons present some difficulties due to the organizational structures between the comparison institutions.

Environmental Scan - Internal

-
- Some of the staffing patterns may be related to the unique organization of the Illinois State IT operations. Unlike other institutions, Illinois State has separate leadership and organizational structures for administrative and academic technology support.
-

Sources:

- <http://www.educause.edu/coredata>

Environmental Scan - Internal

Environmental Sector: **Technology**

Internal Force/Issue: **Wireless Coverage**

Key Trends:

- One measure of instructional capability for information technology is wireless coverage. This measure is extremely difficult to calculate, since there are different desires for coverage by different constituencies. Administrators, for reasons of sensitivity and security, may not desire wireless coverage in the locker room of the kinesiology area, or in the auditorium for the fine arts complex. Faculty may not desire wireless coverage in certain areas for safety or practicality and students may have a different view.
- At Illinois State University, 12 instructional buildings carrying 66 percent of the semester's credit load have 100 percent wireless coverage. These are (in order of credit production):

1. Schroeder Hall	5. Turner Hall	9. Fairchild Hall
2. Stevenson Hall	6. Moulton Hall	10. Cook Hall
3. Edwards Hall	7. Fell Hall	11. Ropp Agriculture
4. Felmley Hall of Science	8. Student Fitness Kinesiology Recreation	12. Old Union

- Additionally, the residence halls, Milner Library, and the Alumni Center have 100 percent wireless coverage.
- Classroom buildings with less than 100 percent coverage are:

State Farm Hall of Business (16%)	DeGarmo Hall (33%)	Centennial East (11%)
Center for Visual Arts (21%)	Williams Hall (9%)	Centennial West (15%)

Classrooms With Wireless Access Multiplied From 2005 to 2010

Share of classrooms with wireless Internet access by sector

	Public research universities	Private research universities	Public 4-year colleges	Private 4-year colleges	Community colleges
2005	42%	54%	44%	44%	27%
2006	56%	58%	57%	56%	32%
2007	60%	69%	64%	64%	44%
2008	66%	76%	74%	70%	56%
2009	77%	78%	77%	78%	56%
2010	82%	82%	85%	86%	67%

Source: Campus Computing Project

Implications:

- Illinois State has adequate wireless coverage for instructional use and for common study and collaboration areas.
- In past years, internet access signified by wired capacity and instructional labs was the measure for IT instructional potential. Now wireless is the measure for IT instructional potential and the measurement of these infrastructure technologies are being replaced by personal communication devices and capacities.

Sources:

- From Distraction to Engagement: Wireless Devices in the Classroom, *Berlin Fang*.
<http://www.educause.edu/EDUCAUSE+Quarterly/EDUCAUSEQuarterlyMagazineVolume/FromDistractiontoEngagementWir/192959>

Facilities Summary

In February 2011, the Board of Trustees approved the University's *Master Plan 2010-2030*. This plan includes 67 recommendations that propose changes to the physical and environmental features of the campus to enhance the experience for students, faculty, staff, alumni, and visitors. Appropriate facilities and a healthy, safe, and environmentally sustainable campus are some of the keys to positioning students to excel.

Highlights

- As the University's facilities age (in part to the building boom between the 1960s and 1980s), Illinois State's deferred maintenance backlog has increased by approximately \$39 million since 2002 from \$490.6 million to \$529.3 million.
- During fiscal years 2008 through 2010, expenditures on deferred maintenance projects were between \$21.8 million and \$23.9 million.
- In 2009, only 41 percent of the University's facilities were rated as either in good condition or in satisfactory condition. Fifty percent of the University's facilities were considered in poor condition or in unsatisfactory condition.
- Trend data between 1995 and 2010 indicate that the top three day patterns for courses are: 1) Tuesday/Thursday (30.5 percent), 2) Monday/Wednesday (16.9 percent), and 3) Monday/Wednesday/Friday (14.9 percent). Recently, there has been an increase in Tuesday/Wednesday/Thursday courses, which have increased from two courses in 1995 to 140 in 2010.
- The University partakes in a number of sustainability measures in the areas of cleaning, composting, dining, energy, grounds, recycling, storm water, transportation, and water. Additionally, nearly every project consisting of renovations, deferred maintenance, or a capital project incorporates energy conservation on some level.

