

Education and Cultural Affairs
Subcommittee Friday, July 21, 2023

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AGENDA



South Carolina House of Representatives Legislative Oversight Committee

EDUCATION AND CULTURAL AFFAIRS SUBCOMMITTEE

Chairman Timothy A. "Tim" McGinnis

The Honorable Adam M. Morgan
The Honorable John R. McCravy, III
The Honorable Wendell K. Jones
The Honorable Josiah Magnuson

AGENDA

Friday, July 21, 2023
10:30 a.m.
Room 516 - Blatt Building

Pursuant to Committee Rule 4.7, S.C. ETV shall be allowed access for internet streaming whenever technologically feasible.

AGENDA

- I. Approval of Minutes
- II. Discussion of the study of the Commission on Higher Education
- III. Adjournment



MINUTES



South Carolina House of Representatives Legislative Oversight Committee

Chair Jeffrey E. “Jeff” Johnson

William H. Bailey
Gary S. Brewer
April Cromer
Kambrell H. Garvin
Leon Douglas “Doug” Gilliam
Thomas Duval “Val” Guest, Jr.

William M. “Bill” Hixon
Joseph H. “Joe” Jefferson, Jr.
Wendell Keith Jones
Roger K. Kirby
Josiah Magnuson
John R. McCravy, III

First Vice-Chair Chris Wooten

Timothy A. “Tim” McGinnis
Adam M. Morgan
Travis A. Moore
Russell L. Ott
Marvin R. Pendarvis
Marvin “Mark” Smith

Lewis Carter
Director

Cathy A. Greer
Administration Coordinator

Roland Franklin
Legal Counsel

Riley E. McCullough
Research Analyst

Post Office Box 11867
Columbia, South Carolina 29211
Telephone: (803) 212-6810 • Fax: (803) 212-6811
Room 228 Blatt Building

MEETING MINUTES

Tuesday, June 5, 2023
Room 521

Archived Video Available

- I. Pursuant to House Legislative Oversight Committee Rule 6.7, South Carolina ETV was allowed access for streaming the meeting. You may access an archived video of this meeting by visiting the South Carolina General Assembly’s website (<http://www.scstatehouse.gov>) and clicking on Committee Postings and Reports, then under House Standing Committees click on Legislative Oversight. Then, click on Video Archives for a listing of archived videos for the Committee.

Attendance

- I. The Education and Cultural Subcommittee meeting was called to order by Chair Timothy A. “Tim” McGinnis on Tuesday, June 5, 2023, in Room 521 of the Blatt Building. Four subcommittee members (Chair McGinnis; Representative Josiah Magnuson; and Representative John R. McCravy, III) were present, and one absent (Representative Adam Morgan) for all or a portion of the meeting.

Minutes

- I. House Rule 4.5 requires standing committees to prepare and make available to the public the minutes of committee meetings, but the minutes do not have to be verbatim accounts of meetings.

Approval of Minutes

Approval of Minutes

- I. Representative Magnuson made a motion to approve the meeting minutes from prior meeting. A roll call vote was held, and the motion passed.

Rep. Garvin's motion to approve meeting minutes.	Yea	Nay	Not Voting
Rep. Jones			✓
Rep. Magnuson	✓		
Rep. Morgan			✓
Rep. McCravy	✓		
Rep. McGinnis	✓		

Discussion of Commission on Higher Education

- I. Chair McGinnis calls the meeting to order. Members introduce themselves and Rep. Magnuson gives an opening prayer.
- II. Agency director, Dr. Rusty Monhollon, and members of his executive team are present. The director continued to provide an overview of agency. Topics of discussion include:
- a. Changing landscape of higher education (e.g., demographics, stagnant enrollment, rising costs, relevance of higher education to the modern world)
 - b. Agency history
 - c. Postsecondary Governance Models
 - d. Ascend 60x30
 - e. Agency counterparts (e.g., U.S. Department of Education,, etc.)
 - f. Agency head qualifications
 - g. Commission purpose and responsibilities
 - h. Commissioner qualifications, selection, and training
 - i. Organizational chart
 - j. Administration division overview
 - k. Agency FTEs, retention, and training
 - l. Agency appropriations
 - m. Grants collaboration
 - n. Records retention and report compliance
 - o. Internal audit and risk mitigation
 - p. Agency performance measures

- q. Agency accomplishments
- r. Agency related body entities

Adjournment

- I. There being no further business, the meeting is adjourned.



