A PUBLIC AGENDA FOR
COLLEGE AND CAREER SUCCESS

March 6, 2008

Dear Colleague:

We are pleased to provide you the attached ***DRAFT*** **PUBLIC NEEDS REPORT,** phase one in the development **of a Public Agenda for Illinois Higher Education: Planning for College and Career Success.**

This draft report was prepared by The National Center for Higher Education Management Systems (NCHEMS), the consultancy hired to assist in the Public Agenda process. We hope you will find this extensive analysis of the state's demographics, workforce trends, and educational attainment characteristics helpful in determining the State's priorities for higher education.

Please pay particular attention to the first three introductory pages of findings and the final page of emerging themes. These pages offer a good synopsis of the underlying data in this report.

This is a *draft* document, and we encourage your comments and suggestions. Specifically, if you believe there are problems or gaps in the data presented in the findings, please feel free to submit your comments with relevant backup material if appropriate to publicagenda@ibhe.org by March 31.

You are also invited to attend several briefings on this draft report. A summary version of the report will be presented at these meetings.

Initial meetings to discuss the draft report, **all of which are open to the public**, include:

- **March 11**, 2:00-3:30 p.m., Roosevelt University, 430 South Michigan Avenue, Congress Lounge, 2nd Floor, Chicago – a general briefing on the Public Needs report.
- **March 12**, 5:00-6:00 p.m. State Capitol in Springfield – a joint hearing/briefing for the House Higher Education and Appropriations-Higher Education Committees. Room # TBD.
- **March 13**, 10:00 a.m.-noon, Illinois Community College Board, 401 E. Capitol, Springfield – a general briefing on the Public Needs report and the Public Agenda process.
- **March 20**, 9:00 a.m.-noon, DePaul University, 243 South Wabash, CTI Building, Room 924, Chicago-first task force meeting.

IF YOU PLAN TO ATTEND ANY OF THESE MEETINGS, PLEASE RSVP TO:
publicagenda@ibhe.org

I look forward to your comments and hope you can join us at any of the upcoming events.

Sincerely,

Judy Erwin
Executive Director

NCHEMS

National Center for Higher Education Management Systems

D R A F T

A Public Agenda for Illinois Higher Education: Planning for Career and College Success

Observations and Findings Regarding Public Needs

March 6, 2008

INTRODUCTION

This document contains the results of the initial round of analyses performed by the National Center for Higher Education Management Systems (NCHEMS) as background for identifying strategic priorities to be addressed by higher education to improve the circumstances of Illinois and its citizens. Additional analyses will be performed as follow-up.

PRIMARY OBSERVATIONS

The following key observations are derived from the analytic findings:

1. The population of Illinois is projected to grow much more slowly than is the case for most other states and the country as a whole (page 3). The growth that is projected will be found almost exclusively in the Northeast region of the state (page 4). Populations in all other regions of the state will be essentially stagnant. The working-age population will be comprised increasingly of minorities (page 5). Only among retirees will whites be the fastest growing subpopulation. Minority populations are heavily concentrated in the Northeast Region of the state.

2. The population of Illinois is reasonably well educated, ranking 17th among the states in the proportion of young adults (through ages 25-54) who have an associate or higher degree (page 10). It ranks 12th in the proportion of the working-age population with a baccalaureate or graduate degree; only 27th in the proportion with an associate degree (page 12). It has a lower proportion with high school or less and higher proportion with college educations than the U.S. average (page 13). While Illinois compares favorably to the U.S. as a whole, it compares less favorably to international competitors (page 11).

3. The average education data mask substantial differences between the races, with whites being considerably better educated than their minority counterparts (pages 14-16). Education attainment also varies considerably from one region of the state to another with the highest educational attainment found in the Chicago suburbs and McLean and Champaign counties and the lowest on the south side of Chicago and in some of the more rural parts of the state (page 24).

4. The economy of Illinois mirrors closely that of the nation as a whole (page 27). However, it has been growing much more slowly than the economies of most other states (page 28).

5. The kinds of jobs typically most desirable and lucrative—those in management and professional occupations—are held by residents of very few parts of the state, primarily those in the Chicago suburbs and around Champaign-Urbana (page 33). Growth in jobs requiring postsecondary training is projected to be lower than in all but seven other states (page 34). The occupations in which desirable jobs will be growing are those in:

    - Nursing and other health professions
    - Computer specialists

- Teachers
- Accountants and auditors
- Vehicle repair technicians

(Pages 36-37)

Many of these are fields in which demand exceeds in-state supply (page 38).

6. Illinois' economy has been sufficiently strong to allow its citizens to enjoy a per capita income in excess of the national average. While above the national average, the state's per capita income has shown a steady, long-term decline (page 39). Income varies greatly from one part of the state to another—highest in the suburban areas of the Northeast Region and lowest in the southern and eastern parts of the state (and of the Northeast Region) (page 40).

7. Earnings are higher in Illinois than the national average at every level of educational attainment. The economic benefits of postsecondary education vary widely from one region of the state (from $0 to nearly $30,000 for an associate degree and from $1,600 to $67,000 for a bachelor's degree). The economic benefits are greatest in those areas with the greatest concentration of managerial and professional jobs (pages 33, 42-44).

8. Illinois outperforms the nation as a whole at every stage of the education pipeline. However, Illinois is substantially below the best-performing states at every stage of the pipeline (page 46). Minorities (except for Asian-Americans) are significantly underrepresented at each stage of the pipeline (page 47, 50 and 53). There are similarly substantial variations from one region of the state to another—in both high school graduation and postsecondary education participation with the Northeast and Central Regions of the state being below the state average on both measures (pages 49, 52).

9. Illinois exports a significant number of college students, primarily to public research universities in nearby states (pages 56-57).

10. The students who do enroll in-state overwhelmingly enroll within the region in which they reside. This is particularly true of part-time students but applies to full-time students as well (pages 58-59). In all regions, the clear majority of students who enroll in public institutions enroll in community colleges (page 60). Transfer rates from community colleges to public four-year institutions are relatively low in all parts of the state, but especially low in the Northeast Region where a higher proportion of students begin their postsecondary educations in four-year institutions (pages 72-73).

11. The six-year graduation rates at four-year institutions are higher than the national average and three-year rates at community colleges are below the national average. Enrollment patterns are such that the numbers of degrees produced relative to numbers of high school graduates are well below the national average (pages 74-77). Graduation rates of African-Americans and Hispanics are particularly low and contribute to the low statewide performance (page 78).

12. Illinois relies heavily on in-migration of educated individuals to meet the needs of its economy. Interestingly, students who have achieved associate degrees tend to leave the state, while those with baccalaureate and graduate degrees migrate into the state. When analyzed by age, large numbers of young people come to the state (and Chicago in particular), while older workers leave the state. Net migration is positive among adults age 30-64 only for individuals with less than a high school education (pages 81-82). The state has depended heavily on in-migration of computer specialists; this is one of the few areas where there is an in-migration of older as well as younger workers (page 84-85).

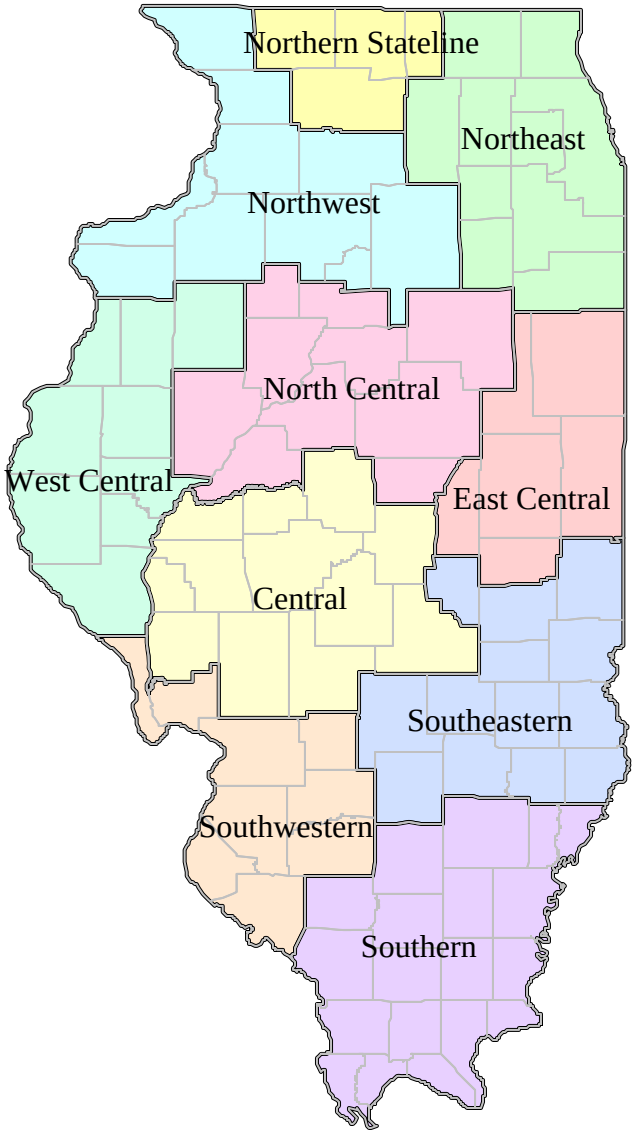
13. While the Illinois economy is stronger than those of many upper Midwestern states, it has some clear weaknesses. Particularly noticeable is the region-to-region variation and the dependence on established companies, rather than emerging companies, for its economic vitality (page 89). Illinois is very much in the middle of the pack with regard to innovation assets (page 90). Illinois universities are in the top 10 states in all major fields with regard to research and development expenditures, with particular strength in math and computer science (page 93). This has not translated into entrepreneurial activity that is driving a revitalized economy (pages 95-98).

14. Although Illinois' population is above the national average in education attainment, the state must improve its position if it is to remain globally competitive (page 101). If the state's institutions maintain business as usual, improvement will require additional resources from either the state or from students (page 103). Relative to the rest of the country, Illinois has a somewhat higher tax capacity and lower tax effort (page 106). However, since Illinois, like all other states, has a long-term structural deficit in its budget, the likelihood of tapping tax capacity specifically for higher education is probably not high (page 107).

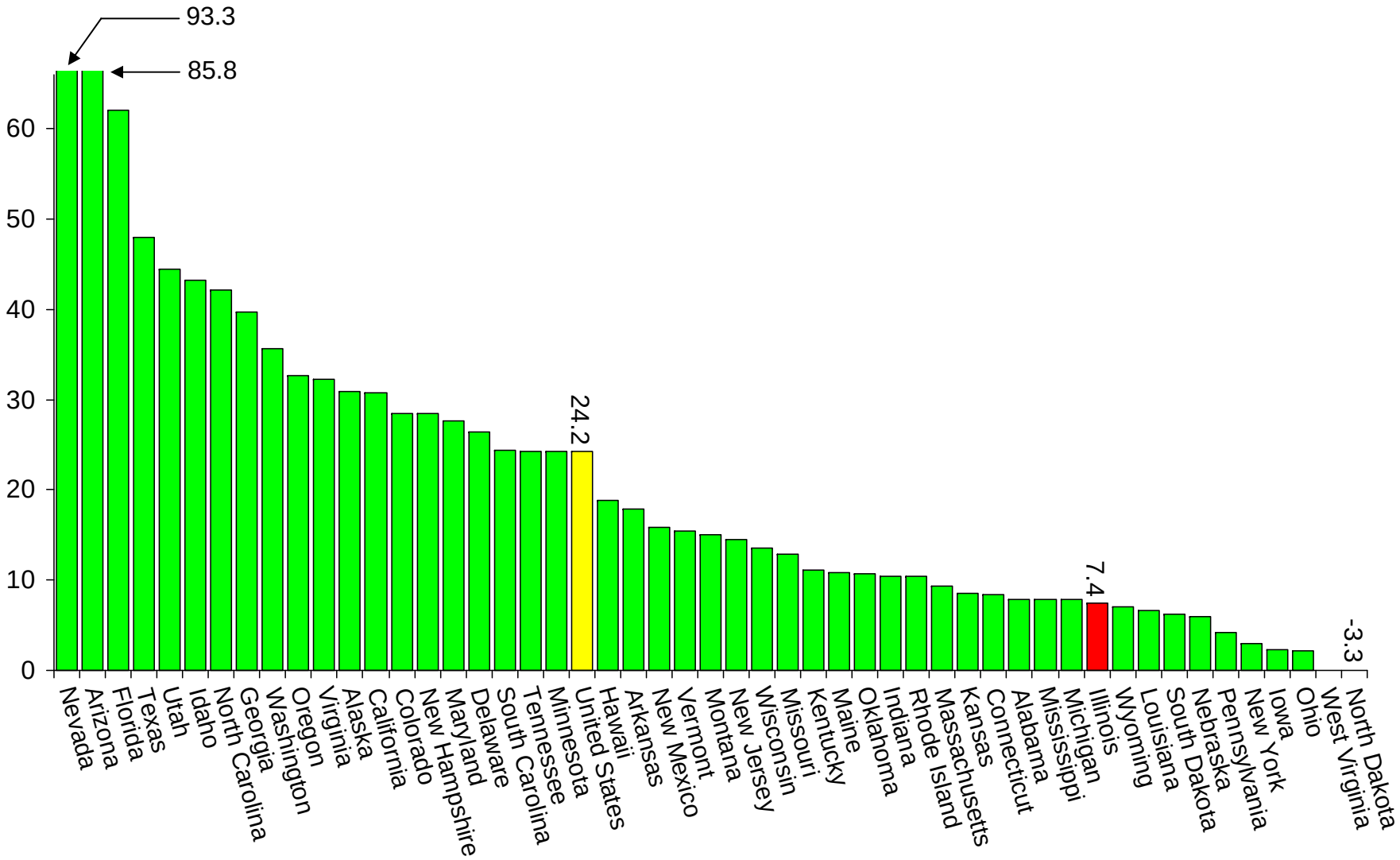
    Increasing revenues from students is also problematic. After many years of stability, the share of educational costs borne by students has increased markedly (page 108). By all measures, higher education is substantially less affordable than it was in 2001 (pages 109-112).

Population and Demographic Characteristics

Illinois Economic Development Regions

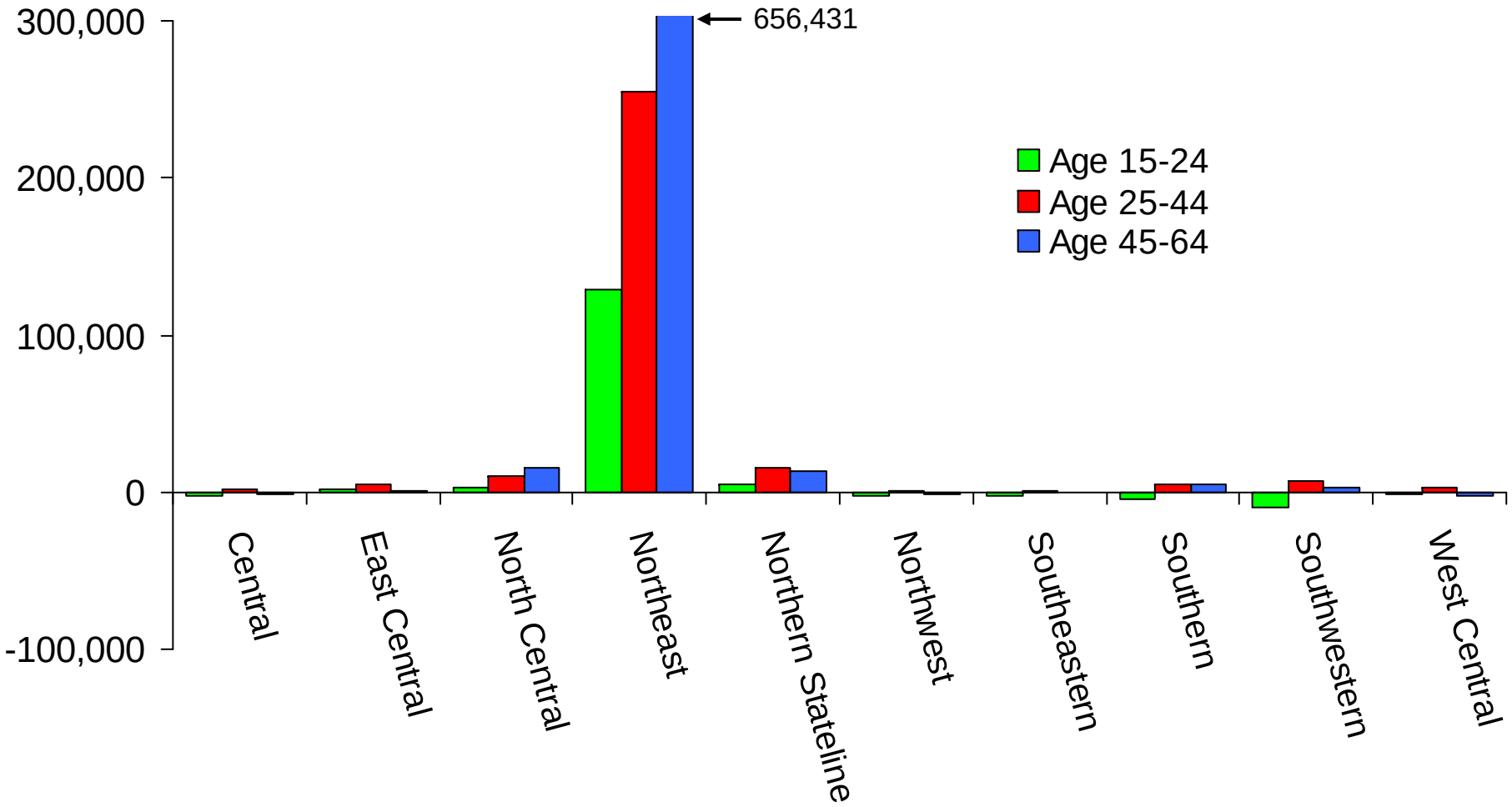


Population Projections—Percent Change, 2000-25



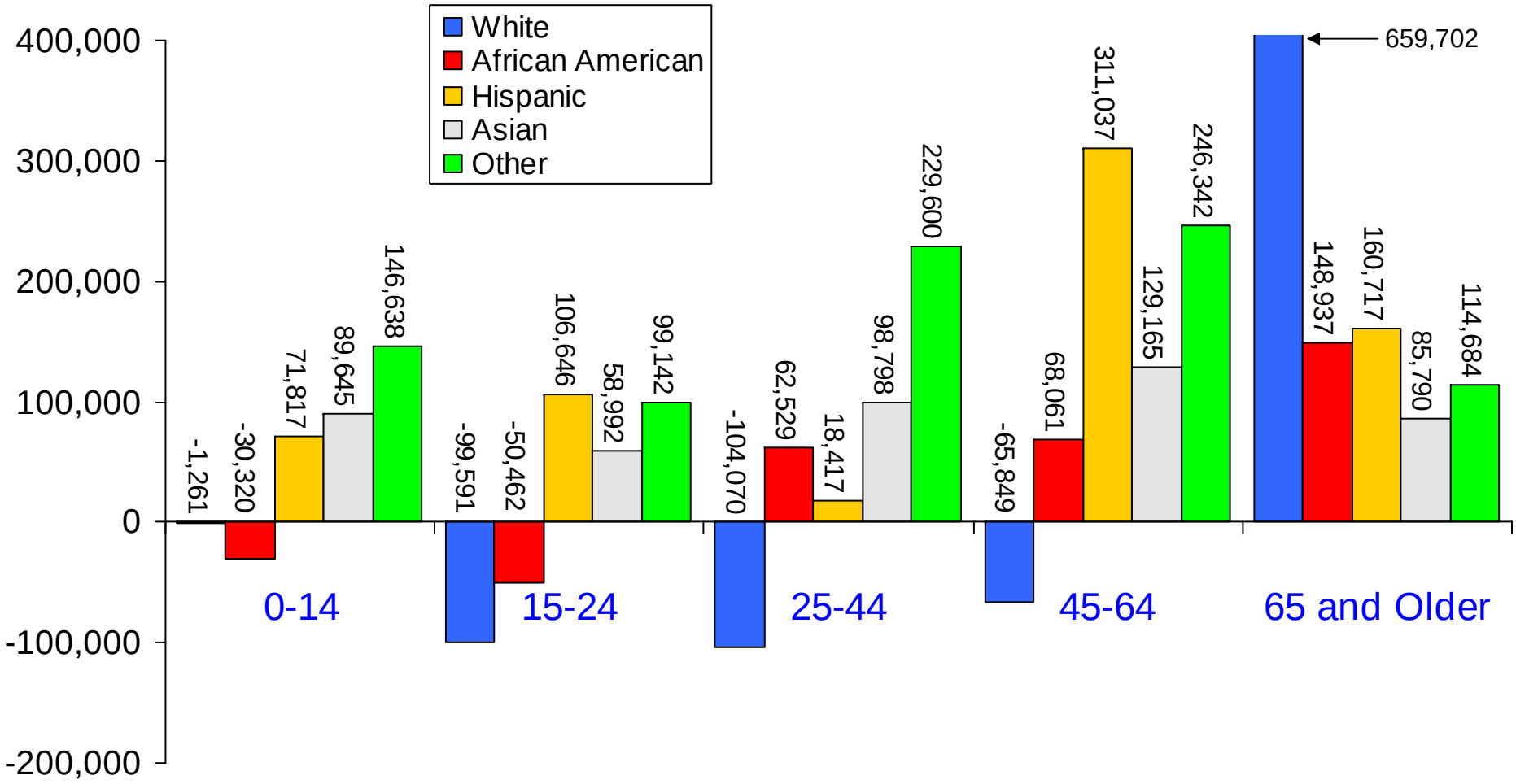
Source: U.S. Census Bureau

Population Projections by Region and Age, 2005-25



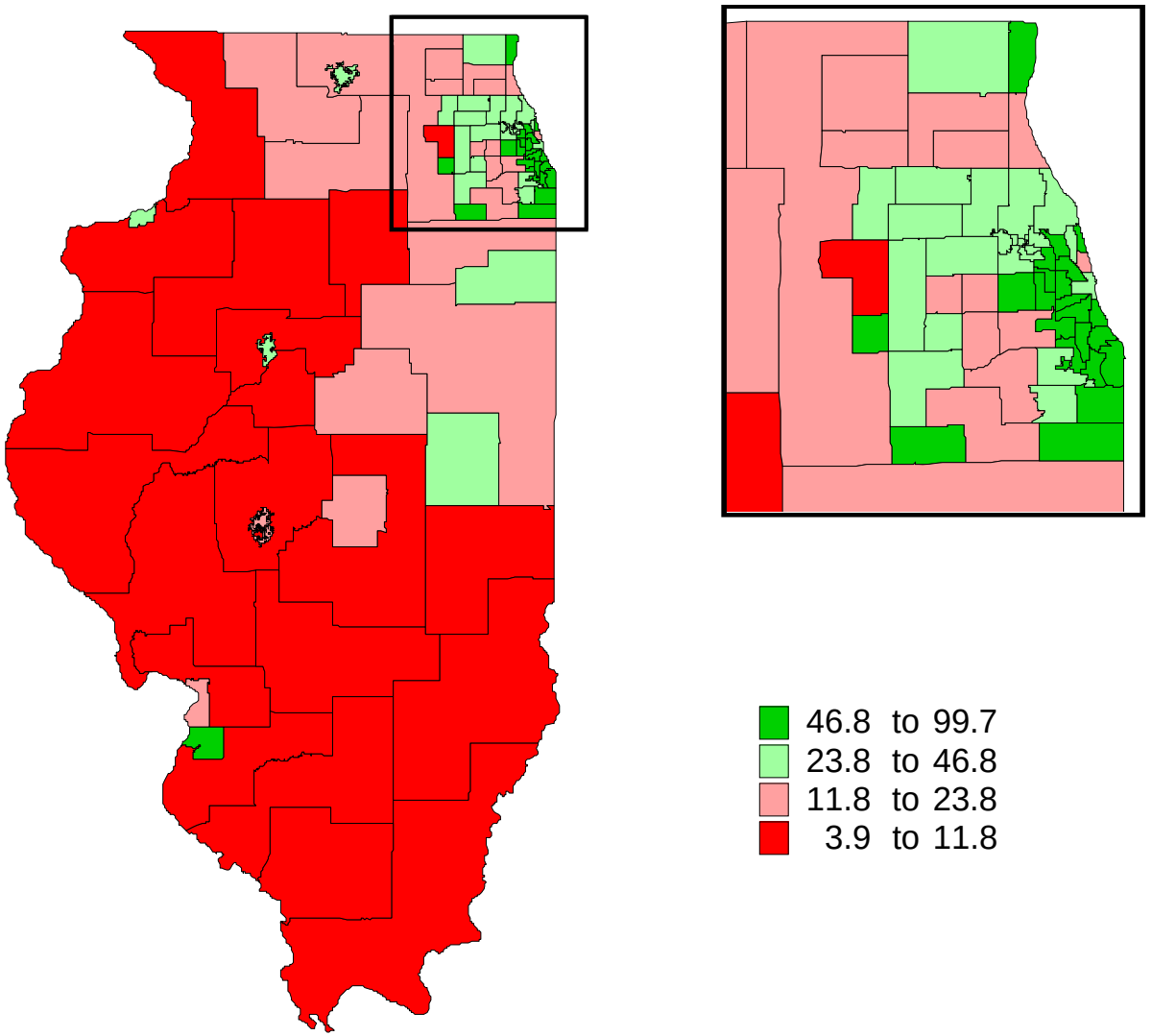
Source: Illinois Department of Commerce and Economic Opportunity

Projected Change in Illinois Population by Age and Race/Ethnicity, 2006-25 (in Thousands)



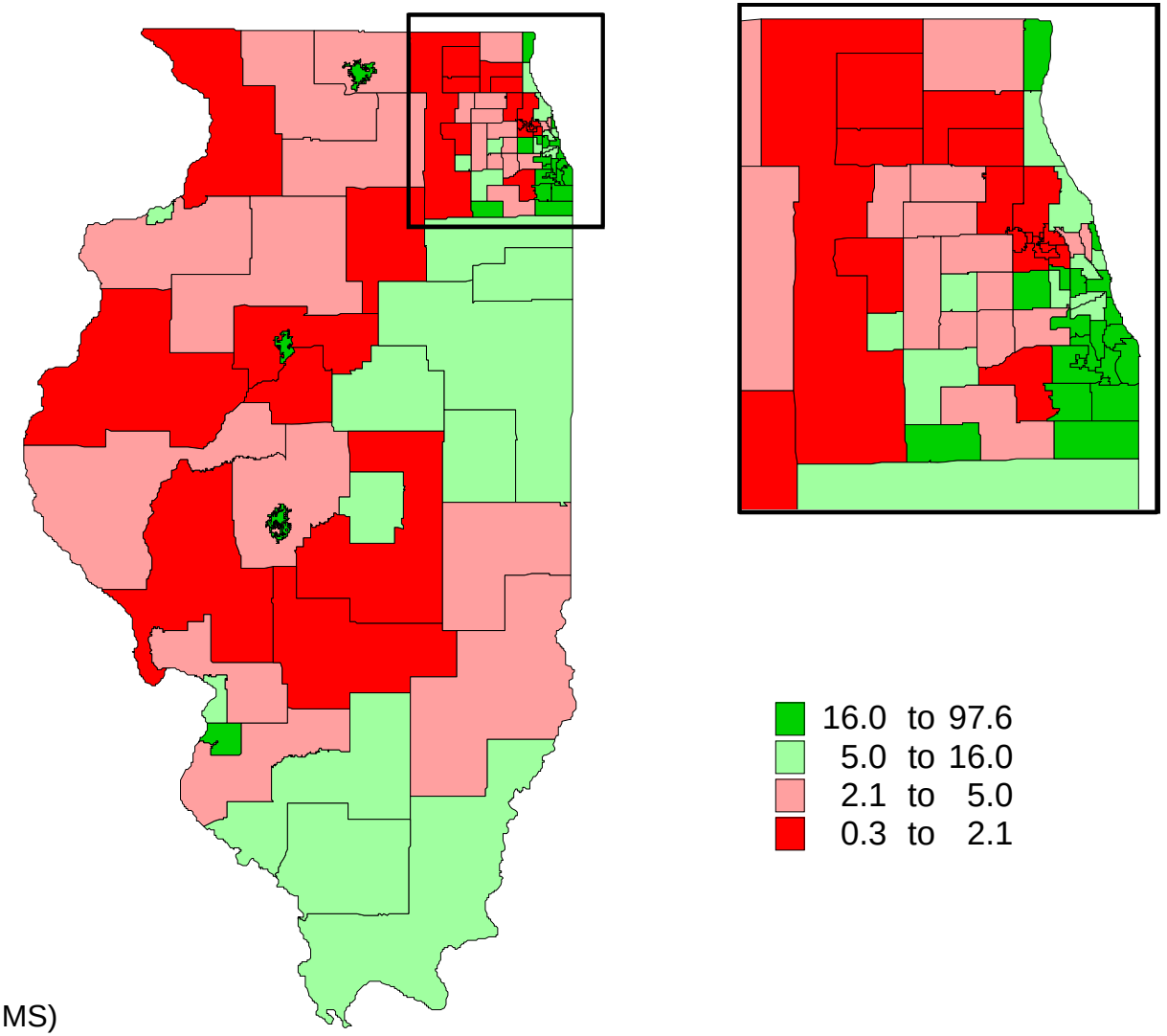
Source: Illinois Department of Commerce and Economic Opportunity

Minorities as a Percent of Total Population, 2006
(Public Use Microdata Areas)



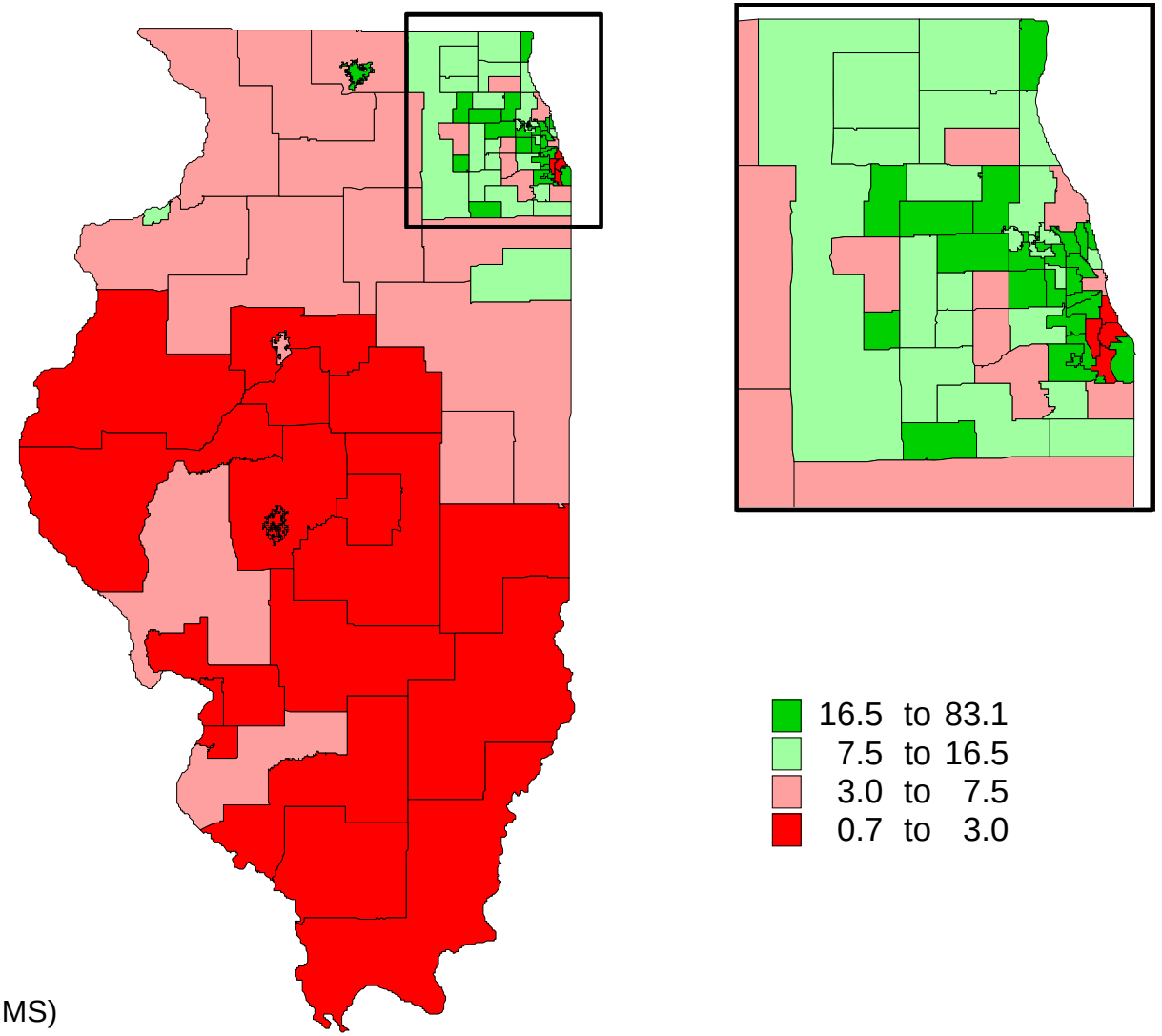
Source: 2006 American Community Survey (ACS), Public Use Micro Data Samples (PUMS)

Percent African-American, 2006
(Public Use Microdata Areas)



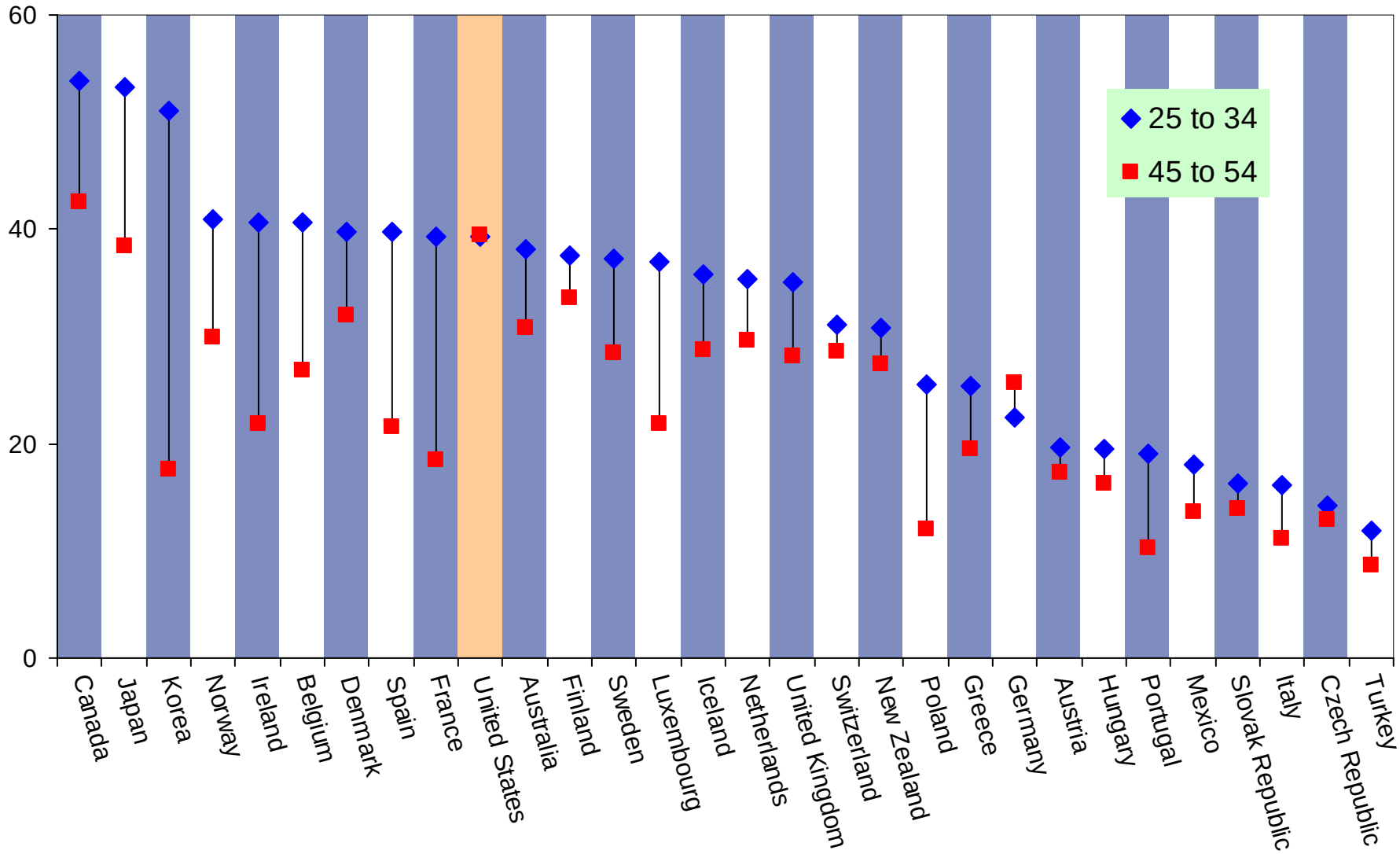
Source: 2006 ACS (PUMS)

Percent Hispanic/Latino, 2006
(Public Use Microdata Areas)



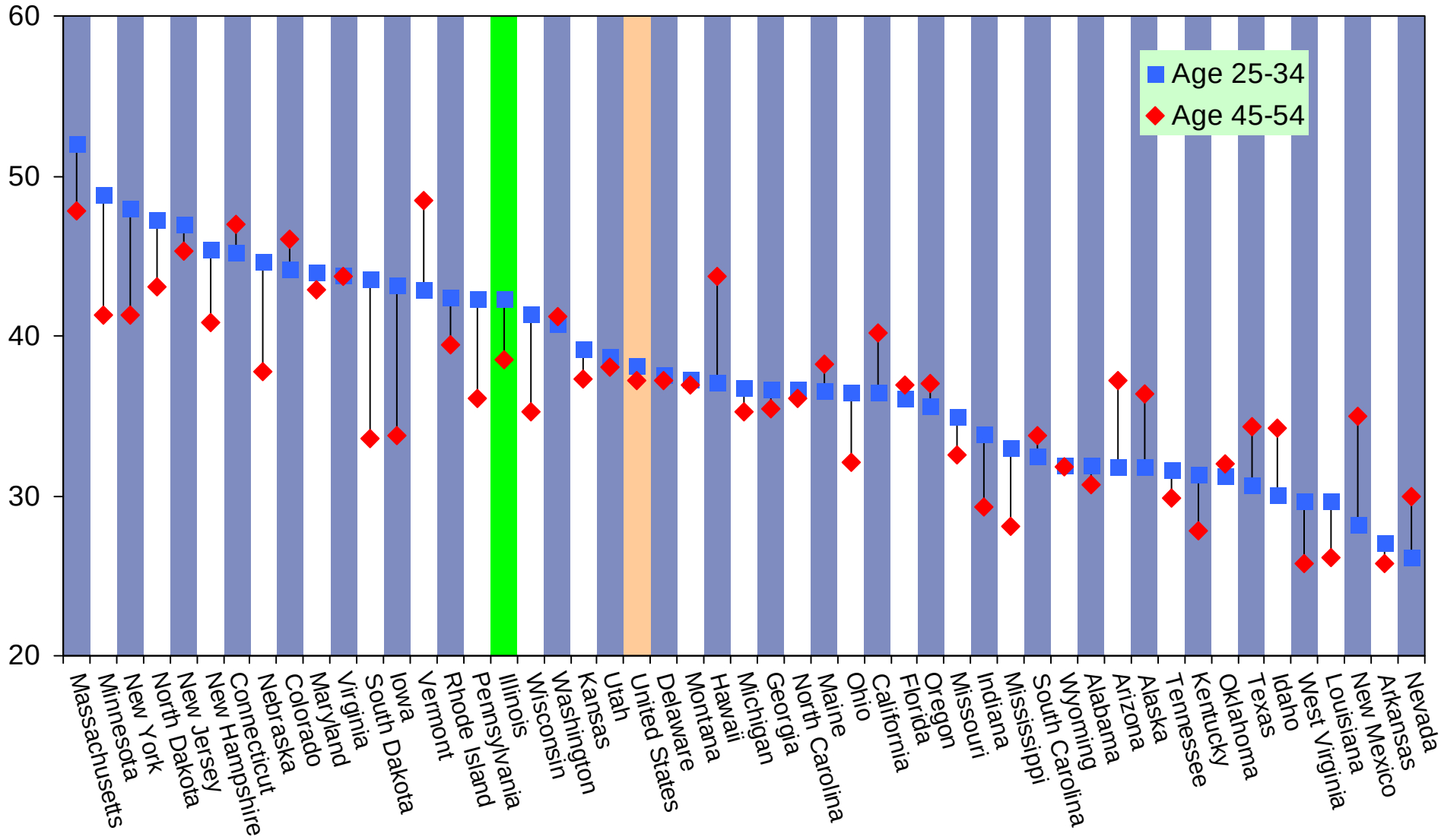
Source: 2006 ACS (PUMS)

Differences in College Attainment (Associate and Higher) Between Younger and Older Adults—U.S. and OECD Countries, 2005



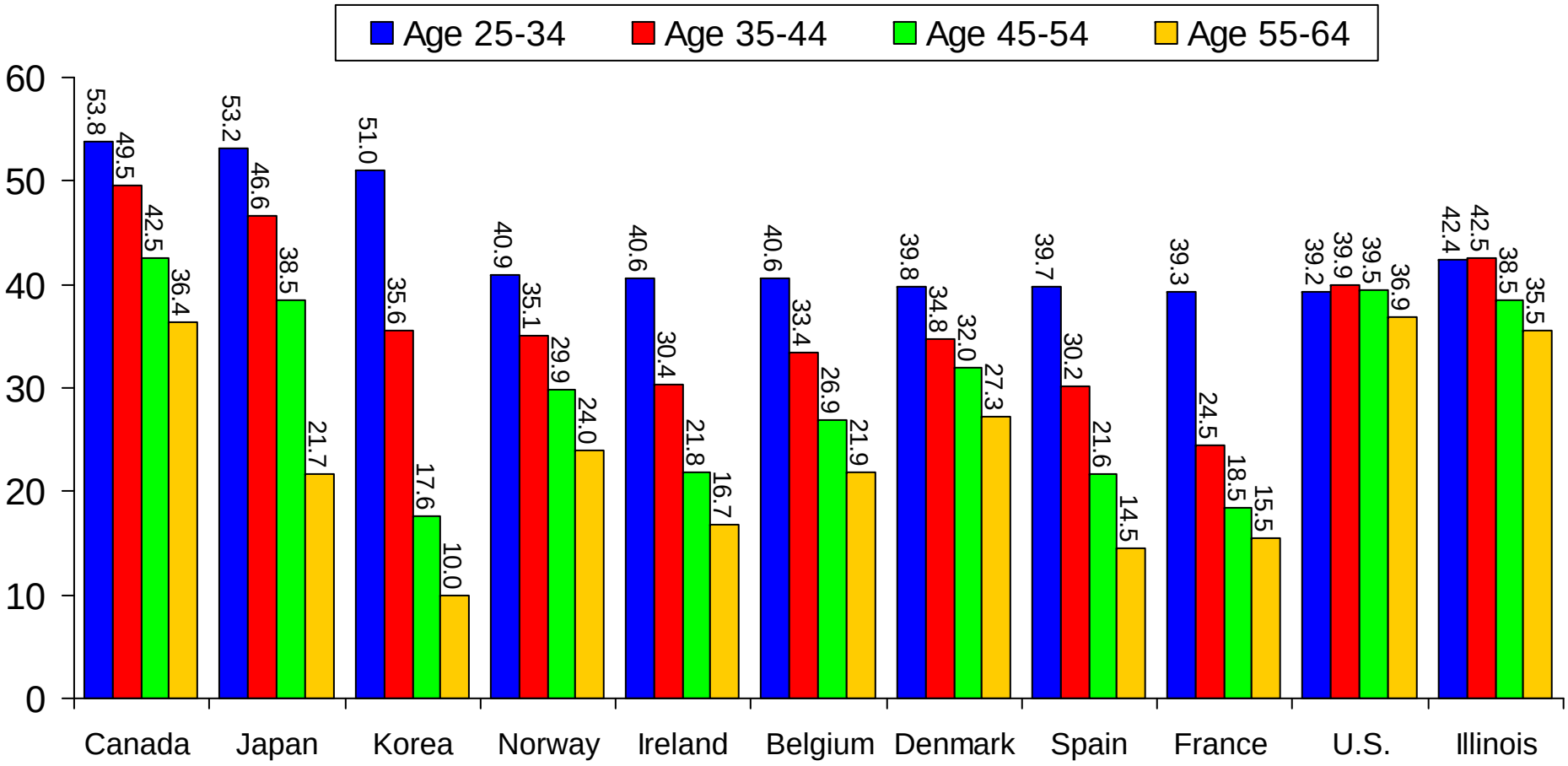
Source: Organisation for Economic Co-operation and Development (OECD), *Education at a Glance 2007*

Differences in College Attainment (Associate and Higher) Between Younger and Older Adults—U.S., 2005



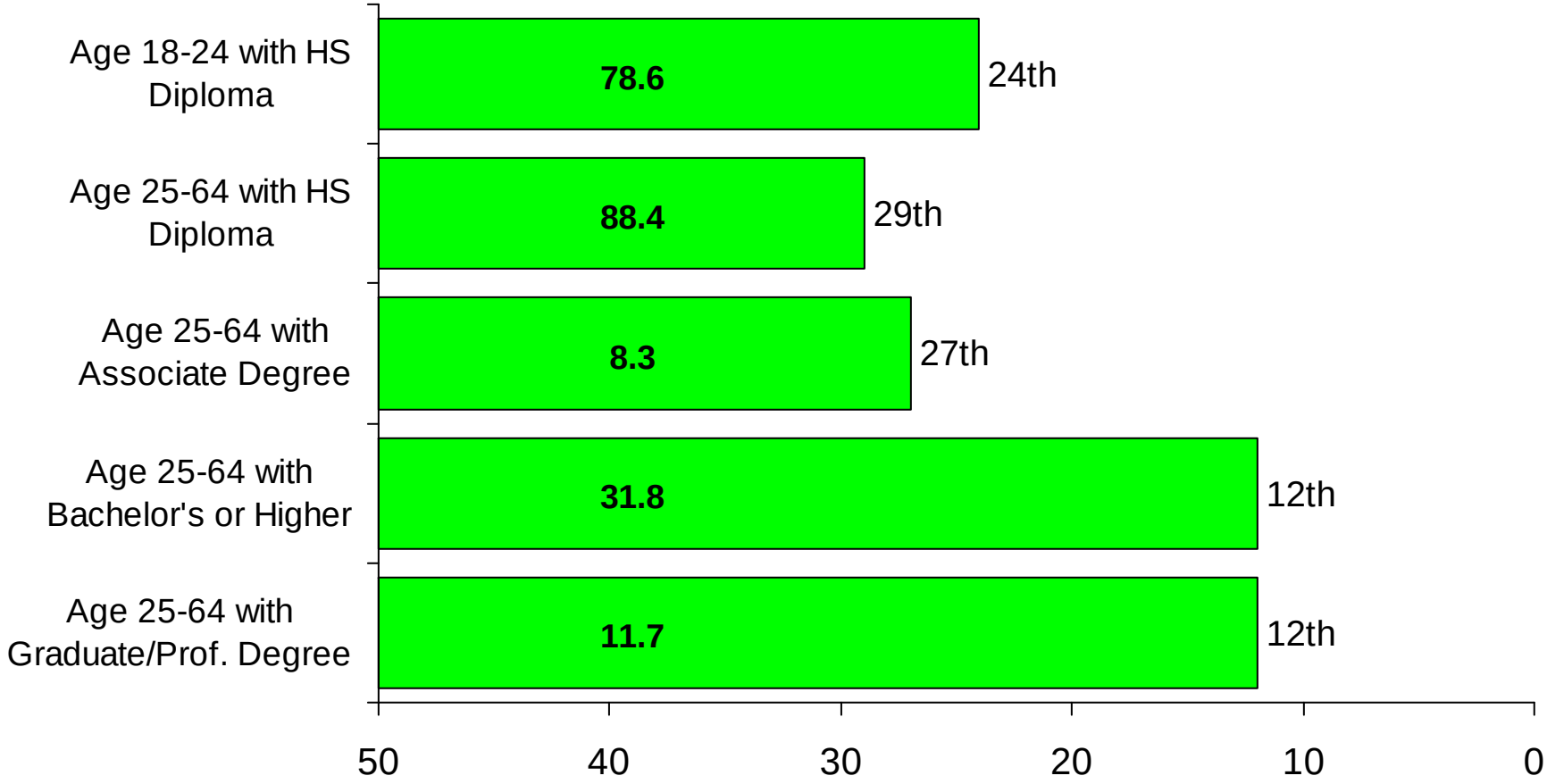
Source: U.S. Census Bureau, 2005 ACS

Percent of Adults with an Associate Degree or Higher by Age Group—Illinois, U.S. and Leading OECD Countries



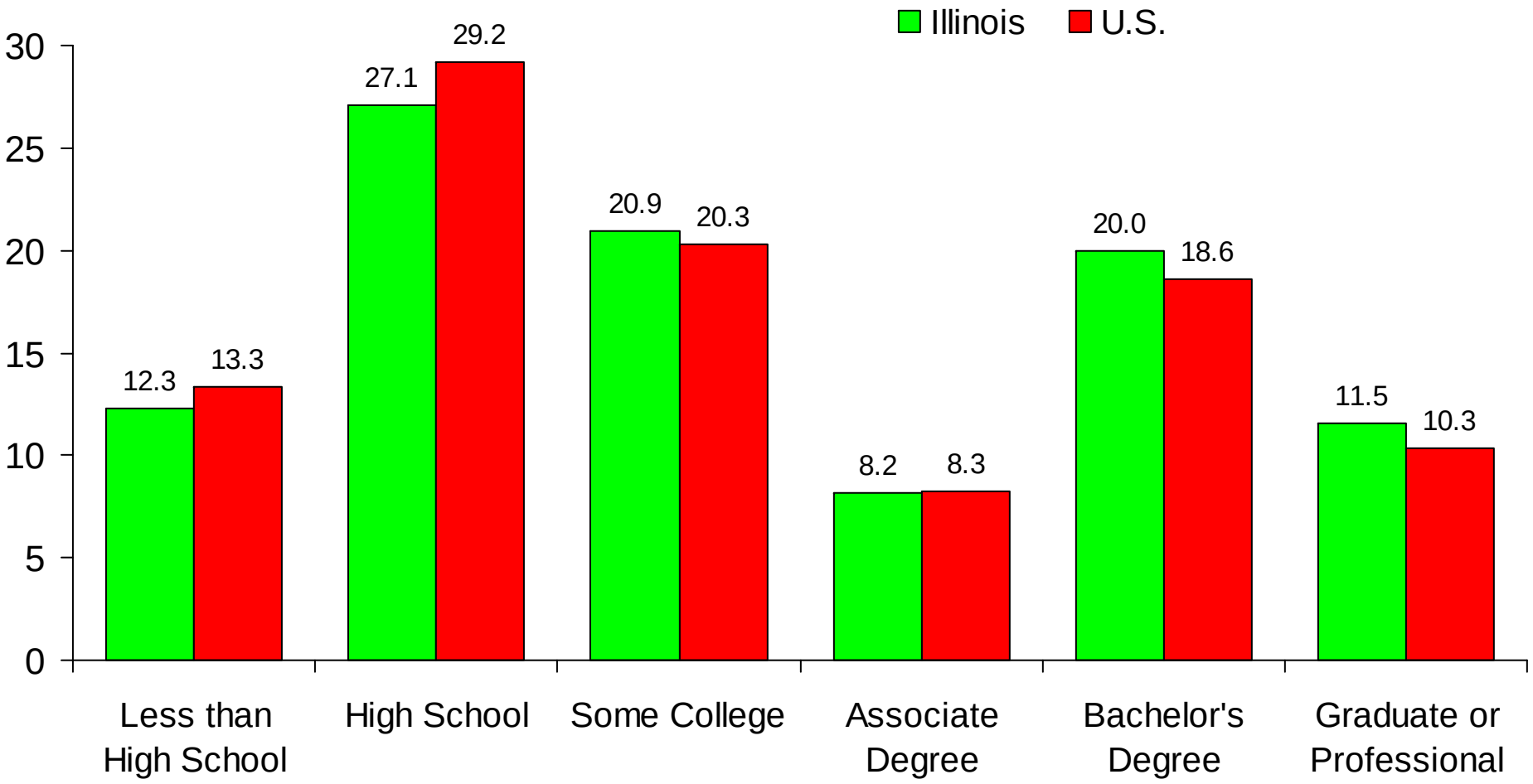
Source: OECD, *Education at a Glance 2007*