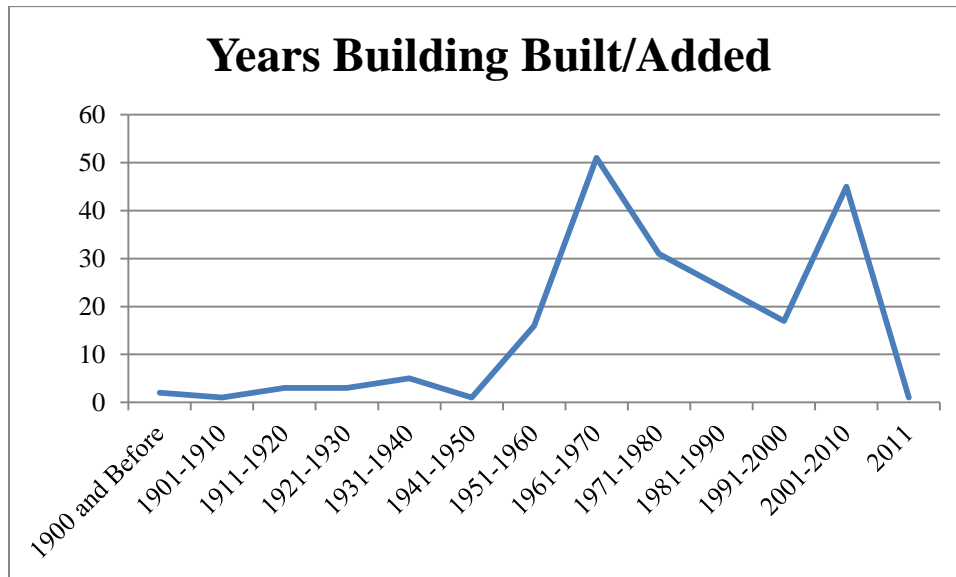
Environmental Scan – Internal

Environmental Sector: Facilities

Internal Force/Issue: Facilities Assessment

Key Trends:

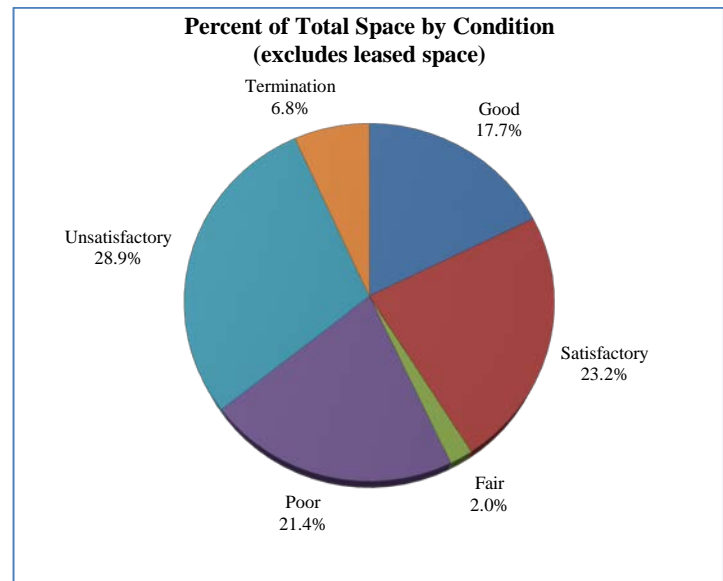
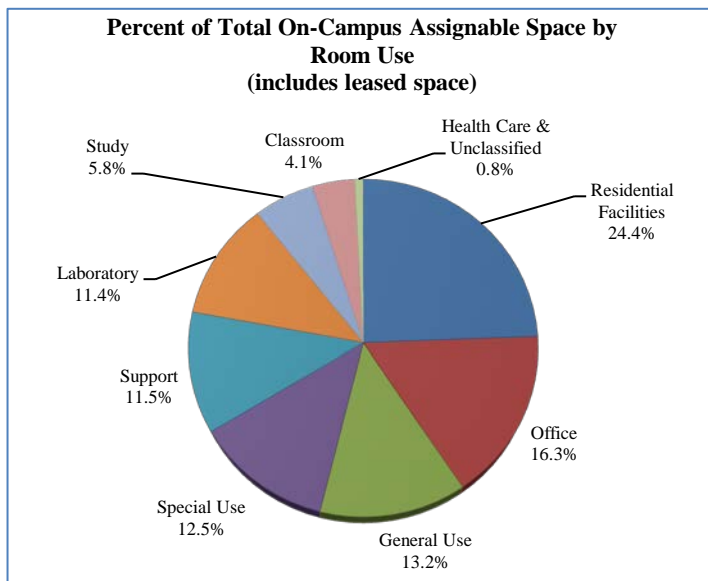
- In fiscal year 2012, Illinois State had 206 buildings totaling:
 - 4.2 million net assignable square feet
 - 6.9 million gross square feet
 - 2.0 million residential gross square feet