South Carolina House of Representatives Legislative Oversight Committee

Chair Jeffrey E. “Jeff” Johnson

William H. Bailey
Gary S. Brewer
April Cromer
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MEETING MINUTES

Tuesday, June 27, 2023
Room 521

Archived Video Available

- I. Pursuant to House Legislative Oversight Committee Rule 6.7, South Carolina ETV was allowed access for streaming the meeting. You may access an archived video of this meeting by visiting the South Carolina General Assembly’s website (<http://www.scstatehouse.gov>) and clicking on Committee Postings and Reports, then under House Standing Committees click on Legislative Oversight. Then, click on Video Archives for a listing of archived videos for the Committee.

Attendance

- I. The Education and Cultural Subcommittee meeting was called to order by Chair Timothy A. “Tim” McGinnis on Tuesday, June 27, 2023, in Room 110 of the Blatt Building. Two Subcommittee members (Chair McGinnis; and Representative Josiah Magnuson) were present for all or a portion of the meeting. Three members were absent (Representative Adam M. Morgan; Representative Wendell K. Jones, and Representative John R. McCravy, III).

Minutes

- I. House Rule 4.5 requires standing committees to prepare and make available to the public the minutes of committee meetings, but the minutes do not have to be verbatim accounts of meetings.

Approval of Minutes

Approval of Minutes

- I. The Subcommittee did not have a quorum to approve the minutes.

Discussion of Commission on Higher Education

- I. Chair McGinnis calls the meeting to order.
- II. Agency director, Dr. Rusty Monhollon, and members of his executive team are present. The provides answers to questions raised at the Tuesday, June 27, 2023, meeting. The director responded to the following issues:
 - a. Institutional employee numbers for different categories (e.g., administration, teaching faculty, etc.)
 - b. Mental health in higher education
 - c. Maintenance and inspection of institutional facilities (e.g., structural integrity, safety, etc.)
 - d. South Carolina's rank in educational attainment
 - e. Parental involvement in higher education
- III. Agency director, Dr. Rusty Monhollon introduces members of his staff who will present information to the Subcommittee.
 - a. Monica Goodwin, Director of the Office of Data Management and IT
 - i. The director presented information on the following:
 1. Purpose of the Office of Data Management and IT
 2. Organizational Chart
 3. Human Resources
 4. Internal Operations
 5. Data Collection and Reporting
 - b. Mariam Dittman, Ph.D., Director of Academic Affairs and Licensing
 - i. The director presented information on the following:
 1. Purpose of the Office of Academic Affairs and Licensing
 2. Organizational Chart
 3. Human Resources
 4. Internal Operations
 5. Academic Program Review Responsibilities
 6. Academic Program Approval Process/Data Collection/Licensing
 7. Reciprocity Agreements
 8. SmartState Program
 9. Academic Common Market Responsibilities

10. Regional Contract Responsibilities
 11. REACH Act Compliance
 12. Institutional Mission Statement Approvals
 13. Scholarship Enhancements
 14. Student Complaints
 15. Academic Research and Reporting
- c. Karen Woodfaulk, Ph.D., Office of Student Affairs
- i. The director presented information on the following:
 1. Purpose of the Office of Academic Affairs and Licensing
 2. Organizational Chart
 3. Human Resources
 4. Scholarship and Grants Appropriations
 5. Financial Aid Programs (i.e., Palmetto Fellows Scholarship, HOPE Scholarship, LIFE Scholarship, Lottery Tuition Assistance, SC National Guard College Assistance Program, SC Need-based Grant, SC Need-based Grant: Foster Care Youth Funding, SC Need-based Grant: College Transition Program, and College Transition Program Scholarship)
 6. Scholarship Appeals
 7. College Access: (College Goal South Carolina, College Application Events, College and Career Decision Day)

Adjournment

- I. There being no further business, the meeting is adjourned.