Educational Attainment and Rank Among States—Illinois, 2005 (Percent)



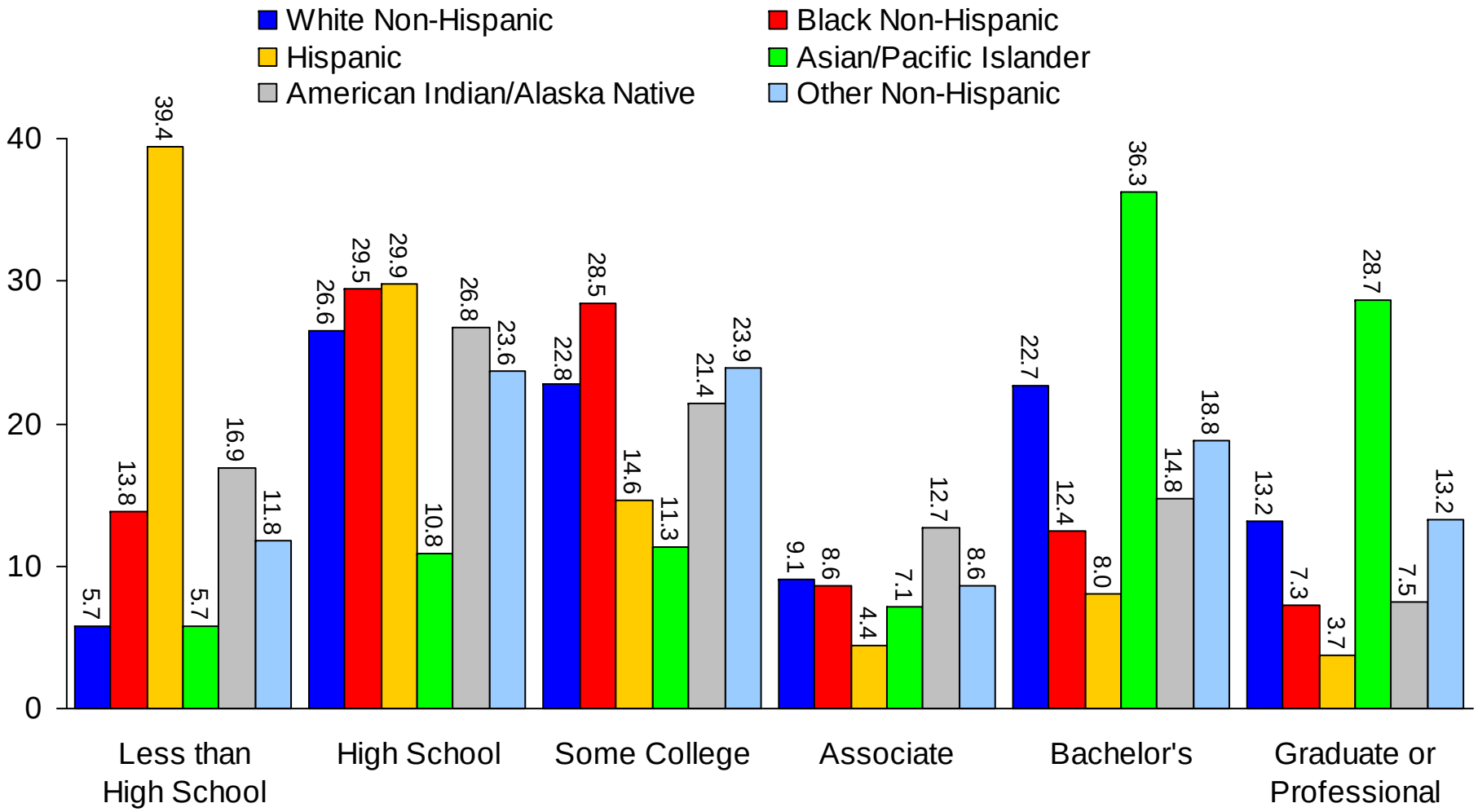
Source: U.S. Census Bureau, 2005 ACS

Educational Attainment of Population Age 25-64, 2006



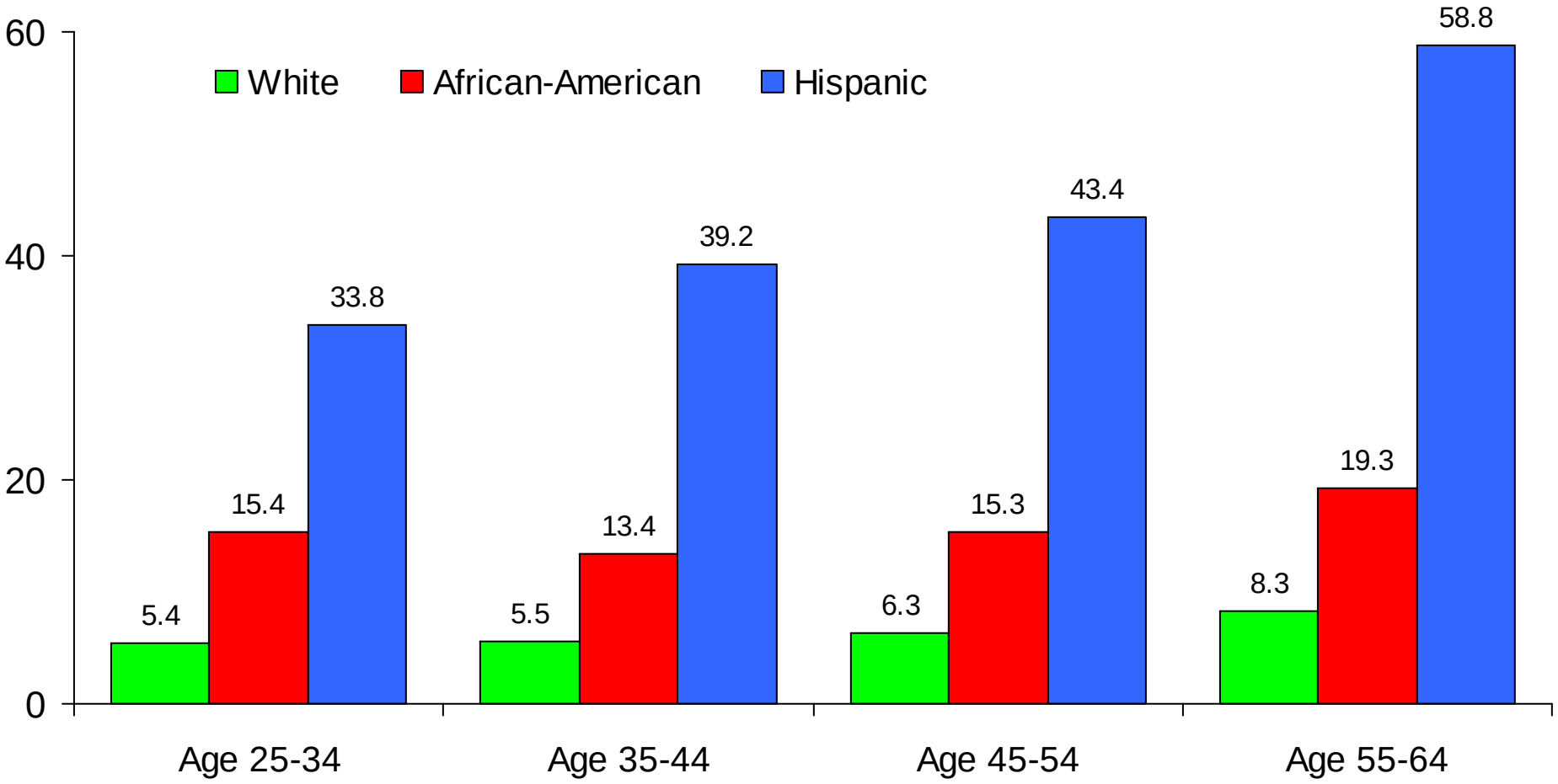
Source: U.S. Census Bureau, 2005 ACS (PUMS)

Percent Educational Attainment of Population Age 25-64 By Race/Ethnicity—Illinois, 2005



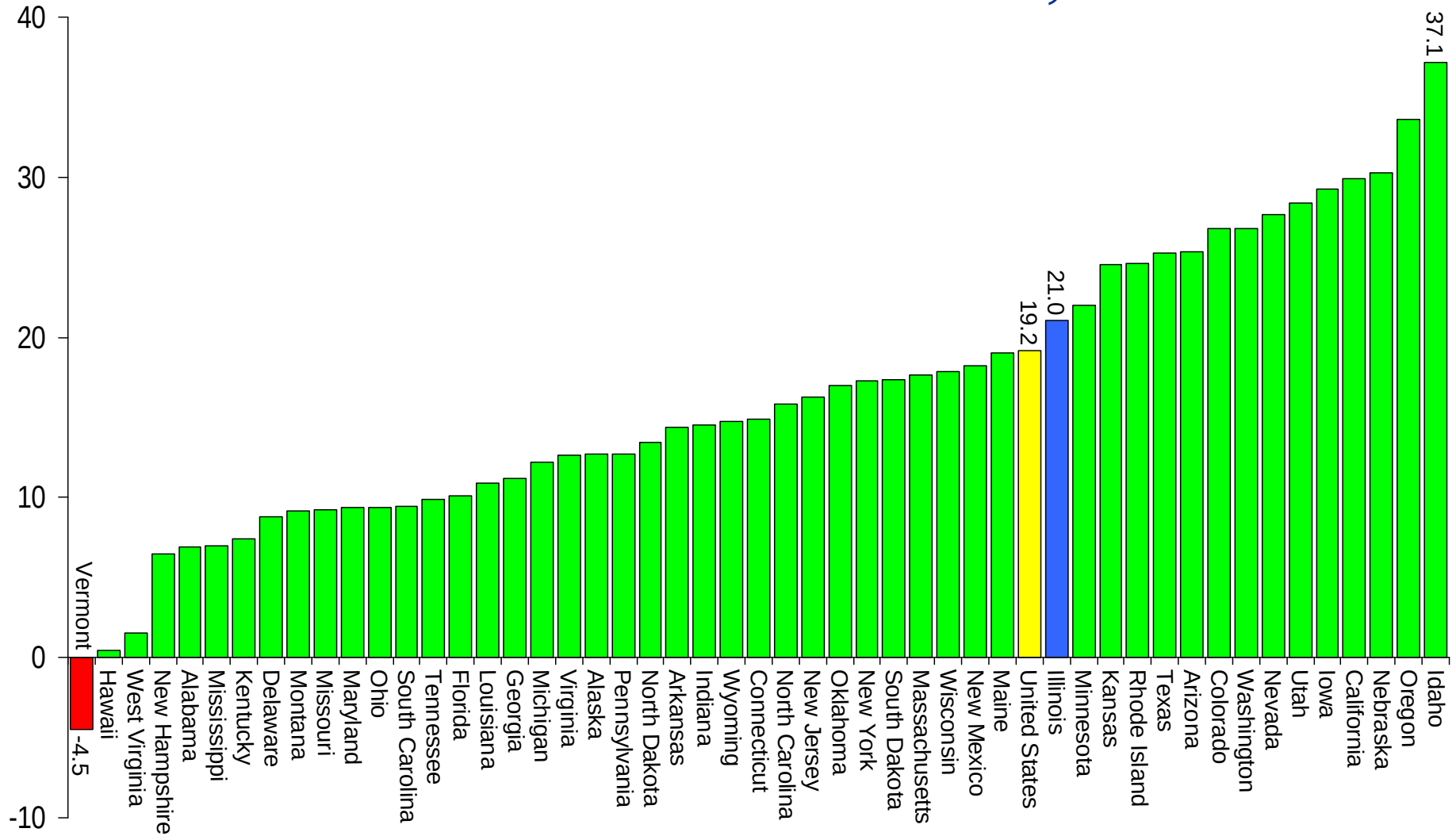
Source: U.S. Census Bureau, 2005 ACS (PUMS)

Percent of Adults with No High School Diploma by Age and Race/Ethnicity, 2006



Source: U.S. Census Bureau, 2006 ACS (PUMS)

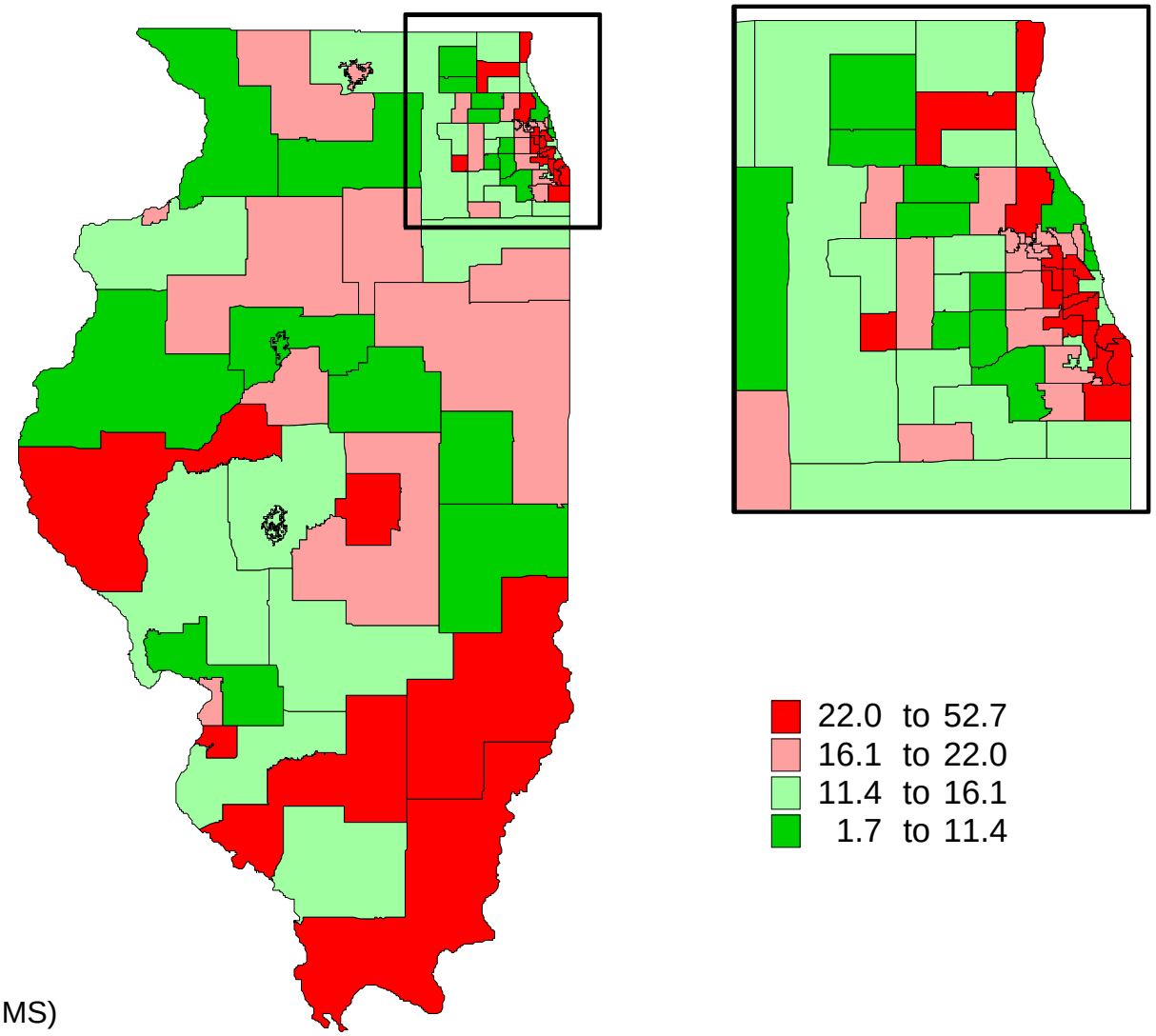
Difference in High School Attainment Between Whites and Minorities, 2006*



* Minorities include African-American, Hispanic, and Native American

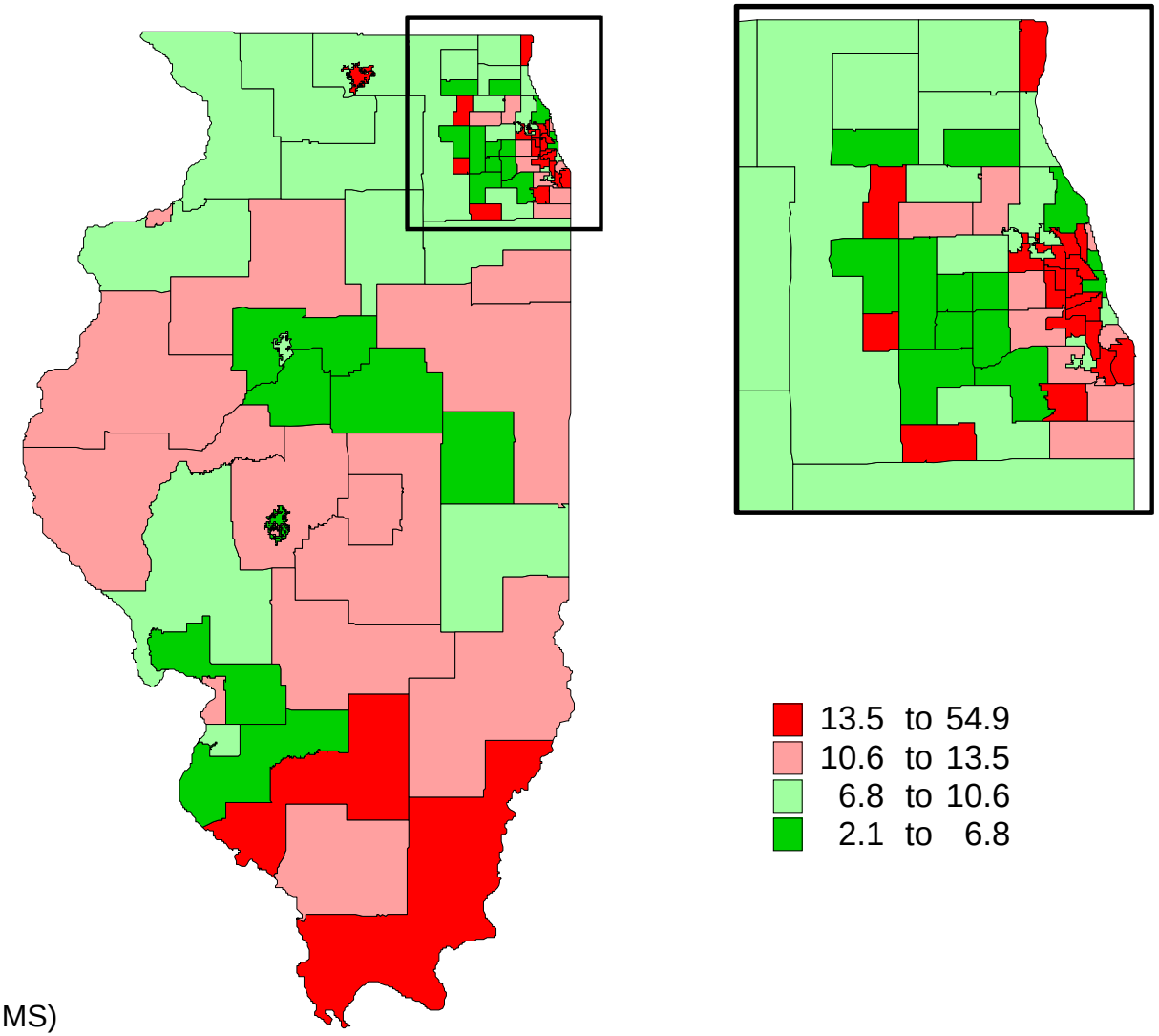
Source: U.S. Census Bureau, 2006 ACS (PUMS)

Percent of Population Age 18-24 with No High School Diploma, 2006 (Public Use Microdata Areas)



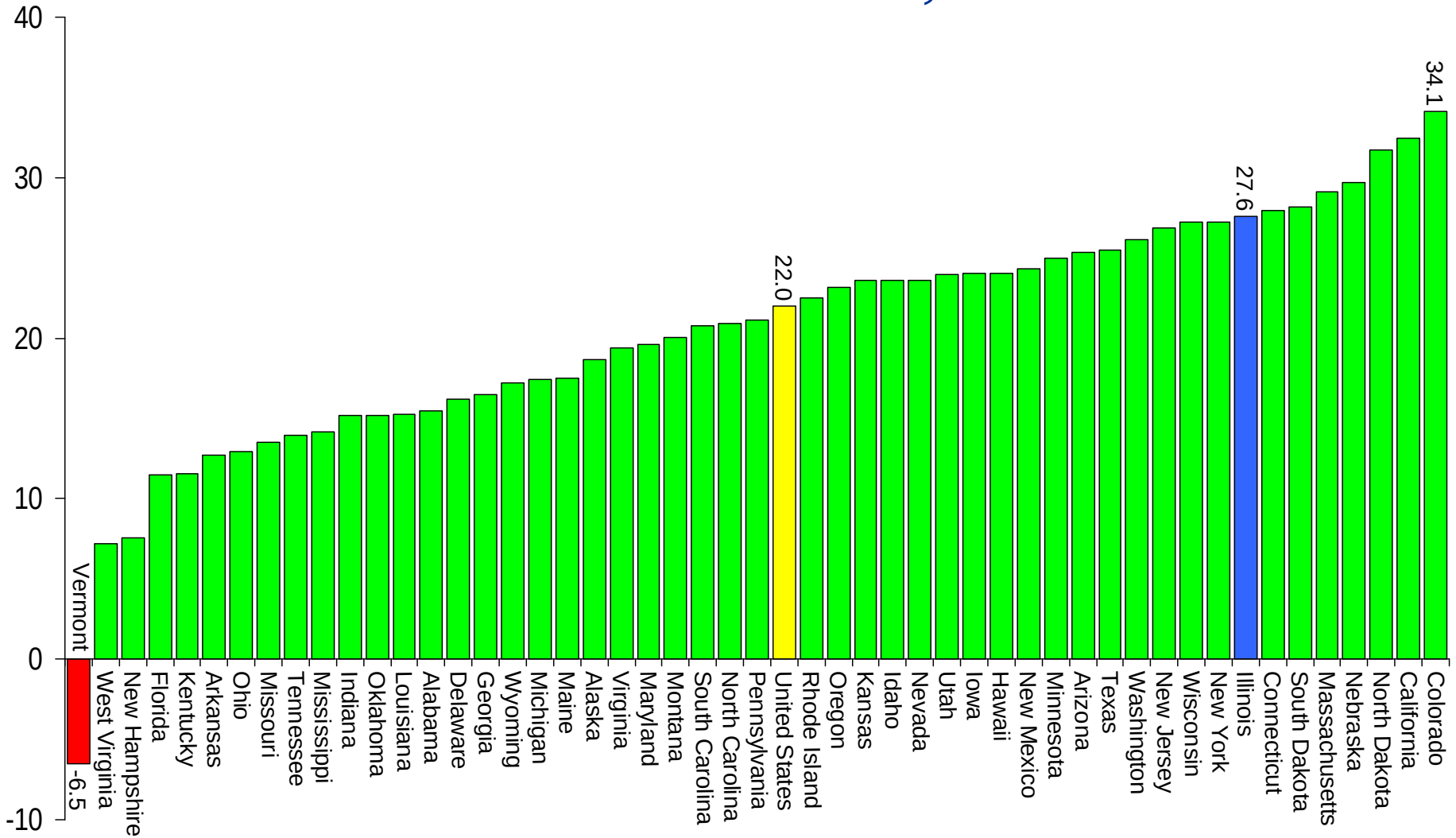
Source: 2006 ACS (PUMS)

Percent of Population Age 25-64 with No High School Diploma, 2006 (Public Use Microdata Areas)



Source: 2006 ACS (PUMS)

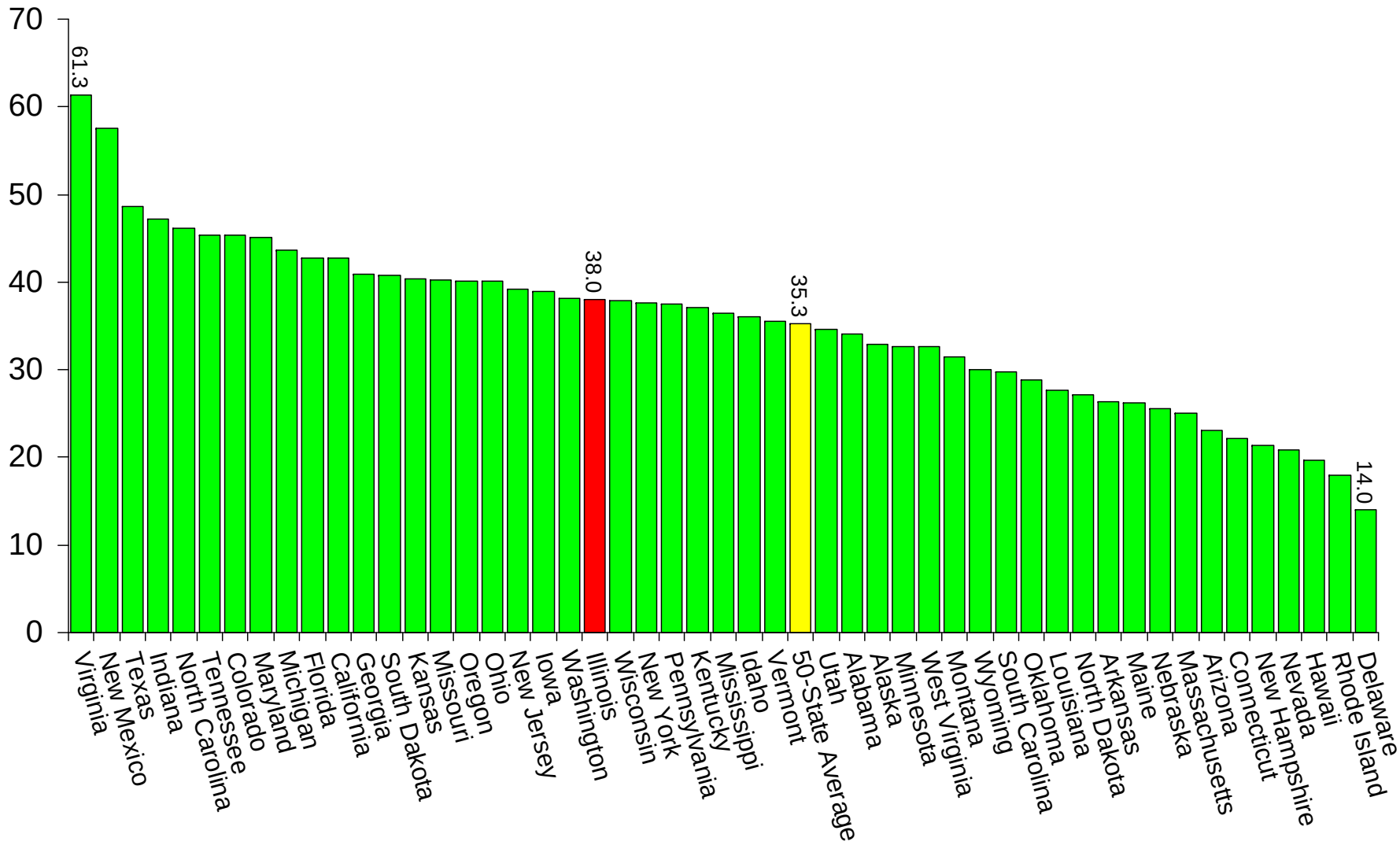
Difference in College Attainment Between Whites and Minorities, 2006*



* Minorities include African-American, Hispanic, and Native American

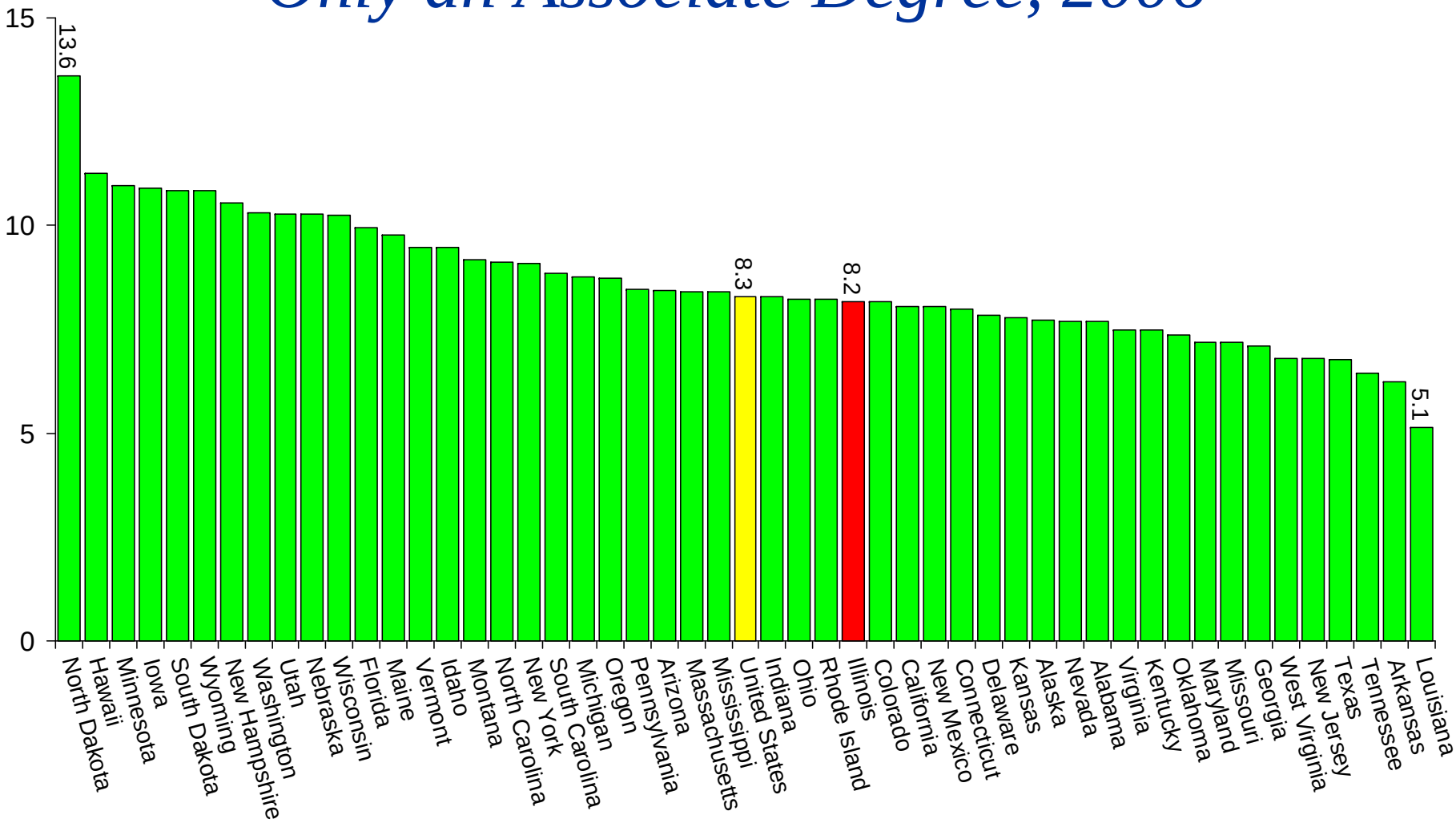
Source: U.S. Census Bureau, 2006 ACS (PUMS)

Gaps in Percentage of Residents Age 25-64 with a College Degree Between the Most and Least Educated Counties, 2000



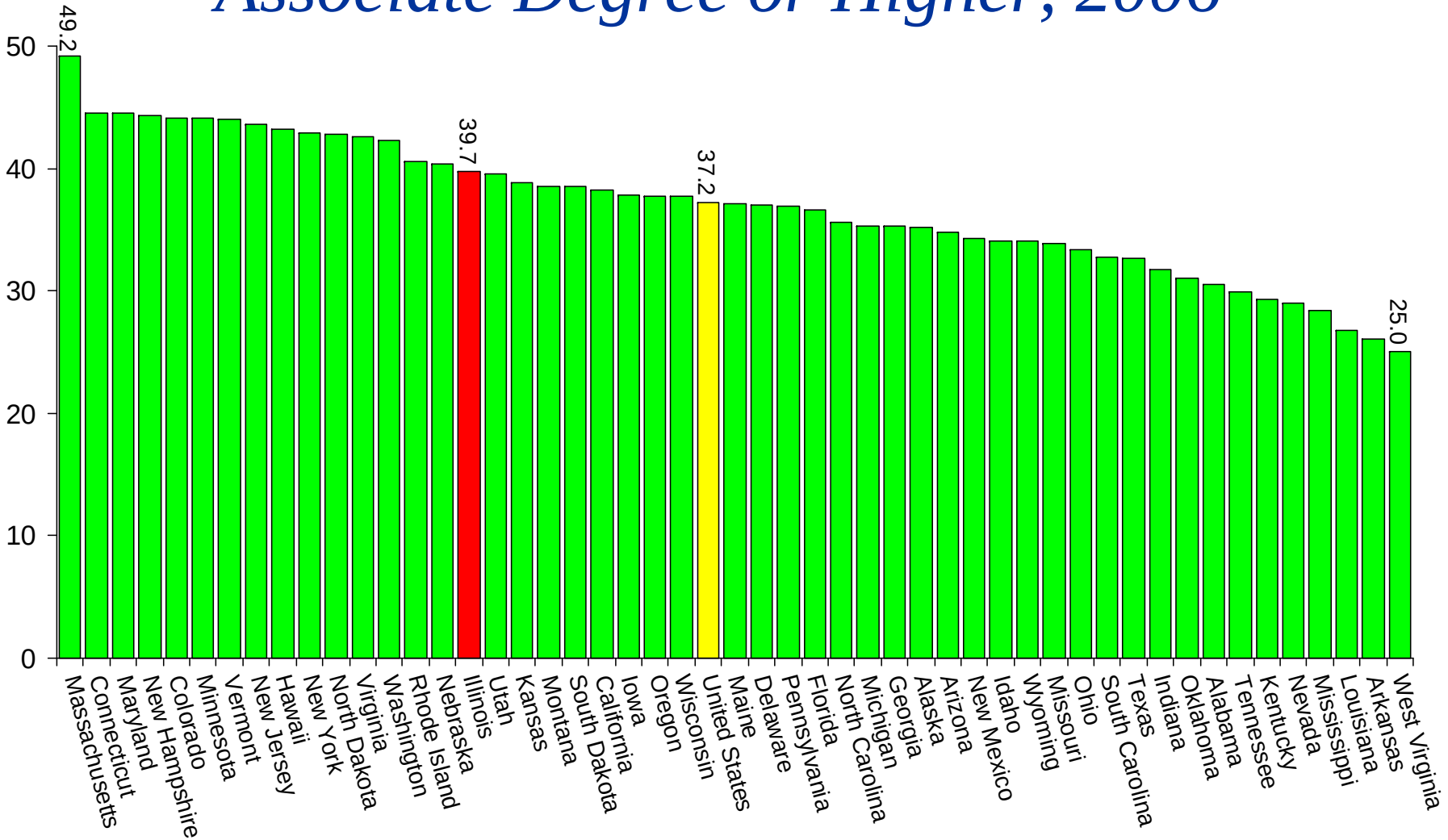
Source: U.S. Census Bureau, 2000 Census

Percent of Population Age 25-64 with Only an Associate Degree, 2006



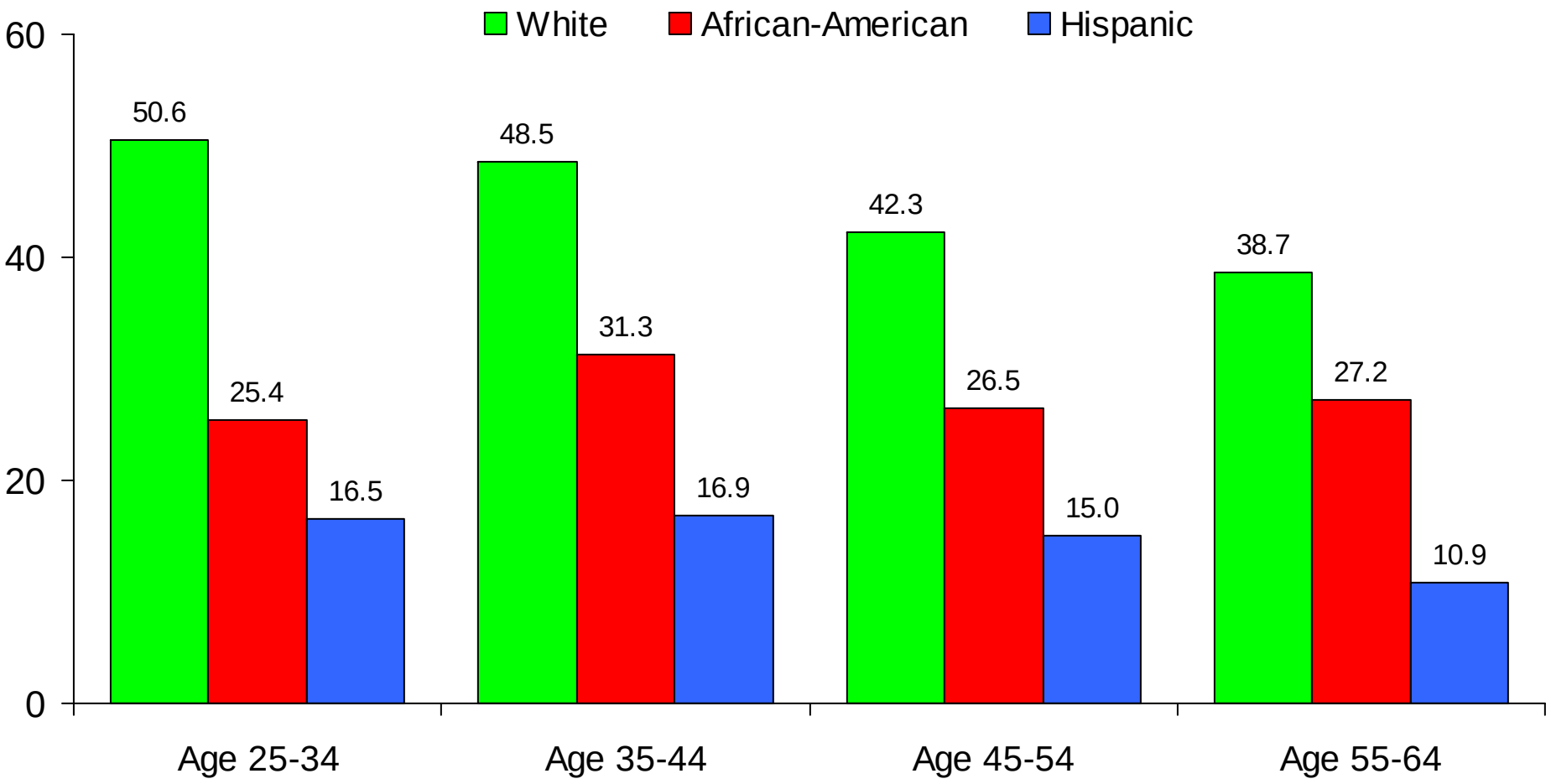
Source: U.S. Census Bureau, 2006 ACS

Percent of Population Age 25-64 with an Associate Degree or Higher, 2006



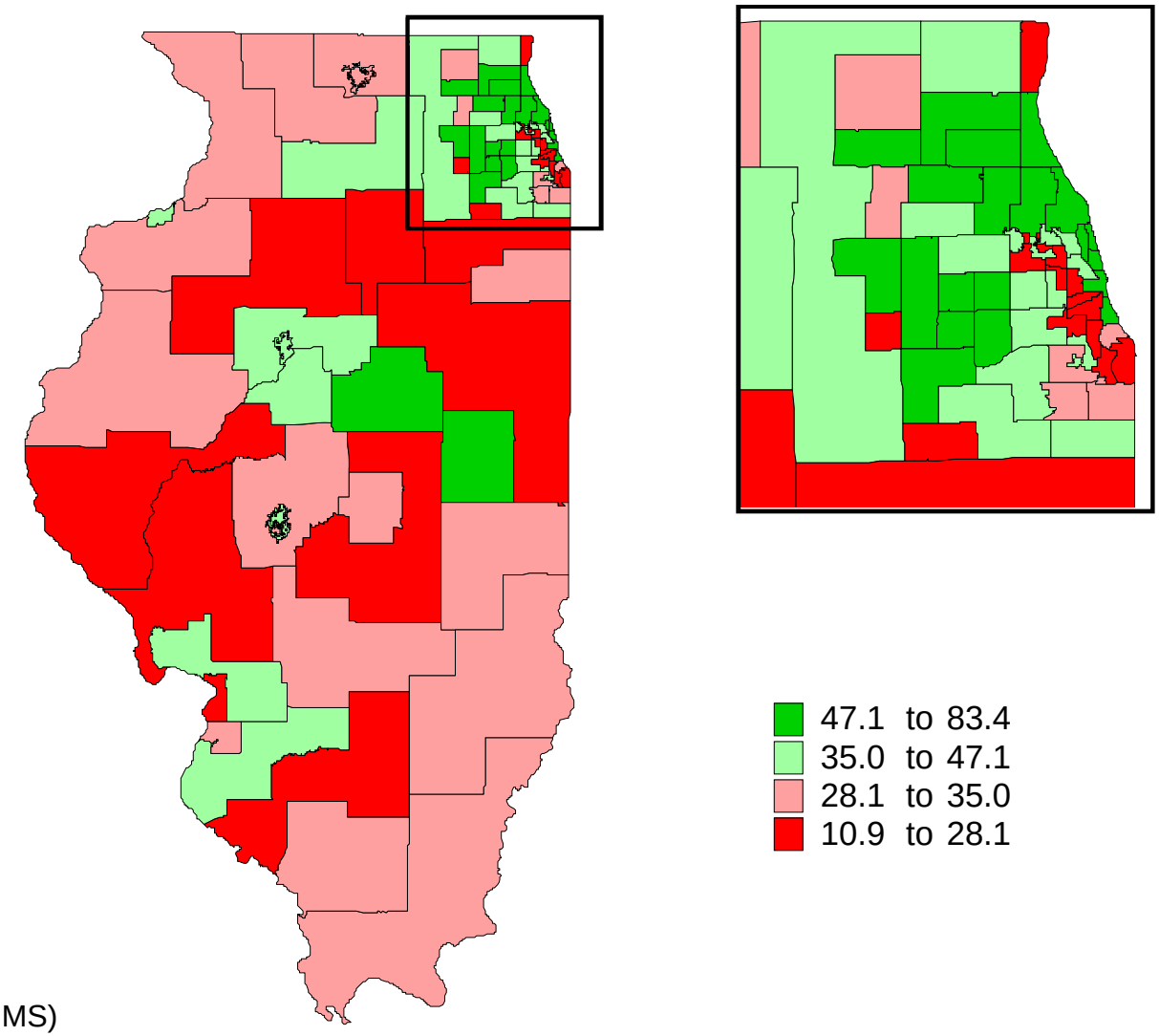
Source: U.S. Census Bureau, 2006 ACS

Percent of Adults with a College Degree (Associate and Higher) by Age and Race/Ethnicity, 2006



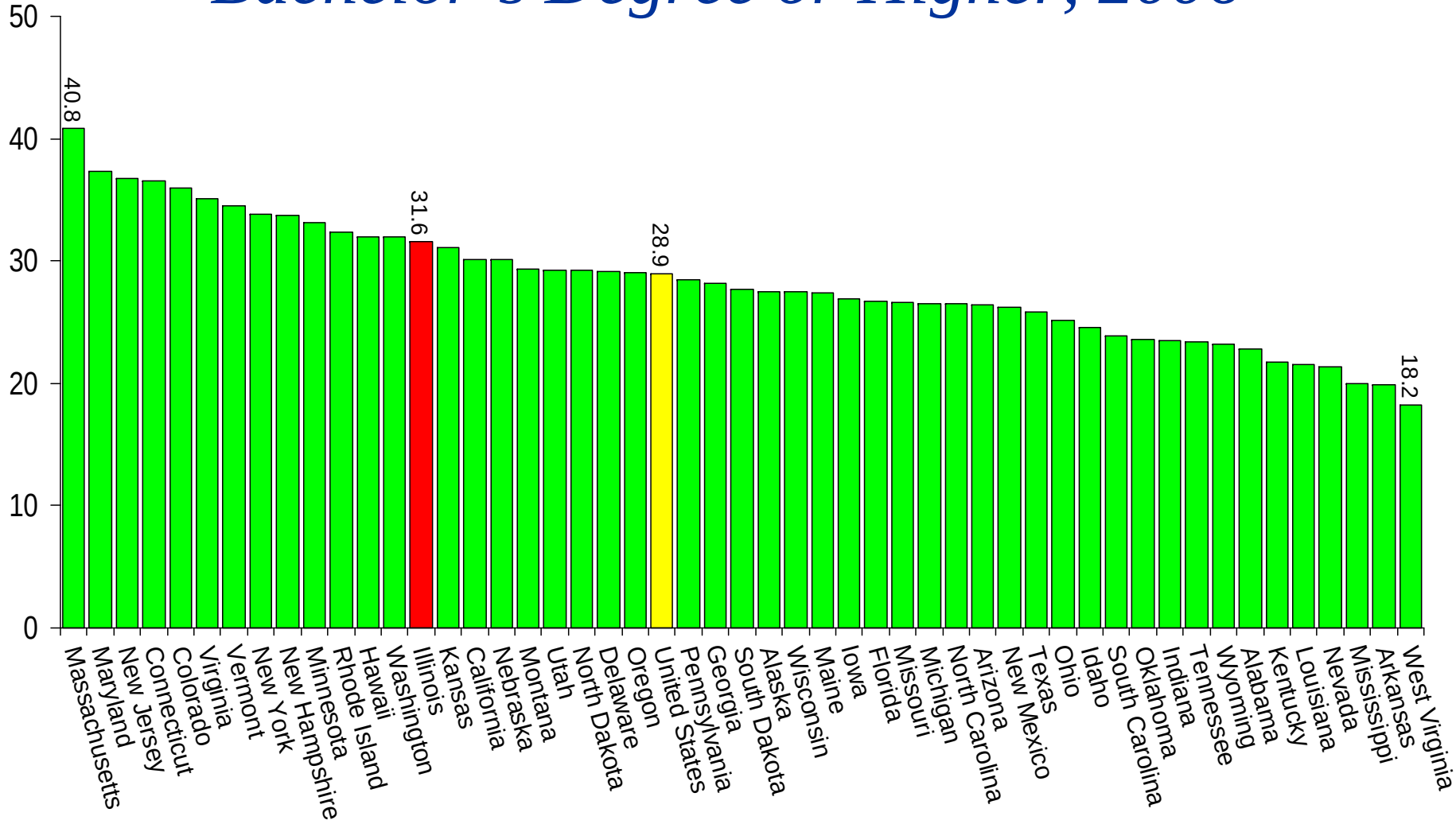
Source: U.S. Census Bureau, 2006 ACS (PUMS)

Percent of Population Age 25-64 with an Associate Degree or Higher, 2006 (Public Use Microdata Areas)



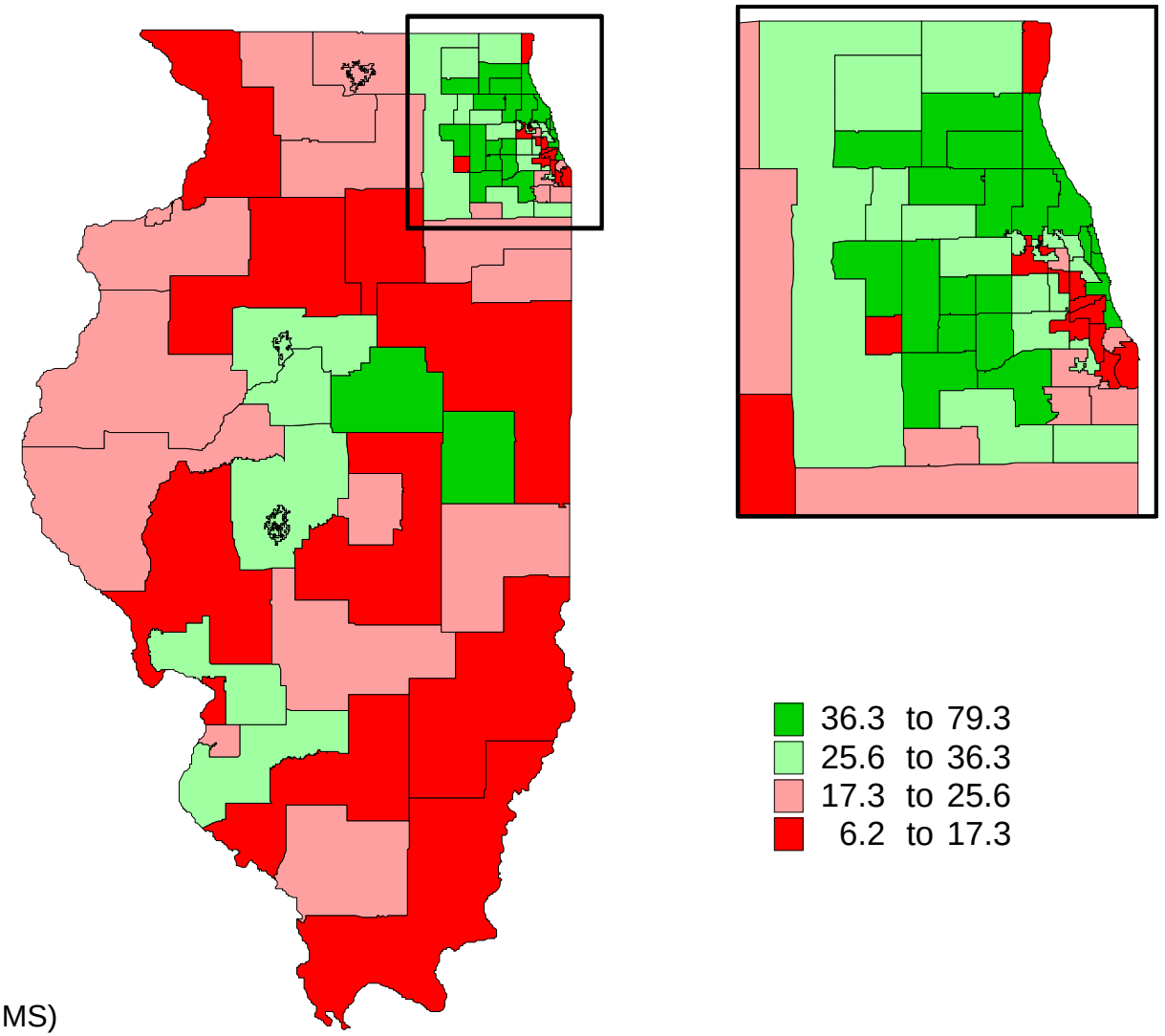
Source: 2006 ACS (PUMS)