- The chart above shows significant building growth between the 1960s and 1980s. Please note that the sharp increase in building growth between 2000 and 2010 is due in part to the University's acquisition of the University Farm in Lexington, IL in 2001 and the State Farm Hall of Business completed in 2005.
- The following information represents data collected for the 2009 Statewide Space Survey and excludes major new construction completed since (Student Fitness Center and McCormick Hall and the current reconstruction project at Cardinal Court).
- The top two types of space on campus are residential facilities (24 percent) and office facilities (16 percent), which support administrative, instructional, research, and public service activities. Other categories that are not far behind in space are general use (13 percent), special use (13 percent), support (12 percent), laboratory (11 percent), study (6 percent), classroom (4 percent), and healthcare and unclassified (1 percent).

Environmental Scan – Internal

- In 2009 only 41 percent of the University’s facilities were rated as either in good condition with minimal renovation needed or in satisfactory condition requiring limited renovation. Fifty percent of the University’s facilities were considered in poor condition (significant renovations needed) or in unsatisfactory condition (major renovations required to update and overhaul of the subsystems needed).



Implications:

- As the data show, the University’s facilities are aging and it is necessary to have plans in place to maintain these facilities appropriately in order to effectively operate in each of its functions.
- The University has already begun addressing some of its most pressing facility needs (i.e. recently approved Fine Arts Complex and the reconstruction of Cardinal Court).
- As funding continues to be more of a challenge in the future, the University needs to continue to explore new and alternative ways to take care of its facility needs.

Sources:

- Facilities Planning
- 2009 Statewide Space Survey

Environmental Scan - Internal

Environmental Sector: Facilities

Internal Force/Issue: Space Utilization

Key Trends:

- The following classroom use data is based on academic year 2009-2010:
 - Total of 164 classrooms on campus
 - Two-thirds of the classrooms accommodate fewer than 50 students
 - The top three day patterns for courses are: 1) Tuesday/Thursday (30.5 percent), 2) Monday/Wednesday (16.9 percent), and 3) Monday/Wednesday/Friday (14.9 percent).
 - Trend data between 1995 and 2010 indicates that the Monday/Wednesday/Friday courses have declined by 27 percent; Monday/Wednesday classes have increased by 50 percent; Friday courses have increased by 106 percent; Tuesday/Wednesday/Thursday courses have grown by 7,000 percent.
 - Recommended practice is to fill 80 percent of classroom space; Illinois State is at 100 percent at times. The classrooms that experience the highest usage are the larger classrooms, particularly the 100-199-seat rooms.
- The following represents benchmark comparisons summarized using 2008-2009 data to overall institutional space. Please note that SF=square footage and ASF=assignable square footage.

Institution / Location	Total ASF (w/o residen'l)	Square Foot Tabulation			Academic ASF (Col. 8+9)	Academic ASF per	
		Classroom SF	Lab SF	Office SF		Student	Faculty
Wichita State	1,718,169	114,034	243,964	359,508	357,998	25	694
Ball State	2,095,678	128,134	500,480	511,345	628,614	37	536
UNC-Greensboro	1,731,412	132,142	296,476	414,694	428,618	25	356
Bowling Green	2,947,761	175,779	223,479	490,517	399,258	22	391
Miami (Ohio)	3,218,160	163,881	240,505	517,498	404,386	20	321
Illinois State	2,728,188	144,779	322,757	467,181	467,536	22	395
Old Dominion	3,714,786	168,117	287,202	357,116	455,319	20	397
UNC-Charlotte	1,918,081	181,055	364,662	218,118	545,717	23	387
Western Michigan	6,028,000	251,392	355,040	457,530	606,432	24	422
Portland State	0	0	0	0	0	0	0
Central Michigan	1,911,089	180,050	261,600	373,304	441,650	16	371
Mean Value*	2,801,132	163,936	309,617	416,681	473,553	23	427
Median Value*	2,411,933	165,999	291,839	436,112	448,485	23	393