AGENCY SNAPSHOT



South Carolina House of Representatives Legislative Oversight Committee

COMMISSION ON HIGHER EDUCATION OVERVIEW

ABOUT



- The South Carolina Commission on Higher Education (CHE) was established in 1967 and serves as the coordinating board for South Carolina's 33 public institutions of higher learning.
- CHE is committed to promoting access, affordability, and excellence within the state system of higher education.
- CHE acts both as an oversight entity on behalf of the General Assembly and an advocate for the citizens of South Carolina as they seek opportunities to improve their lives and those of their families, through higher education.

LEADERSHIP

Agency Head

- Dr. Rusty L. Monhollon became CHE's president and executive director in July of 2019.
- § 59-103-90: Manage and carry out duties of Commission; ensure staff has professional competence and experience
- Commission appoints agency head to manage and carry out duties as prescribed by law and assigned by the Commission

Commission

- 15-member board selected per § 59-103-10
- Eight appointed by Governor, with advice and consent of Senate
- Seven appointed by the governor upon the recommendation of the legislative delegation from the Congressional district

ROLE

The agency performs a range of work to support and coordinate the state system of higher education. Generally, this entails:

- Administering state, regional, and federal programs, in addition to state-funded lottery scholarships and grants.
- Approving new academic degree programs and institutions' revisions to mission statements.
- Collecting, analyzing, and reporting comprehensive data on postsecondary education in South Carolina.
- Coordinating the interests of federal and state government, institutions of higher education, public K12 education, students and their families, and the business community.
- Licensing non-public educational institutions operating and soliciting within the state.
- Recommending policy to the governor, the General Assembly, and relevant state agencies using data.
- Reviewing the productivity of existing academic programs and institutions' missions to see they are advancing defined state goals.

FTEs/BUDGET

FY 2022-23



PERFORMANCE MEASURES

- 1 **Increase Higher Education Enrollment**
Strategy 1: Assist families with planning for higher education costs
Strategy 2: Increase family awareness of postsecondary education opportunities
Strategy 3: Obtain grants targeting K-12 population to prepare them for postsecondary education
- 2 **Promote Quality and Excellence of South Carolina's Higher Education System**
Strategy 1: Promote on-time degree completion
- 3 **Improve Affordability and Accessibility of South Carolina Higher Education Programs and Services for Students and Families**
Strategy 1: Promote high-quality early college opportunities
Strategy 2: Advance cost-saving opportunities to obtain a postsecondary credential
- 4 **Promote Higher Education's Value to the State's Economic Growth and Human Capital Development**
Strategy 1: Collaborate with peer agencies and institutions

STATISTICS

FY 2021-22 State Appropriations to Public Colleges and Universities

\$731,848,791

8.4% of FY 2021-22

Total State recurring Appropriations

Total Number of Institutions	84
Public Institution Total	33
Independent Institution Total	25
Out-of-State Degree Granting	24
Fall 2021 Grand Total Headcount Enrollment	230,566
FY 2020-21 Grand Total Degrees Awarded	55,428

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AGENCY PRESENTATION



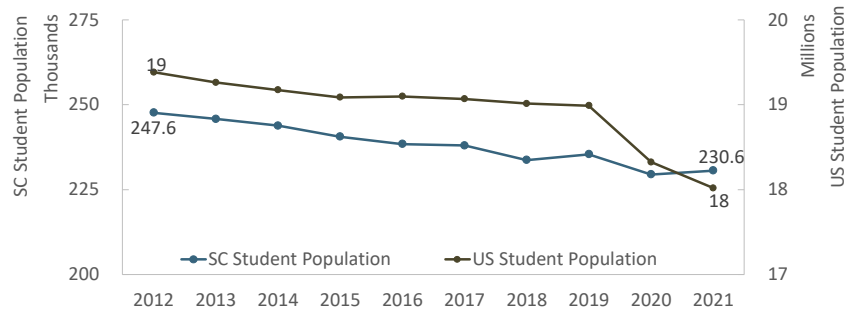
South Carolina
Commission on Higher Education
Access | Affordability | Excellence

Student Population Trends Student Demographics

2023 CHE Presentation to House Legislative Oversight Committee

Total Student Population SC vs. US, 2012-2021 Public and Private not-for profit

- The decrease in SC student population happened at the same rate as U.S. (6.9% vs. 7%).
- SC student population rebounded from 2020 to 2021 while US continued decline.