Percent of Population Age 25-64 with a Bachelor's Degree or Higher, 2006



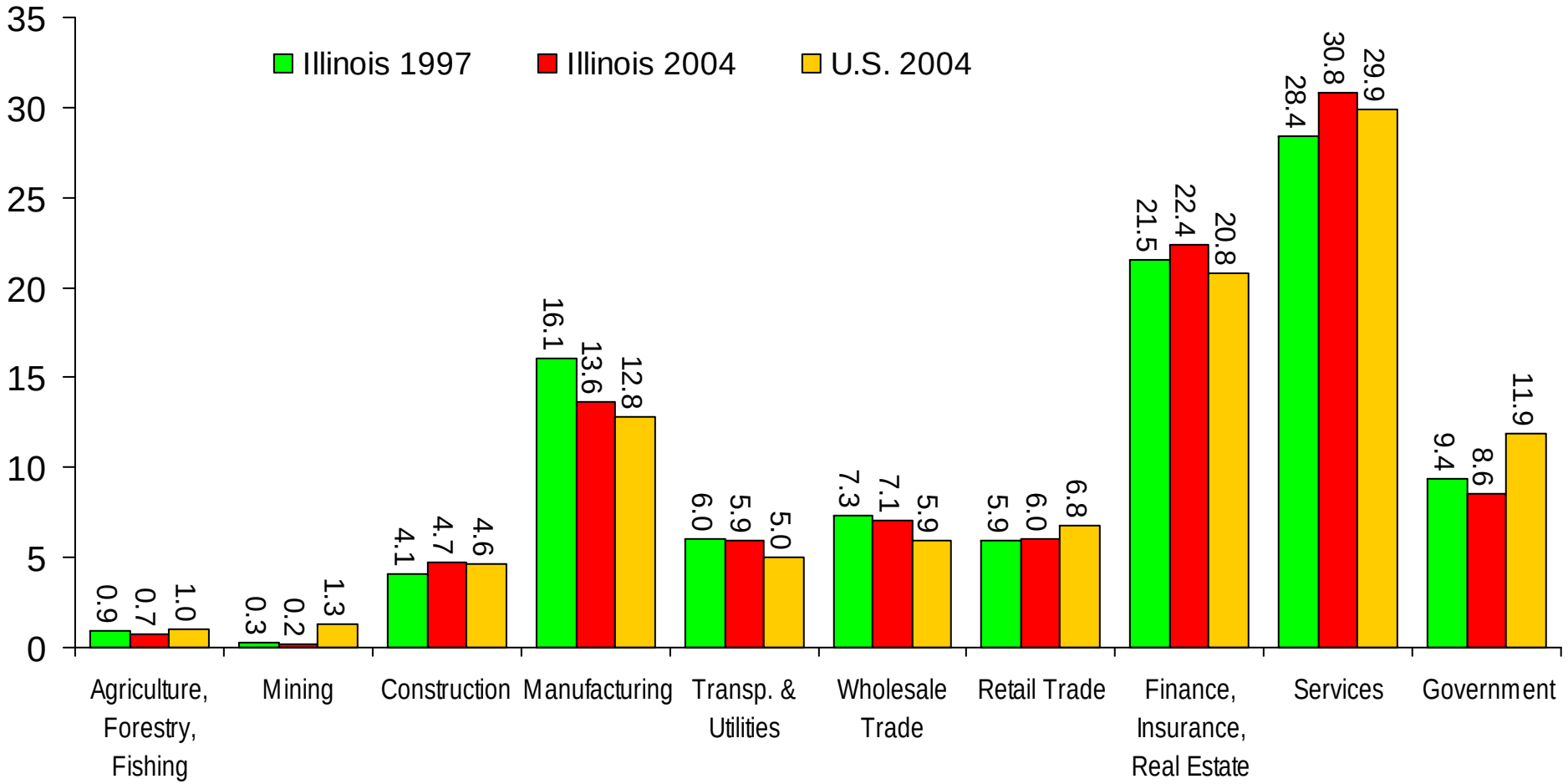
Source: U.S. Census Bureau, 2006 ACS

Percent of Population Age 25-64 with a Bachelor's Degree or Higher, 2006 (Public Use Microdata Areas)



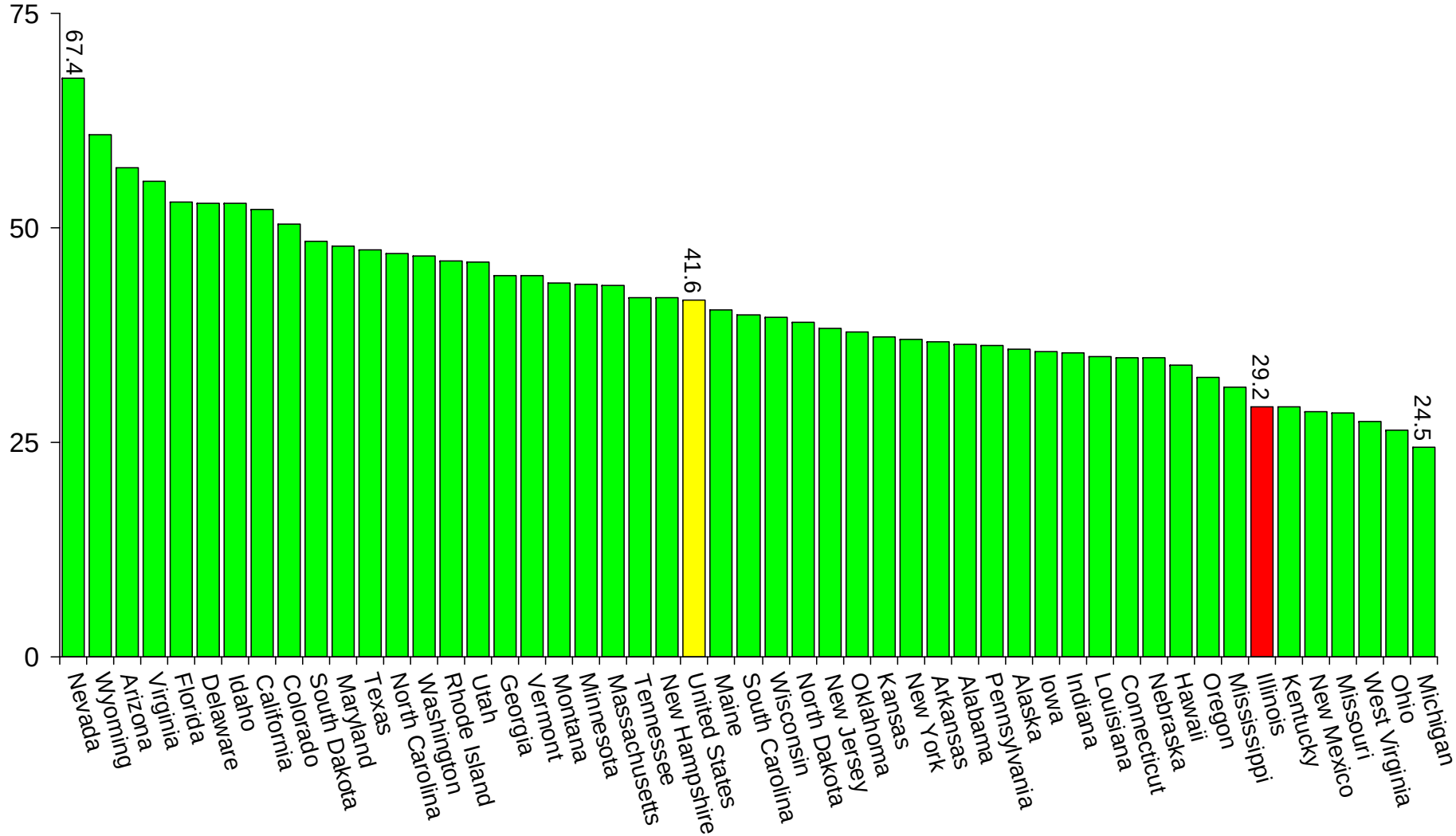
Source: 2006 ACS (PUMS)

Percent of Total Gross State Product by Industry and Comparison to U.S.



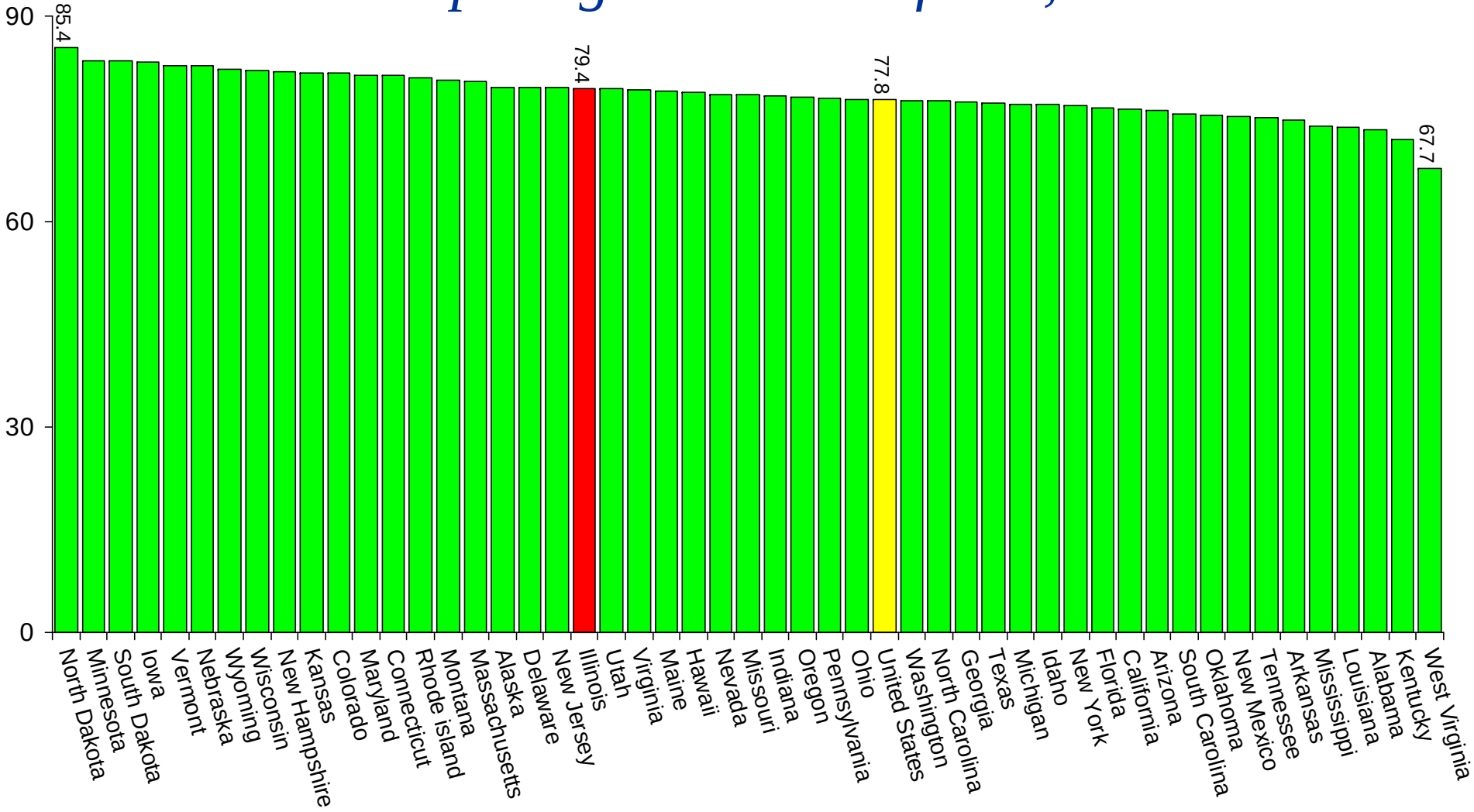
Source: Bureau of Labor Statistics

Change in Gross State Product, 1997-2004



Source: Bureau of Economic Analysis

Percent of Civilian Population Age 25-64 Participating in the Workforce, 2005



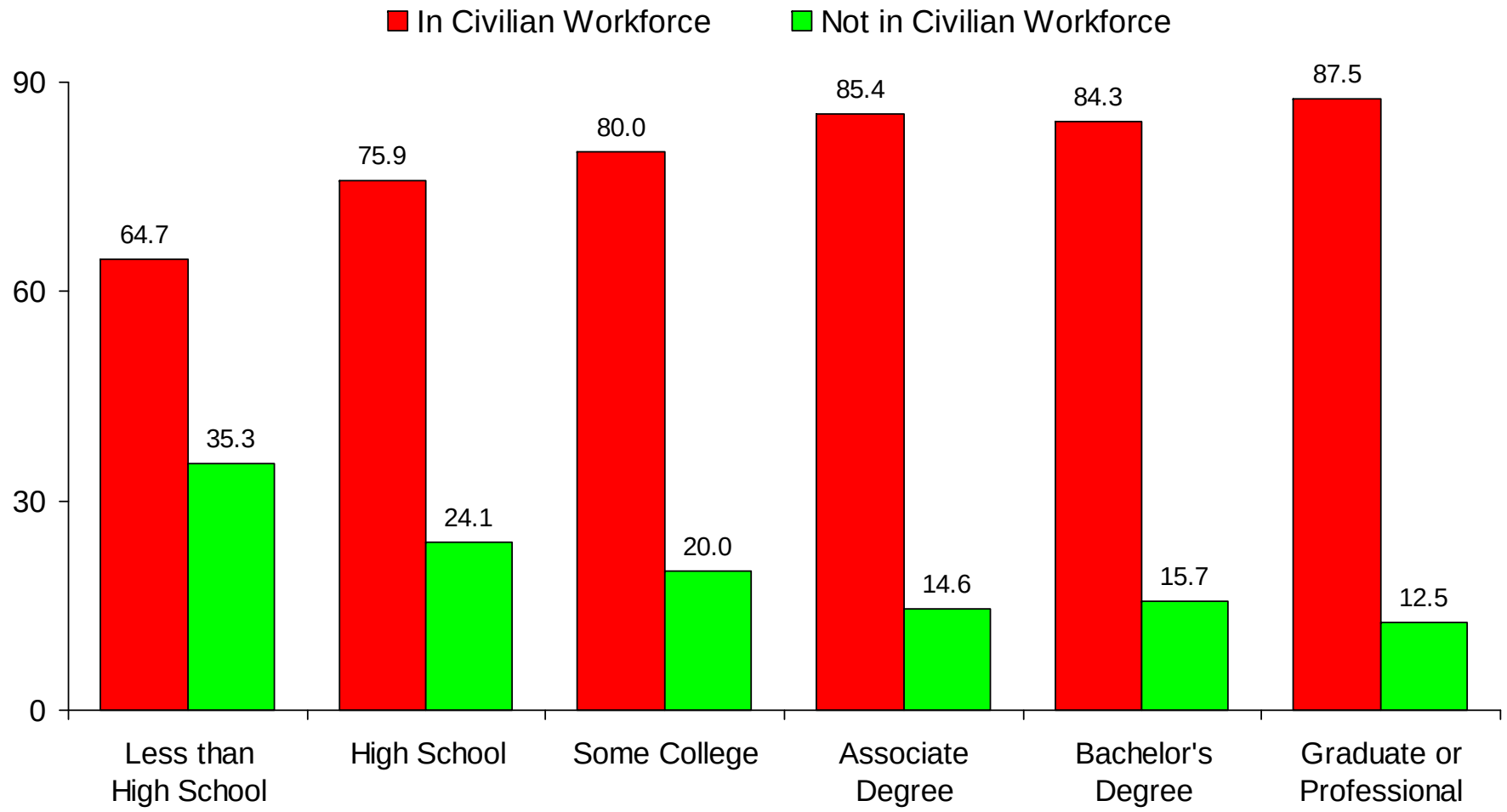
Source: U.S. Bureau of Labor Statistics

Percent of Civilians Age 25-64 Not Participating in the Workforce—By Education Attainment, 2005

	U.S.	Illinois
Less than High School	37.0	35.3
High School	24.7	24.1
Some College	21.0	20.0
Associate Degree	17.4	14.6
Bachelor's Degree	16.5	15.7
Graduate/Prof. Degree	13.9	12.5

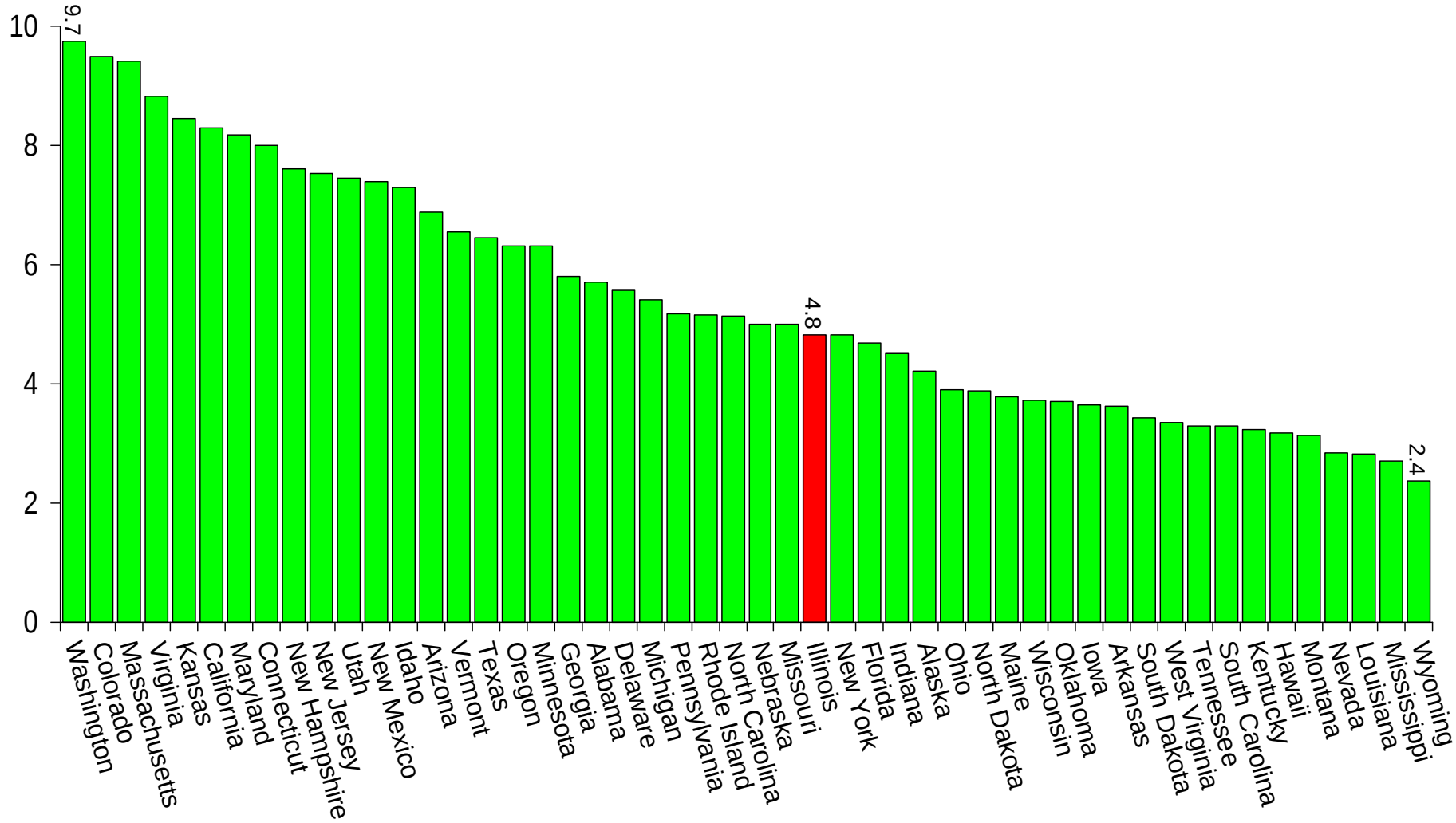
Source: U.S. Census Bureau, 2005 ACS (PUMS)

Percent of Civilians Age 25-64 Participating in the Workforce by Level of Education, 2005—Illinois



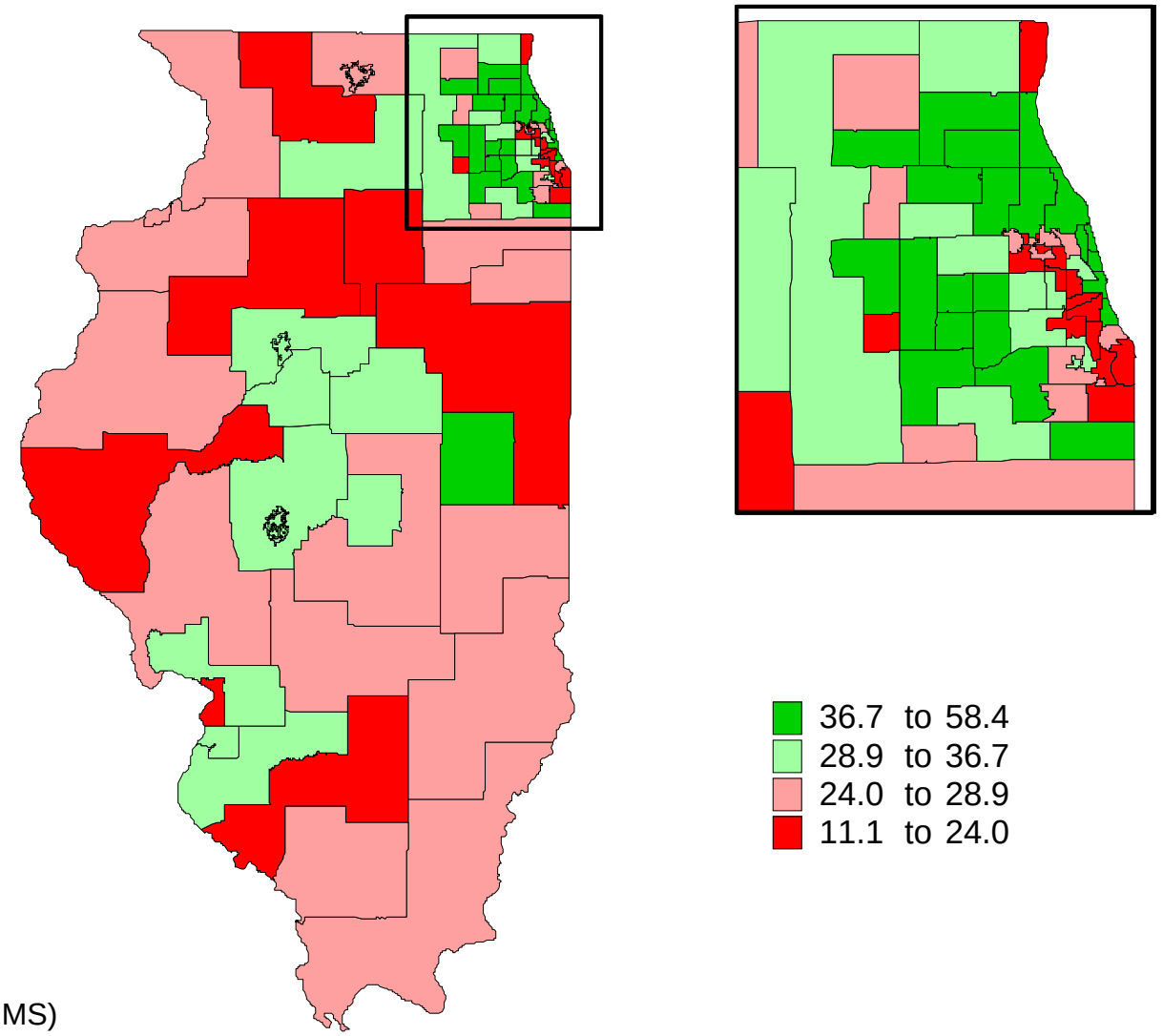
Source: Integrated Public Use Microdata Series 5% Sample, Minnesota Population Center

Employment in High-Technology Establishments as Share of Total Employment by State, 2004



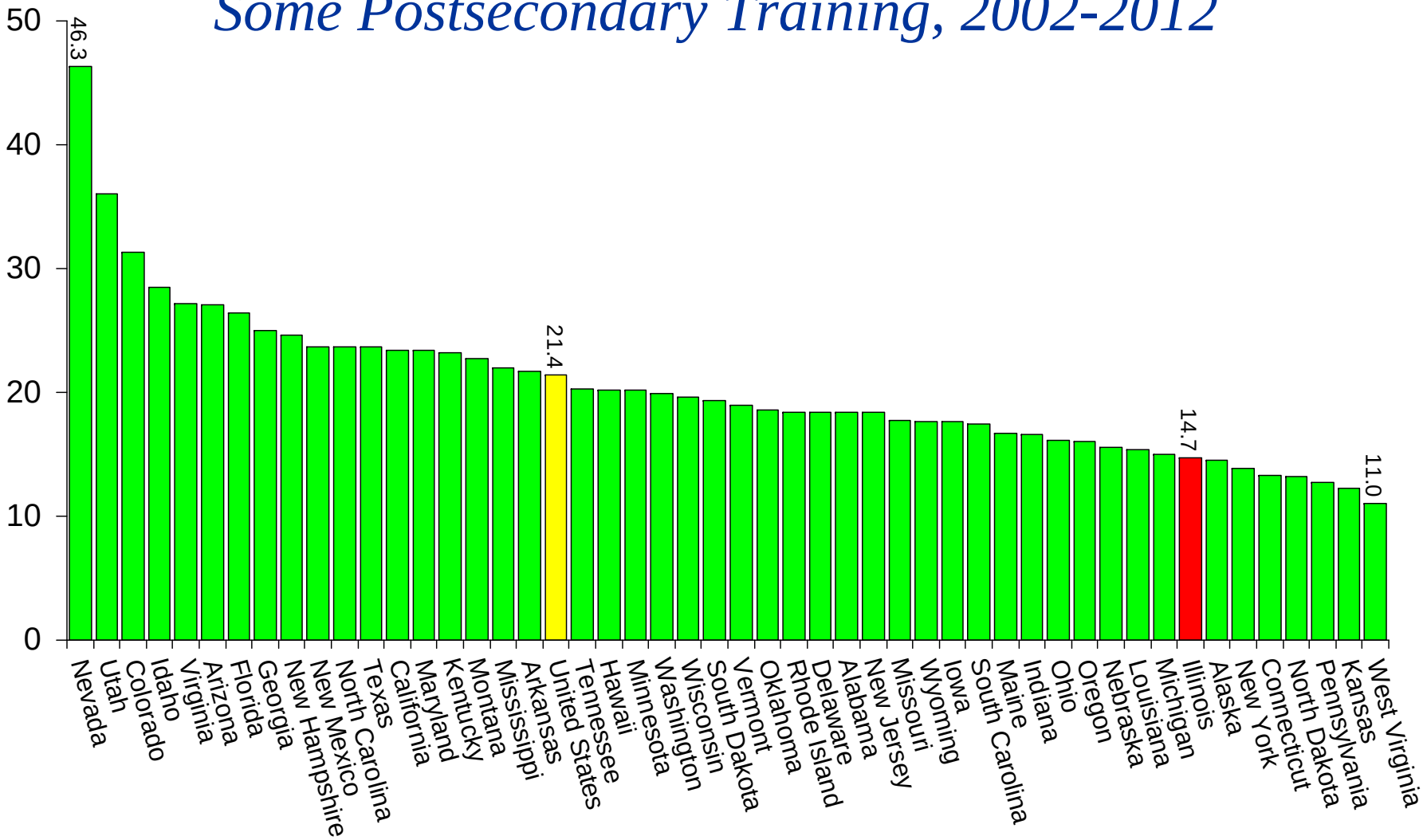
Source: U.S. Bureau of Labor Statistics, Corporation for Enterprise Development (CFED)

Percent Employment in Management and Professional Occupations, 2006 (Public Use Microdata Areas)



Source: 2006 ACS (PUMS)

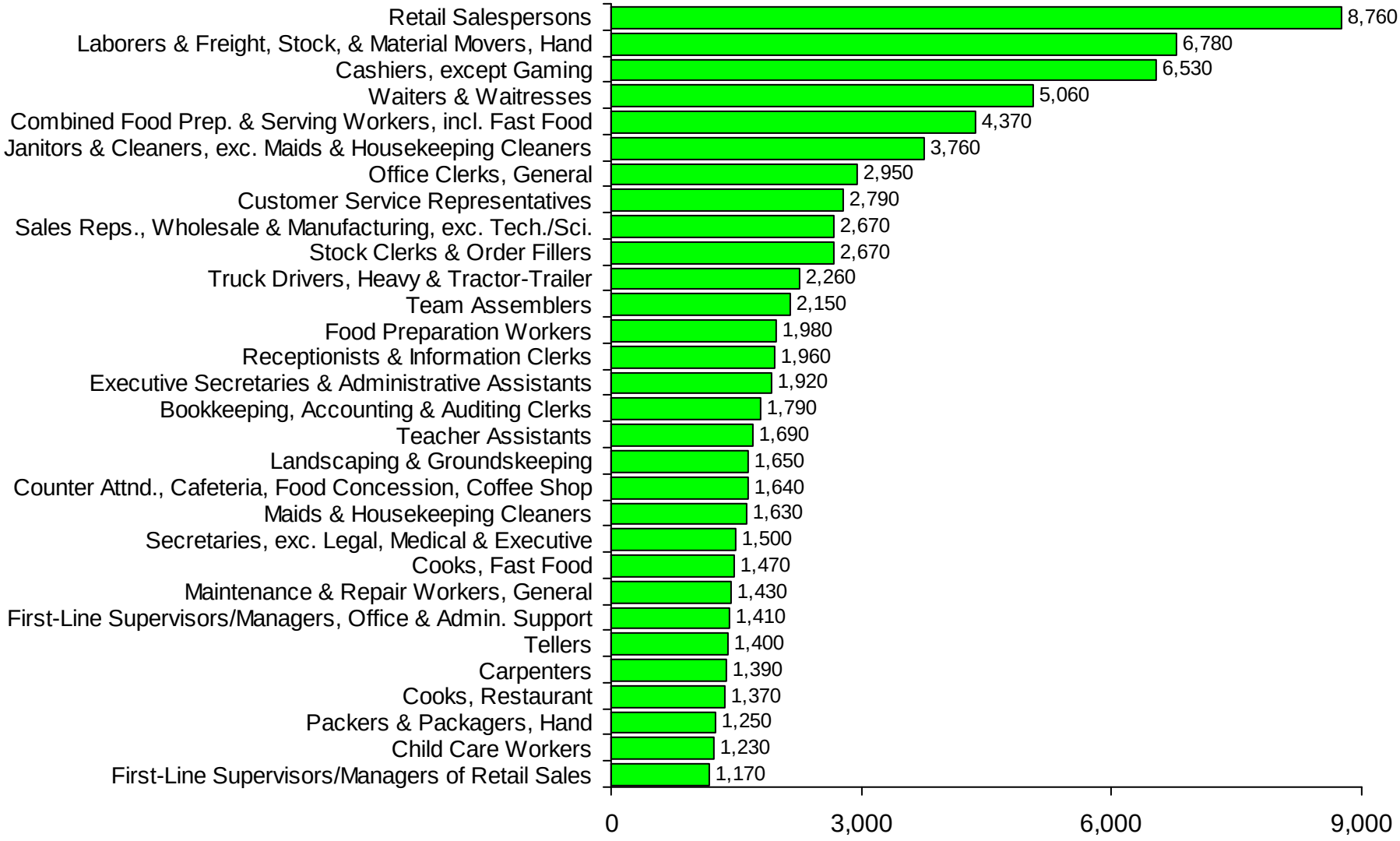
Projected Percent Change in Occupations Requiring Some Postsecondary Training, 2002-2012



Note: Some college, Associate, Bachelor's and higher.

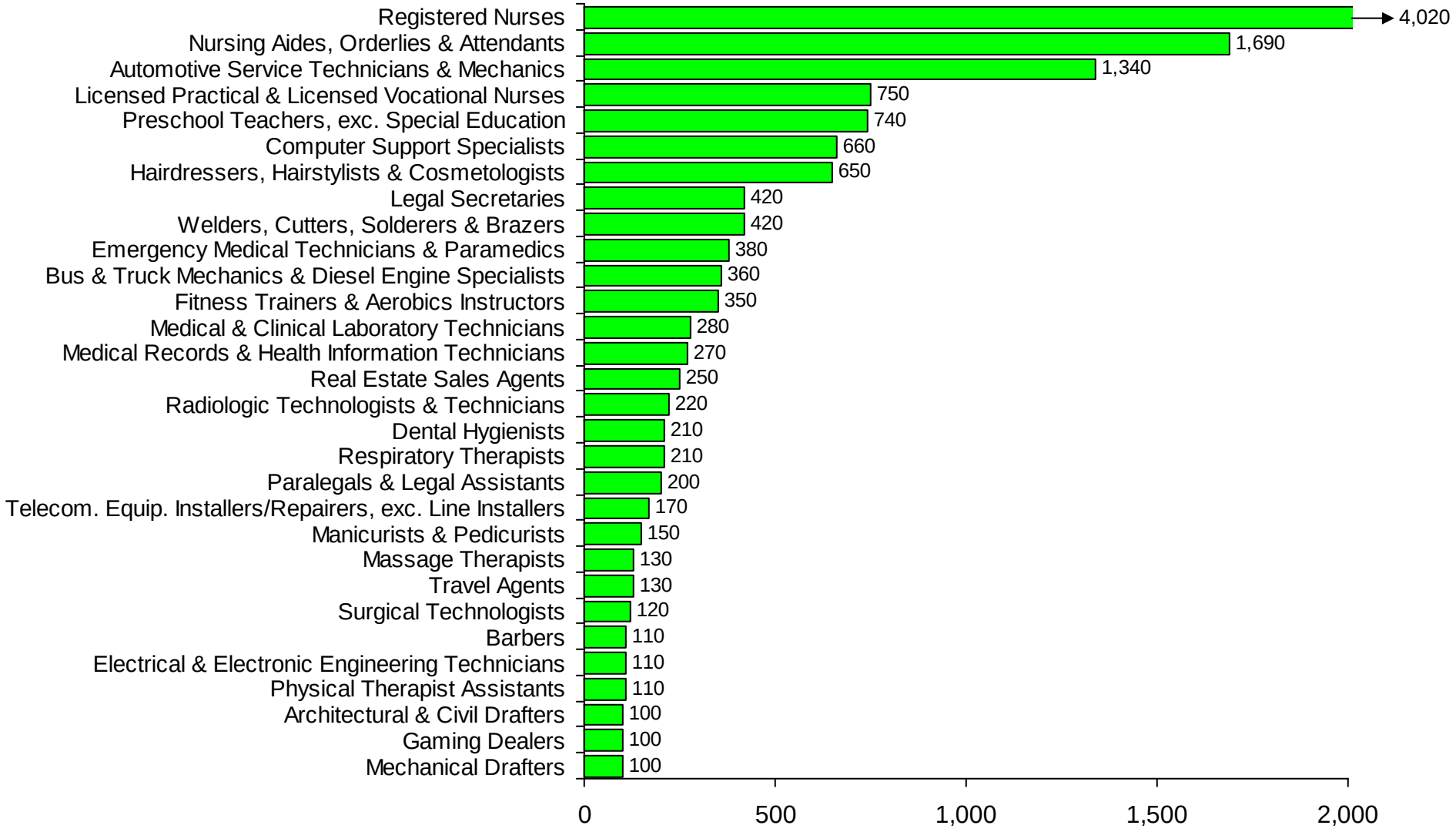
Source: ACINet, *Career InfoNet*

Occupations with Most Average Annual Openings, from 2004 to 2014—No Postsecondary Education Required



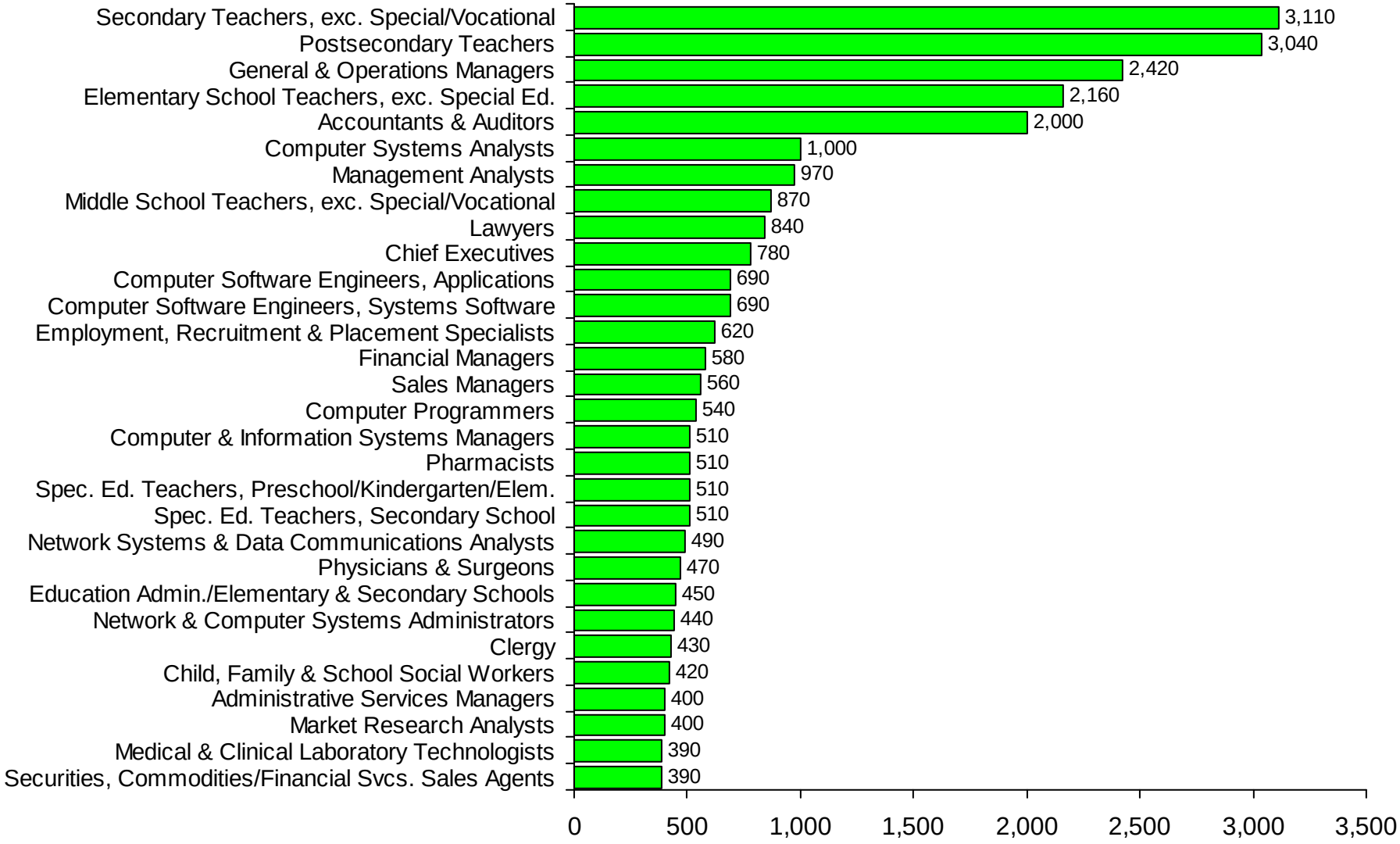
Source: ACINET, Illinois Department of Commerce and Economic Opportunity

Occupations with Most Average Annual Openings, from 2004 to 2014—Some College or Associate Degree Required



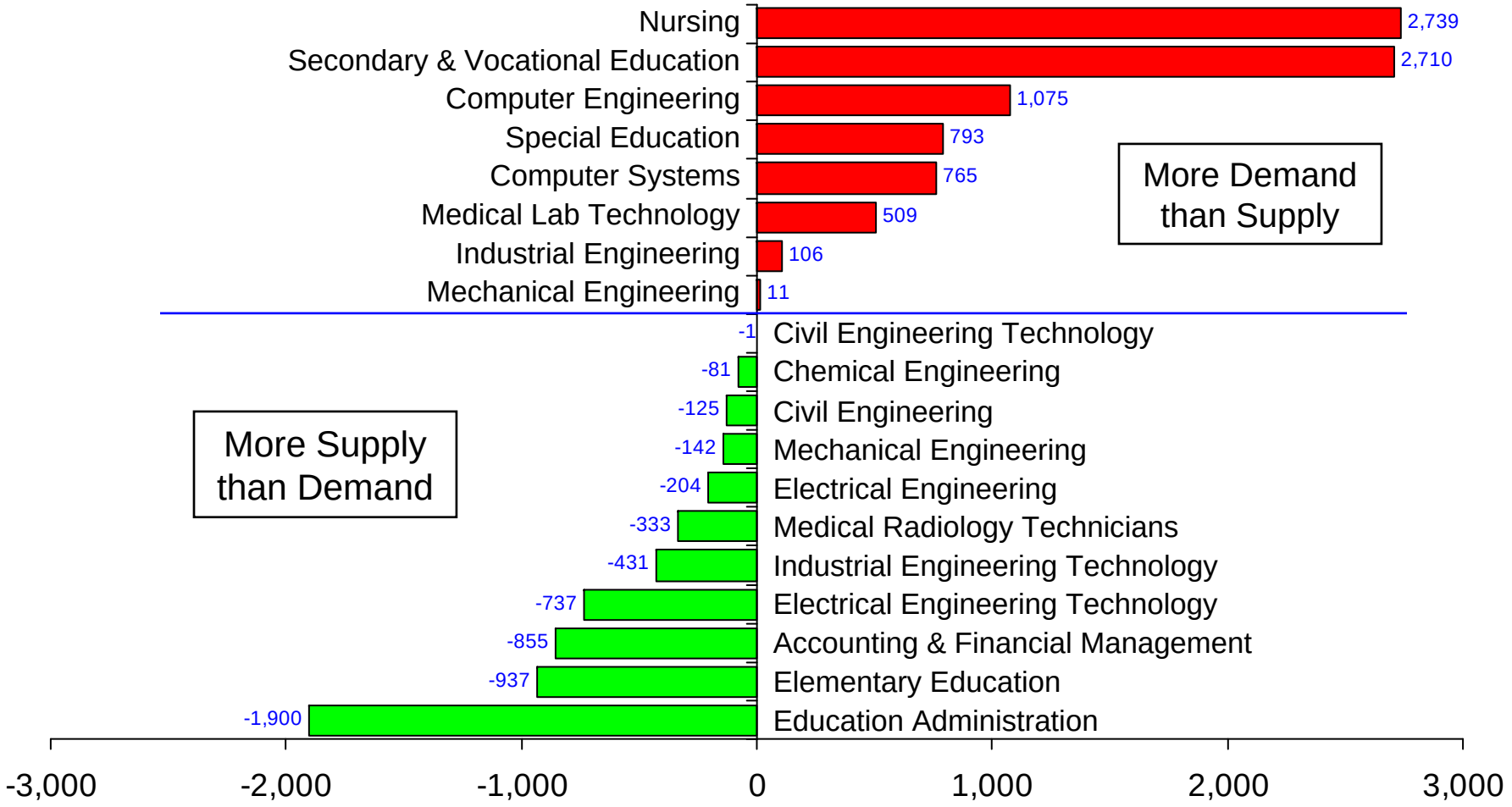
Source: ACINET, Illinois Department of Commerce and Economic Opportunity

Occupations with Most Average Annual Openings, from 2004 to 2014—Bachelor's Degree or Higher Required



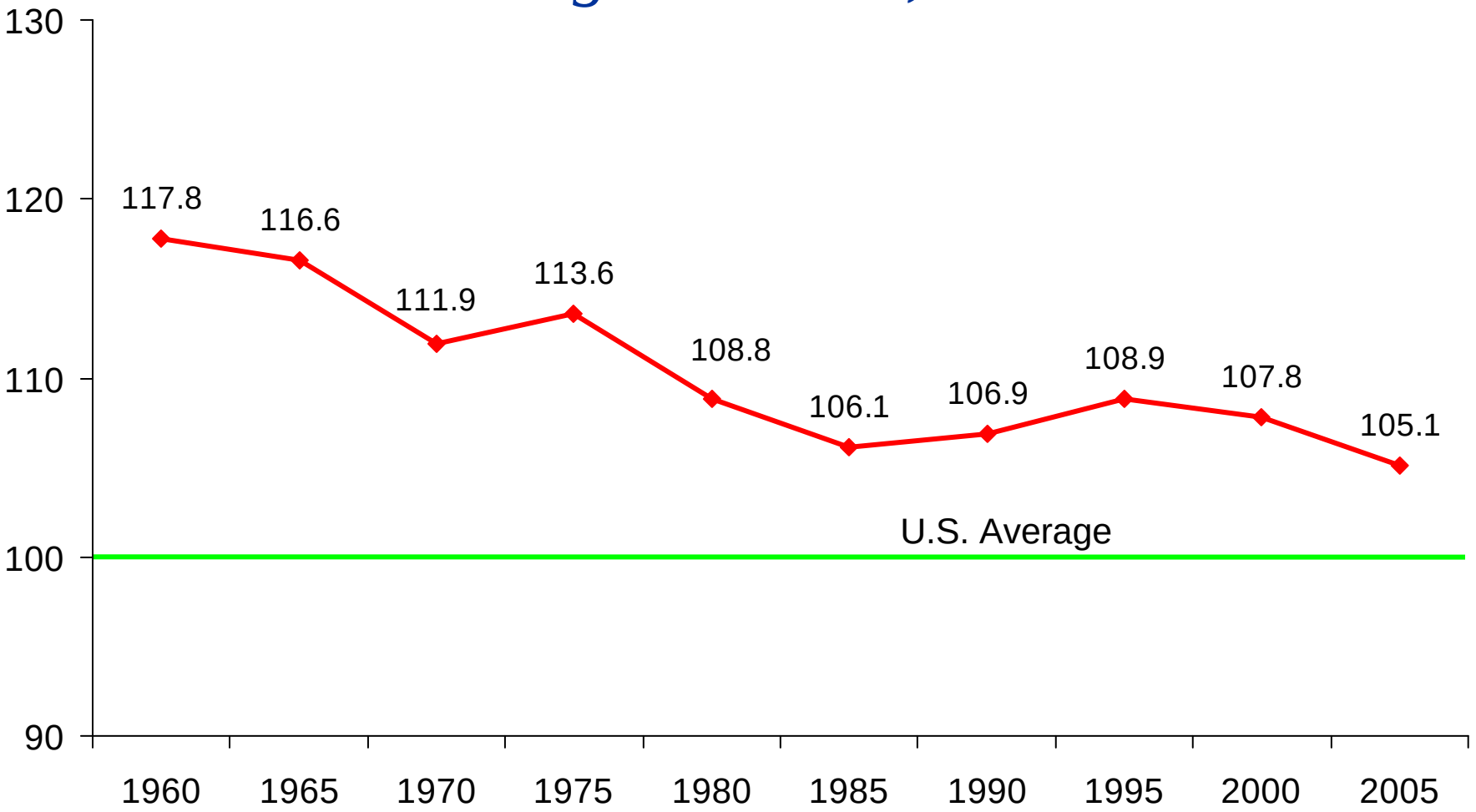
Source: ACINET, Illinois Department of Commerce and Economic Opportunity

Demand vs. Supply in Selected Occupations—Gap Between Projected Annual Openings 2004-14 and Annual Degrees Produced 2005-06



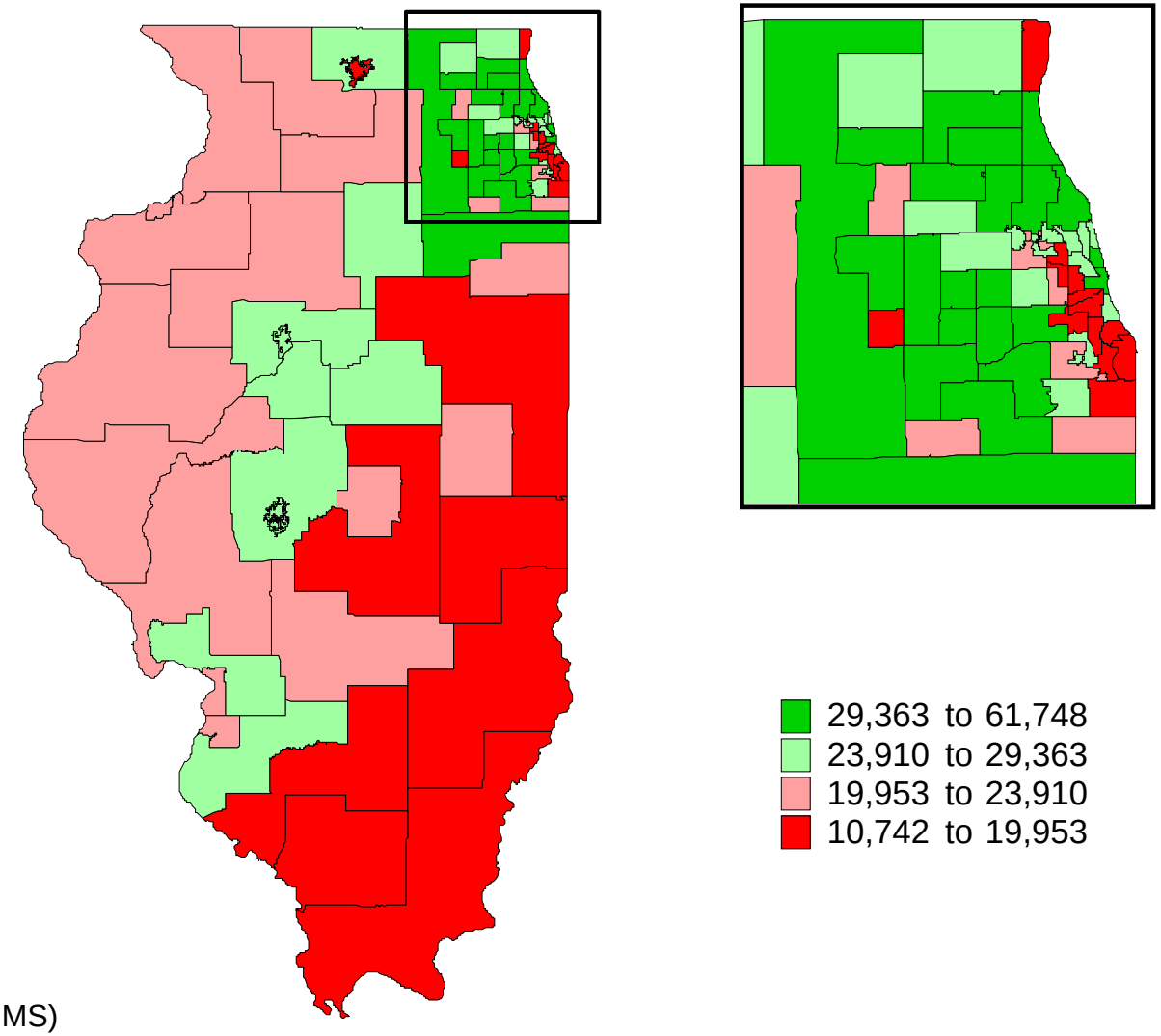
Source: Occupational Supply and Demand System (data from Illinois Dept. of Commerce and Economic Opportunity and NCES IPEDS Completions Survey)