Environmental Scan - Internal

- Illinois State is slightly below the mean total assignable square footage (without residential) in comparison to its peer institutions.
 - Illinois State is below peer mean on academic assignable square footage, but higher than the mean in office square footage than the peer mean.
-

Implications:

- As the University's resources become more and more restricted, it is important to review the utilization of space on campus and determine if it is being effectively utilized.
 - The increasing popularity of online and hybrid courses also raise questions about the continuing need for any additional physical classroom space and how existing spaces might be used more efficiently.
 - Course patterns also suggest a shift away from the traditional course patterns and a move towards a compressed week and non-traditional options, such as Friday-only courses.
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Sources:

- Facilities Planning
- Office of the University Registrar

Environmental Scan - Internal

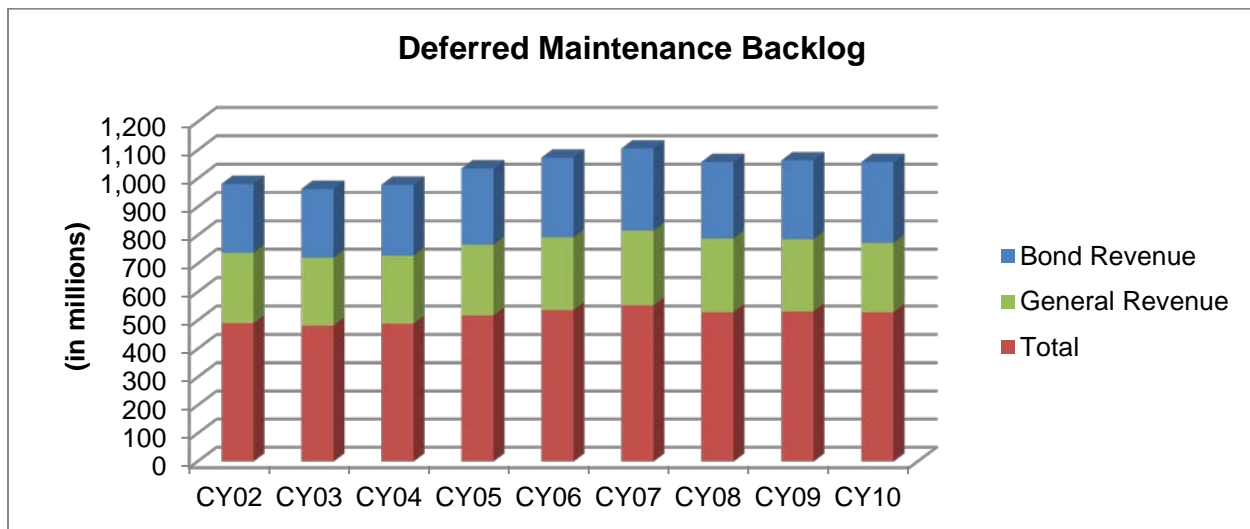
Environmental Sector: Facilities

Internal Force/Issue: Deferred Maintenance

Key Trends:

Deferred Maintenance Backlog
(in millions)

	<u>CY02</u>	<u>CY03</u>	<u>CY04</u>	<u>CY05</u>	<u>CY06</u>	<u>CY07</u>	<u>CY08</u>	<u>CY09</u>	<u>CY10</u>
Total	490.6	481.9	489.2	518.0	536.9	553.2	529.3	532.2	529.3
General Revenue	247.7	239.2	239.1	249.5	256.1	263.2	259.8	254.2	244.0
Bond Revenue	242.9	242.6	250.1	268.4	280.8	290.0	269.4	278.0	285.3



- Illinois State’s deferred maintenance backlog has increased by approximately \$39 million since 2002. While bond revenue has increased, the general revenue portion of the backlog has fluctuated over the years due to residence hall and dining center upgrades, as well as enhancements to the Bone Student Center and athletics facilities.
- As the University has addressed some major capital projects over the years, a portion of the backlog has decreased. During the fiscal years 2008 through 2010, expenditures on deferred maintenance projects were between \$21.8 million and \$23.9 million.