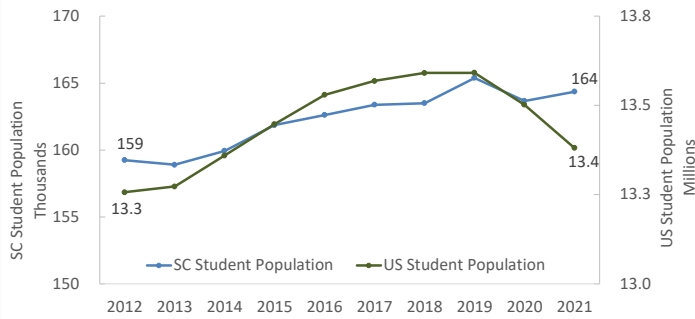
Source: The Integrated Postsecondary Education Data System (IPEDS).

2023 CHE Presentation to House Legislative Oversight Committee

2



Total Student Population SC vs. US, 2012-2021 Public and Private not-for-profit, four-year



- A higher growth trend was observed for SC (3%) vs. 1% nationally.
- The undergraduate population dropped slightly in SC (0.4%) vs. 2% drop nationally.
- The graduate population increased by 24% in SC and 14% nationally.
- In SC, the full-time student population increased by 4% while it decreased nationally (~1%).
- The part-time student population increased by 1.2% in SC and 4% nationally.

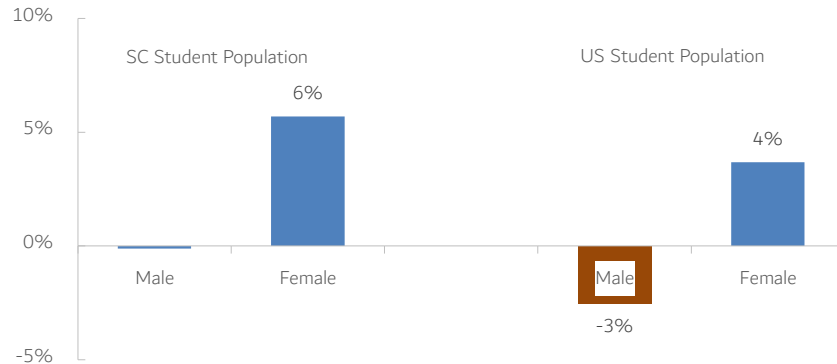
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3



Total Student Population SC vs. US, 2012-2021 Public and Private not-for-profit, four-year

- Male student population recorded a small decrease in SC under 1% and 3% nationally.
- Female population registered a growth locally (6%) and nationally (4%).



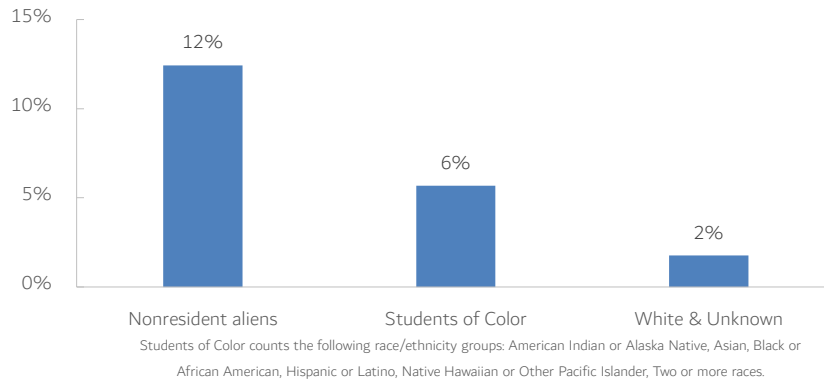
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4



Total Student Population SC, 2012-2021 Public and Private not-for profit, four-year

- Male student population recorded a small decrease in SC under 1% and 3% nationally.
- Female population registered a growth locally (6%) and nationally (4%).