Per Capita Personal Income as a Percent of U.S. Average—Illinois, 1960-2005



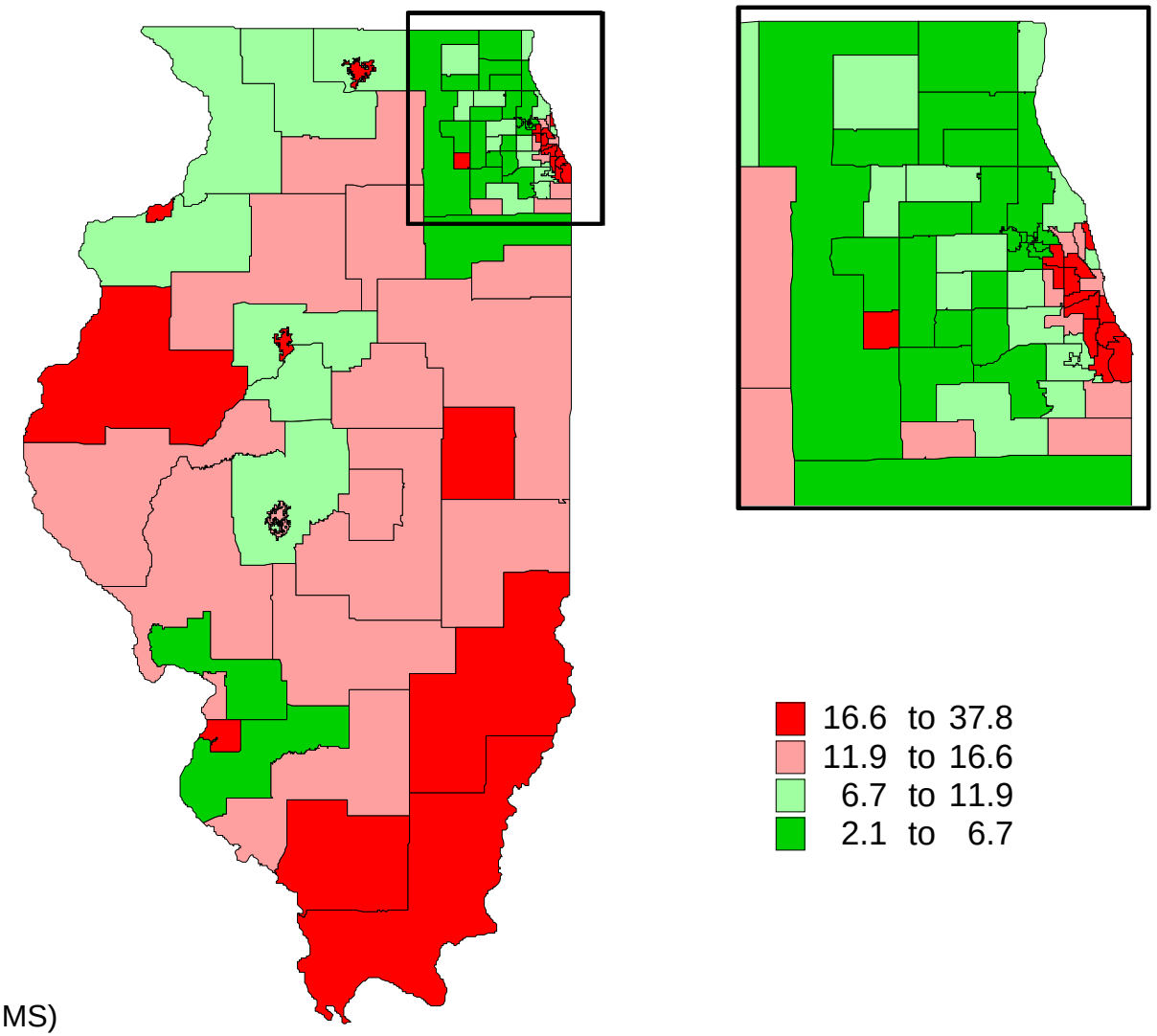
Source: Regional Economic Information System, Bureau of Economic Analysis, U.S. Dept. of Commerce

Personal Income per Capita, 2006
(Public Use Microdata Areas)



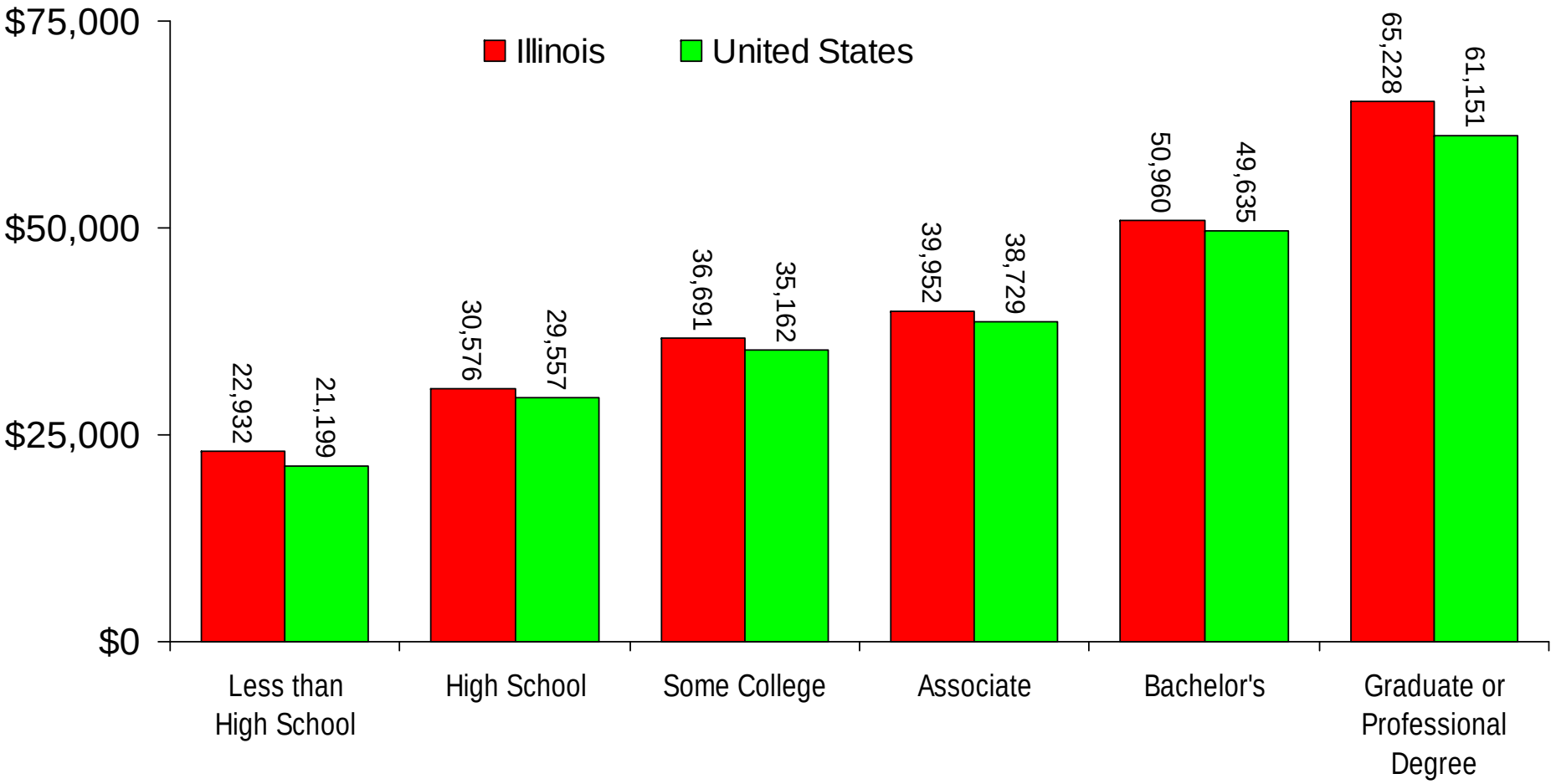
Source: 2006 ACS (PUMS)

Percent of Total Population at or Below Poverty Level, 2006 (Public Use Microdata Areas)



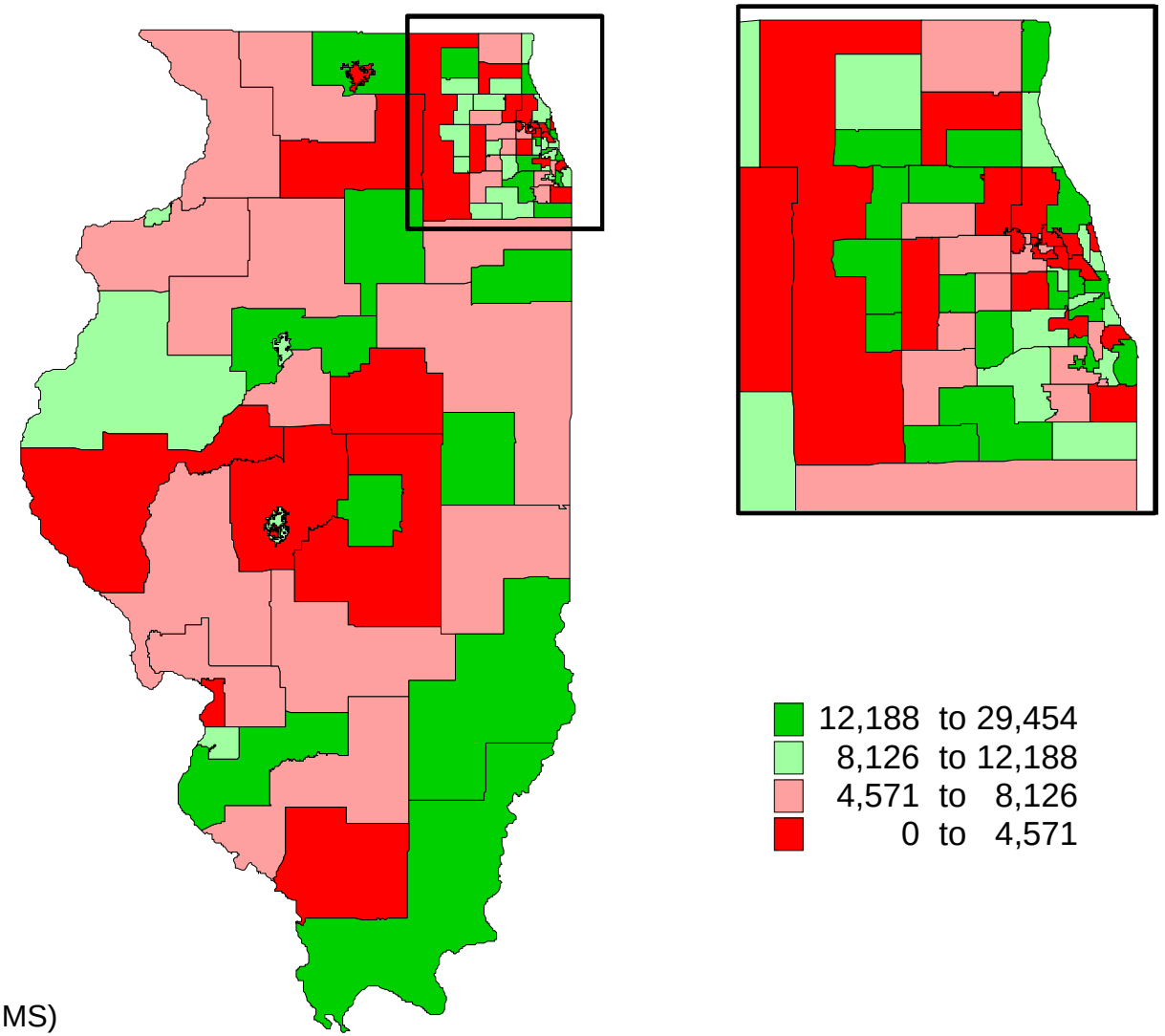
Source: 2006 ACS (PUMS)

Median Earnings of Population Age 25-64 by Level of Education, 2005



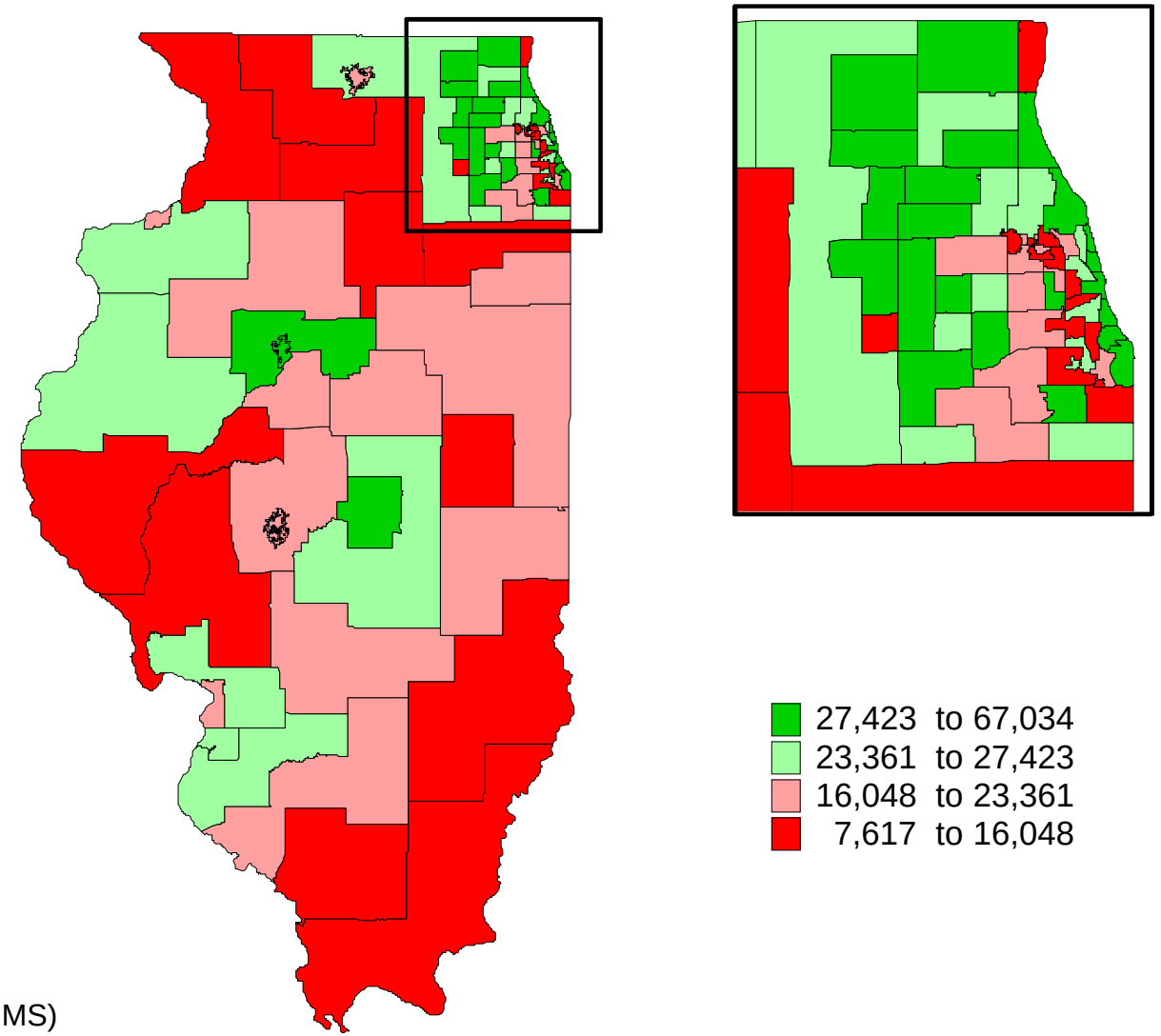
Source: U.S. Census Bureau, ACS

Difference in Median Earnings Between a High School Diploma and an Associate Degree, 2006 (Public Use Microdata Areas)



Source: 2006 ACS (PUMS)

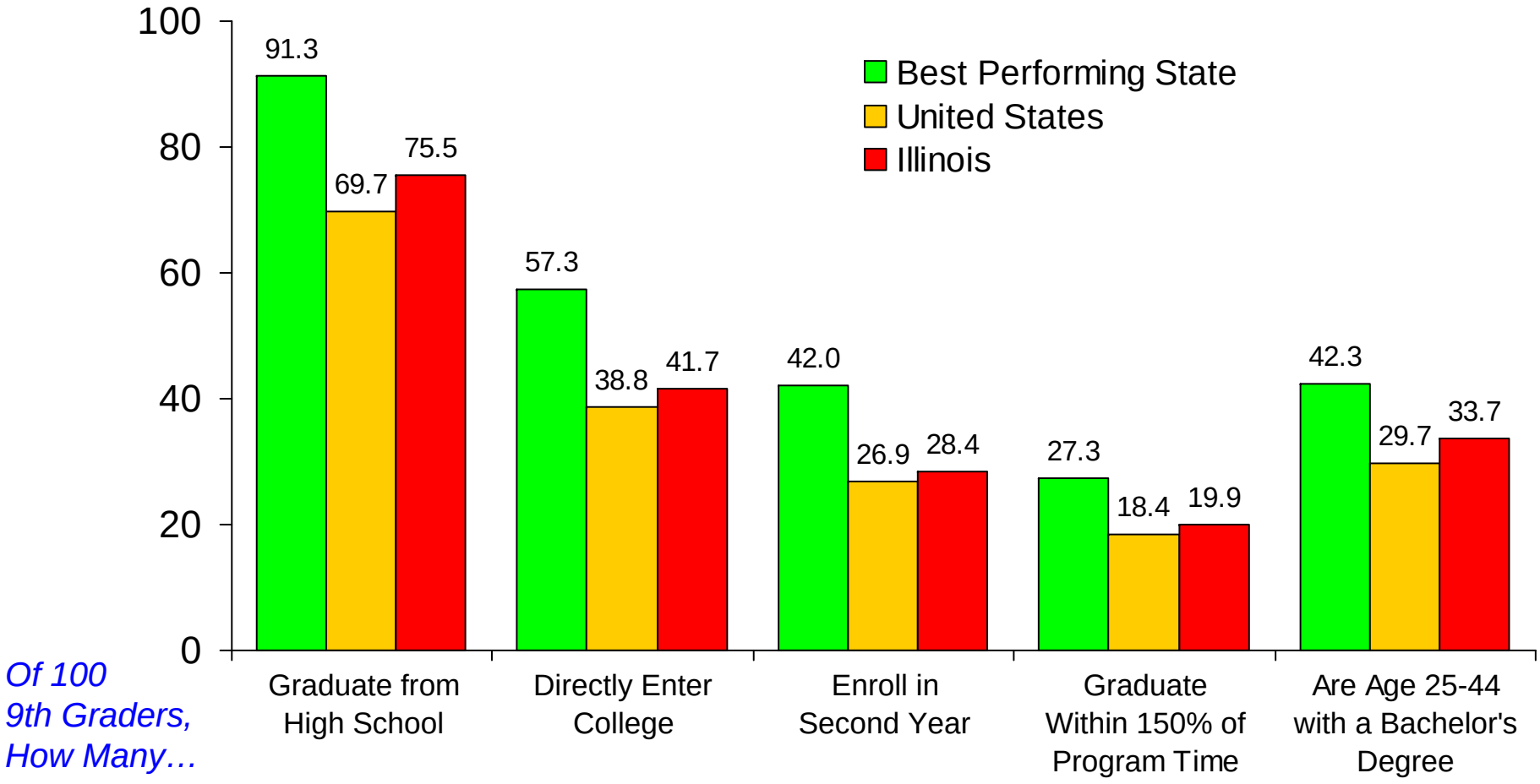
Difference in Median Earnings Between a High School Diploma and a Bachelor's Degree, 2006 (Public Use Microdata Areas)



Source: 2006 ACS (PUMS)

The Student Pipeline

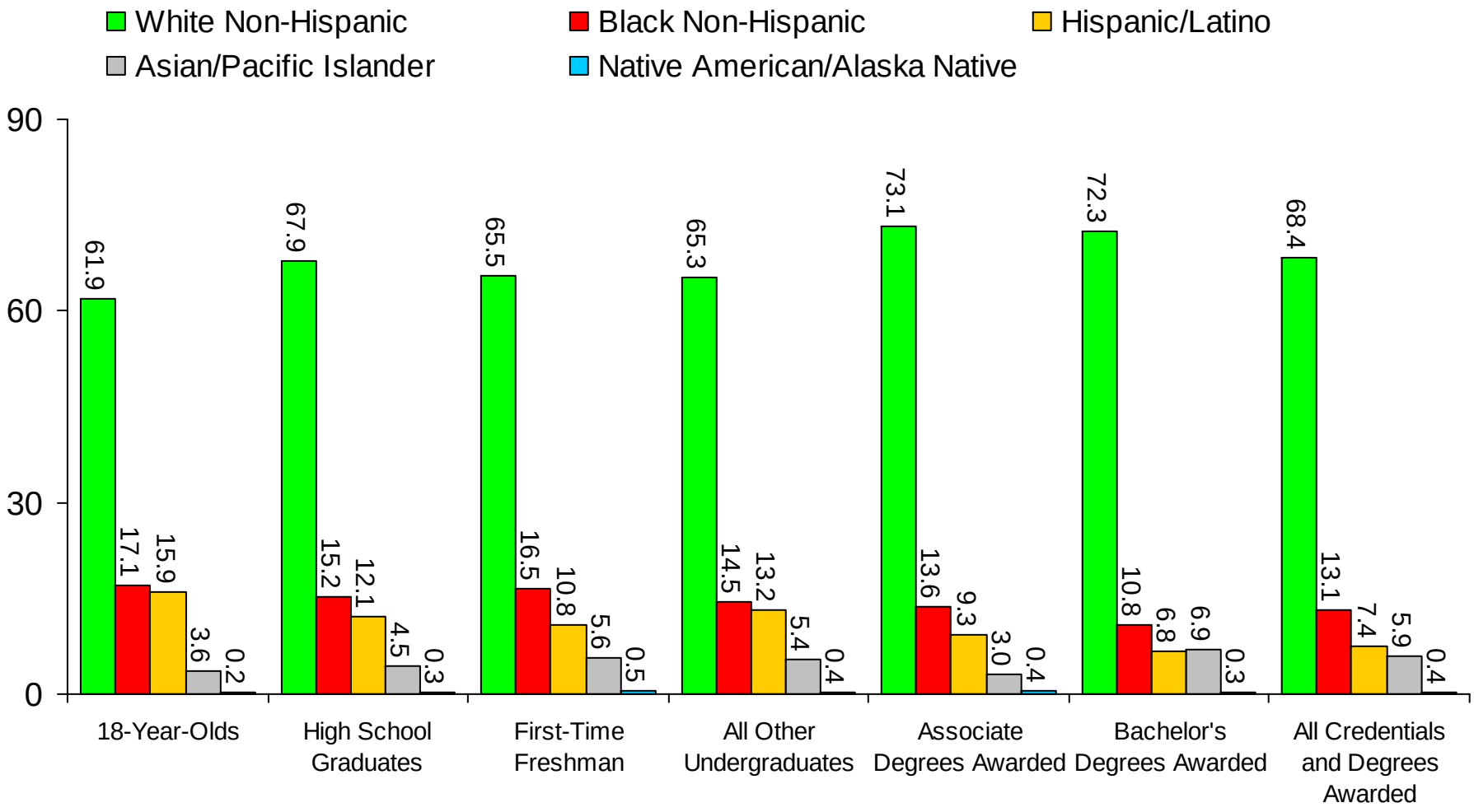
Student Pipeline, 2004



Of 100 9th Graders, How Many…

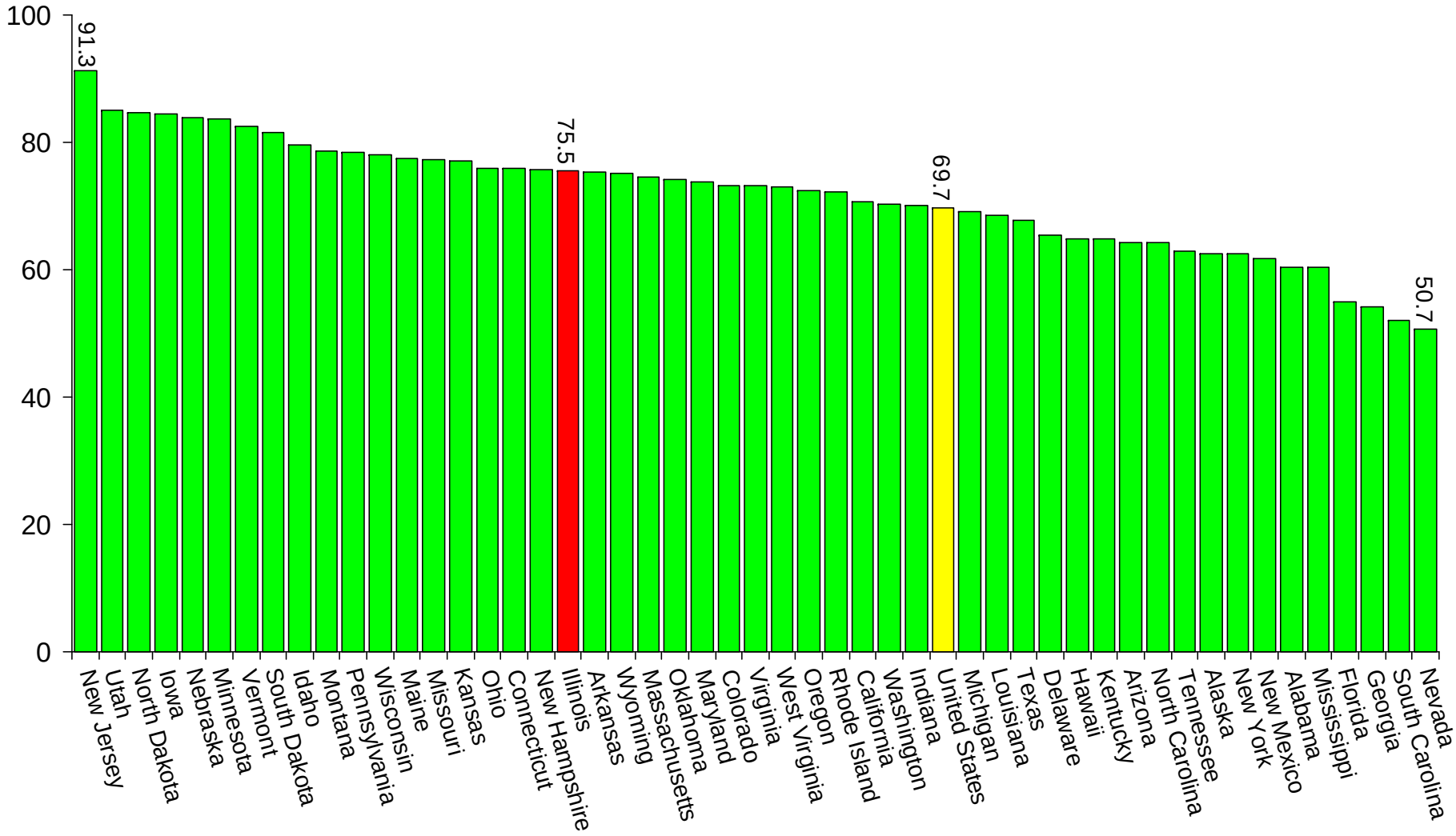
Source: NCES Common Core Data 2004; Tom Mortenson, *Postsecondary Education Opportunity*; NCES, IPEDS Fall 2004 Retention Rate File and Fall 2003 Enrollments, 2004 Graduation Rates; U.S. Census Bureau, 2005 ACS

Race/Ethnic Representation at Each Stage of the Education Pipeline—Illinois, 2005



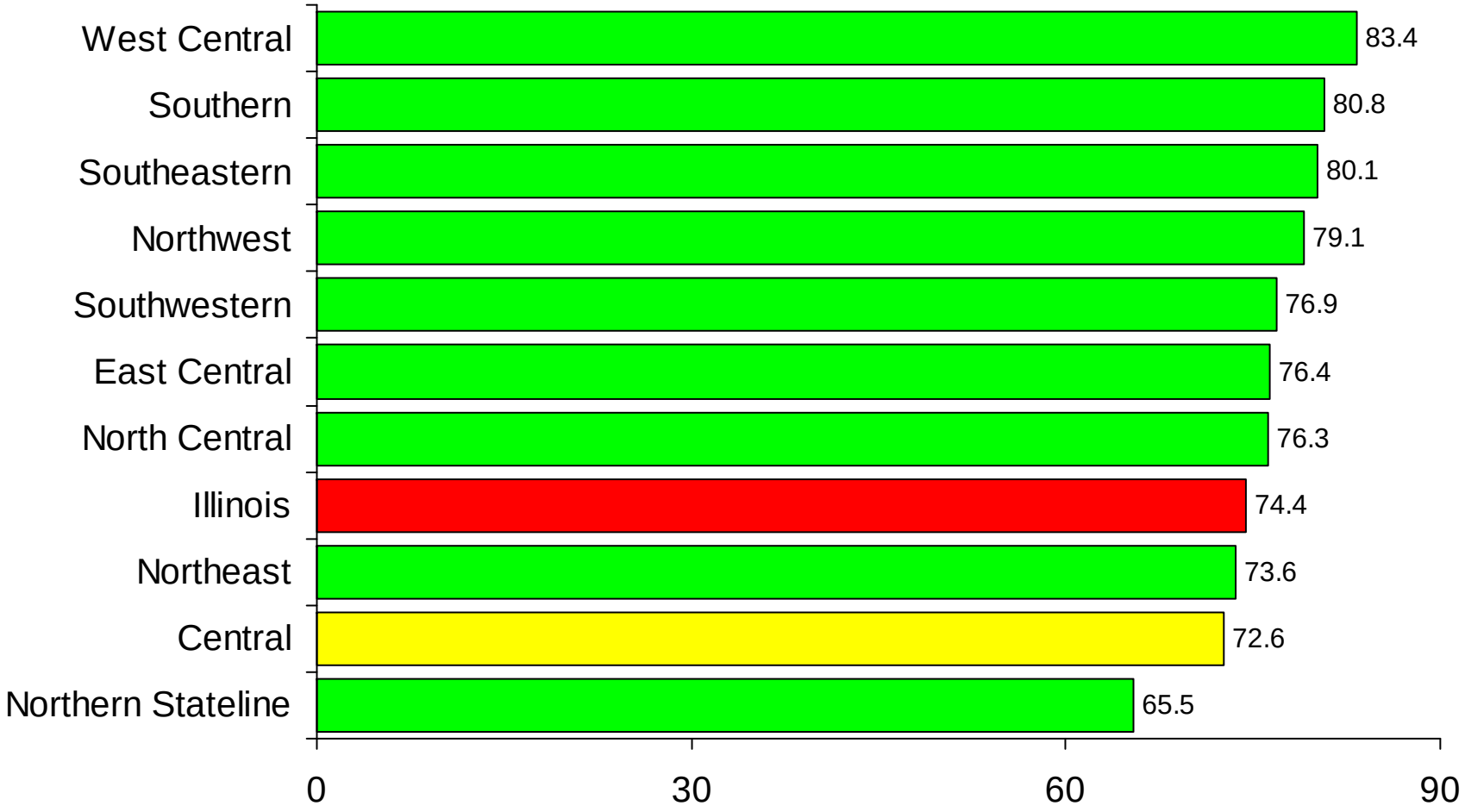
Source: U.S. Census Bureau Population Estimates; NCES Common Core of Data; NCES, IPEDS Fall 2005 Enrollments File, 2004-05 Completions File

High School Graduation Rates—Public High School Graduates as a Percent of 9th Graders Four Years Earlier, 2004



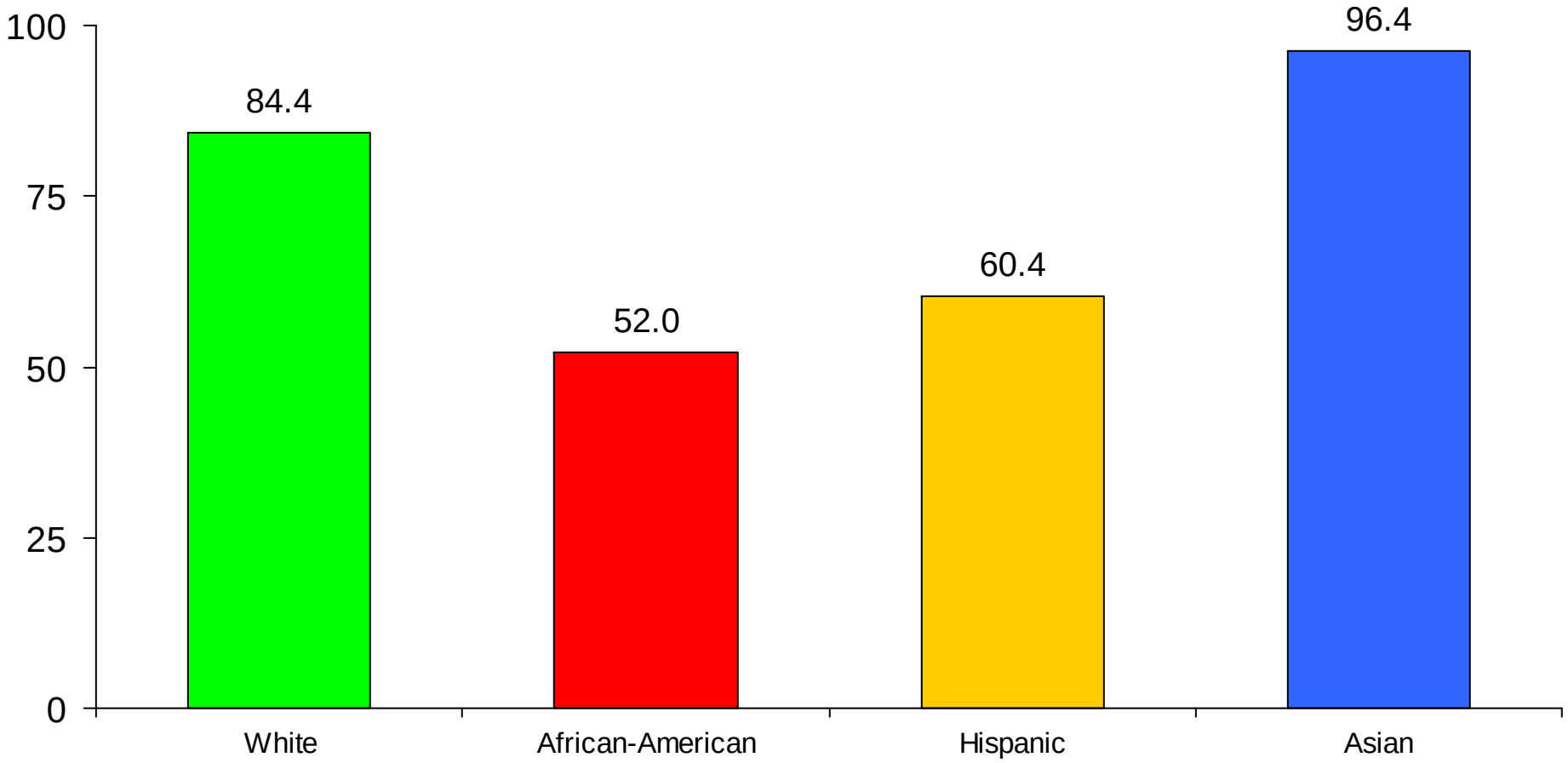
Source: Tom Mortenson, Postsecondary Opportunity (rev. 071106)

High School Graduation Rates—Percentage of 9th Graders Graduating Four Years Later by Region (Average 2005 and 2006)



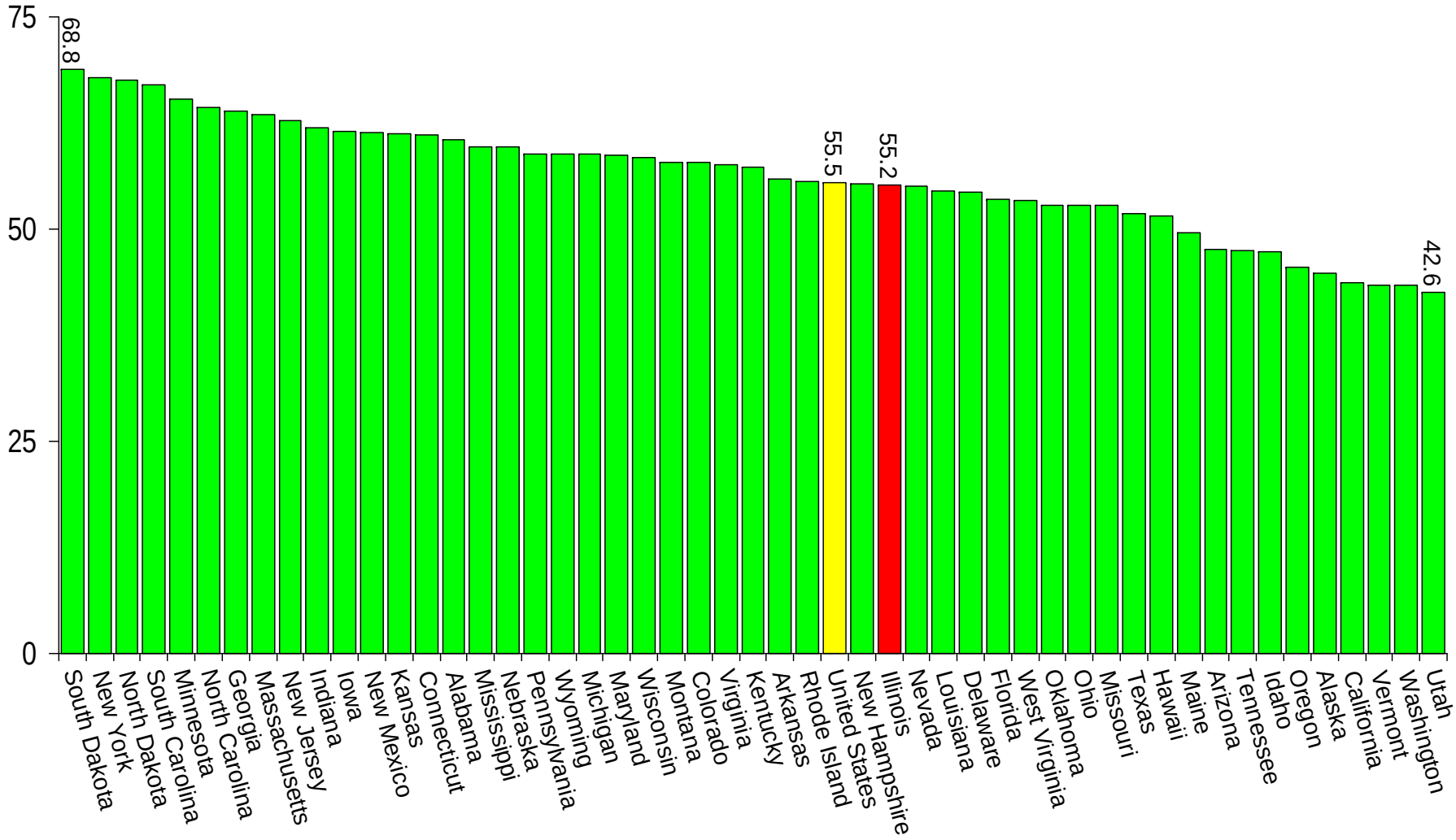
Source: Illinois State Board of Education; NCES, Common Core Data

High School Graduation Rates—Percentage of 9th Graders Graduating Four Years Later by Race/Ethnicity (Average 2005 and 2006)



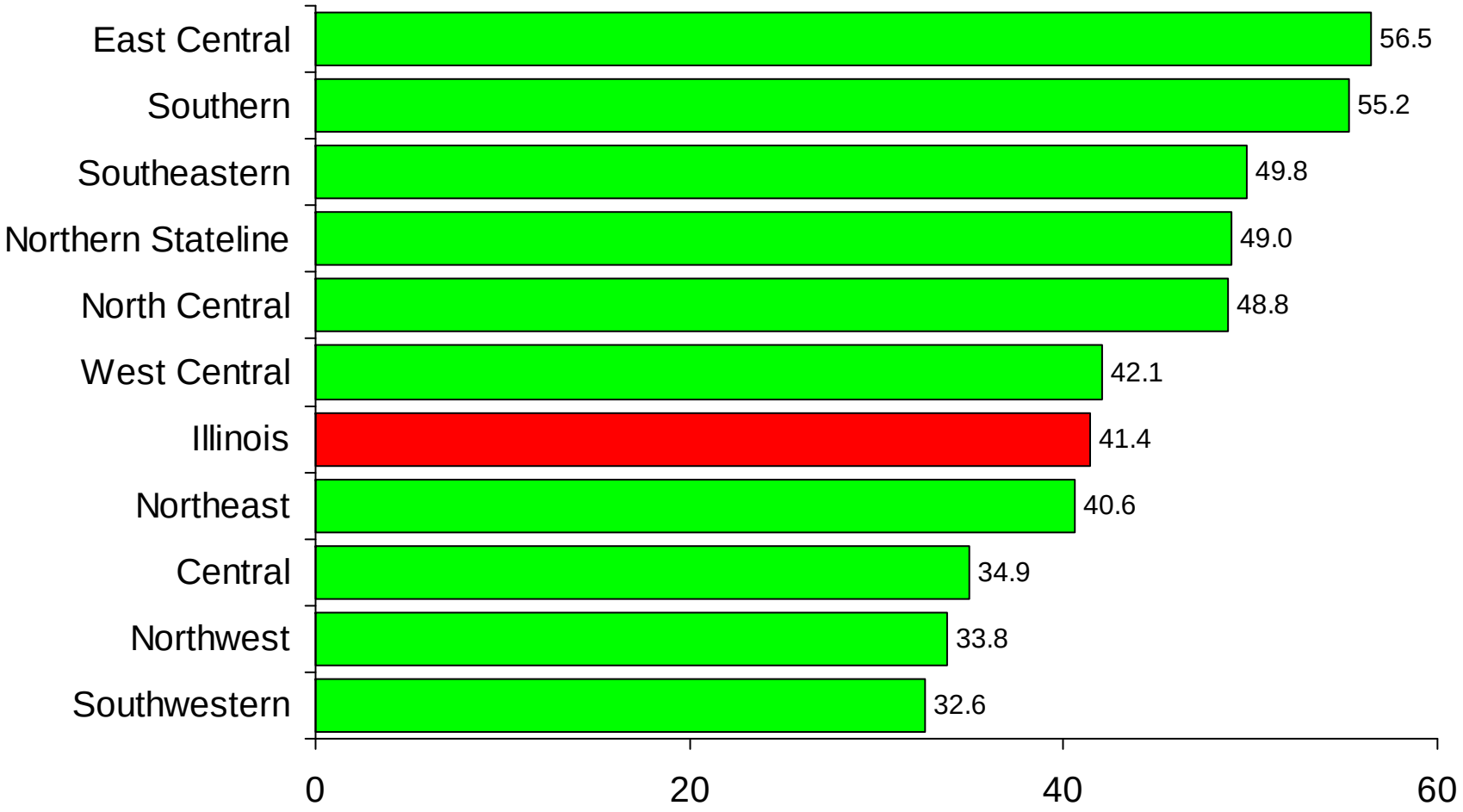
Source: Illinois State Board of Education; NCES, Common Core Data

College-Going Rates—First-Time Freshmen Directly Out of High School as a Percent of Recent High School Graduates, 2004



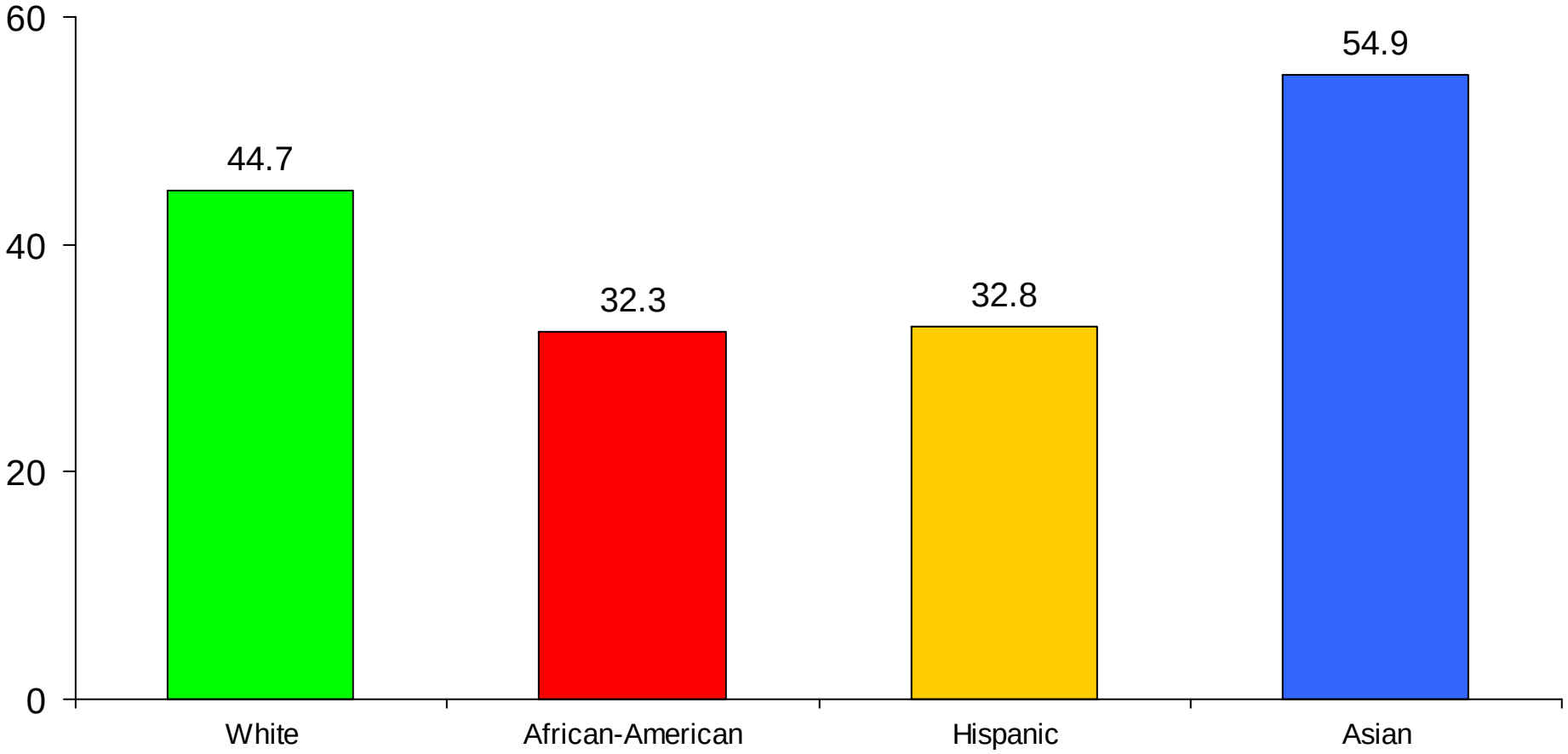
Source: Tom Mortenson, Postsecondary Opportunity (2004 data update 02-06-07)

In-State College-Going Rates Directly Out of High School by Region (Average 2005 and 2006)



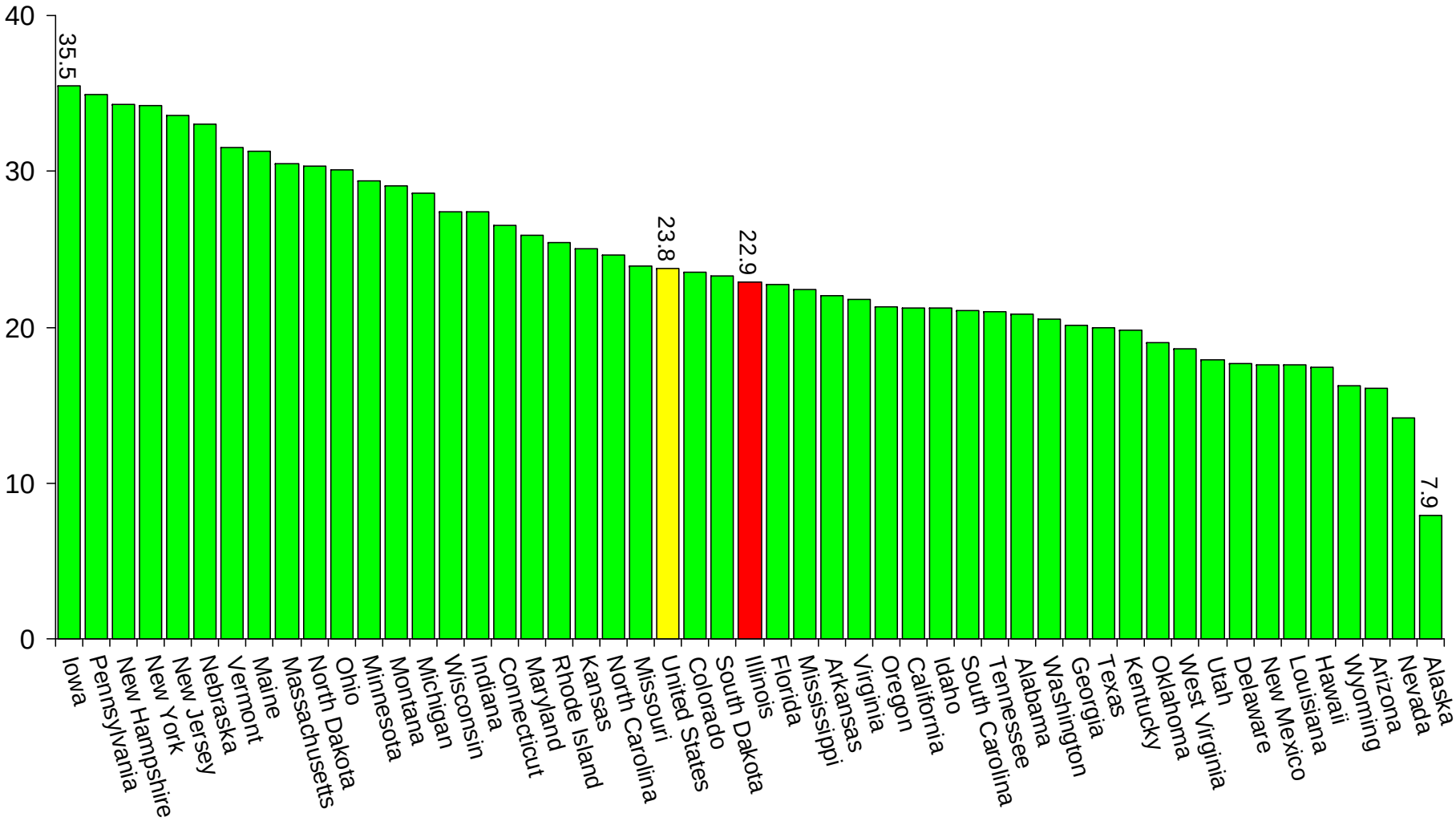
Source: Illinois State Board of Education, Illinois Shared Enrollment and Graduation Information