Environmental Scan - Internal

- The mounting deferred maintenance backlog is not unique to Illinois State. In fact, it is not just unique to public institutions. Private institutions peaked capital spending in 2008 and has had sharp drops in spending ever since.
-

Implications:

- As the University's facilities continue to age, it will become more and more difficult to either make necessary renovations or replace the facilities altogether due to funding shortfalls.
 - The State of Illinois' financial ability to assist is no longer something the University can depend upon. In fiscal year 2010, Governor Quinn signed an appropriations bill that included \$54 million for the Fine Arts Complex on the University's capital request list. Two fiscal years later the money still has yet to be released. In the meantime, the facilities that the new complex will replace are continuing to fail and drive up the deferred maintenance backlog even further.
 - The University needs to continue seeking alternative funding for improvements of its facilities in order to compensate for the lack of state funding dependability. One example of this is the public/private partnership the University is currently engaged in to build the new Cardinal Court residential complex.
 - It has been suggested that rating agencies may begin using deferred maintenance figures when evaluating institutions, which could have a domino effect into other financial woes facing institutions.
-

Sources:

- Budget Office
- "Business Officers Discuss Deferred Maintenance and a Financial Threat," *The Chronicle of Higher Education*, July 11, 2011:
<http://chronicle.com/blogs/buildings/business-officers-discuss-deferred-maintenance-as-a-financial-threat/29900>

Environmental Scan - Internal

Environmental Sector: **Facilities**

Internal Force/Issue: **Energy Conservation and Sustainability**

Key Trends:

- Energy conservation at Illinois State has become infused into the campus culture. Nearly every project consisting of renovations, deferred maintenance, or a capital project incorporates energy conservation on some level. The following projects are current examples of energy conservation measures being taken:
 - Illinois State contracted with an Energy Service Company (ESCO) to audit the University's facilities to determine where potential energy savings could occur in areas such as reducing energy consumption and utility costs. The audit identified 17 energy conservation measures totaling \$8.5 million that would result in savings in utility, operational and maintenance costs in Milner Library, the Science Lab Building, and the Heating Plant.
 - Current construction projects that will result in significant energy savings include Braden Auditorium, Williams Hall Annex (including the annex), and the Science Lab Building.
 - Holiday shutdown energy saving measures (i.e. turning down thermostats, unplugging unneeded equipment, shutting window coverings) have made an impact on the bottom-line. During the shutdown in winter 2009-2010, \$72,000 in savings were realized.
- The Center for Renewable Energy was created in 2007 and is formally recognized by the State of Illinois. The Center has three major functional areas - supporting the Renewable Energy major at the University, serving the Illinois renewable energy community by providing information to the public, and encouraging applied research on renewable energy at Illinois State and through collaborations with other universities.
- The University also partakes in a number of sustainability measures in the areas of cleaning, composting, dining, energy, grounds, recycling, storm water, transportation, and water. The following is a sampling of what has been done over the last few years:
 - New University policy on sustainability
 - Green Team
 - Connect by Hertz Car Share program
 - Reggie Ride
 - Trayless dining and dine-in challenge

Environmental Scan - Internal

- Good to Go Commuter challenge
 - Jesse Fell Project
 - Student Sustainability Fund
 - Community composting program at University Farm
 - The University has been recognized in The Princeton Review's Guide to Green Colleges and as a Tree Campus USA for the third year in a row by the Arbor Day Foundation.
-

Implications:

- It is important for the University to keep sustainability and energy conservation at the forefront of policy making and construction-related projects. Not only does it save the University valuable resources, but also pushes the University towards being a leader in green initiatives globally.
 - As the University continues to integrate sustainability and energy conservation into student curriculum as well as out-of-classroom experiences, it will enrich students' education further and prepare them for experiences post-graduation that they can utilize in their careers and beyond.
-

Sources:

- Office of Energy Management
- Office of Sustainability

Other Indicators Summary

Highlights

- Students who graduate from Illinois State leave the University with a very positive attitude. Over 90 percent of undergraduate alumni and 80 percent of graduate alumni indicate that they have either a strongly positive or positive attitude toward the University.
- Alumni also indicate satisfaction with the quality of instruction in their degree program. Ninety-four percent of undergraduate alumni and 98 percent of graduate alumni indicate they are very satisfied or satisfied with their instruction.
- According to health and wellness survey results, students at Illinois State measure higher in tobacco, alcohol, and marijuana use compared to the national average.
- The top five issues that Illinois State students indicated as contributors to academic problems were lack of motivation (42 percent), sleep difficulties (35 percent), lack of interest in class (34 percent), organizational or time management issues (33 percent), and relationship issues (32 percent).
- The percent of faculty, staff, and graduate students indicating that they had felt overwhelming anxiety in the last 12 months was 35.6 percent. Nearly half of all faculty, staff, and graduate students felt that their job had become more stressful in the past year.
- An economic impact study completed in 2010, showed that Illinois State directly contributes more than \$600 million to the McLean County economy through payroll expenditures for faculty, staff, and student employees, general operating expenses, capital expenditures, and student spending beyond tuition and fees.
- The economic impact study also showed that money spent by Illinois State and its faculty, staff, and students is responsible for directly or indirectly creating more than 10,000 jobs in McLean County.



Environmental Scan - Internal

Environmental Sector: Other Indicators

Internal Force/Issue: Alumni Satisfaction

Key Trends:

- An alumni survey is administered annually to alumni one-year and five-years after graduation to both baccalaureate and graduate-level graduates.
- Selected results are highlighted below that help determine alumni satisfaction:

	Undergraduate Alumni		Graduate Alumni	
	2006	2010	2006	2010
Quality of instruction in degree program (Very Satisfied/Satisfied)	97.4%	94.0%	96.3%	97.9%
Intellectual challenges of the degree program (Very Satisfied/Satisfied)	96.2%	94.0%	98.7%	91.4%
Employment opportunities upon graduation (Very Satisfied/Satisfied)	67.0%	54.9%	86.1%	78.5%
Helping you to better develop your critical thinking ability (Extremely Helpful/ Very Helpful)	71.5%	75.9%	82.7%	73.7%
Helping you become a more active citizen (Extremely Helpful/Very Helpful)	71.5%	75.9%	82.7%	73.7%
ISU quality of education (Superior/ Above Average)	73.0%	77.9%	79.0%	73.7%
How well did our ISU degree prepare you for additional degrees (Very Well/ Well)	79.8%	83.9%	84.0%	70.0%
How well did your degree program prepare you for your career (Very Well/ Well)	64.6%	67.0%	83.4%	75.0%
Attitude toward Illinois State University (Strongly Positive/Positive)	92.2%	88.0%	82.4%	81.3%
Attitude toward degree program (Strongly Positive/Positive)	83.4%	84.3%	91.0%	82.5%

- The results above show that there are some dips in satisfaction in various areas regarding the University from 2006 to 2010. Undergraduates rated their satisfaction higher in six of the ten indicators shown above, while graduate alumni satisfaction declined in all but one indicator.

Environmental Scan - Internal

- “Attitude toward Illinois State University,” which is the broadest indicator, reveals that 88.0 percent of undergraduate alumni in 2010 were either strongly positive or positive towards the University, while 81.3 percent of graduate alumni were either strongly positive or positive towards the University.
-

Implications:

- The University needs to look at where decreases in satisfaction have occurred and determine if there is an explanation (job market decline) and what efforts can be made to increase alumni satisfaction.
 - Alumni satisfaction is highly important, as it is critical to maintain good University/alumni relations as well as increase the potential for future alumni giving dollars that have become increasingly more important in this difficult economy.
 - Alumni are also a good source of marketing for the University and as competition for students increases, alumni can become crucial to encouraging future students to apply to the institution and make it a top-choice to enroll in.
-

Sources:

- University Assessment Services

Environmental Scan - Internal

Environmental Sector: Other Indicators

Internal Force/Issue: Health and Wellness

Key Trends:

- The data in the table below are health and wellness survey results that include a sample of Illinois State University students.