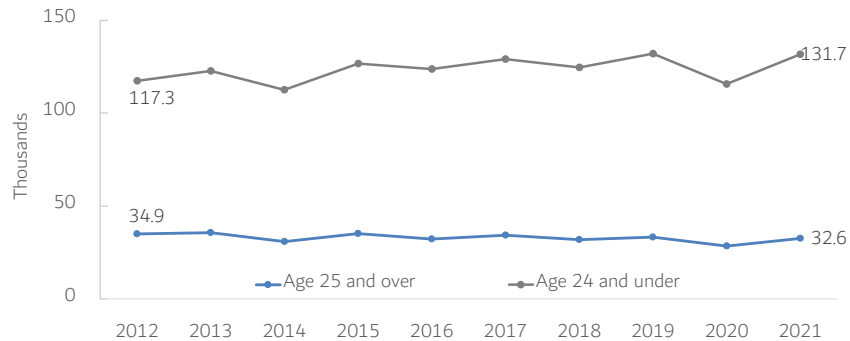
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5



Total Traditional vs. Non-Traditional Public and Private not-for profit, four-year

- In SC, the Age 25 and over decreased 6% and the Age 24 and under group increased 12%.

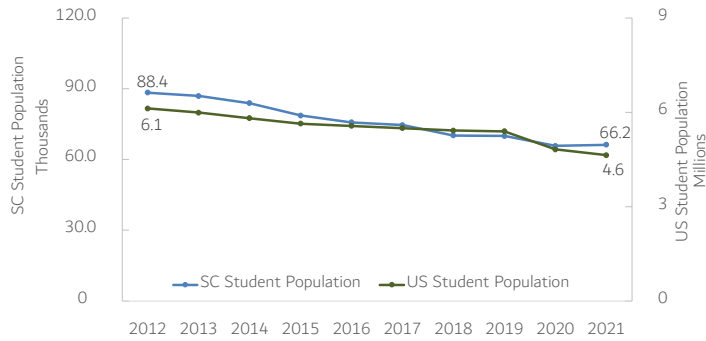


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6



Total Student Population SC vs. US, 2012-2021 Public and Private not-for-profit, two-year



- The student population dropped in SC by 25% and 24% nationally.
- In SC, the full-time student population dropped by 36% vs. 37% nationally.
- The part-time student population decreased at the same rate in SC and nationally (16%).

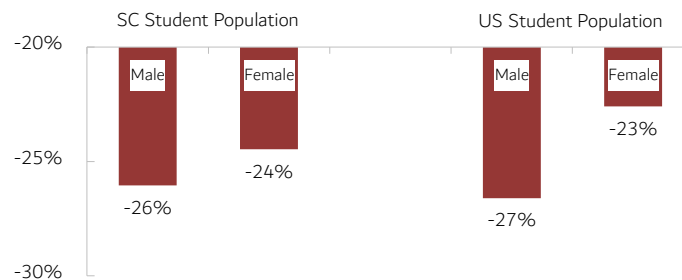
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7



Total Student Population SC vs. US, 2012-2021 Public and Private not-for-profit, two-year

- Both male and female student population decreased dramatically.
- Male student population dropped more significantly than female.



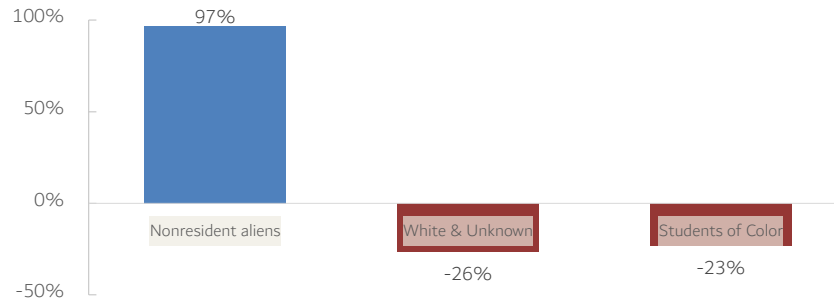
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8



Total Student Population SC vs. US, 2012-2021 Public and Private not-for-profit, two-year

- In SC, the highest growth was registered by Nonresident aliens at 97% (63 individuals).
- Both White and Unknown and Students of Color led to the overall decline in enrollment.