In-State College-Going Rates—Percentage of High School Graduates Enrolling in College the Following Academic Year by Race/Ethnicity (Average 2005 and 2006)



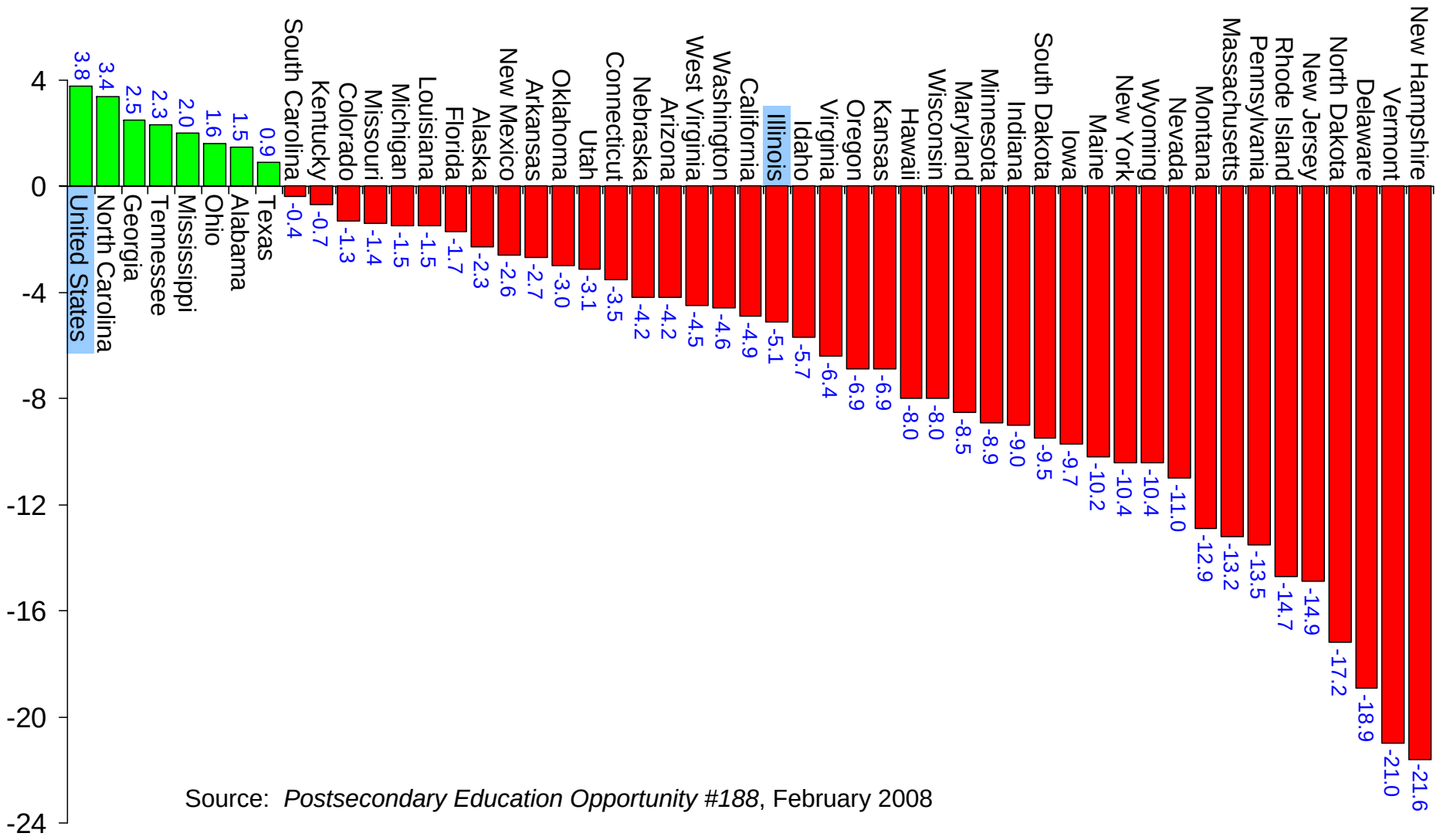
Source: Illinois State Board of Education, Illinois Shared Enrollment and Graduation Information

College Participation Rates by State for Students from Low-Income Families, 2006



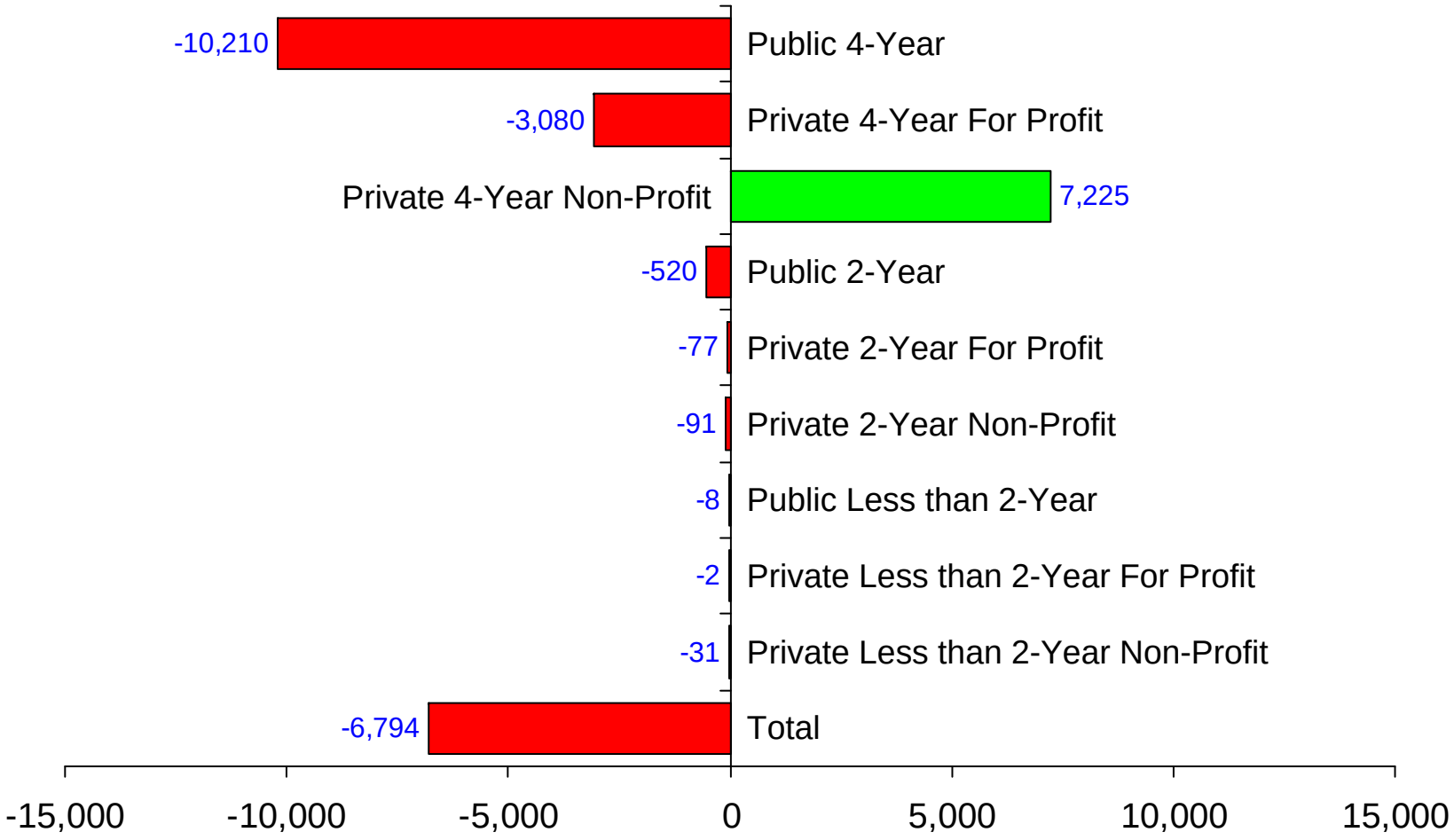
Source: *Postsecondary Education Opportunity #188*, February 2008

Change in College Participation Rates for Students from Low-Income Families by State, 1999-2006



Source: *Postsecondary Education Opportunity #188*, February 2008

Illinois Net Migration of College Students by Sector, Fall 2006



Source: NCES, IPEDS Residency and Migration Survey

Top Out-of-State Institutions Illinois Residents Attend, Fall 2006

Institution	State	First-Time Freshmen	FT Freshmen Just Out of High School	Sector Description
University of Iowa	IA	1,362	1,360	Public 4-year
Indiana University-Bloomington	IN	994	979	Public 4-year
Purdue University-Main Campus	IN	828	812	Public 4-year
Marquette University	WI	635	630	Private 4-year Non Profit
University of Wisconsin-Madison	WI	514	510	Public 4-year
University of Missouri-Columbia	MO	422	385	Public 4-year
Carthage College	WI	387	384	Private 4-year Non Profit
Saint Louis University-Main Campus	MO	363	358	Private 4-year Non Profit
University of Phoenix-Online Campus	AZ	361	29	Private 4-year For Profit
Iowa State University	IA	323	316	Public 4-year
Miami University-Oxford	OH	323	323	Public 4-year
Saint Ambrose University	IA	292	289	Private 4-year Non Profit
Colorado Technical University Online	CO	262	4	Private 4-year For Profit
St Louis College of Pharmacy	MO	260	102	Private 4-year Non Profit
Michigan State University	MI	256	246	Public 4-year
University of Notre Dame	IN	230	230	Private 4-year Non Profit
Kaplan University	IA	221	29	Private 4-year For Profit
University of Michigan-Ann Arbor	MI	219	207	Public 4-year
Valparaiso University	IN	207	205	Private 4-year Non Profit
Arizona State University/Tempe Campus	AZ	205	201	Public 4-year
University of Colorado at Boulder	CO	201	199	Public 4-year
Northern Michigan University	MI	200	195	Public 4-year
University of Kansas Main Campus	KS	199	199	Public 4-year
Western International University	AZ	192	27	Private 4-year For Profit
Ranken Technical College	MO	192	124	Private 4-year Non Profit
Washington University in St Louis	MO	187	187	Private 4-year Non Profit
University of Dayton	OH	186	186	Private 4-year Non Profit
Butler University	IN	174	173	Private 4-year Non Profit
Southeast Missouri State University	MO	158	156	Public 4-year
University of Wisconsin-Platteville	WI	157	155	Public 4-year
Loras College	IA	152	152	Private 4-year Non Profit
Drake University	IA	149	149	Private 4-year Non Profit
Murray State University	KY	147	141	Public 4-year
Grand Valley State University	MI	146	146	Public 4-year
Carroll College	WI	137	137	Private 4-year Non Profit
Purdue University-Calumet Campus	IN	135	114	Public 4-year
Truman State University	MO	130	130	Public 4-year

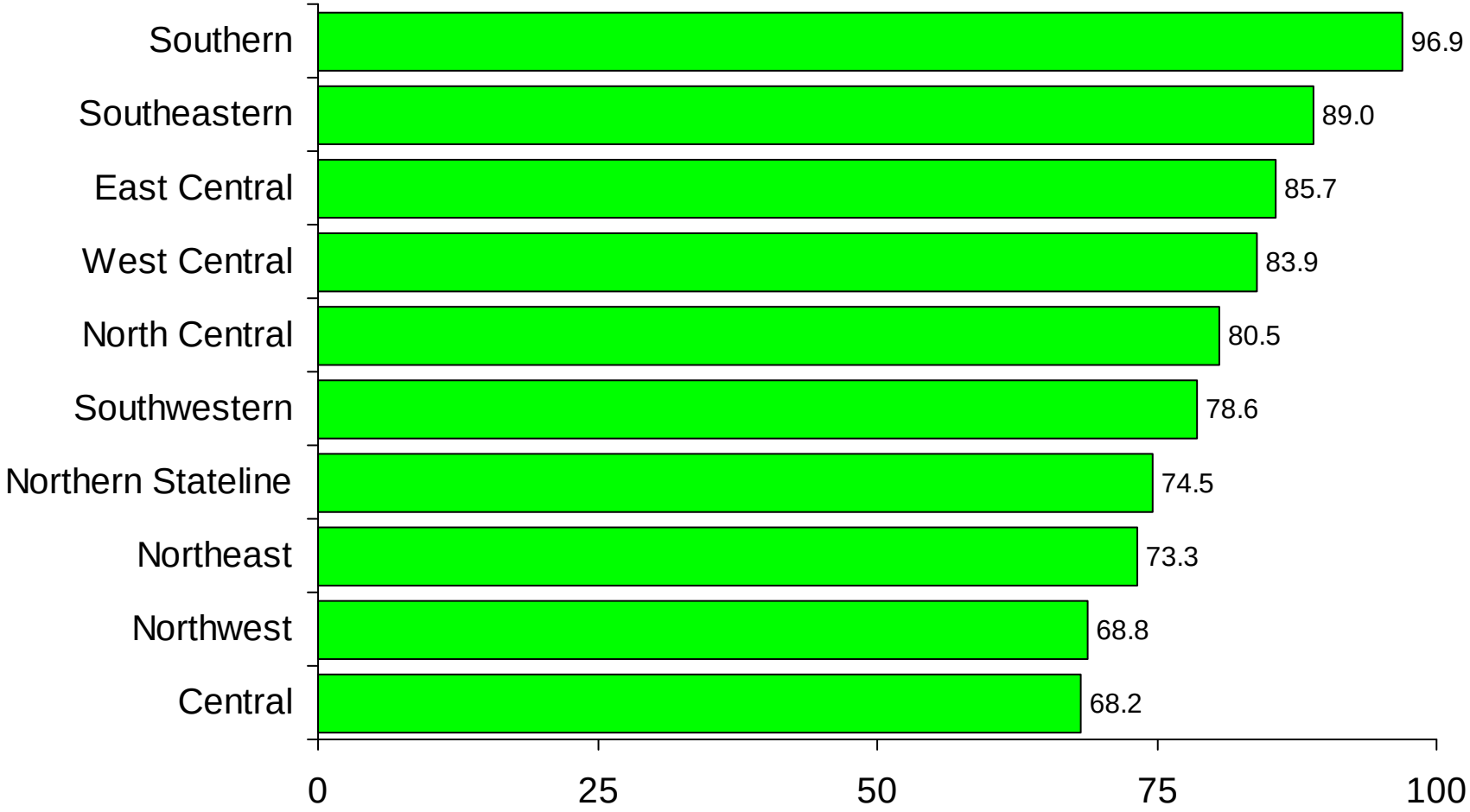
Source: NCES, IPEDS Residency and Migration Survey

Postsecondary First-Time Enrollment Patterns by Region of Residence (Average 2006 and 2007)

REGION OF RESIDENCE	REGION OF ENROLLMENT									
	Northeast	Northern Stateline	Northwest	East Central	Central	North Central	West Central	Southeastern	Southern	Southwestern
Directly Out of High School										
Northeast	**73**	0	0	13	0	7	3	0	3	0
Northern Stateline	9	**75**	0	7	0	5	3	0	2	0
Northwest	7	0	**69**	9	0	6	7	0	3	0
East Central	1	0	0	**86**	0	8	1	0	5	0
Central	2	0	0	11	**68**	7	5	0	7	0
North Central	3	0	0	9	0	**81**	3	0	4	0
West Central	2	0	0	7	1	3	**84**	0	4	0
Southeastern	0	0	0	5	0	1	0	**89**	5	0
Southern	0	0	0	2	0	0	0	0	**97**	0
Southwestern	1	0	0	7	0	3	1	0	8	**79**
Age 25 and Older										
Northeast	**99**	0	0	0	0	0	0	0	1	0
Northern Stateline	3	**97**	0	0	0	0	0	0	0	0
Northwest	1	0	**96**	0	0	0	2	0	1	0
East Central	0	0	0	**99**	0	0	0	0	0	0
Central	0	0	0	0	**98**	0	0	0	0	1
North Central	0	0	0	0	0	**99**	0	0	0	0
West Central	0	0	0	0	0	0	**99**	0	1	0
Southeastern	0	0	0	0	0	0	0	**100**	0	0
Southern	0	0	0	0	0	0	0	0	**100**	0
Southwestern	0	0	0	0	0	0	0	0	2	**98**

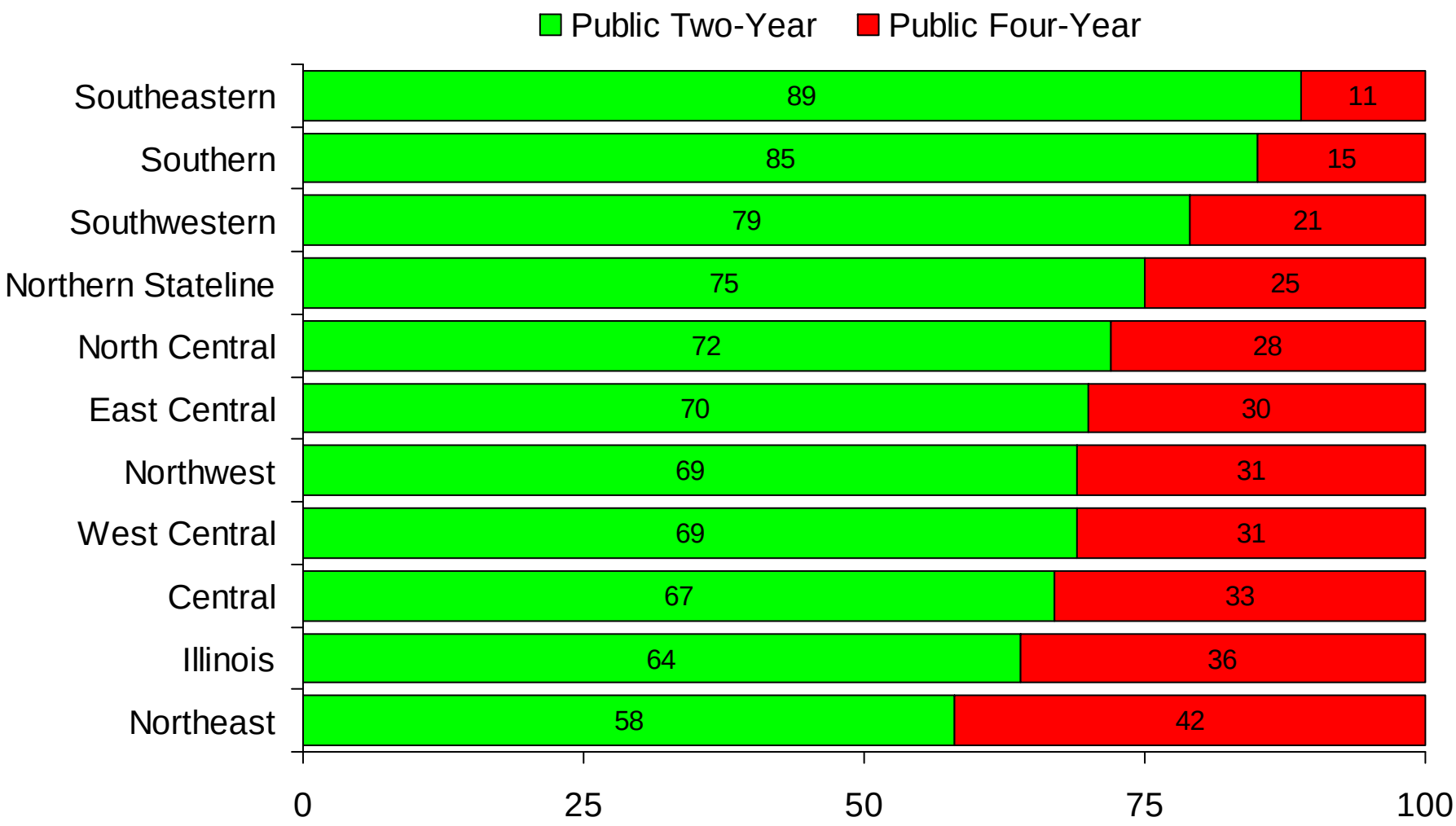
Source: Illinois Shared Enrollment and Graduation Information

Percent of First-Time Freshmen Directly Out of High School Enrolling In-Region (Average 2006 and 2007)



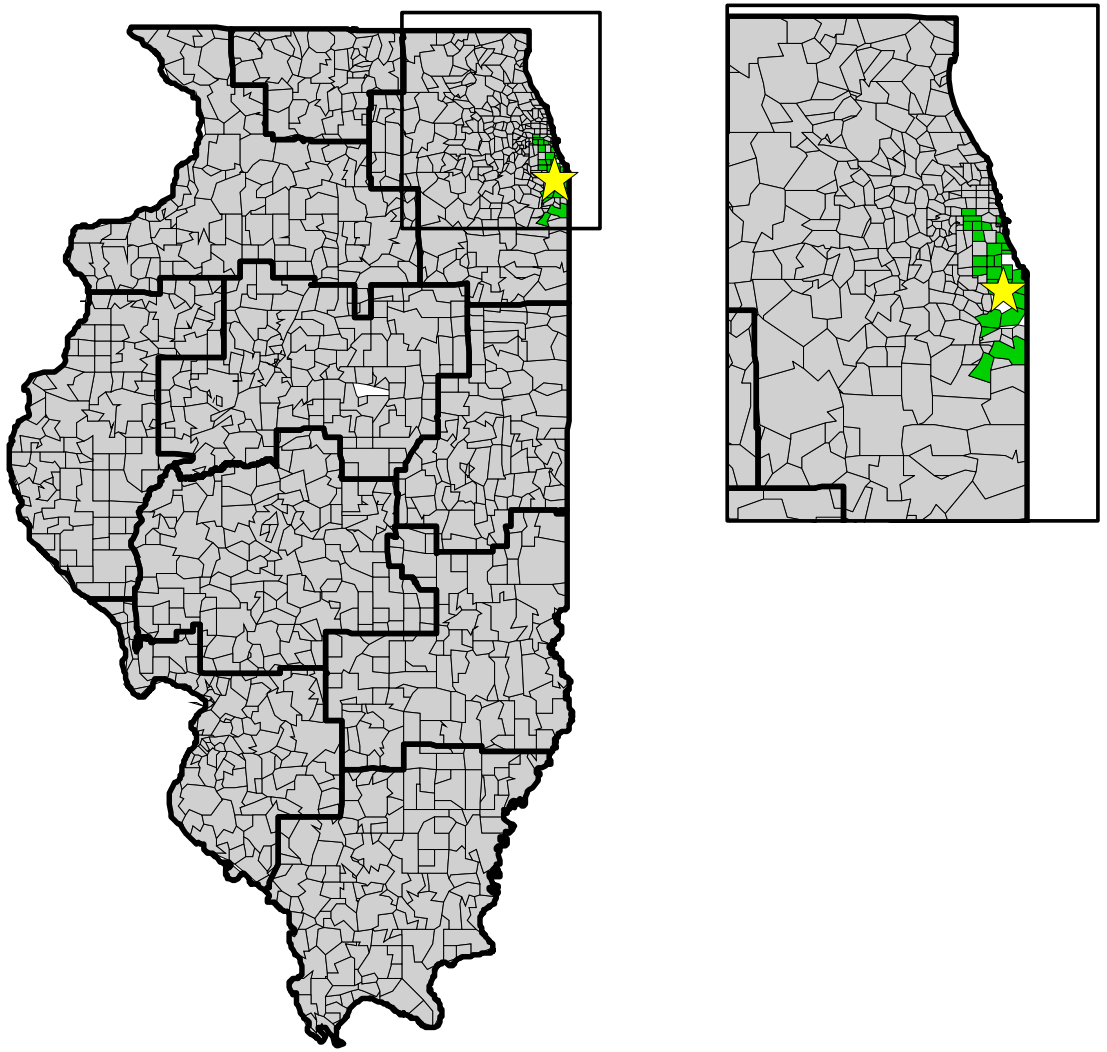
Source: Illinois Shared Enrollment and Graduation Information

Percent of First-Time Freshmen Directly Out of High School Enrollment by Sector (Average 2006 and 2007)



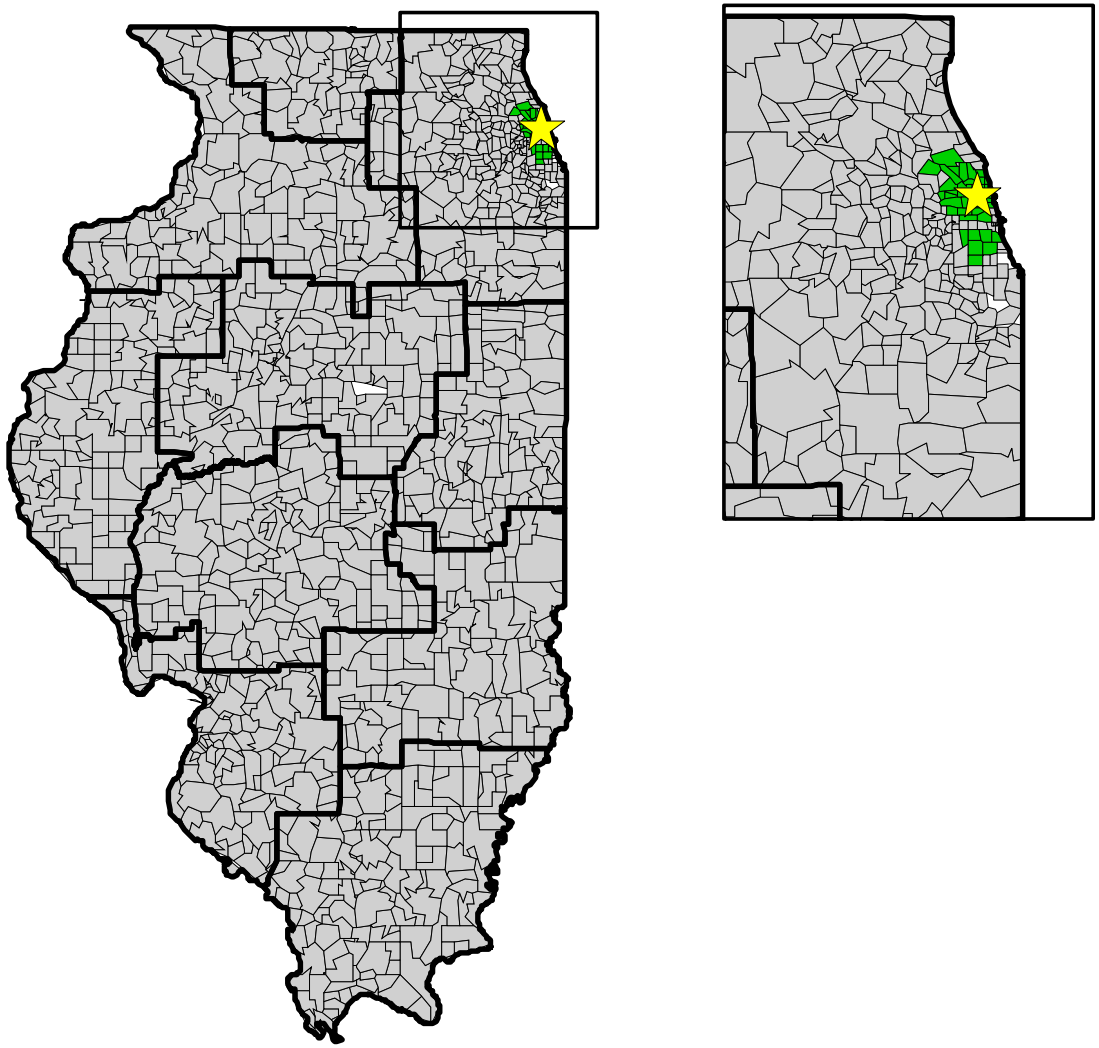
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Chicago State University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



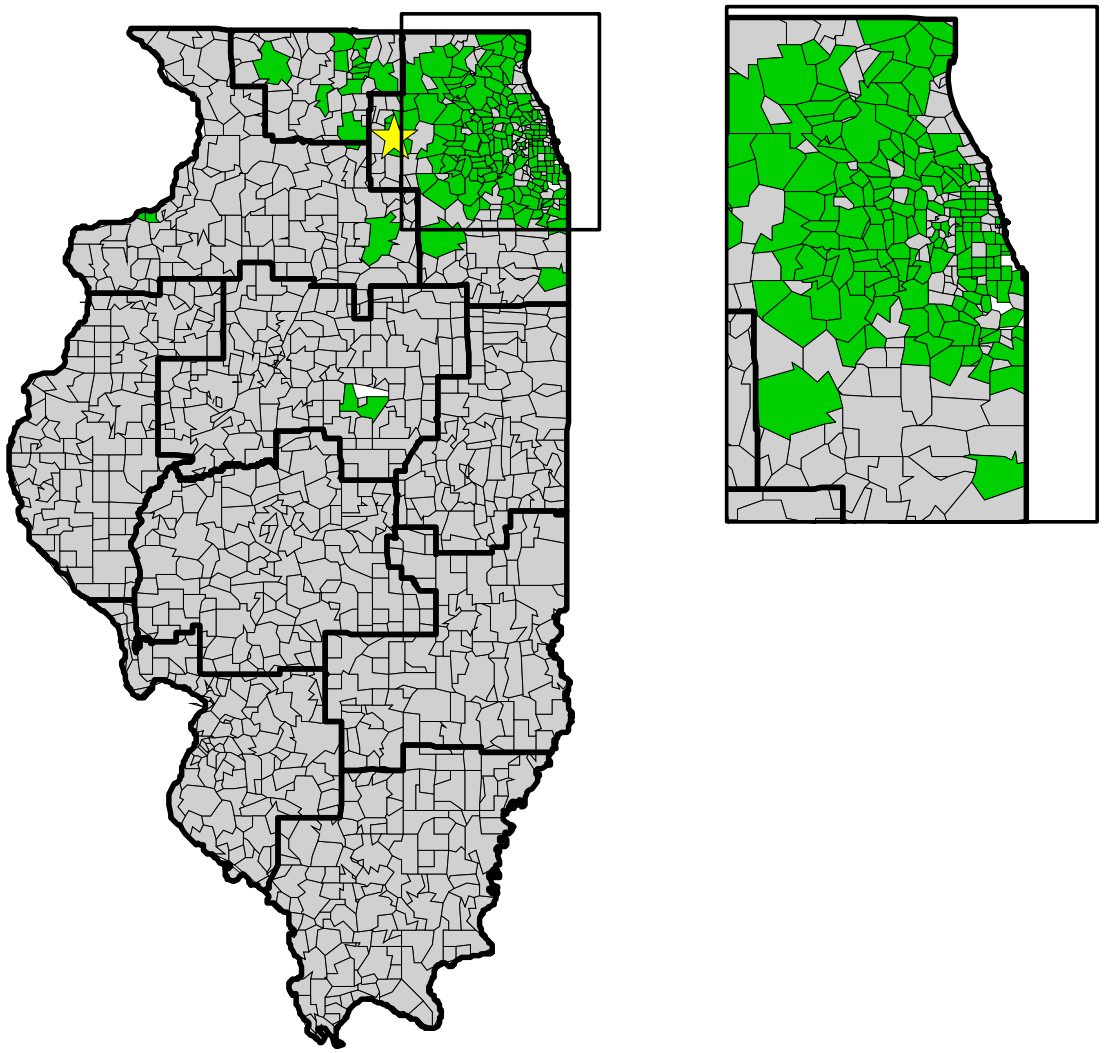
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Northeastern Illinois University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



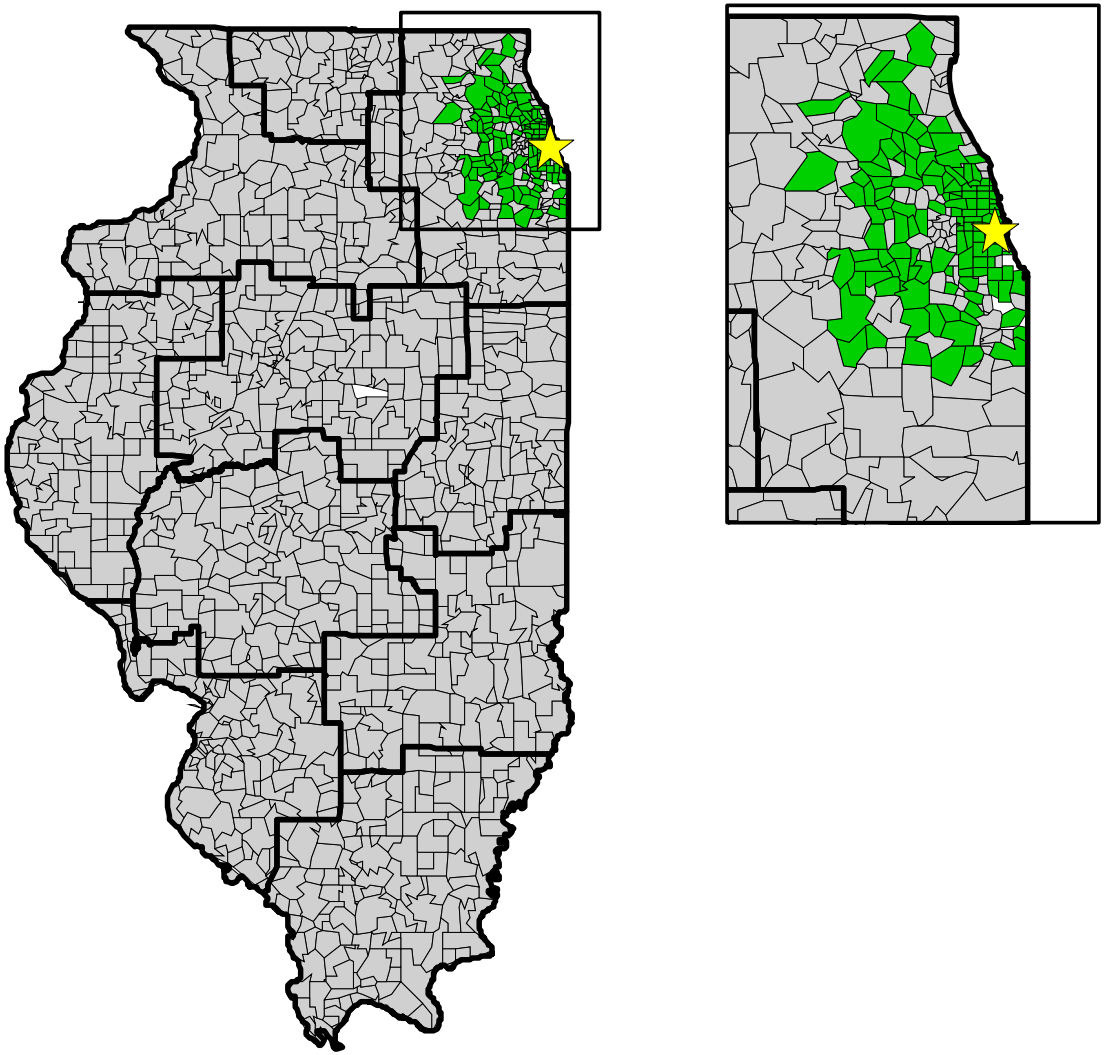
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Northern Illinois University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



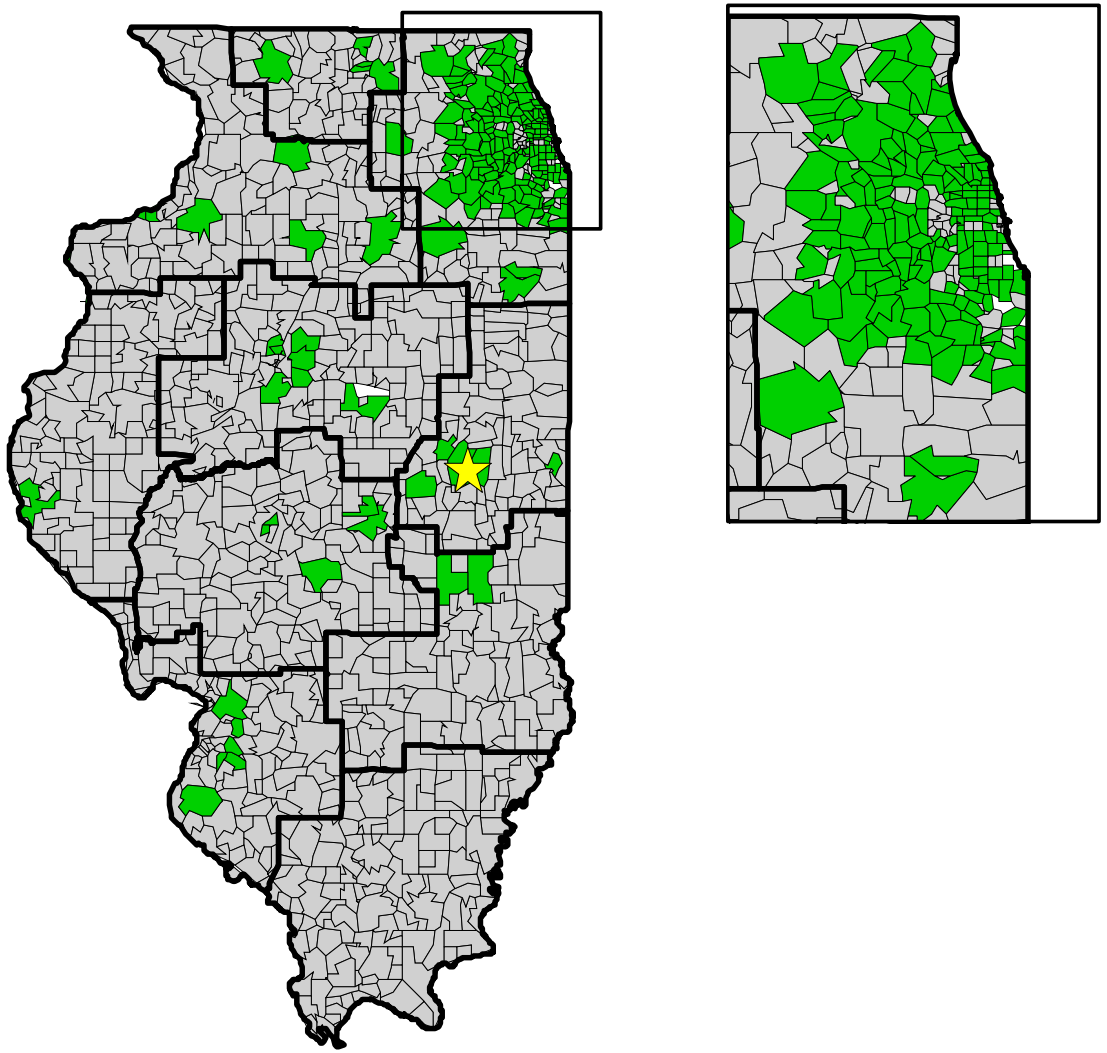
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which the University of Illinois at Chicago Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



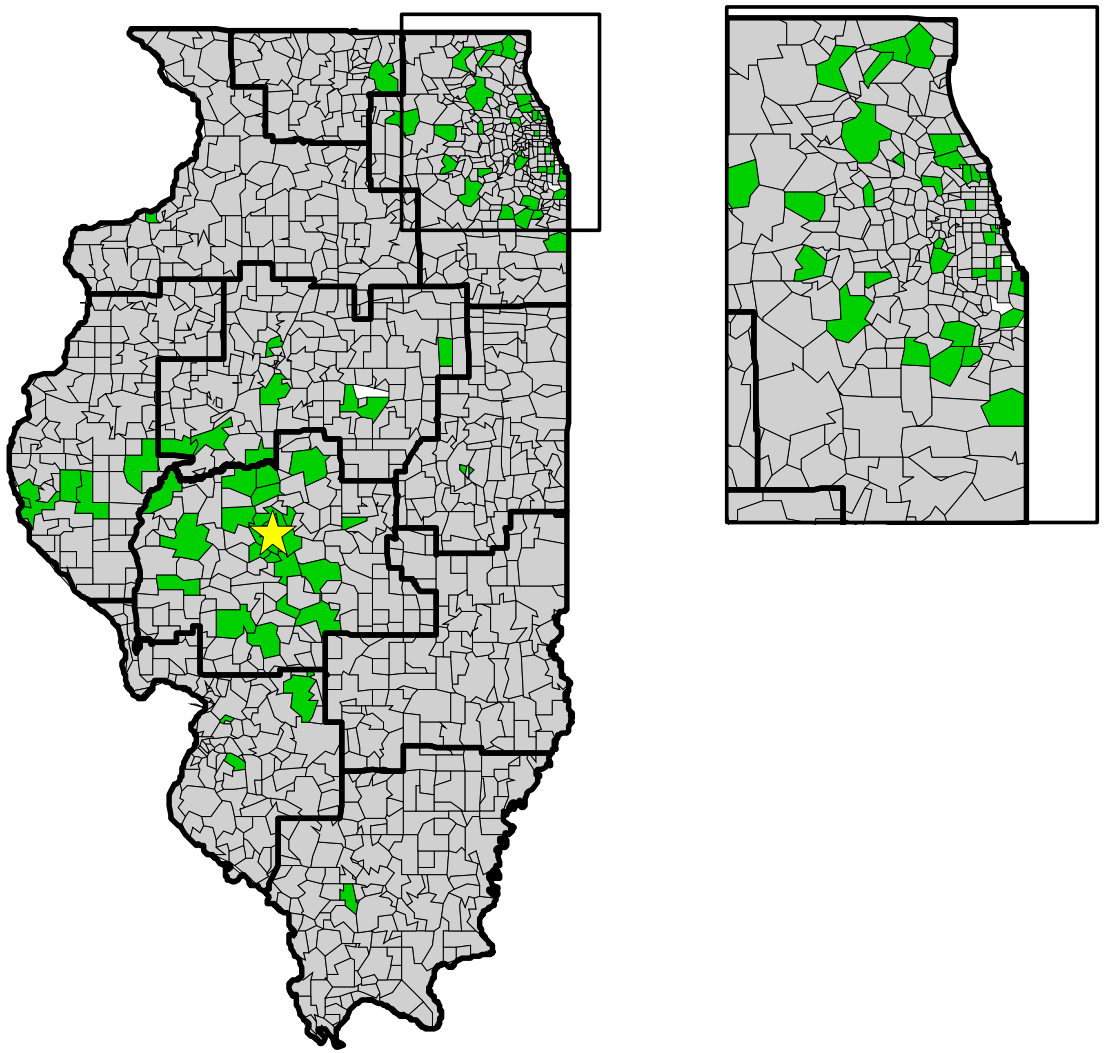
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which the University of Illinois Urbana Campus Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



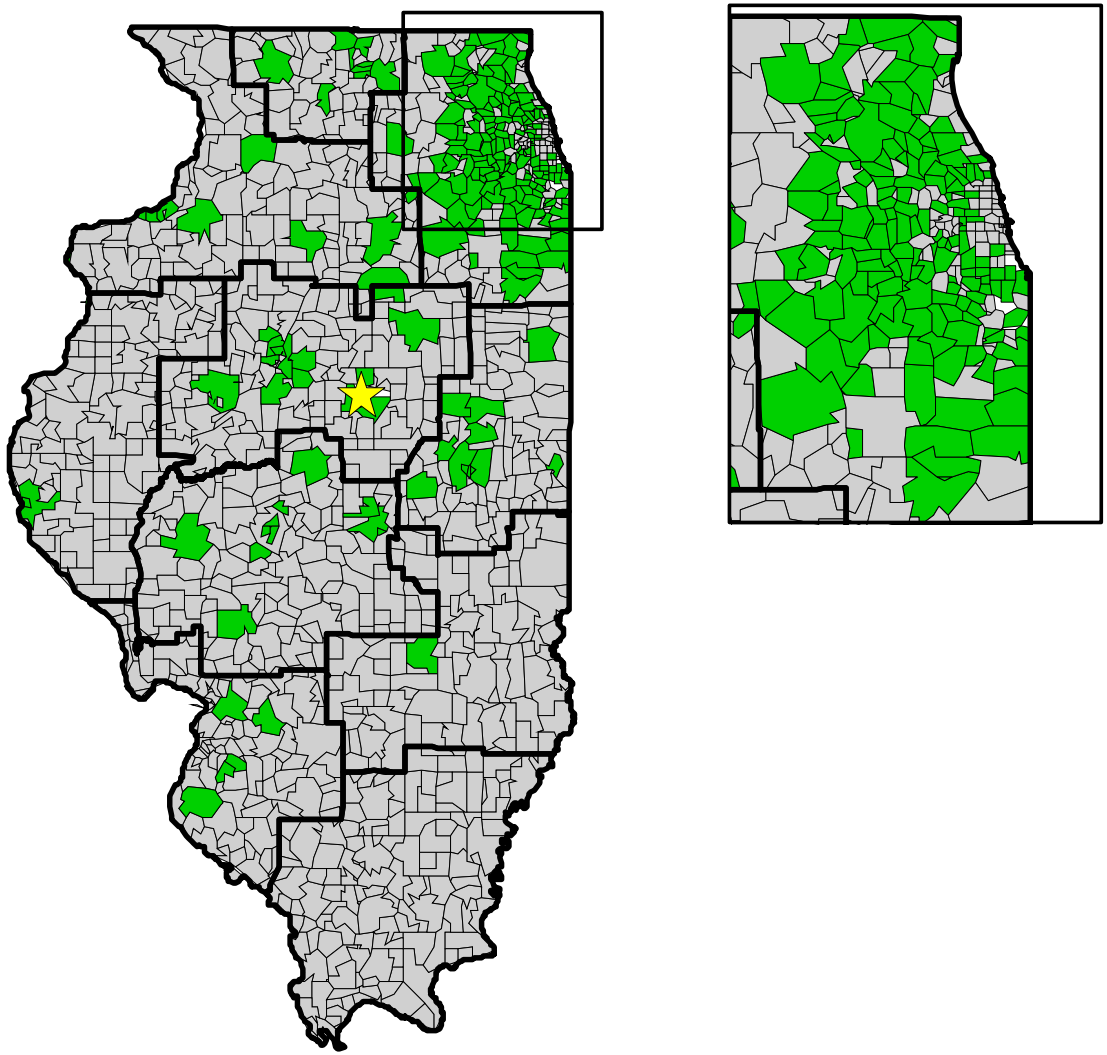
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which University of Illinois at Springfield Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



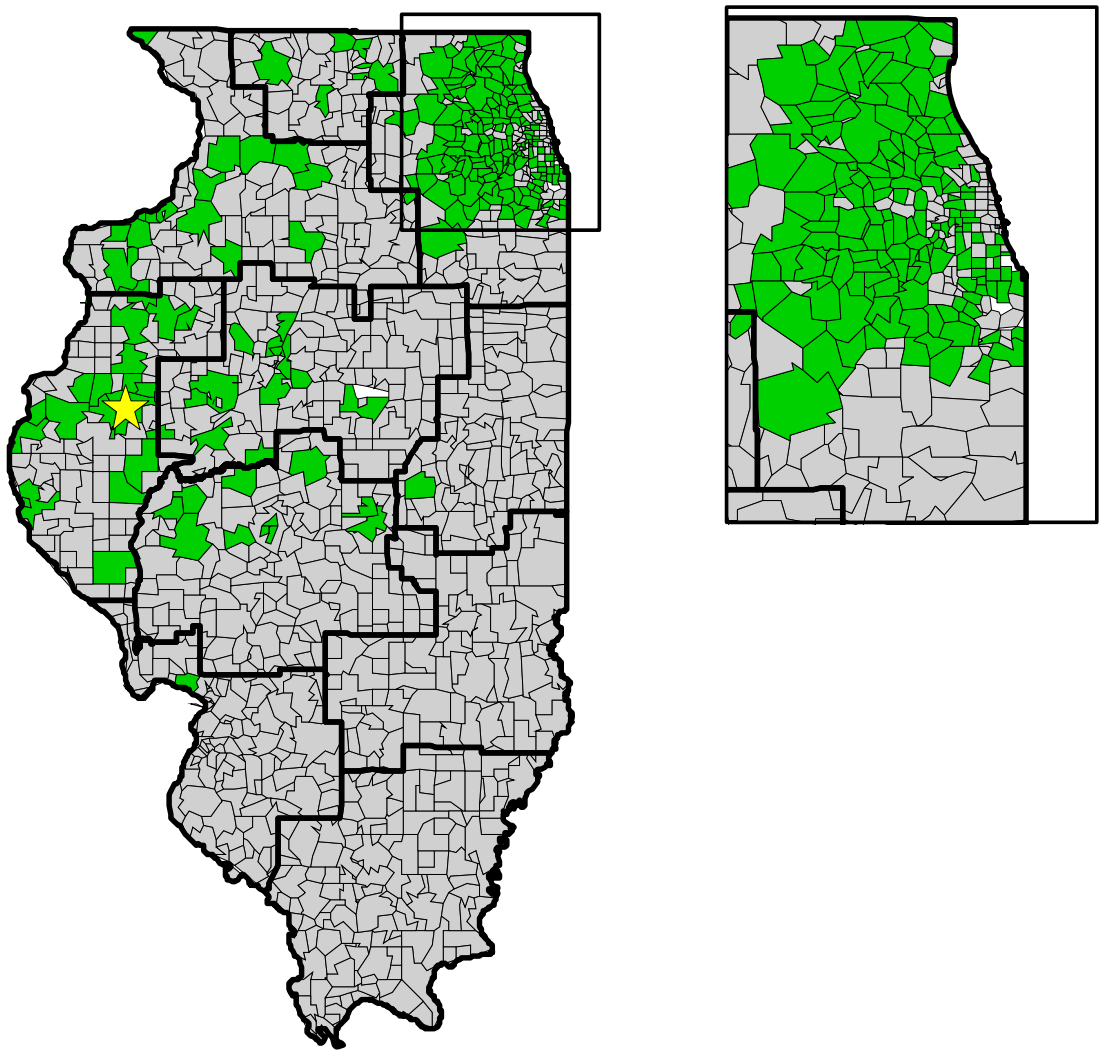
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Illinois State University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