Students								
	Lifetime		Annual		Last 30 Days		3 or More Times a Week	
<u>Substance</u>	<u>ISU</u>	<u>National Average</u>	<u>ISU</u>	<u>National Average</u>	<u>ISU</u>	<u>National Average</u>	<u>ISU</u>	<u>National Average</u>
Tobacco	55.9	48.5	43.1	37.4	27.2	24.8	14.0	13.4
Alcohol	91.6	86.9	91.0	84.3	81.6	71.7	24.9	21.8
Marijuana	55.0	45.1	40.5	31.1	24.4	17.3	10.6	6.7

- The above data show that Illinois State students measure higher in each of the categories regarding tobacco, alcohol, and marijuana use. Over four-fifths of Illinois State students drank alcohol in the month preceding the survey; and approximately 25 percent of the students used tobacco and marijuana. Additionally, 25 percent of the student population indicated that they drink alcohol three or more times in a week.
- The average number of drinks consumed by students per week at Illinois State is 6.9 drinks in comparison to the national average which had an average of 5.2 drinks. Furthermore, 61.9 percent of the Illinois State students reported bingeing on alcohol in the previous two weeks while the national average was 46.1 percent.
- Illinois State students indicated that their top five causes of stress during the previous month were school work (82 percent), lack of money (57 percent), job/work (41 percent), family (38 percent), and relationships with partner (35 percent).
- The top five issues that Illinois State students indicated as contributors to academic problems were lack of motivation (42 percent), sleep difficulties (35 percent), lack of interest in class (34 percent), organizational or time management issues (33 percent), and relationship issues (32 percent).
- Faculty, staff, and graduate students indicated that during the 30 days preceding the survey they were administered, 13.4 percent had used cigarettes during the last 30 days (6.3 percent on a daily basis); 68.6 percent had used alcohol (three percent daily); 2.4 percent had used marijuana (0.3 percent daily).

Environmental Scan - Internal

- The percent of faculty, staff, and graduate students indicating that they had felt overwhelming anxiety in the last 12 months was 35.6 percent. Nearly half of all faculty, staff, and graduate students felt that their job had become more stressful in the past year.
-

Implications:

- Illinois State students are above the national average in substance use pertaining to tobacco, alcohol, and marijuana, which signals a potentially significant problem. This high use can cascade into other areas of their lives, particularly academics.
 - It is important that the University continue to provide education and programming support for faculty, staff, and students on the effects of substance abuse.
 - The University should also recognize the sources of stress that faculty, staff, and students face and evaluate how its programming and services assist them in overcoming their stress. The new Student Fitness Center is one example of how faculty, staff, and students can not only improve their wellness, but also help alleviate stress.
 - Assisting students in the areas of health and wellness can help improve retention and graduation rates, and successfully prepare them for their endeavors after graduation.
 - Assisting faculty and staff helps to maintain work productivity and employee retention.
-

Sources:

- Health, Promotion and Wellness
- Student Health Services
- Core Alcohol and Drug Survey – Spring 2011 (SIU-Carbondale Core Institute)
- Healthy Minds Study 2011 School Report (Center for Student Studies at Survey Sciences Group)
- Faculty/Staff Health Status Survey – Summer 2011

Environmental Scan - Internal

Environmental Sector: **Other Indicators**

Internal Force/Issue: **Illinois State University Economic Impact**

Key Trends:

- An economic impact analysis was prepared by Frank Beck, director of Illinois State's Stevenson Center for Community and Economic Development, and James Payne, economics professor in December 2010.
 - The study showed that Illinois State directly contributes more than \$600 million to the McLean County economy through payroll expenditures for faculty, staff, and student employees, general operating expenses, capital expenditures, and student spending beyond tuition and fees.
 - The money spent by Illinois State and its faculty, staff, and students is responsible for directly or indirectly creating more than 10,000 jobs in McLean County.
 - For every \$1 expended by Illinois State and its faculty, staff, and students, \$1.42 is returned to the McLean County economy.
 - As a state institution, Illinois State has a tax-exempt status, but its payroll expenditures, operating and capital expenditures, and student spending generate millions of dollars in tax revenues that support local governments and schools in McLean County.
 - In fiscal year 2010, university spending helped return \$10 million in property tax revenue and \$1.8 million in sales tax revenue to the local economy.
-

Implications

- As a community partner, this study illustrates the profound impact that Illinois State has on the local economy.
- The data included in the study highlight how intertwined the University and its surrounding community are. Studies such as this can go a long way to help the University make its case for what the institution provides to the community beyond educating students.
- This data can be useful as the University works to maintain strong relationship with members of the community. Because the University provides a sizeable economic boost to McLean County, we can play in active role in helping the county address issues and plan for the future.

Environmental Scan - Internal

Sources

- Economic Impact Analysis, Illinois State University, Frank D. Beck and James E. Payne.
- Illinois State University: A Community Partner, University Marketing and Communications, pages 1-2.

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