Students of Color counts the following race/ethnicity groups: American Indian or Alaska Native, Asian, Black or African American, Hispanic or Latino, Native Hawaiian or Other Pacific Islander, Two or more races.

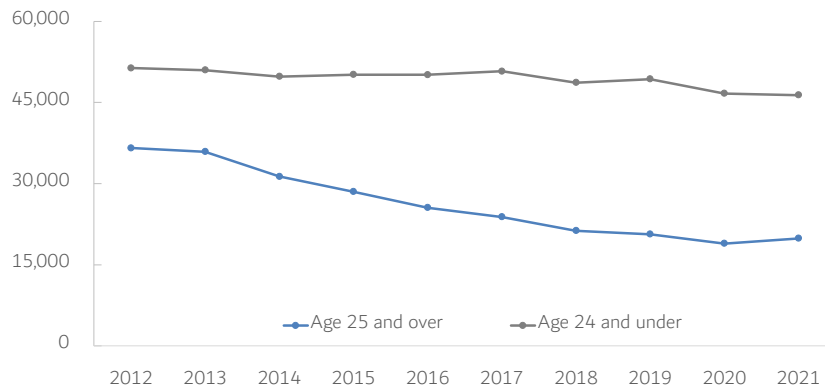
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9



Total Traditional vs. Non-Traditional Public and Private not-for profit, two-year

- In SC, the Age 25 and over group declined 46% followed by the Age 24 and under (10%).



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HIGH SCHOOL STUDENTS ENROLLED IN COLLEGE

	High School	Total headcount	Percent of Total Enrollment
Comprehensives	2,065	51,697	3.99%
USC2	3,063	5,171	59.23%
Technical Colleges	12,254	70,624	17.35%

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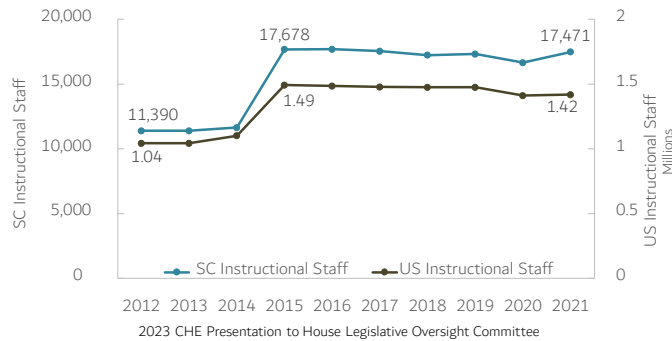
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Faculty Trends and Pay

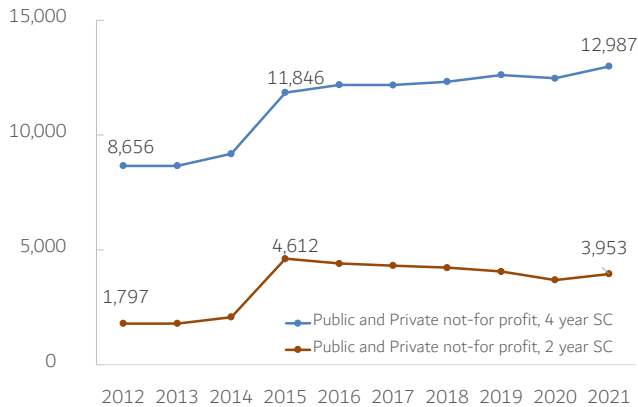
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Total Instructional Staff in SC vs. US, 2012-2021

- The slow recovery from the 2008-2009 Great Recession may explain the jump in instructional staff numbers after 2014.
- Considering 2015 as a starting point, instructional staff decreased in SC by 1% (207 individuals), and nationally by 5%.