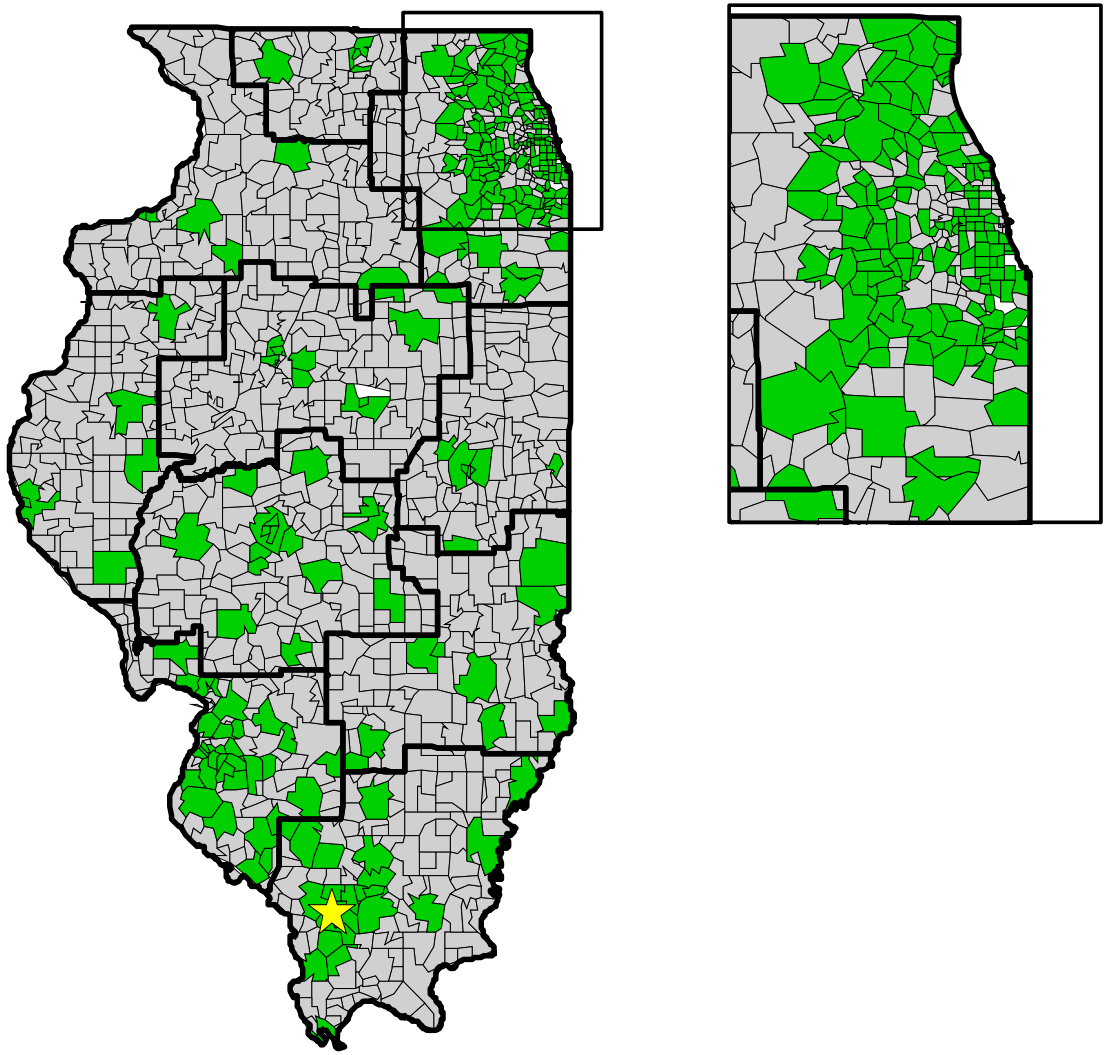
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Western Illinois University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



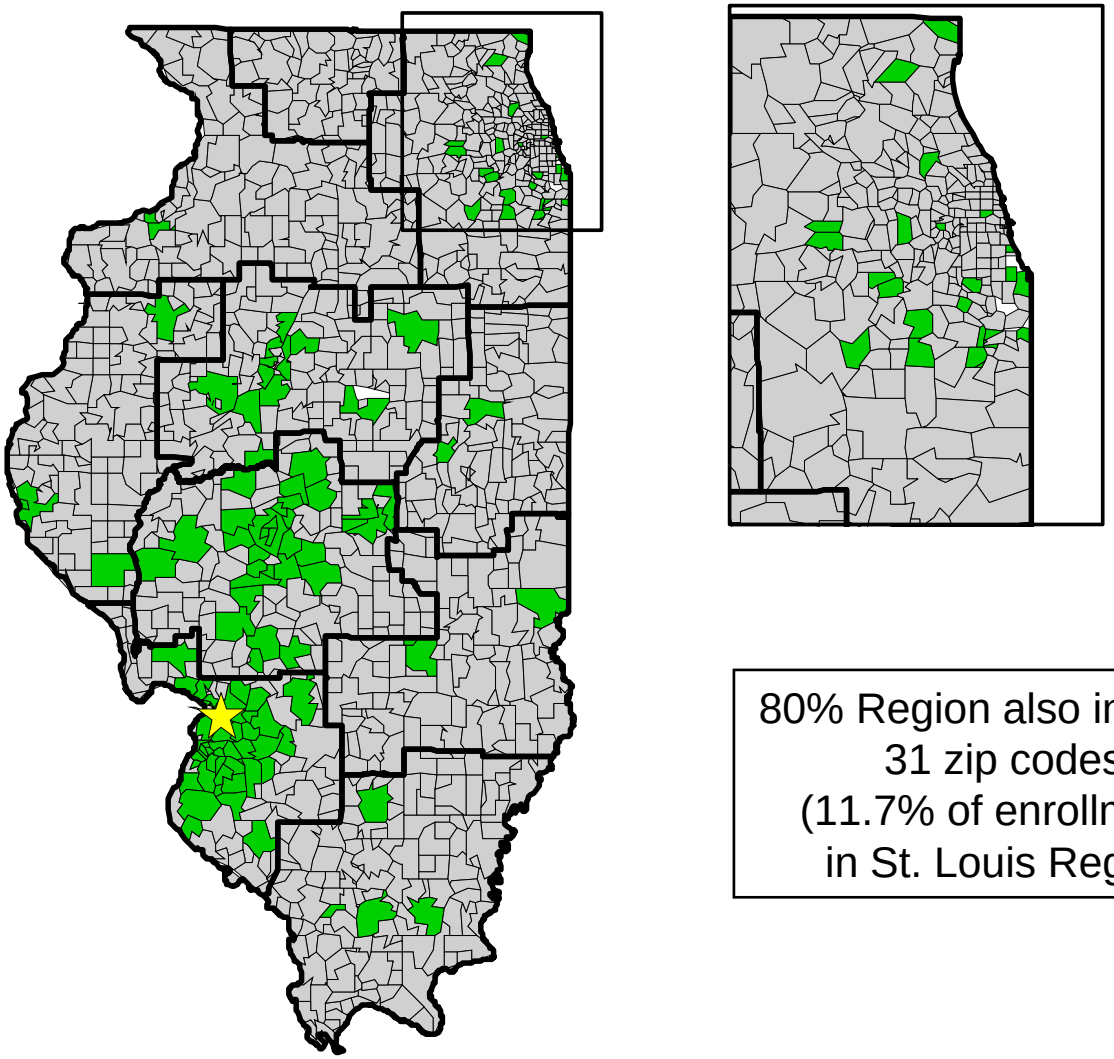
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Southern Illinois University-Carbondale Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



Source: Illinois Shared Enrollment and Graduation Information

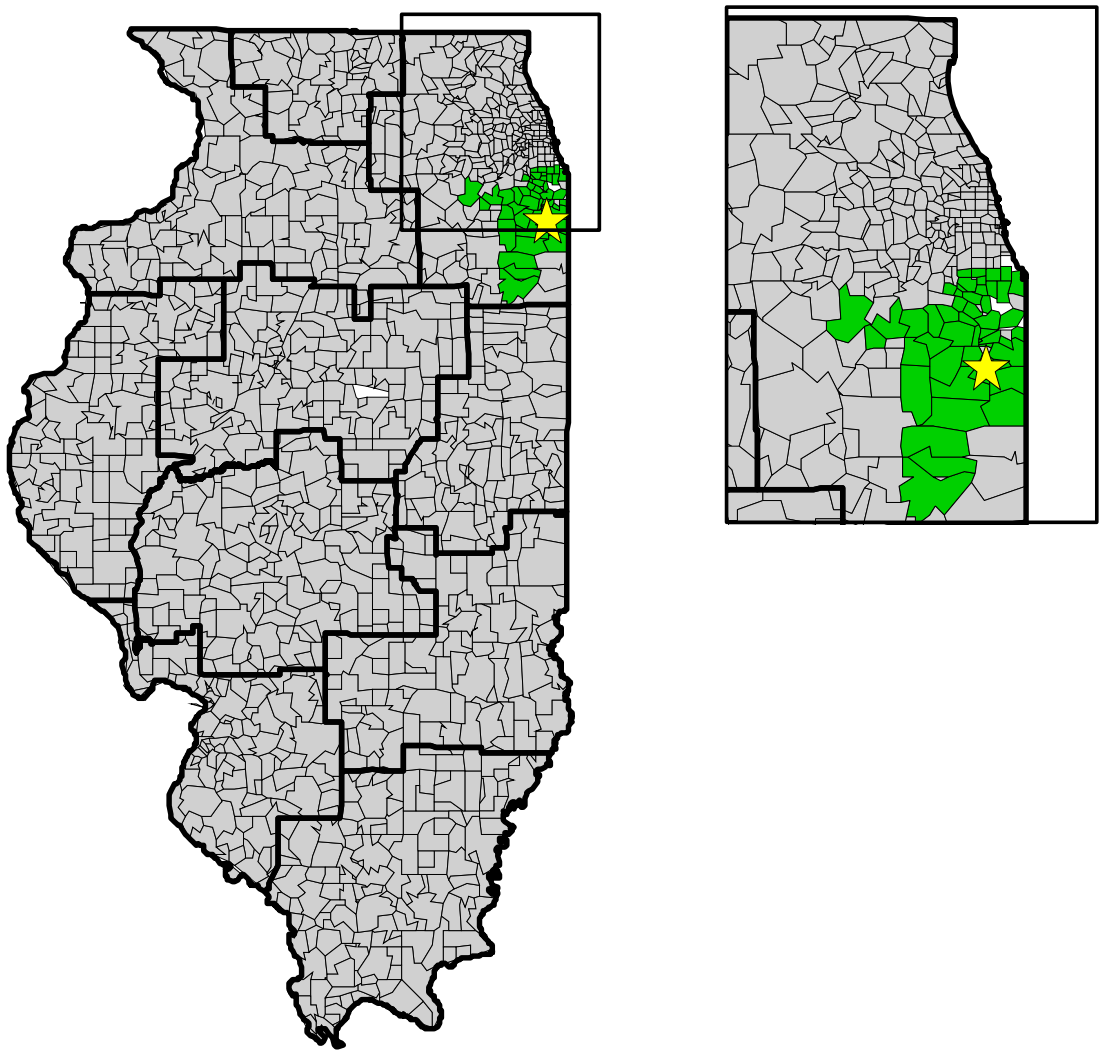
Zip Codes from Which Southern Illinois University-Edwardsville Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



80% Region also includes
31 zip codes
(11.7% of enrollment)
in St. Louis Region

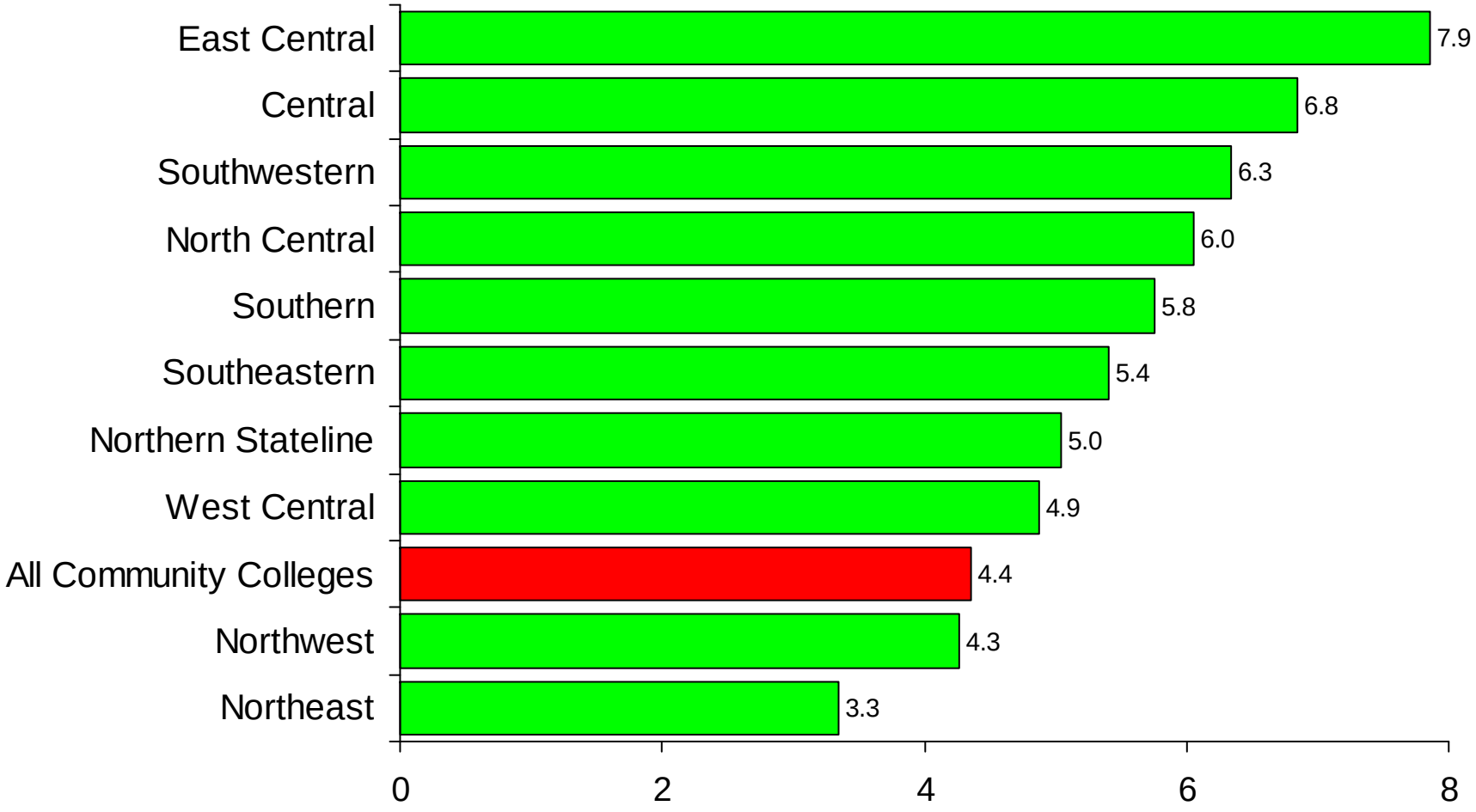
Source: Illinois Shared Enrollment and Graduation Information

Zip Codes from Which Governors State University Receives 80% of Its First-Time Undergraduate Enrollments, 2006-07



Source: Illinois Shared Enrollment and Graduation Information

Annual Community College Transfers to Public 4-Year Institutions Per 100 FTE Students by Region (Average 2005-06 and 2006-07)



Source: Illinois Shared Enrollment and Graduation Information

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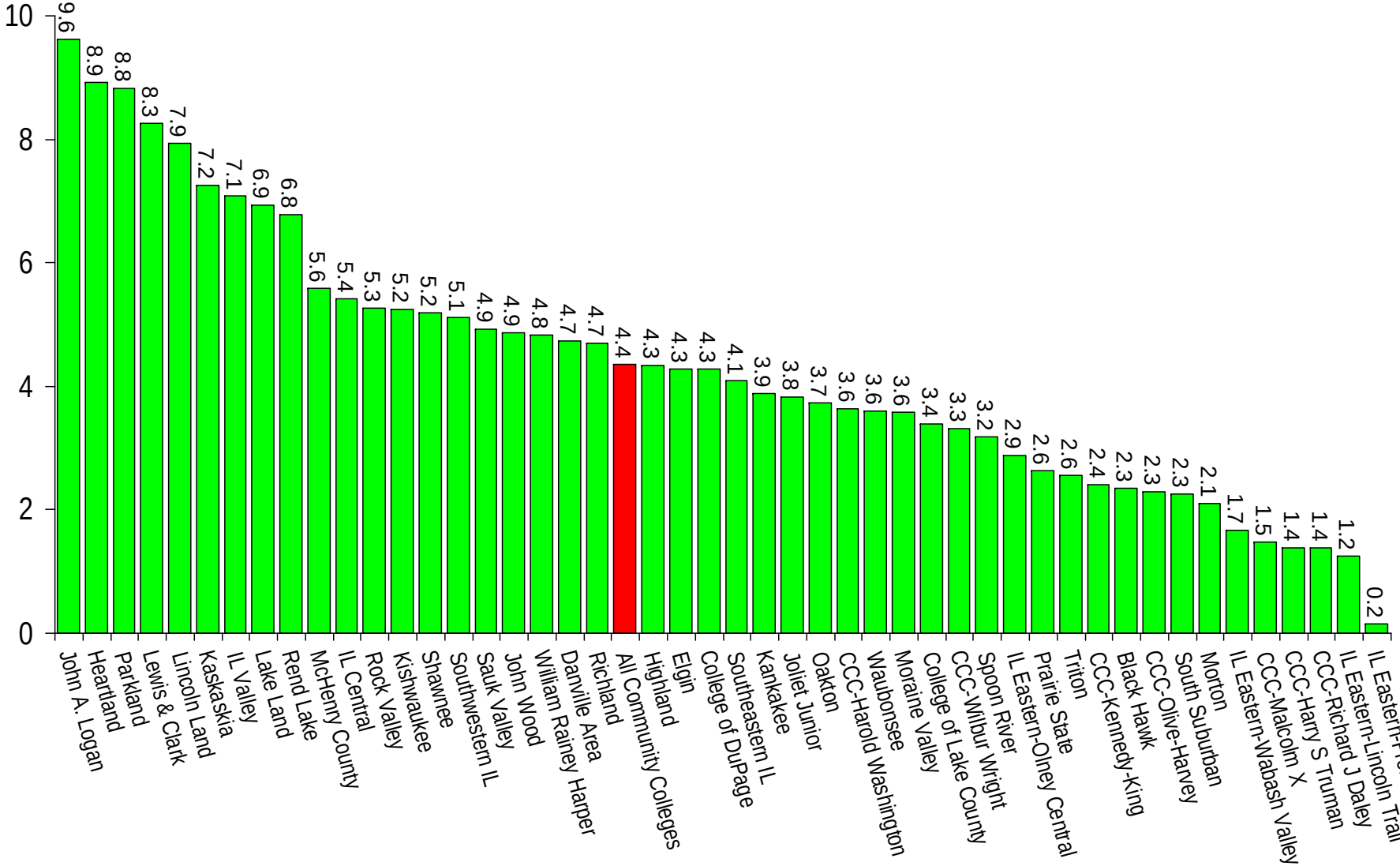
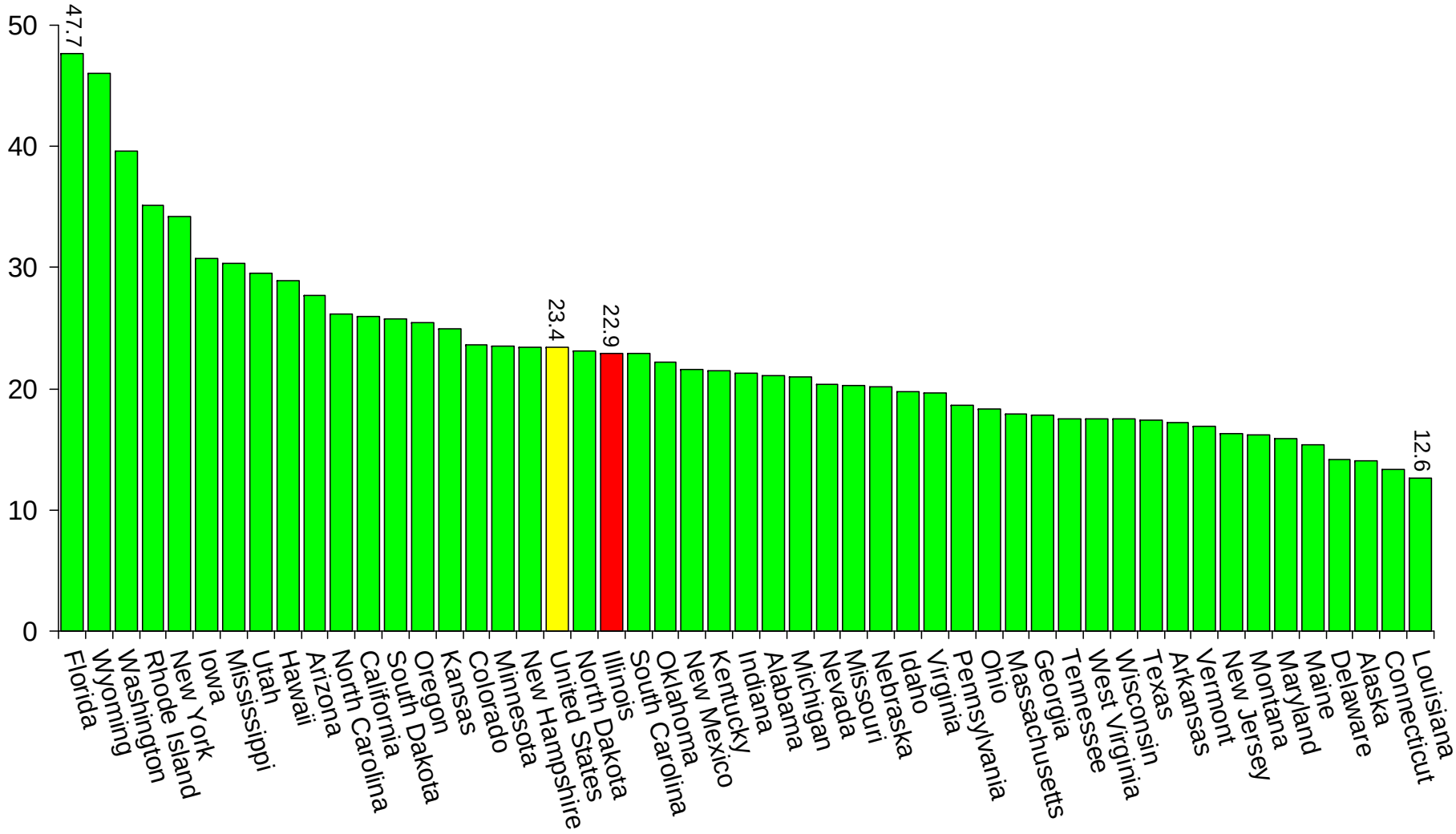


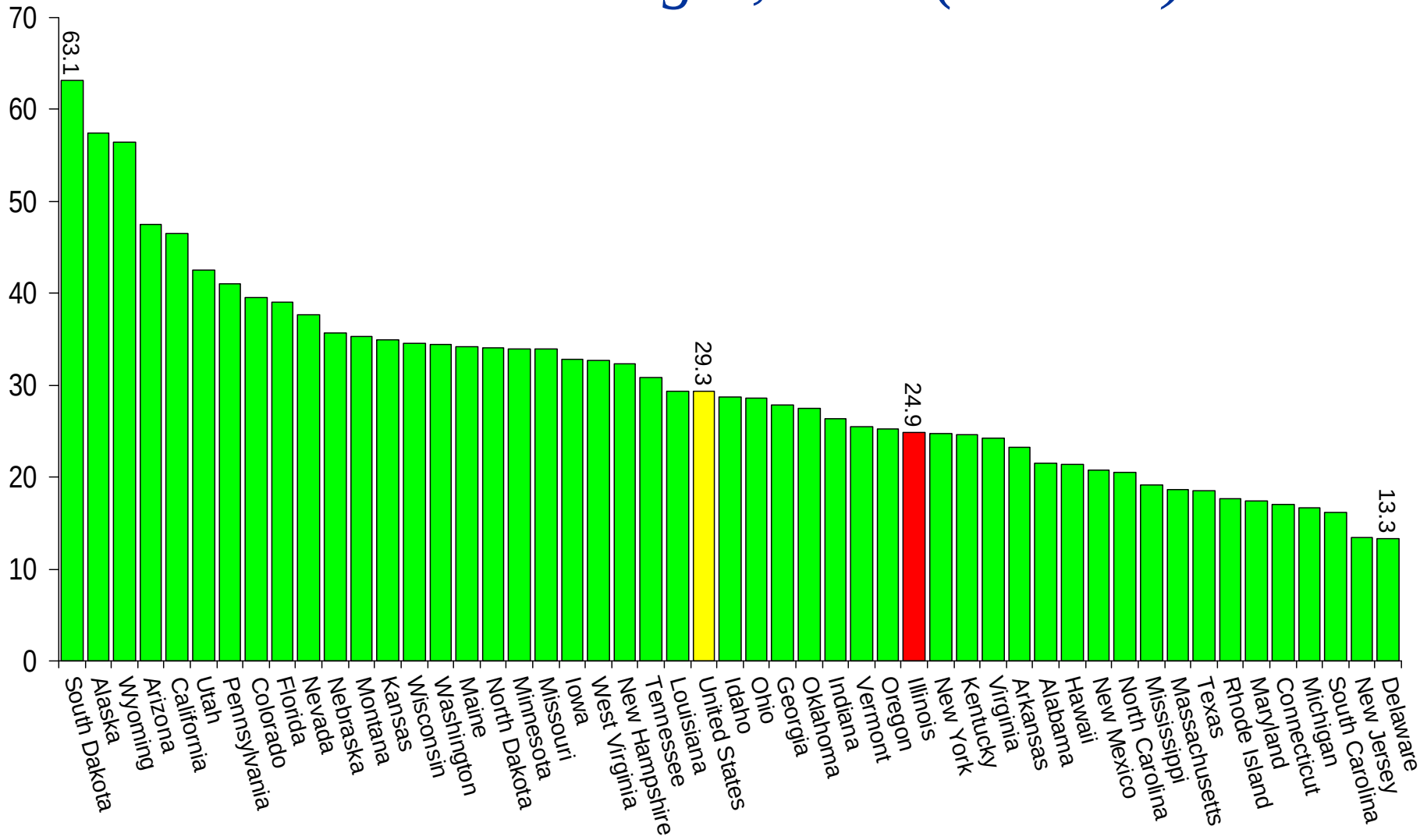
Source: Illinois Shared Enrollment and Graduation Information

Associate Degrees Awarded per 100 High School Graduates Three Years Earlier, 2004



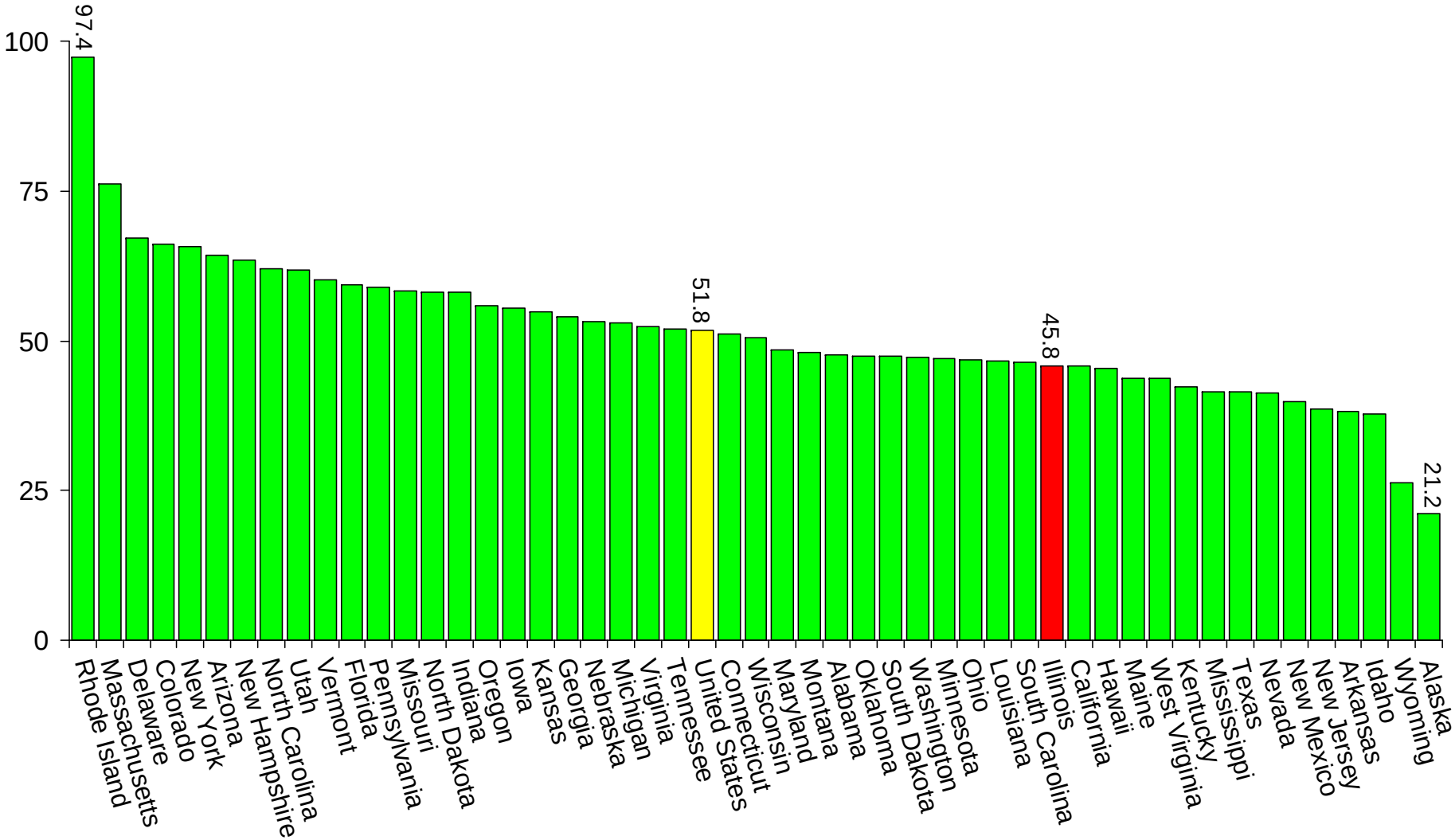
Source: NCES-IPEDS Completions Survey, WICHE

Three-Year Graduation Rates at Two-Year Colleges, 2005 (Percent)



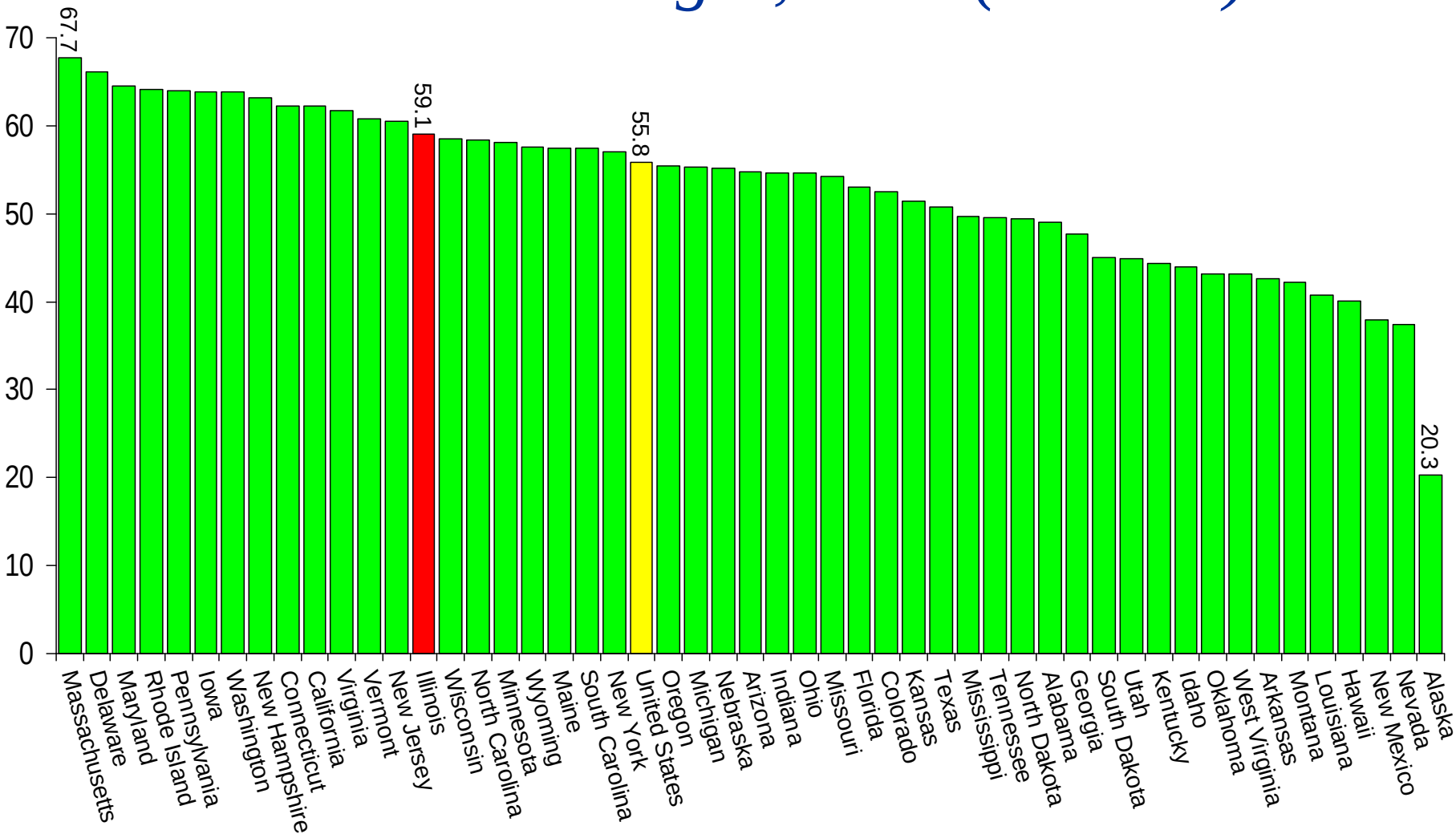
Source: NCES, IPEDS Graduation Rate Survey

Bachelor's Degrees Awarded per 100 High School Graduates Six Years Earlier, 2004



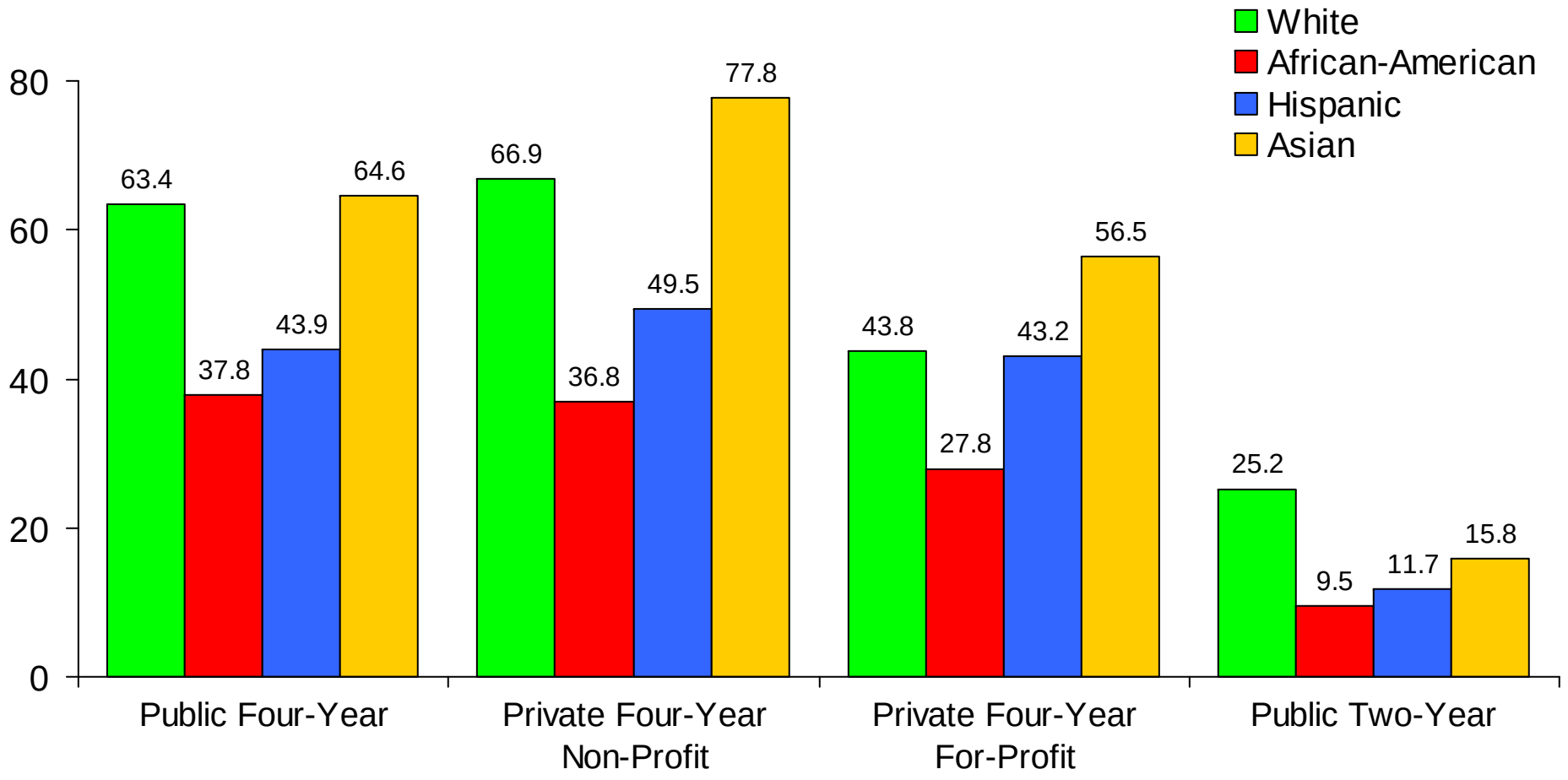
Source: NCES-IPEDS Completions Survey, WICHE

Six-Year Graduation Rates at Four-Year Colleges, 2005 (Percent)



Source: NCES, IPEDS Graduation Rate Survey

Graduation Rates Within 150% of Program Time by Race/Ethnicity and Sector, 2006 (Percent)

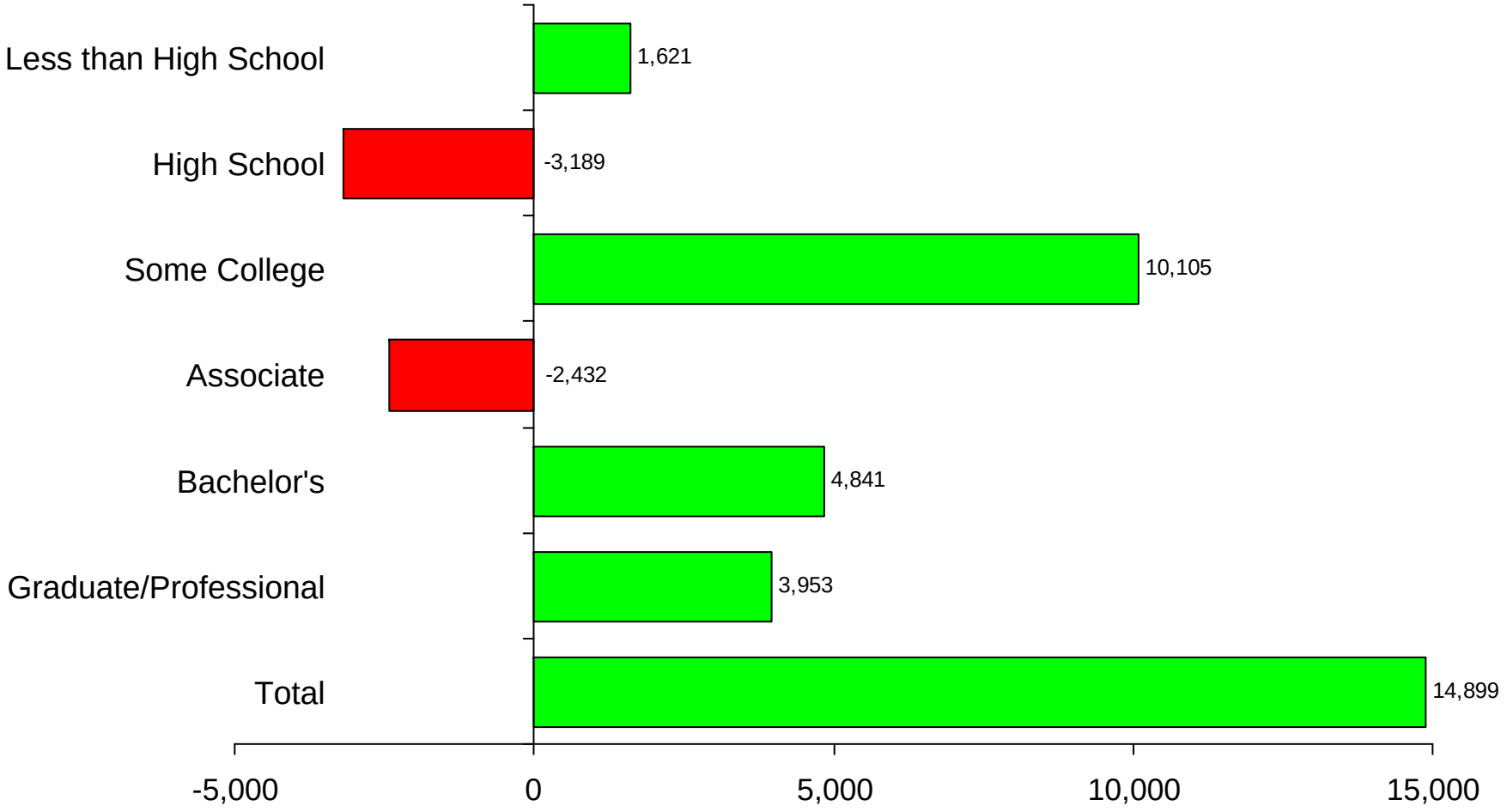


Source: NCES, IPEDS Graduation Rate Survey

Migration

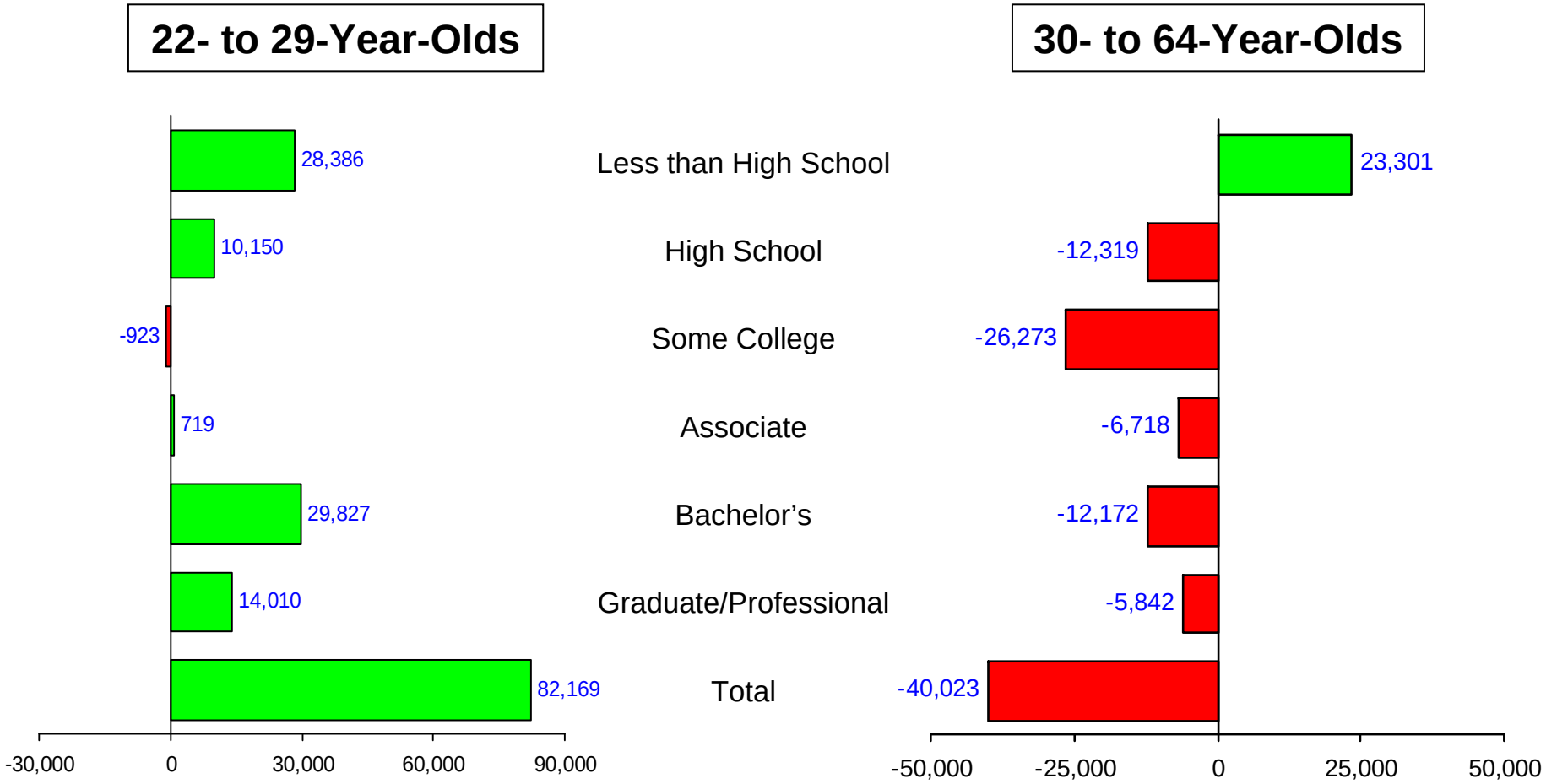
States' Ability to Produce Graduates vs. Ability to Keep and Attract Graduates

Illinois Net Migration of Residents Age 22-64 by Level of Education, 2004-05



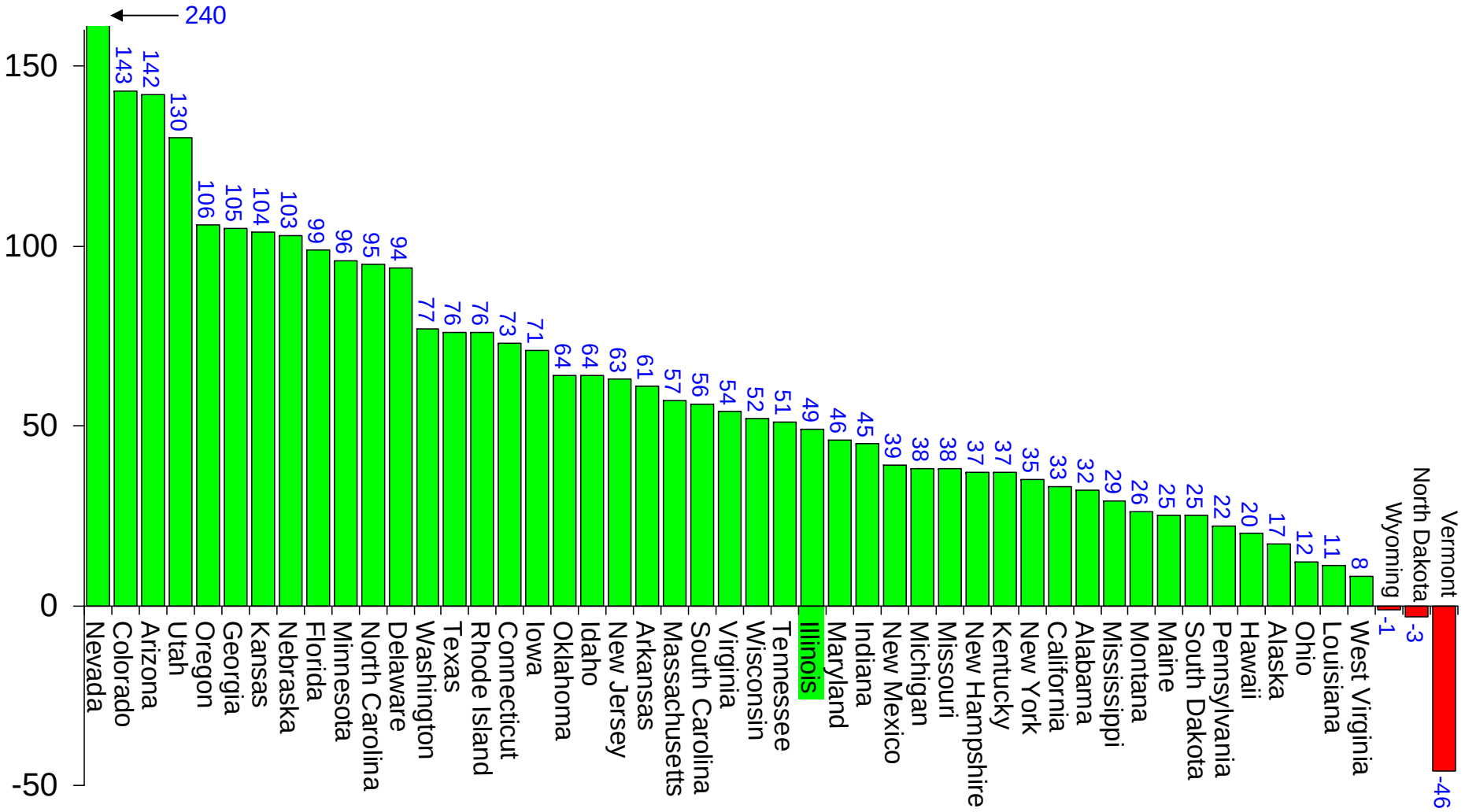
Source: 2005 ACS (PUMS)

Net Migration by Degree Level and Age Group—Illinois, 1995-2000



Source: U.S. Census Bureau, 2000 Census; 5% PUMS Files

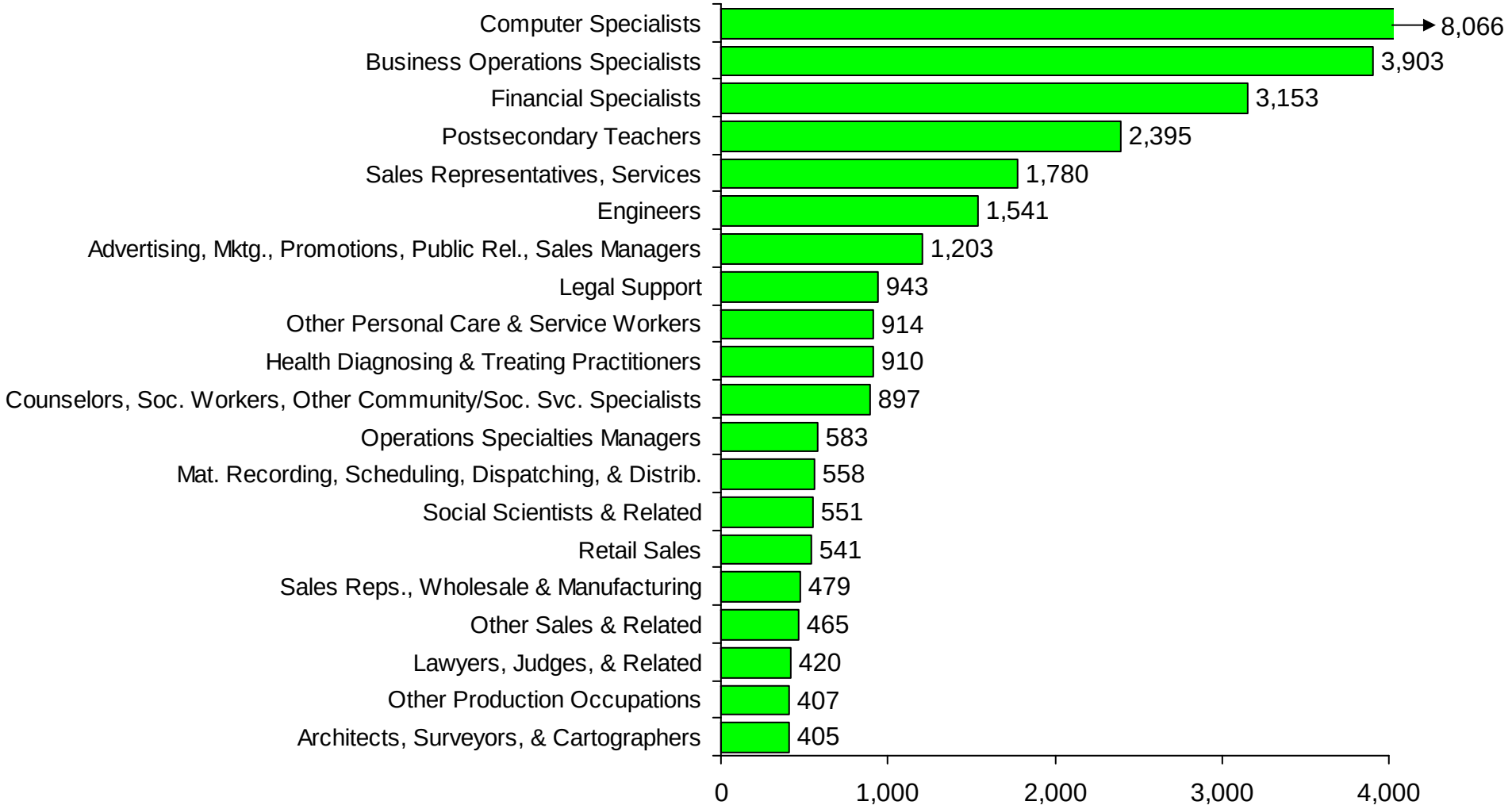
Migration Rate of Residents Age 22-64 with Less than a High School Diploma, 1995-2000*



* Per 1,000 residents age 22-64 with less than a high school diploma.