Total Instructional Staff in SC vs. US, 2012-2021



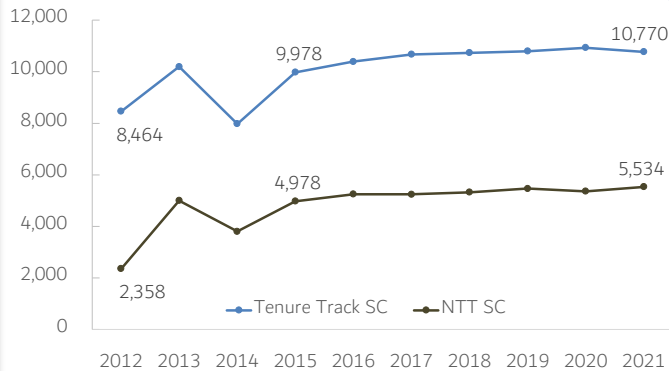
- From 2015 to 2021,
 - In SC, Public and Private not-for profit, 2-year institutions declined 37%, whereas 4-year institutions increased 13%.
 - Nationally, Public and Private not-for profit, 2-year decreased 23% and 4-year institutions increased 3%.
 - Four-year institutions in SC increased 20% for female staff and 7% for male. Two-year institutions decreased 38% for female and 35% for male staff.

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Total Instructional Staff in SC vs. US Public and Private not-for-profit, four-year



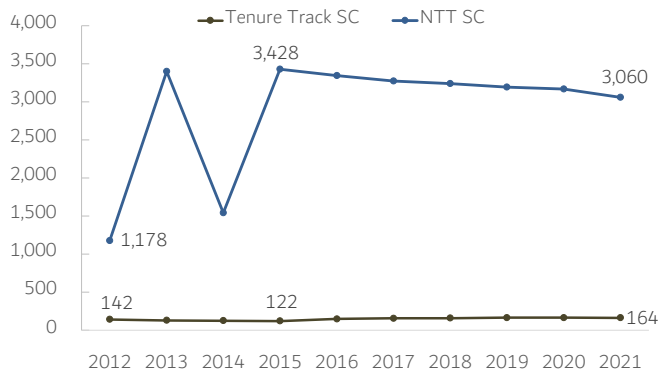
- From 2015 to 2021,
 - In SC, both tenure track and non tenure track staff increased (8% and 11%, respectively).
 - Nationally, the non tenure track increased 14% and tenure track decreased 2%.

2023 CHE Presentation to House Legislative Oversight Committee

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Total Instructional Staff in SC vs. US Public and Private not-for profit, two-year



- From 2015 to 2021,
 - In SC, tenure track staff increased by 34%, whereas the NTT staff decreased by 11%.
 - Nationally, both tenure track and non tenure track decreased by 8% and 7%, respectively.

2023 CHE Presentation to House Legislative Oversight Committee

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









Faculty Pay



Below national average



Above national average

PUBLIC DOCTORAL INSTITUTIONS								
STATE	PROFESSOR		ASSOCIATE PROFESSOR		ASSISTANT PROFESSOR		ALL	
South Carolina		\$134,247		\$94,491		\$89,343		\$96,457
Georgia		\$123,486		\$89,290		\$80,772		\$89,944
North Carolina		\$126,519		\$88,401		\$80,440		\$92,732
United States		\$137,886		\$95,416		\$83,502		\$98,597

Source: 2022 Chronicle of Higher Education Almanac













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Faculty Pay



PUBLIC MASTER'S INSTITUTIONS								
STATE	PROFESSOR		ASSOCIATE PROFESSOR		ASSISTANT PROFESSOR		ALL	
South Carolina		\$90,063		\$75,710		\$65,272		\$73,065
Georgia		\$81,143		\$68,350		\$62,242		\$64,992
North Carolina		\$94,092		\$76,876		\$68,579		\$73,478
United States		\$98,252		\$80,416		\$70,373		\$78,203