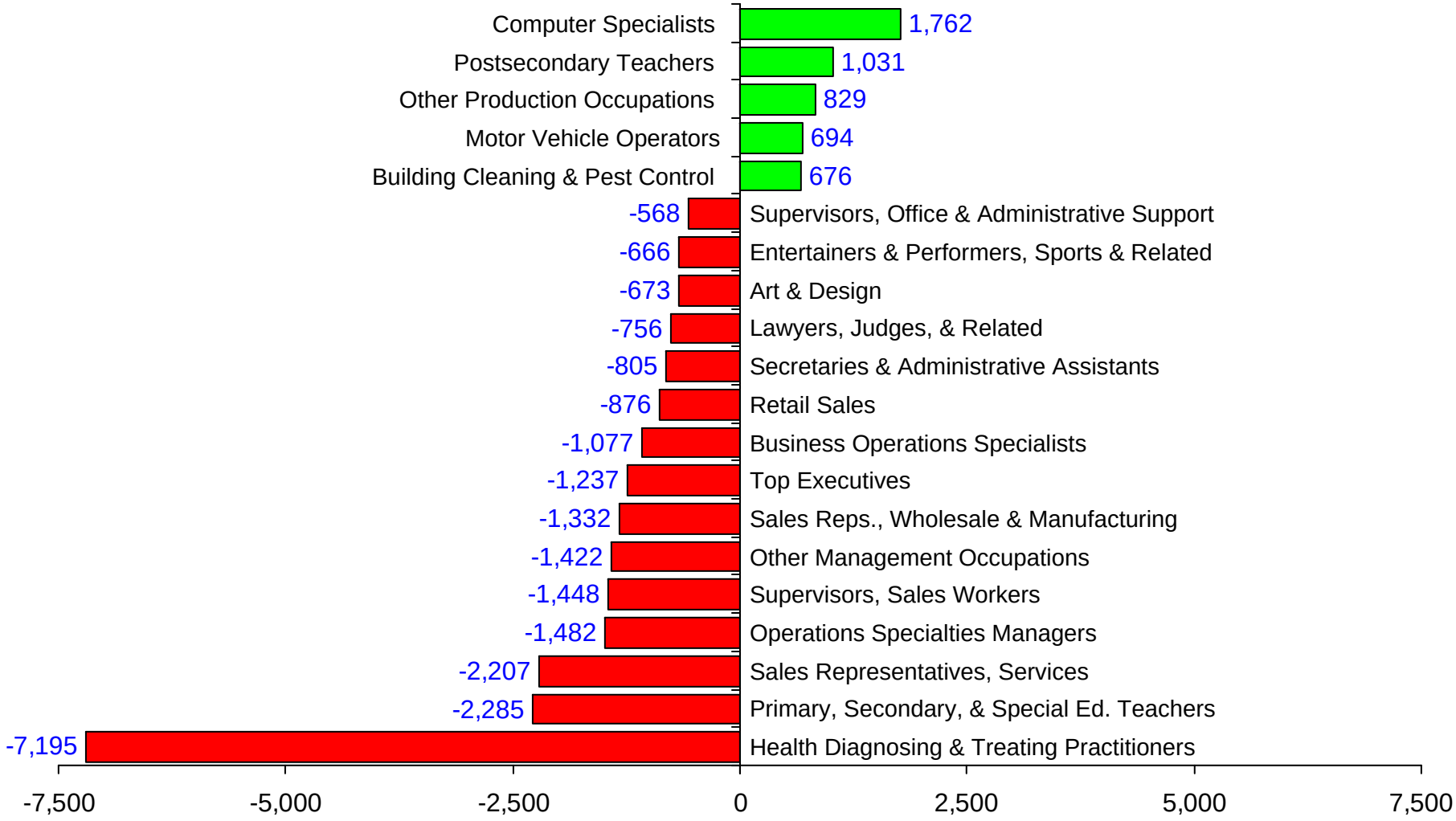
Source: State Higher Education Officers (SHEEO)

Illinois Net Migration of College Degree Holders Age 22-29 by Occupation, 1995 to 2000



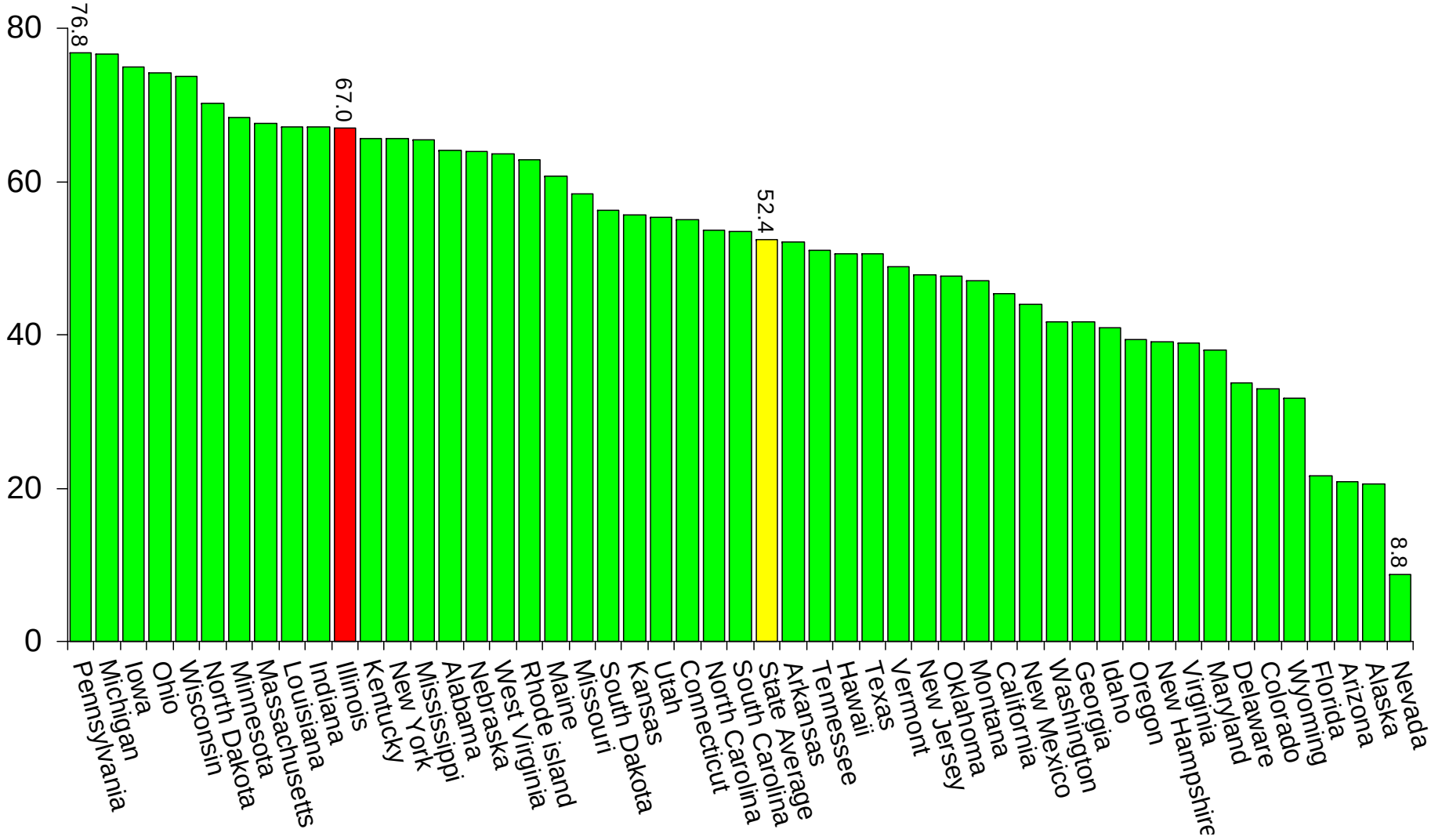
Source: U.S. Census Bureau, 2000 Census 5% PUMS File

Illinois Net Migration of College Degree Holders Age 30-64 by Occupation, 1995 to 2000



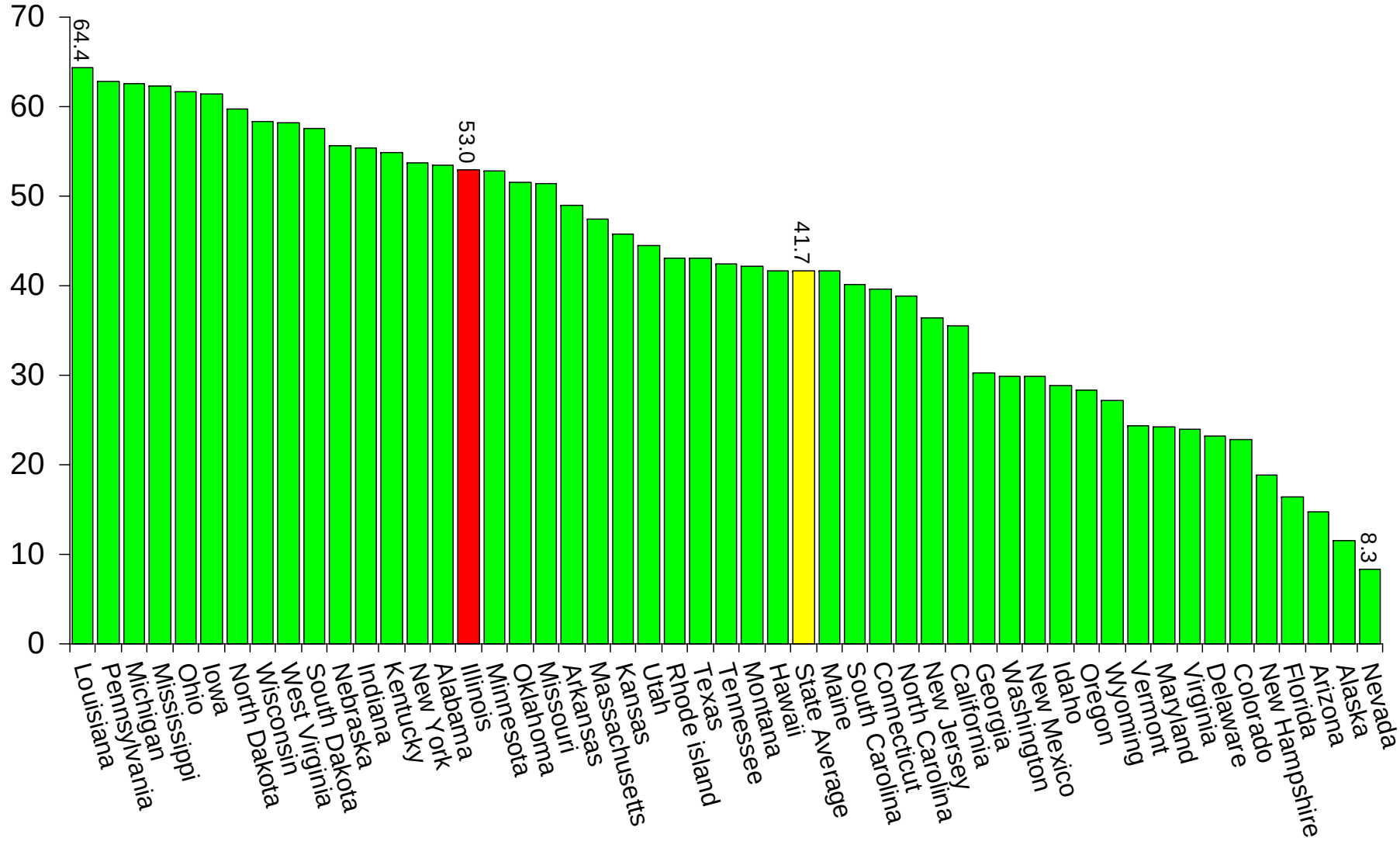
Source: U.S. Census Bureau, 2000 Census 5% PUMS File

Percent of Residents Age 25-64 with an Associate Degree Born In-State, 2005



Source: 2005 ACS

Percent of Residents Age 25-64 with a Bachelor's Degree or Higher Born In-State, 2005



Source: 2005 ACS

Innovation Assets

Development Report Card for the States—Illinois

C	**Performance**	Employment	F
		Earnings and Job Quality	C
		Equity	C
		Quality of Life	D
		Resource Efficiency	B
A	**Business Vitality**	Competitiveness/Existing Businesses	A
		Entrepreneurial Energy	C
B	**Development Capacity**	Human Resources	C
		Financial Resources	A
		Infrastructure Resources	A
		Amenity Resources and Natural Capital	C
		Innovation Assets	C

STRENGTHS (Top 10 Rank)

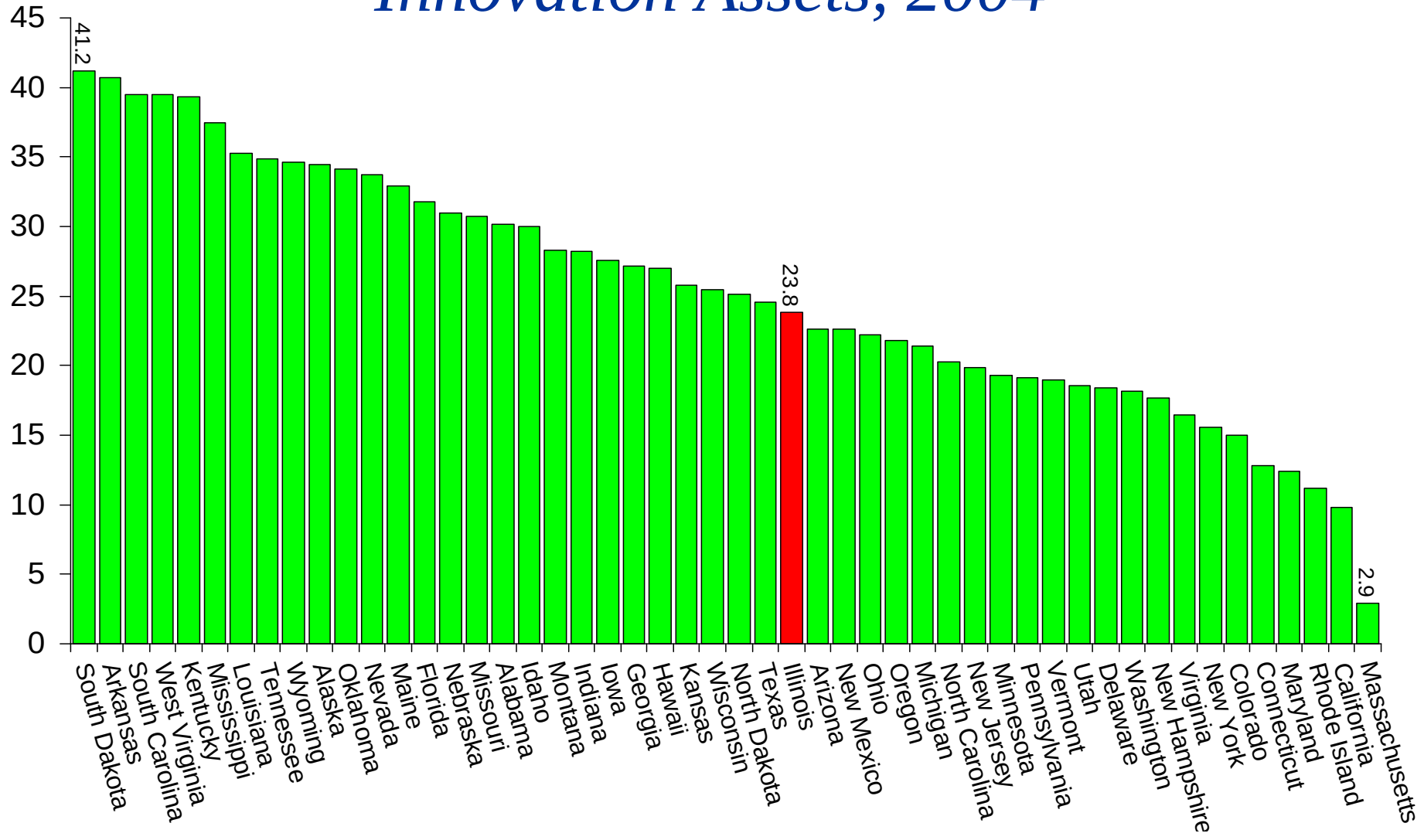
Rank	Measure
2	Initial Public Offerings
3	Change in Homeownership Rate
4	Change in Energy Costs
5	Bridge Deficiency
5	Industrial Diversity
5	Urban Mass Transit
5	Electronic Public Services
6	Disparity between Rural and Urban Areas
7	Vehicle Miles Traveled
8	Strength of Traded Sector
8	Average Annual Pay
10	Average Teacher Salary

WEAKNESSES (Bottom 10 Rank)

Rank	Measure
41	Sewage Treatment Needs
41	Renewable Energy
43	Change in Average Annual Pay
43	Unemployment Rate
43	Average Annual Pay Growth
43	Change in New Companies
44	Change in Income from Dividends, Interest and Rent
44	New Companies
47	Employment Growth: Long Term
48	Net Migration
48	Change in Poverty Rate
48	Change in Health Professional Shortage Areas
49	Mass Layoffs

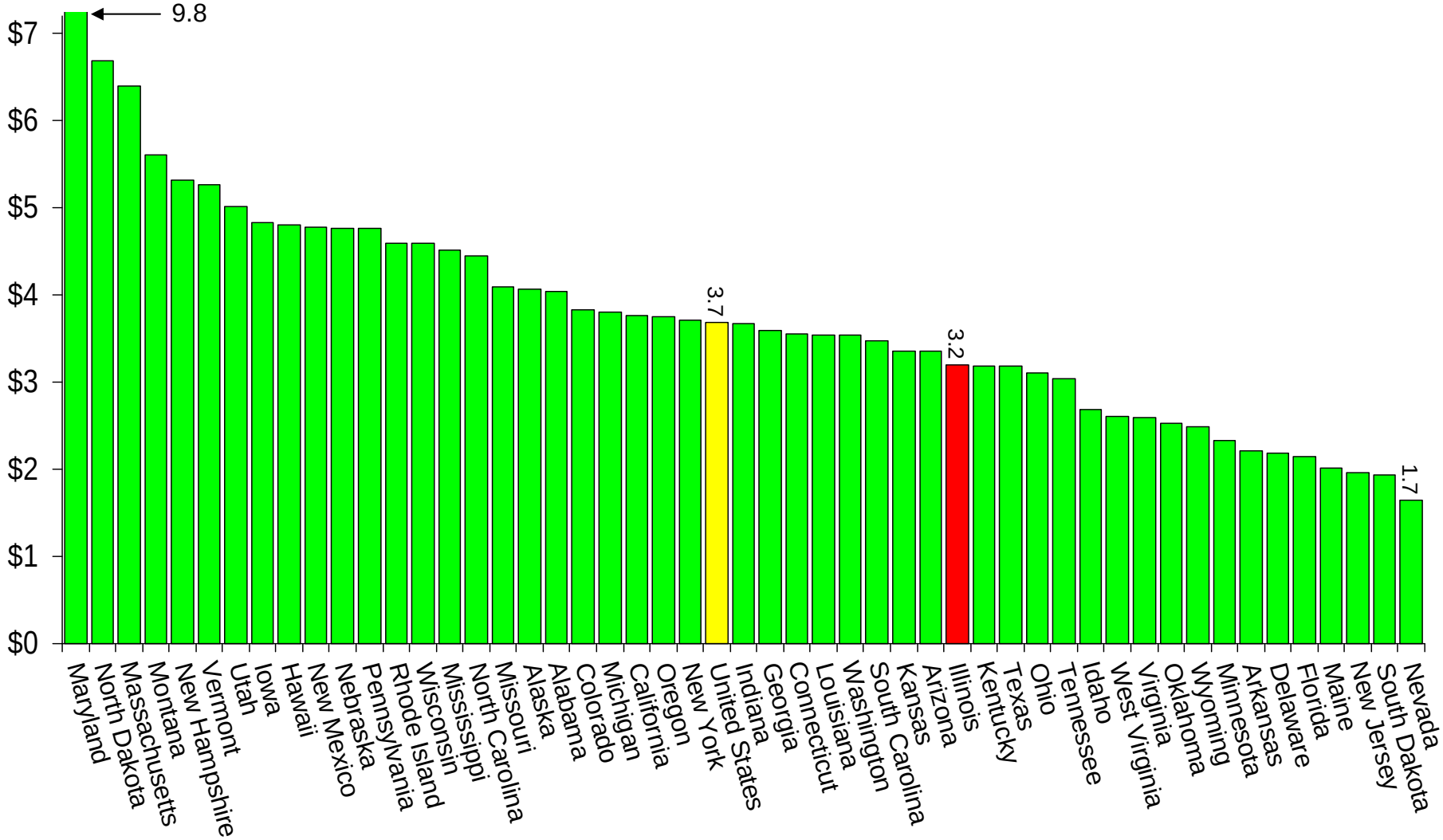
Source: 2006 *Development Report Card for the States*, Corporation for Enterprise Development (CFED)

Overall State Scores on Measures of Innovation Assets, 2004



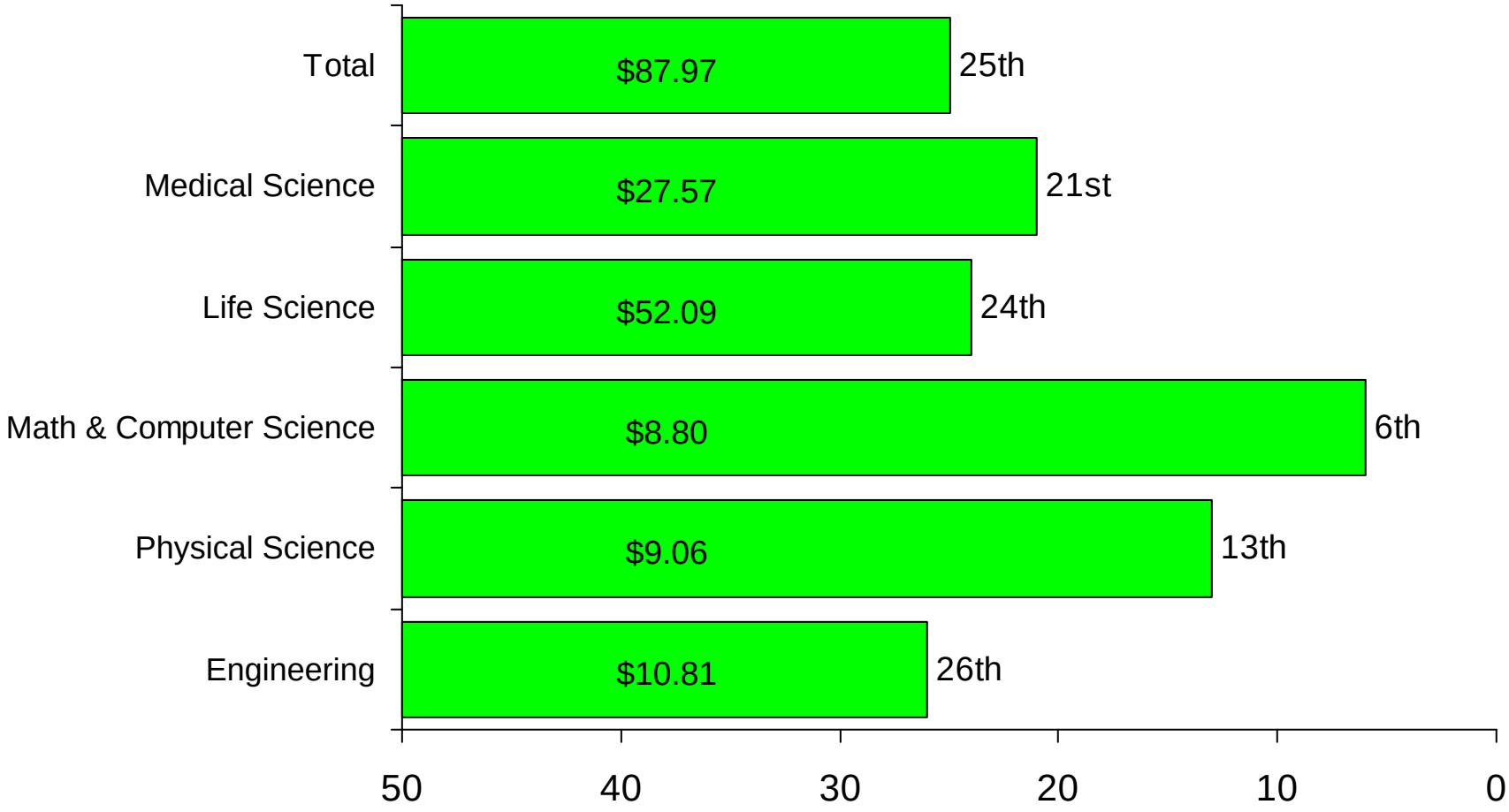
Source: *Development Report Card for the States*, CFED

Academic Research and Development per $1,000 Gross State Product, 2004



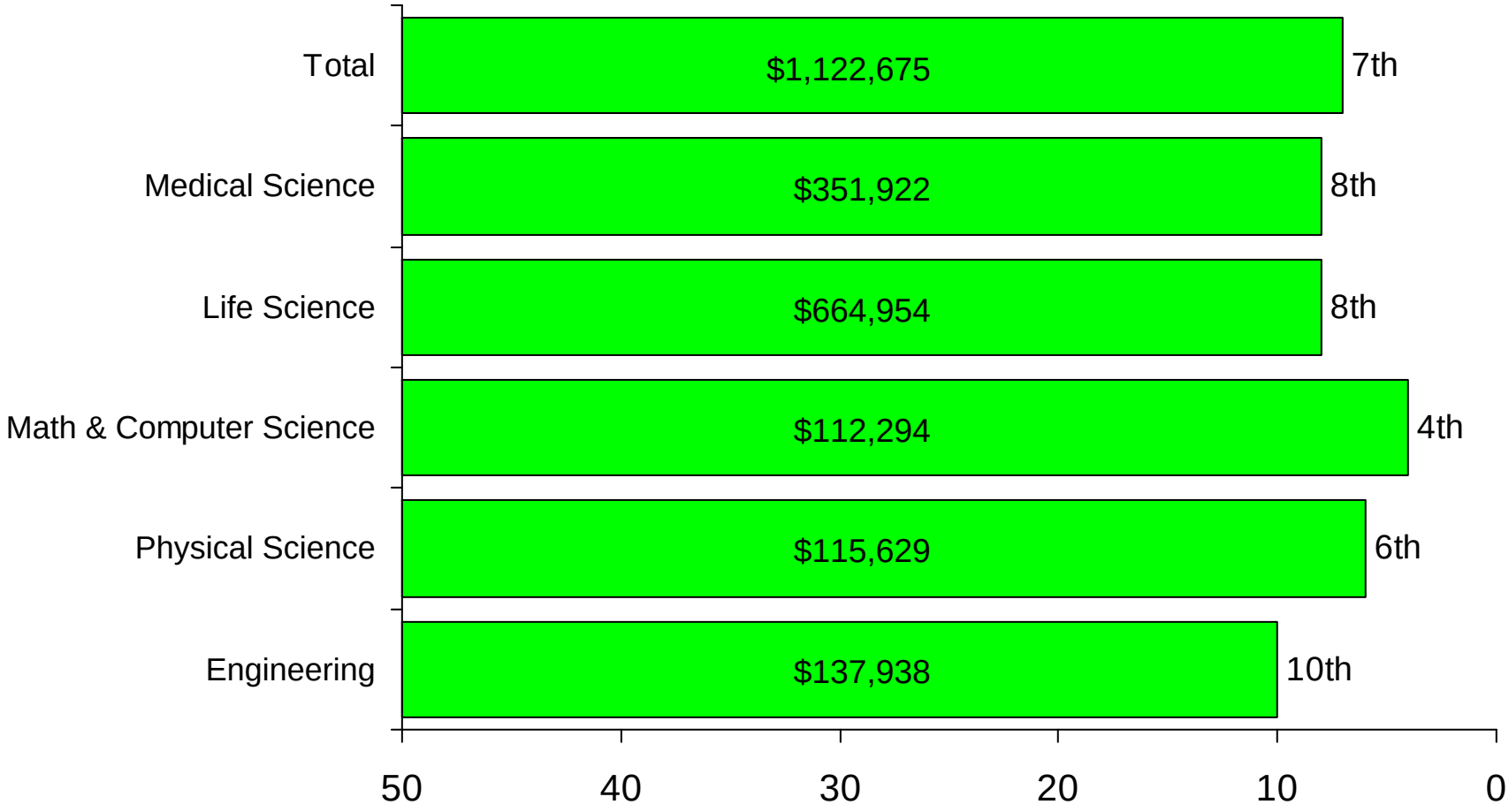
Source: National Science Foundation; Bureau of Economic Analysis

Illinois Rank—Federal Research and Development Expenditures Per Capita, 2005



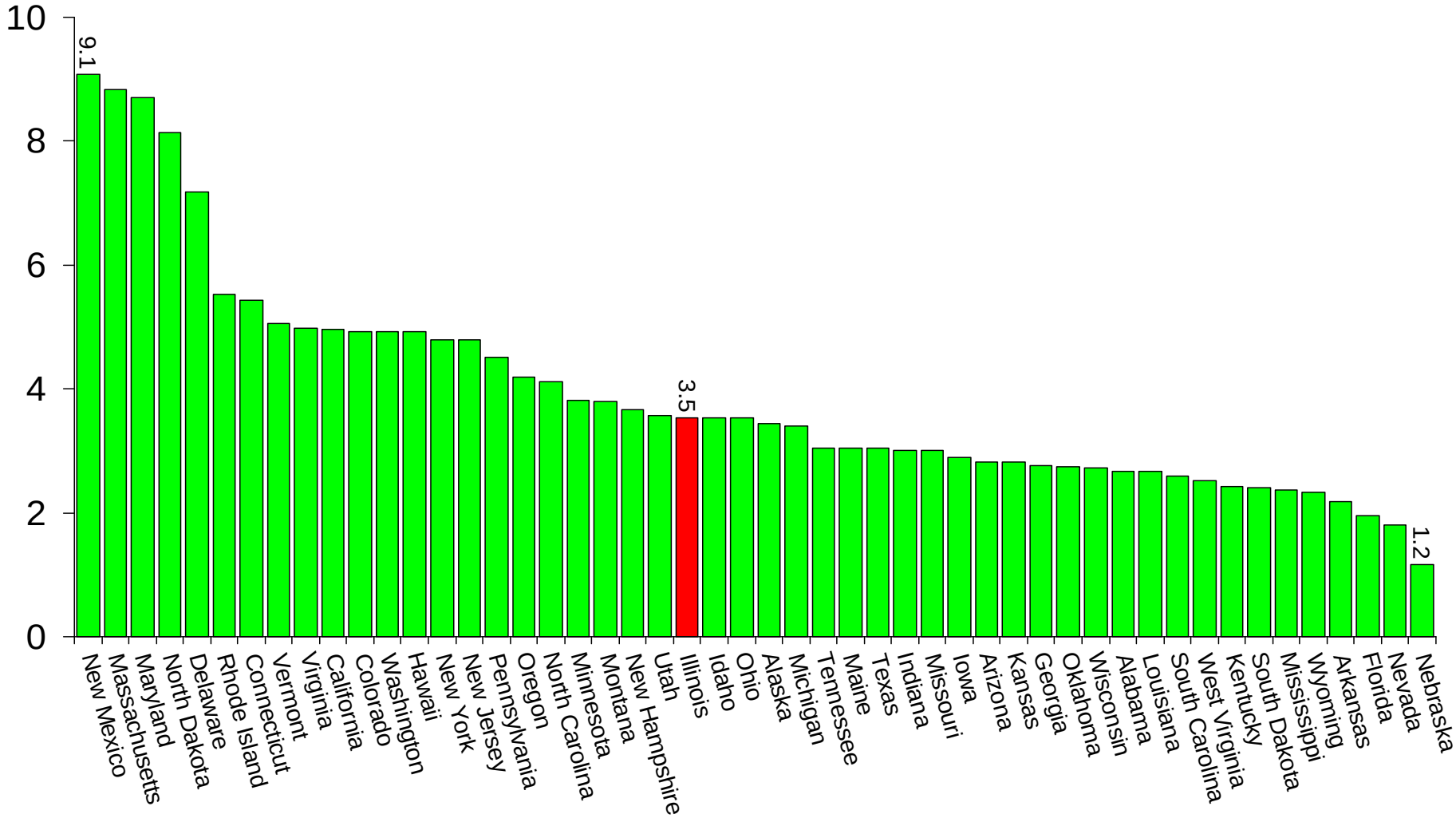
Source: National Science Foundation; U.S. Census Bureau Population Estimates

Illinois Rank—Federal Research and Development Expenditures, 2005



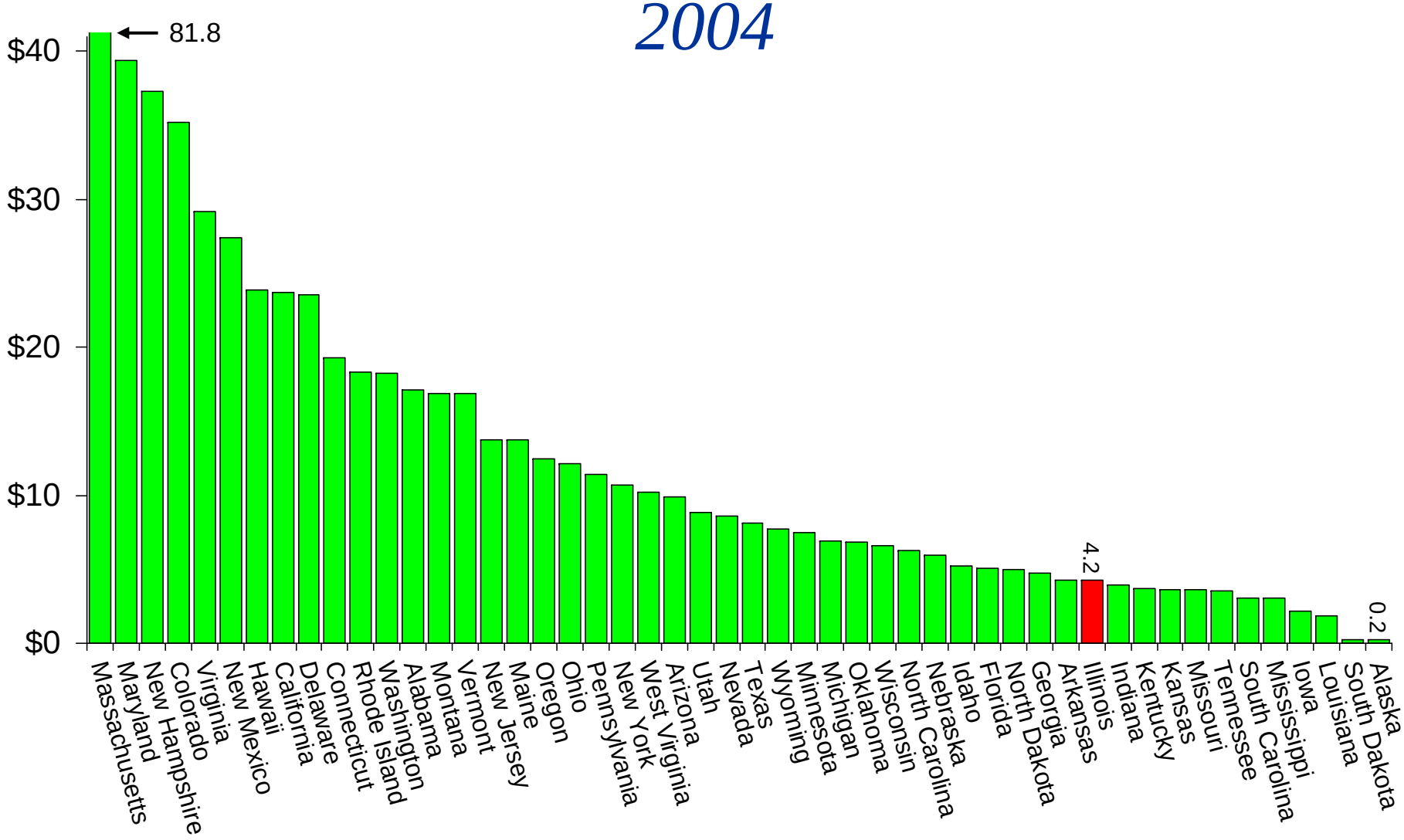
Source: National Science Foundation; U.S. Census Bureau Population Estimates

Number of Doctorates per 1,000 Workers—Science and Engineering, 2004



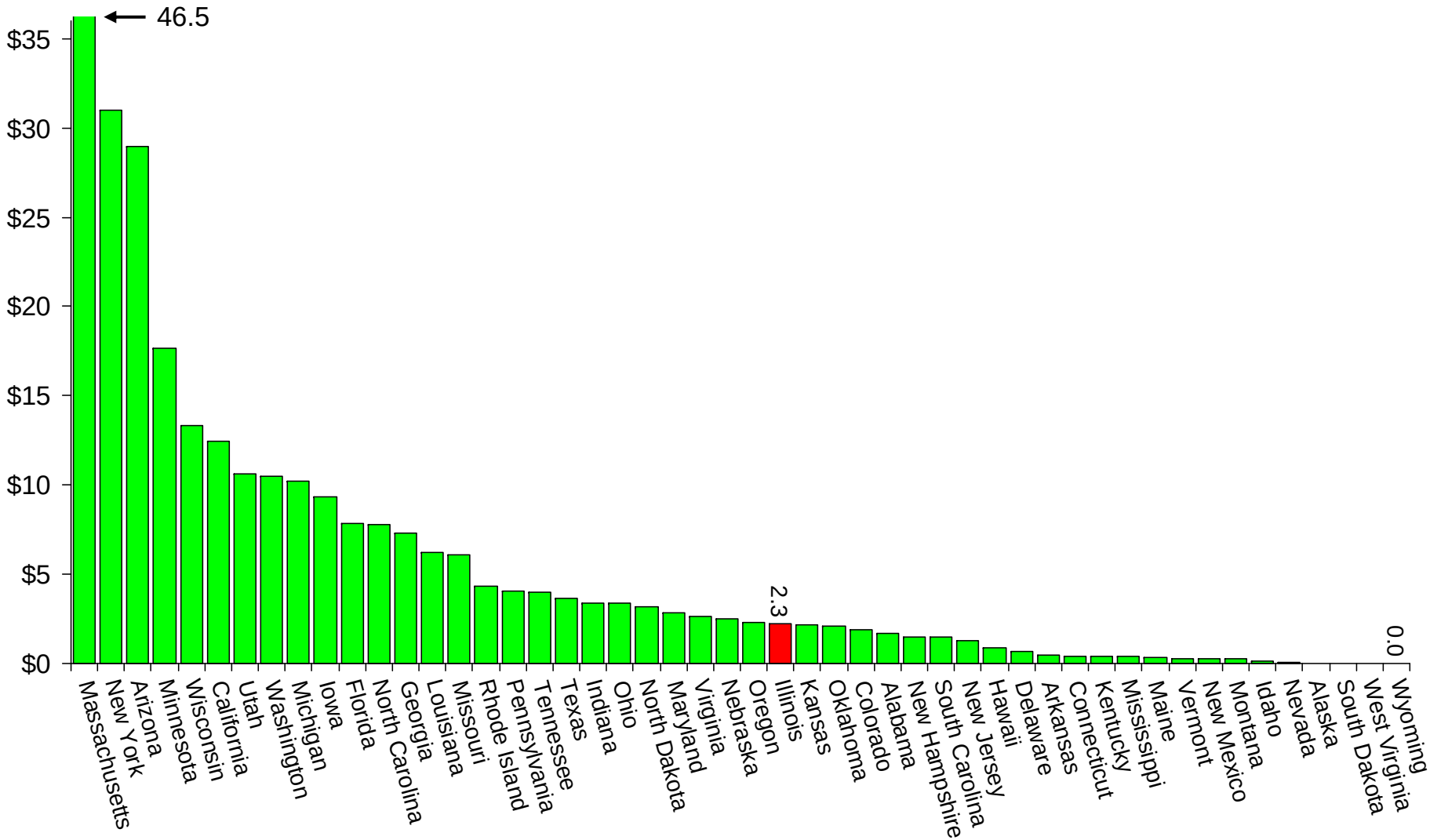
Source: *Development Report Card for the States*, CFED

Dollar Value of SBIR Grants Per Worker, 2004



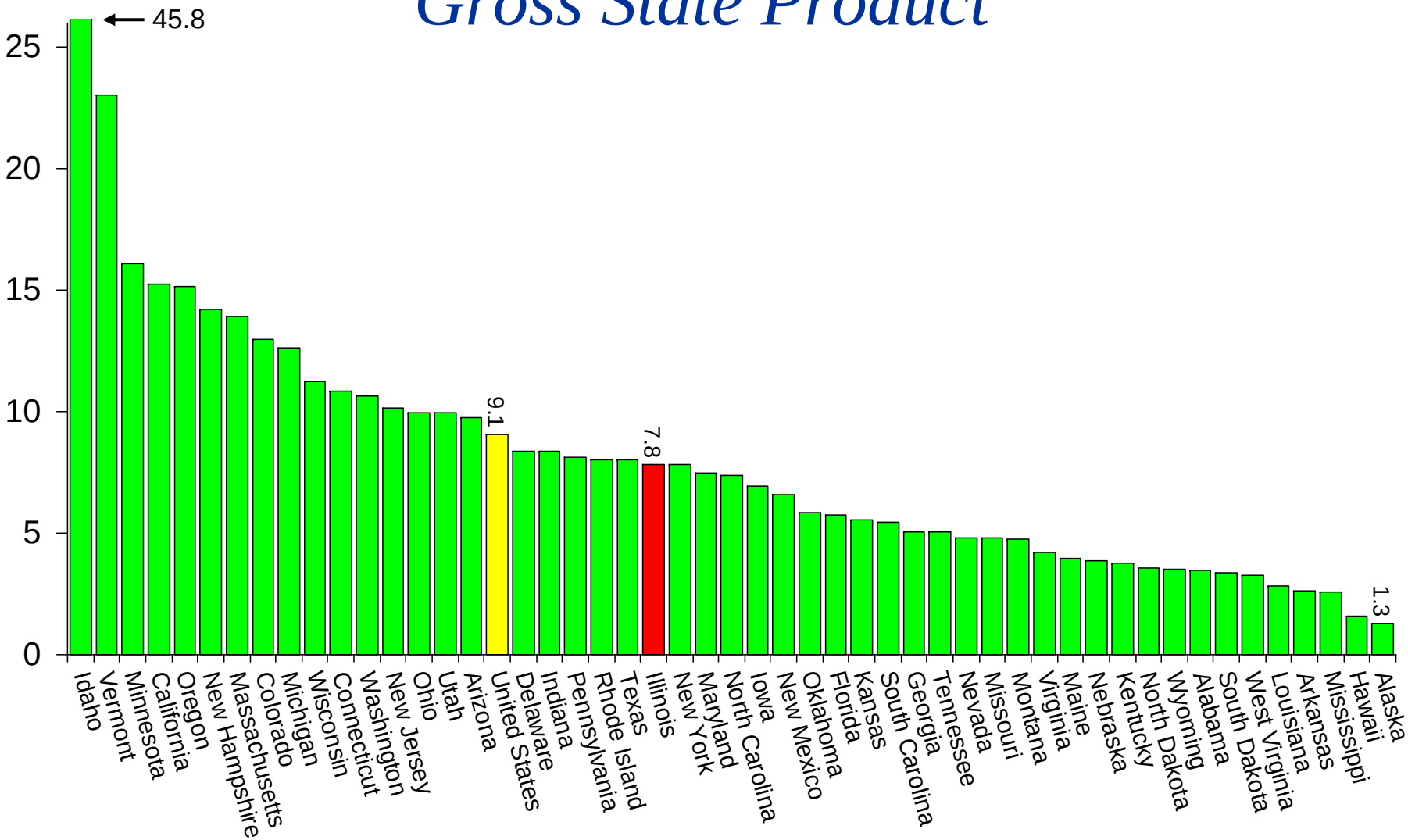
Source: *Development Report Card for the States*, CFED

Gross License Income Per Worker, 2004



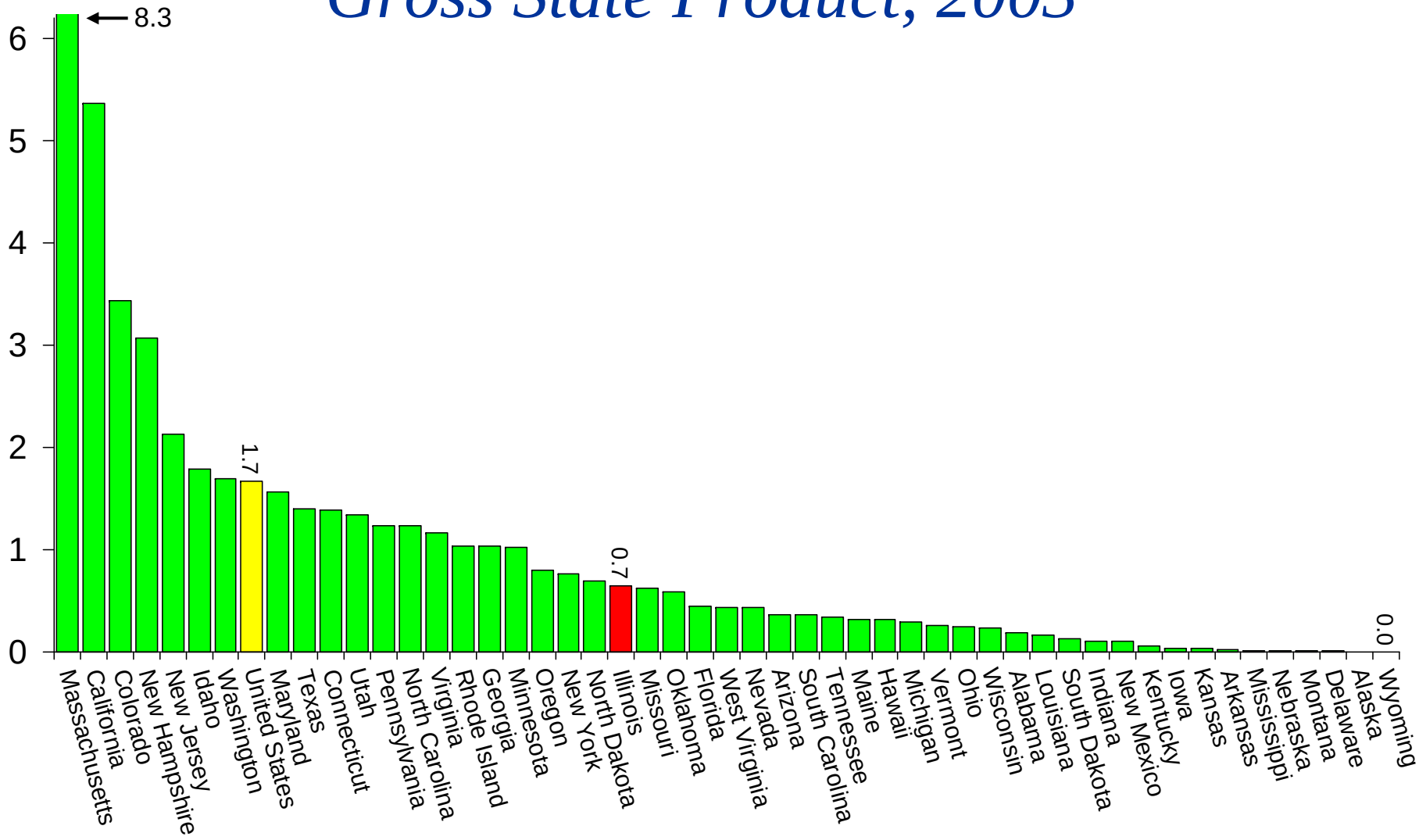
Source: *Development Report Card for the States*, CFED

Number of Patents Issued Per $1,000 Gross State Product



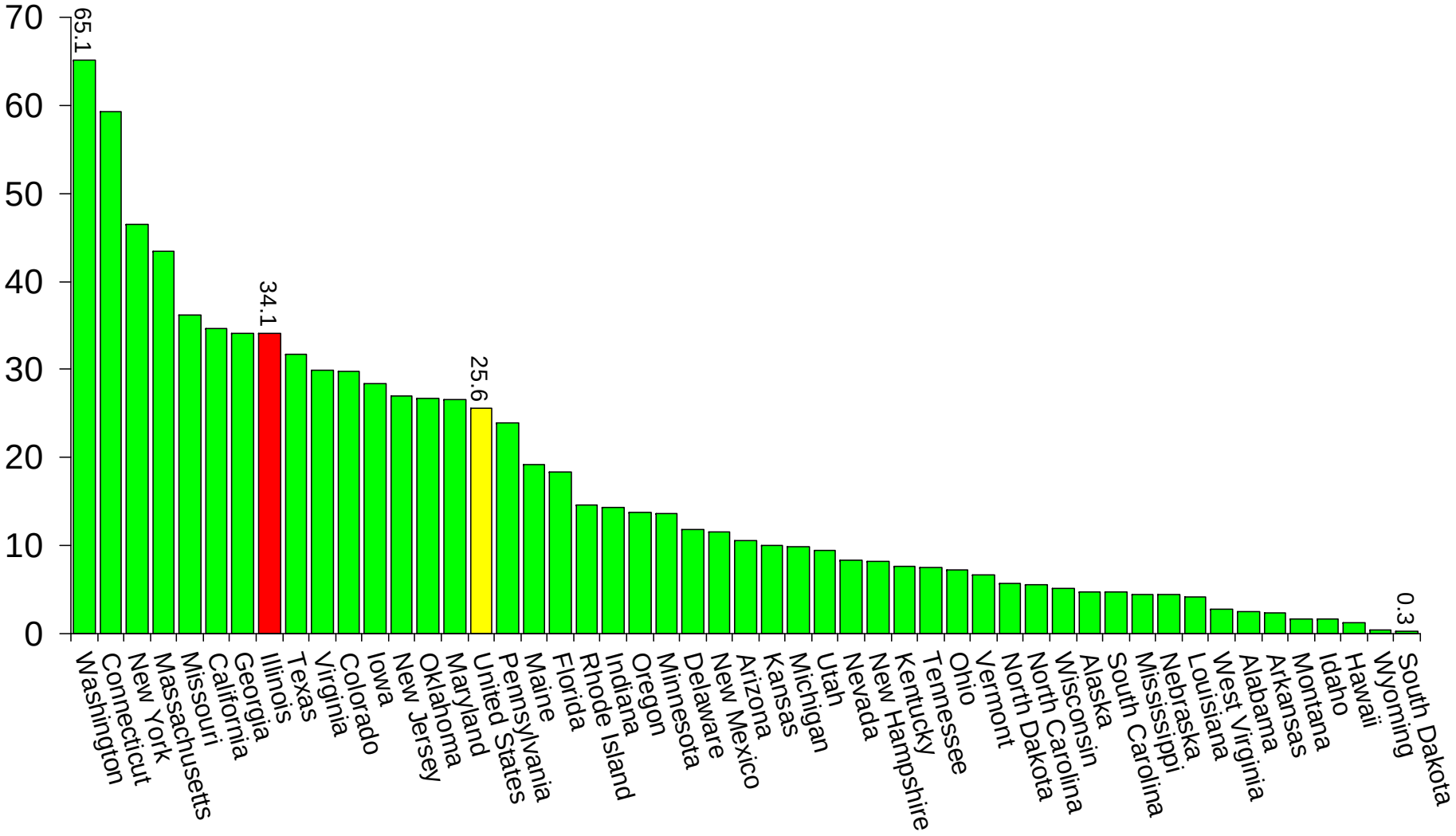
Source: *2004/2005 Economic Vision 2010 Report Card,* Indiana Chamber

Venture Capital—Financing Per $1,000 Gross State Product, 2003



Source: *2004/2005 Economic Vision 2010 Report Card,* Indiana Chamber

Number of Initial Public Offerings—Financing Per $1,000 Gross State Product, 2002

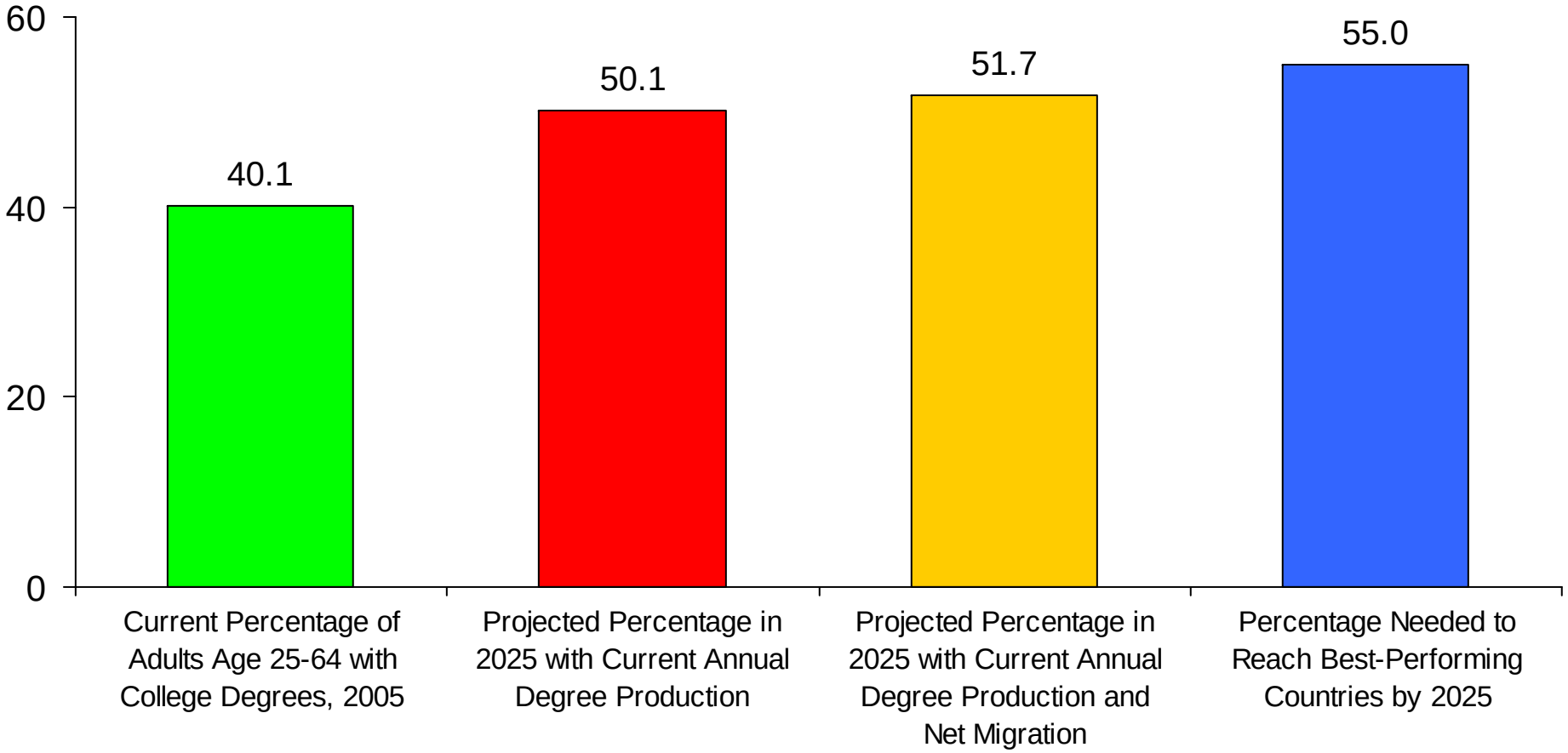


Source: *2004/2005 Economic Vision 2010 Report Card,* Indiana Chamber

The Fiscal Environment

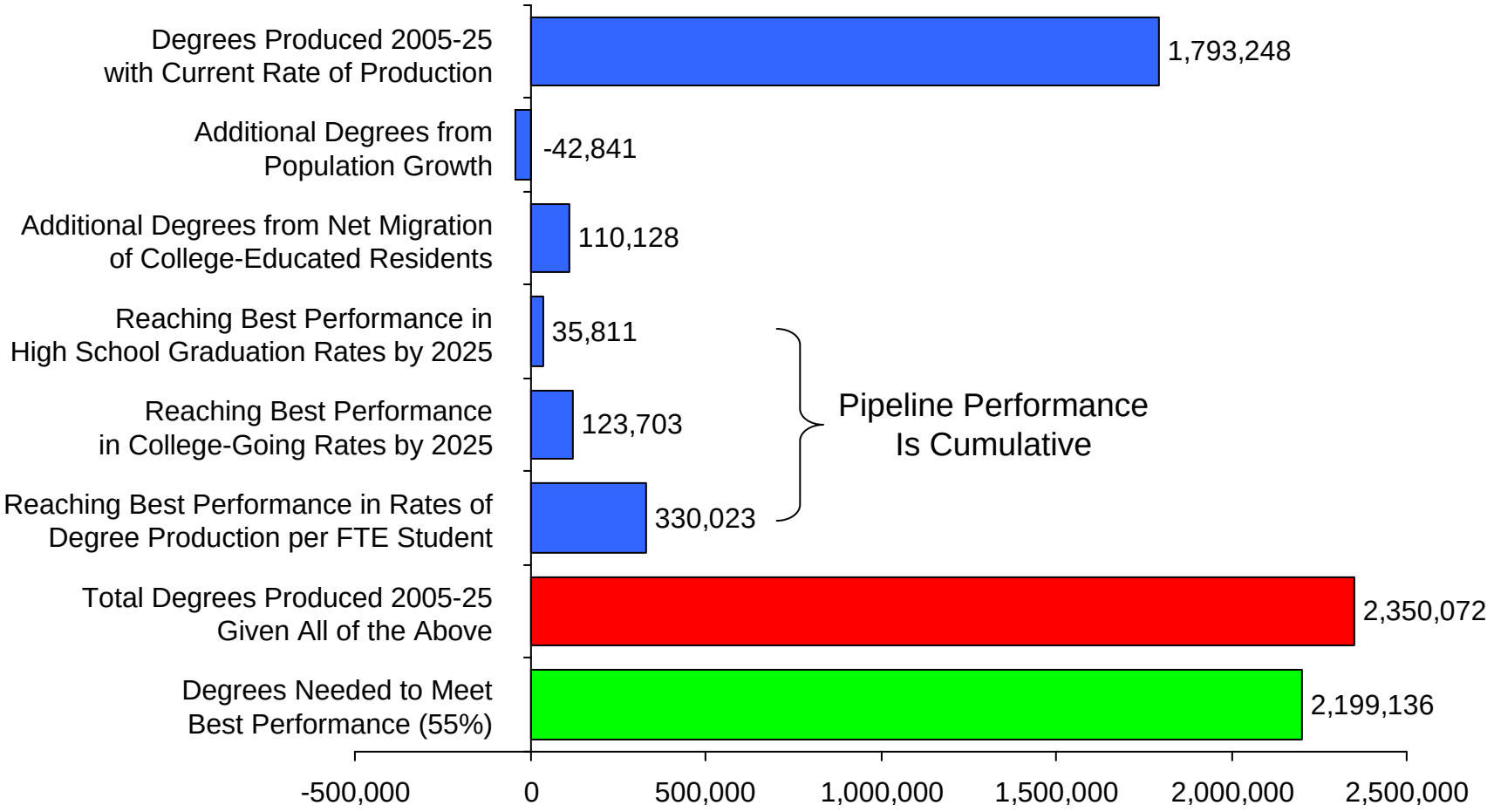
Educational Attainment in Illinois (Percent)

Current, In 2025 with Current Degree Production, and Best-Performing Countries in 2025



How Can Illinois Reach International Competitiveness?

Current Degree Production Combined with Population Growth and Migration, and Improved Performance on Student Pipeline Measures



Source: 2005 ACS (PUMS)

Reaching Top Performance by 2025 (55%)– Illinois

3,649,861	Number of Individuals to Match Best-Performing Countries (55%)
1,530,725	Number of Individuals (Age 25-44) Who Already Have Degrees
2,119,136	Additional Production Needed (2005 to 2025)
1,793,248	Degrees Produced at Current Annual Rate of Production
110,128	Additional Residents with College Degrees from Net Migration
215,760	Additional Degrees Needed
10,788	Additional Degrees Needed per Year (Currently Produce 98,628 in All Sectors)
18.9%	Increase in Annual Associate and Bachelor's Degree Production Needed (in Public Sector Only)

Collective Cost to State, Assuming Tuition Stays the Same

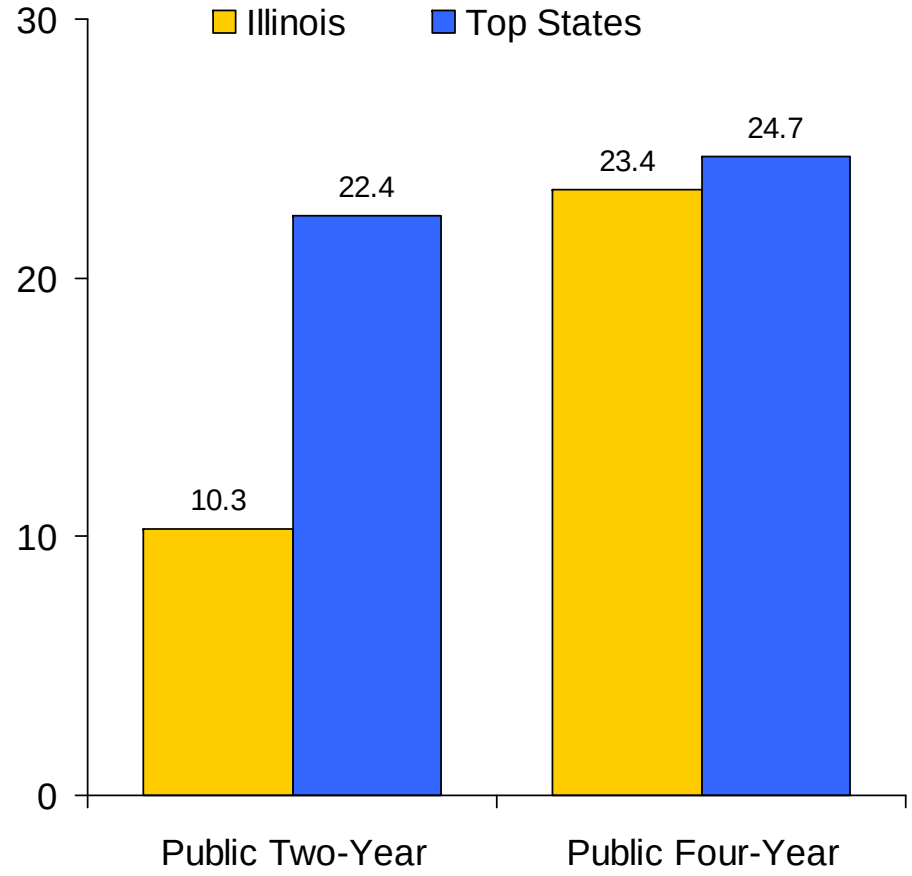
$ 422 Million	=	Annual Costs of Additional Students at Current $ per Student
$ 3.54 Billion	=	Current State Contribution
11.9%	=	Percent Increase in Annual State Support Needed

Average Cost to State, Assuming No Additional State Investment

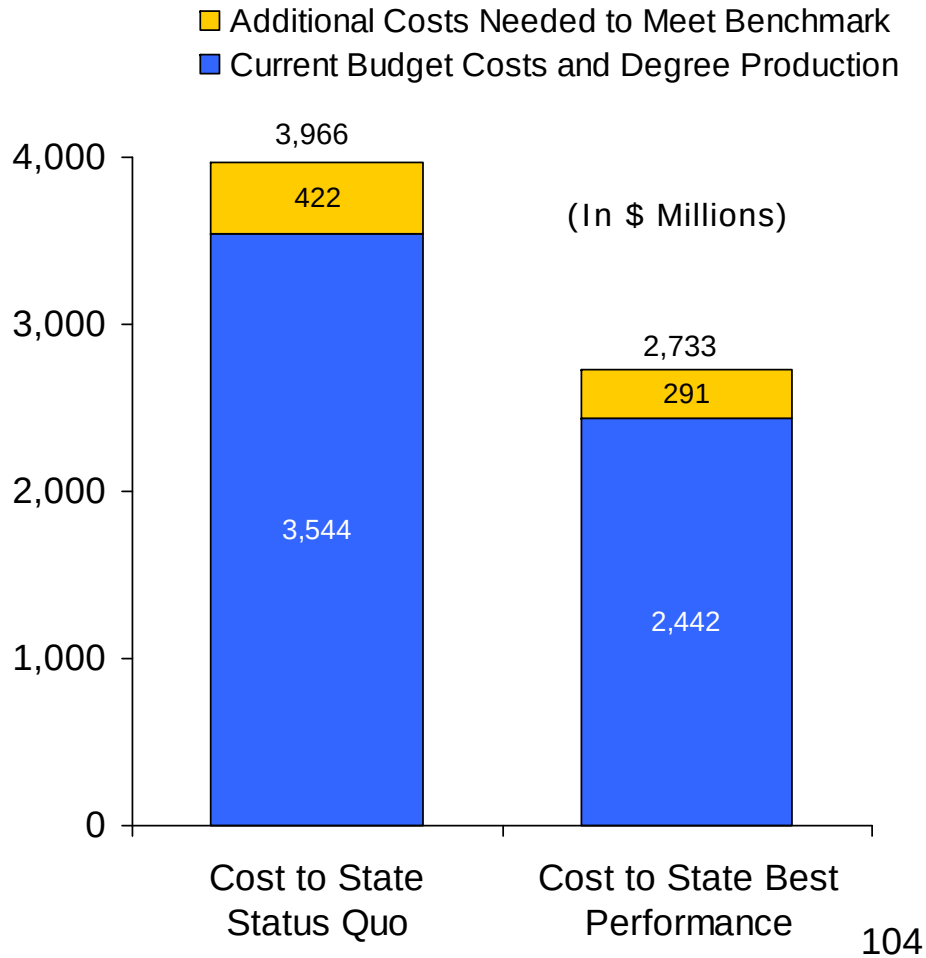
$ 1,221	=	Additional Annual Costs to Students at Public Four-Year Institutions 21.8% Increase in Tuition and Fees (Currently $ 5,597)
$ 774	=	Additional Annual Costs to Students at Public Two-Year Institutions 54% Increase in Tuition and Fees (Currently $ 1,431)

Savings If Illinois Reaches Top Performance in Degree Production

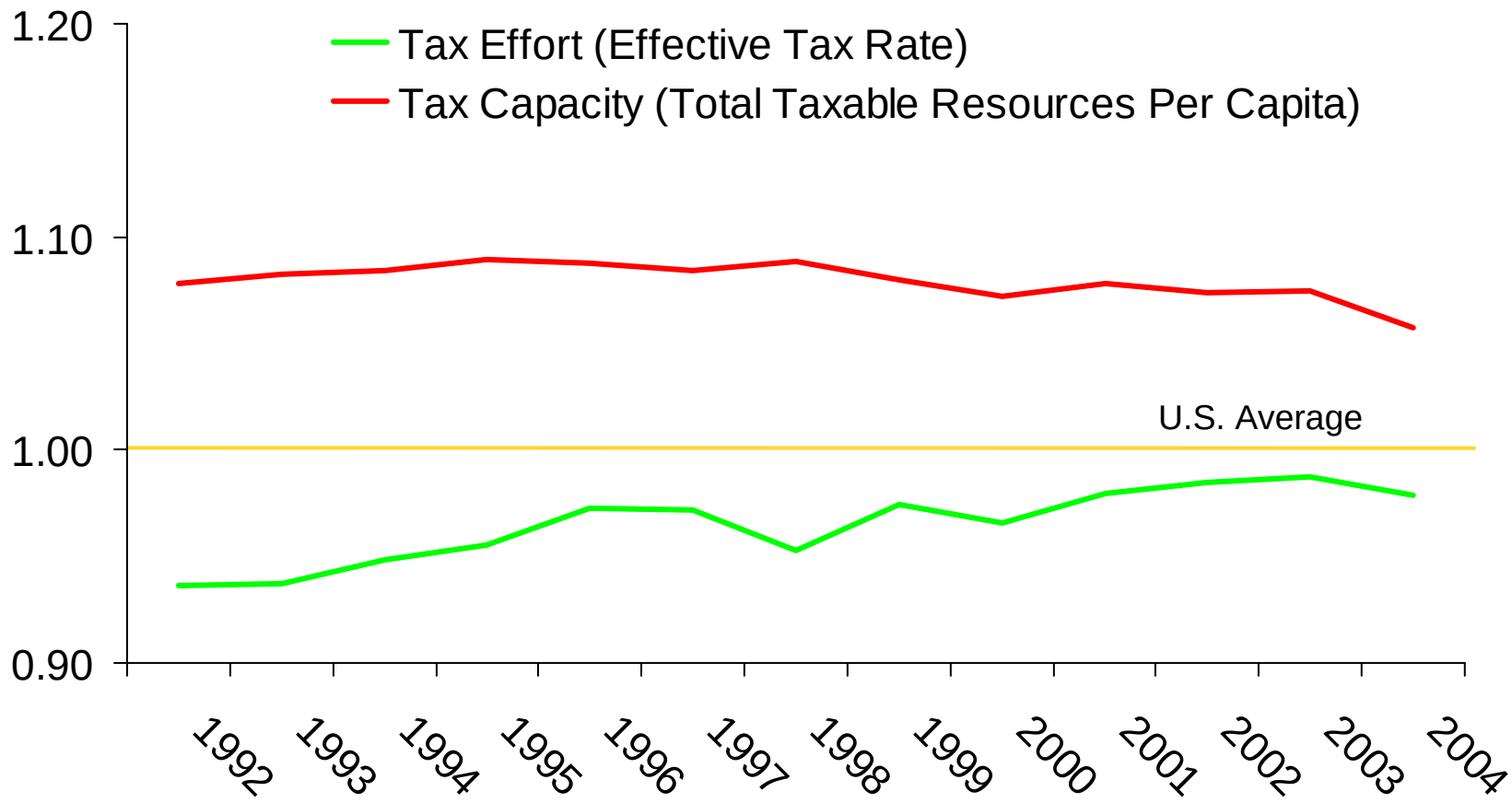
Performance: Undergraduate Degrees Awarded Per 100 Full-Time Equivalent Students



Reduced costs to Illinois would be **$1.2 billion** by improving efficiency of degree production to level of top states

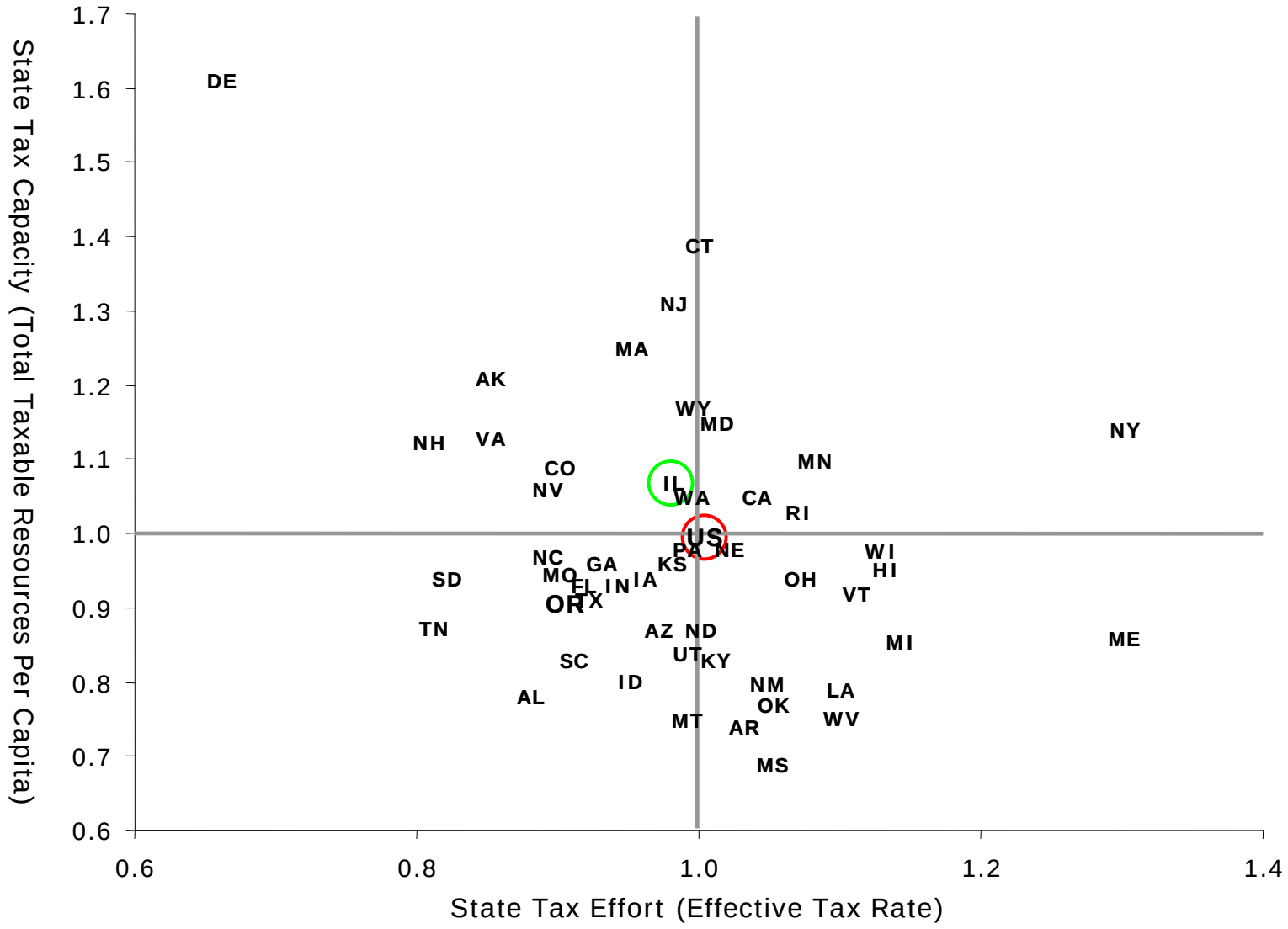


State Tax Capacity and Effort—Illinois Indexed to U.S. Average



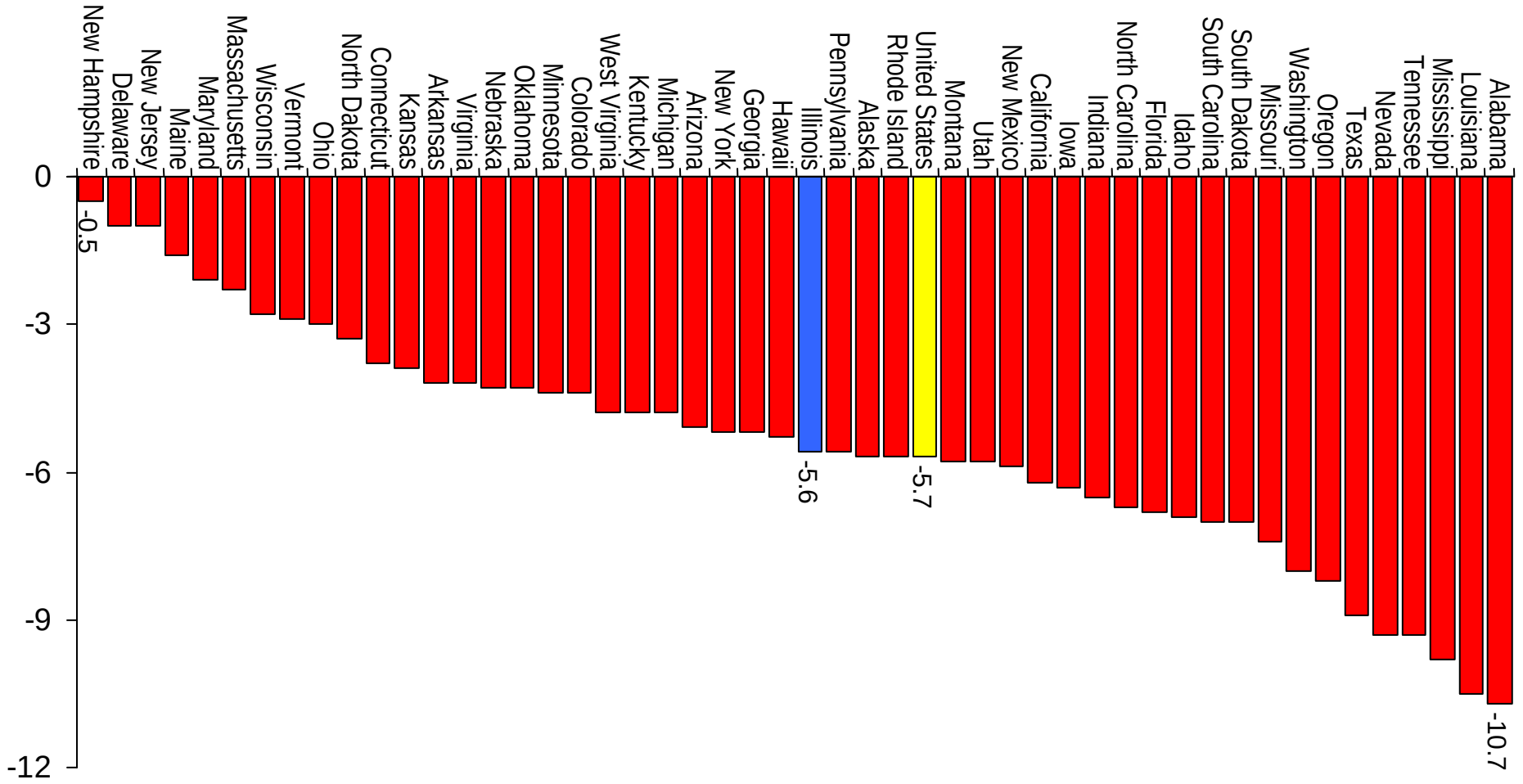
Source: State Higher Education Executive Officers (SHEEO)

State Tax Capacity and Effort—Illinois Indexed to U.S. Average



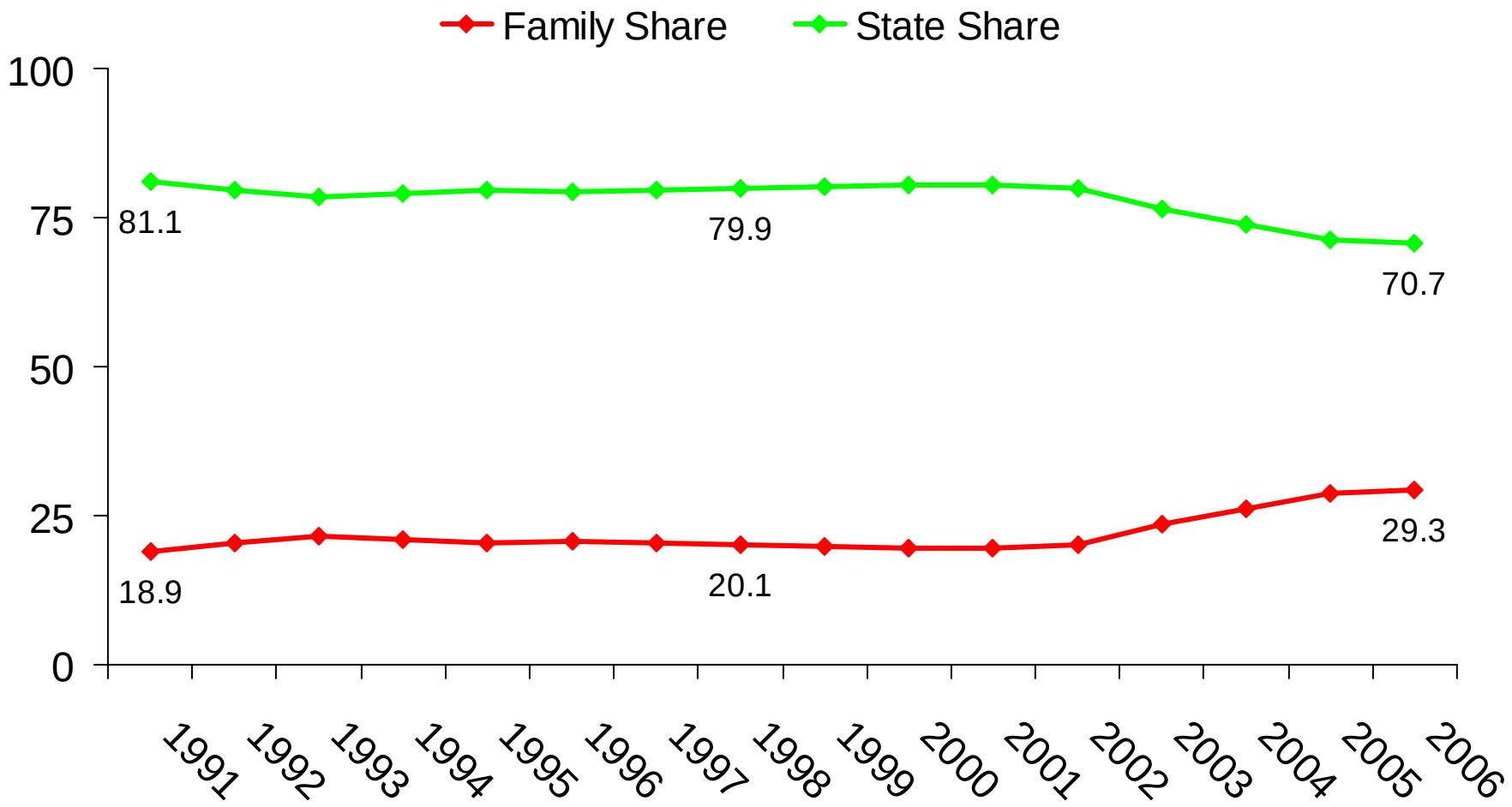
Source: State Higher Education Executive Officers (SHEEO)

Projected State and Local Budget Surplus (Gap) as a Percent of Revenues, 2013



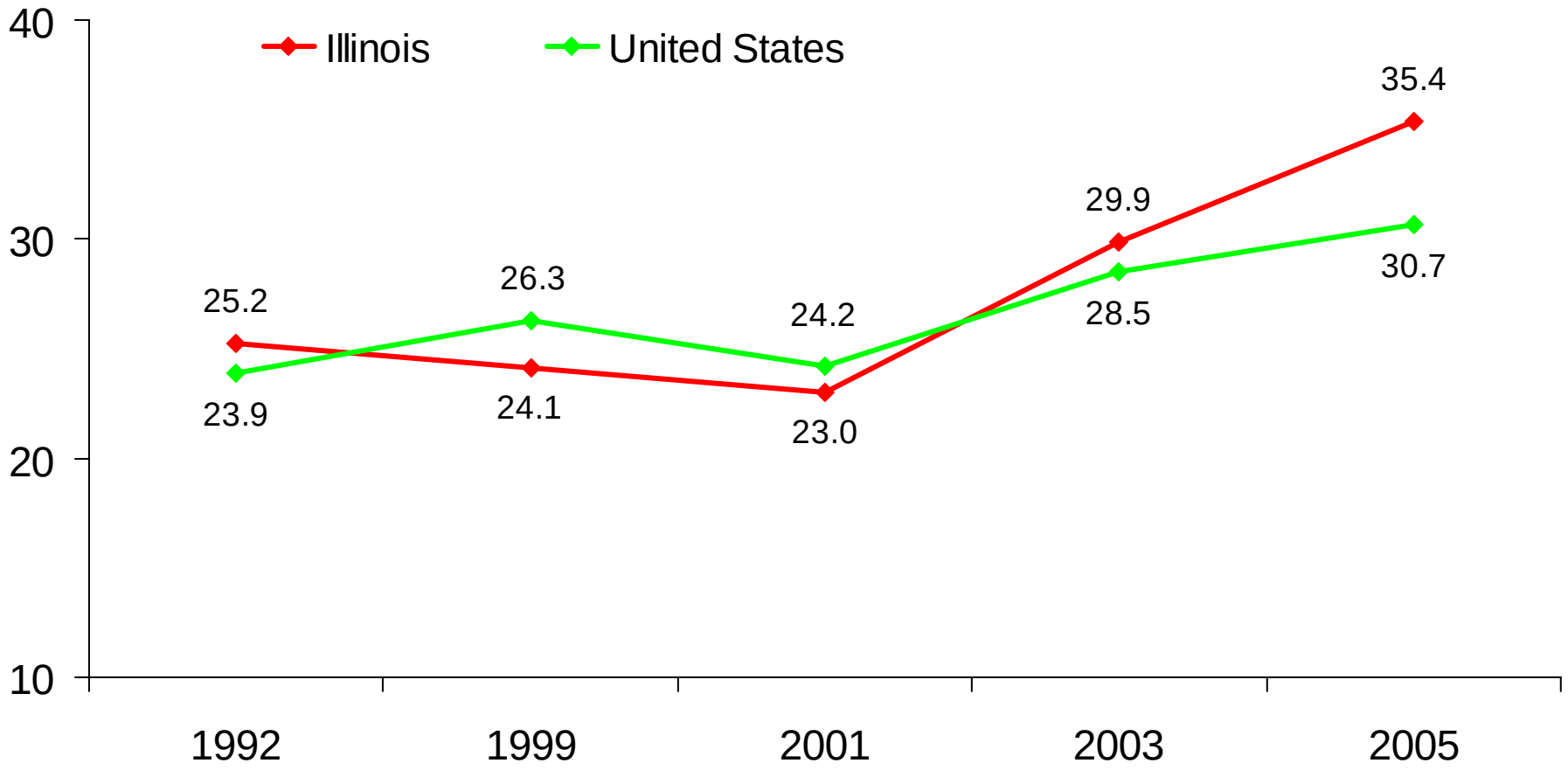
Source: NCHEMS; Don Boyd (Rockefeller Institute of Government), 2005

State and Family Share of Funding for Public Higher Education, 1991-2006



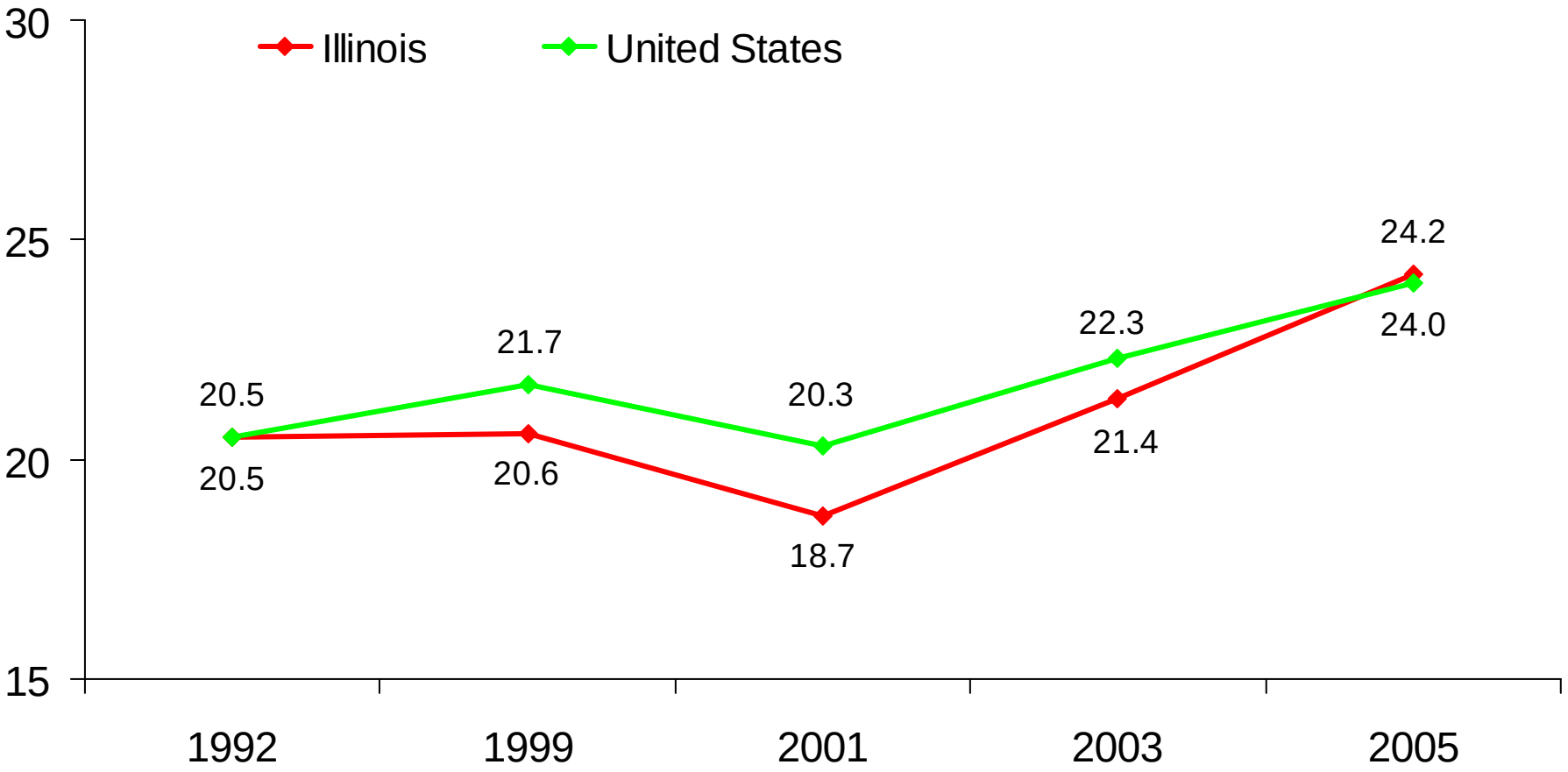
Source: SHEEO State Higher Education Finance Survey

Percent of Income (Average of All Income Groups) Needed to Pay for College Expenses Minus Financial Aid— Public Four-Year Colleges



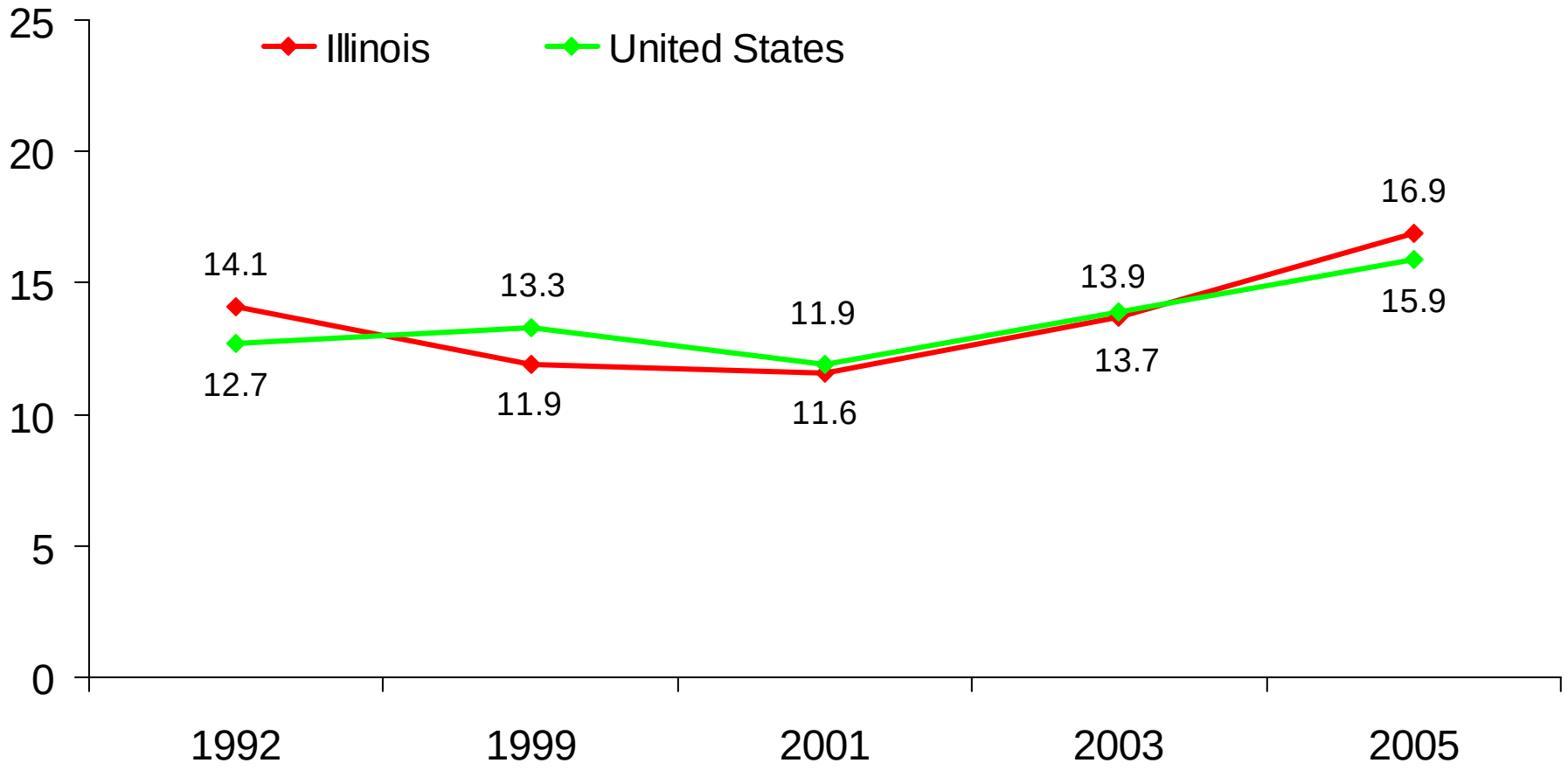
Source: NCPPHE, *Measuring Up: The State-by-State Report Card for Higher Education*

Percent of Income (Average of All Income Groups) Needed to Pay for College Expenses Minus Financial Aid— Public Two-Year Colleges



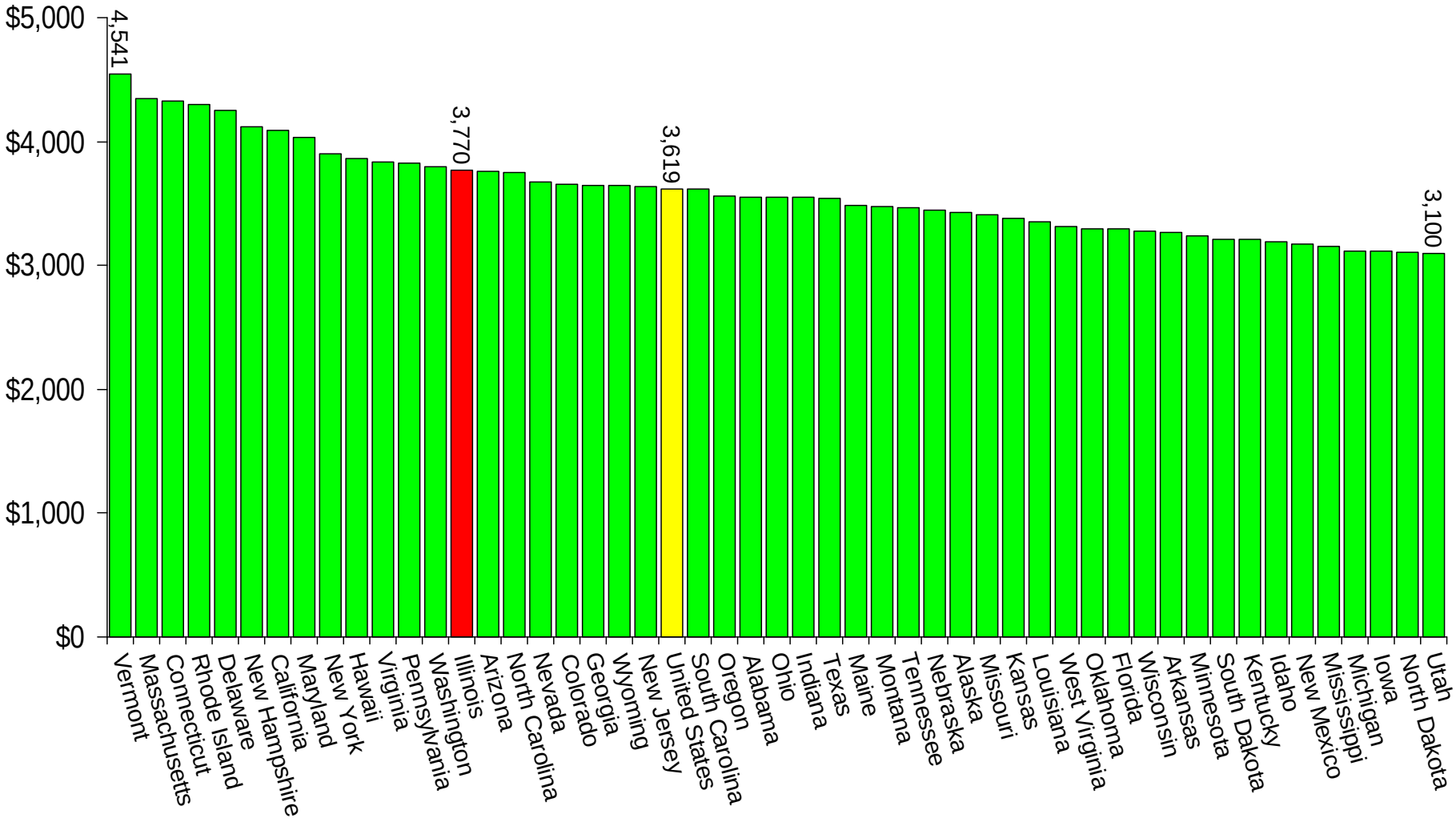
Source: NCPPHE, *Measuring Up: The State-by-State Report Card for Higher Education*

Share of Income that Poorest Families Need to Pay for Tuition at Lowest-Priced Colleges



Source: NCPPHE, *Measuring Up: The State-by-State Report Card for Higher Education*

Average Loan Amount Students Borrow Each Year, 2004



Source: NCPPHE, *Measuring Up: The State-by-State Report Card for Higher Education*

Emerging Themes

From the Analyses, a Limited Number of State Needs Become Apparent:

1. Reduce/eliminate disparities between whites and minorities in high school completion, college participation, and college completion.
2. Reduce geographic disparities in college participation.
3. Improve rates of transfer from two-year to four-year institutions.
4. More strongly link the innovation assets of the state to economic development, especially in regions outside the major metropolitan areas.
5. Address issues of affordability.