2023 CHE Presentation to House Legislative Oversight Committee

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Faculty Pay

Below national average Above national average

STATE	2-YEAR PUBLIC INSTITUTIONS: ALL
South Carolina	↓ \$51,647
Georgia	↓ \$42,512
North Carolina	↓ \$50,252
United States	\$67,588













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Faculty Pay



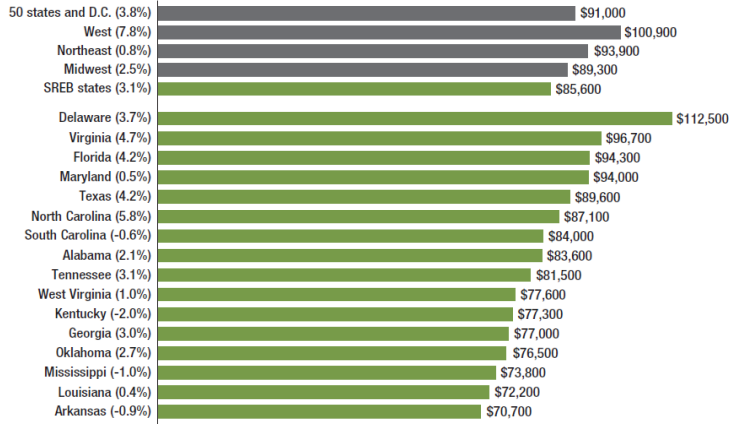
PRIVATE NONPROFIT MASTER'S INSTITUTIONS							
STATE	PROFESSOR		ASSOCIATE PROFESSOR		ASSISTANT PROFESSOR		ALL
South Carolina		\$61,684		\$54,040		\$51,408	 \$53,560
Georgia		\$79,892		\$65,303		\$57,860	 \$63,726
North Carolina		\$73,936		\$63,290		\$55,871	 \$62,502
United States		\$89,690		\$74,431		\$64,368	\$70,788

2023 CHE Presentation to House Legislative Oversight Committee

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Average Salaries, Full-Time Instructional Faculty at Public Four-Year Colleges and Universities, 2019-20



Note: Inflation-adjusted change 2014-15 to 2019-20 shown in parentheses.

Sources: SREB-State Data Exchange and SREB analysis of National Center for Education Statistics data.

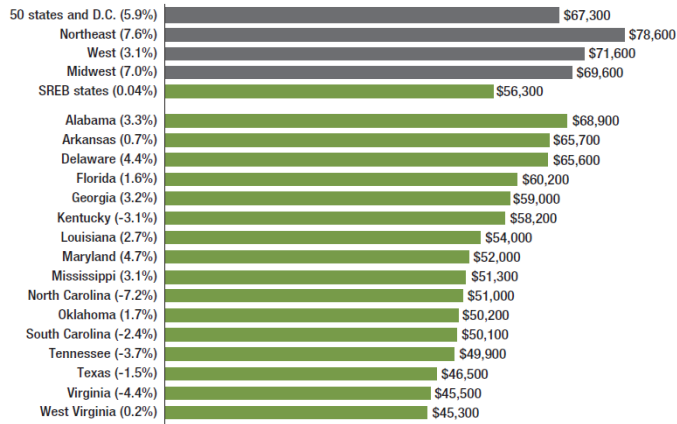
2023 CHE Presentation to House Legislative Oversight Committee

Source: SREB 2022 Fact Book, South Carolina

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Average Salaries, Full-Time Instructional Faculty at Public Two-Year Colleges, 2019-20



Note: Inflation-adjusted change 2014-15 to 2019-20 shown in parentheses.

Sources: SREB-State Data Exchange and SREB analysis of National Center for Education Statistics data.

2023 CHE Presentation to House Legislative Oversight Committee

Source: SREB 2022 Fact Book, South Carolina

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Table 86
Median Salaries of Full-Time Faculty by Discipline and Rank
at Public Four-Year Colleges and Universities, United States, 2019-20

	Professor	Associate Professor	Assistant Professor	New Assistant Professor	Instructor
Agriculture, Agriculture Operations, and Related Sciences	\$97,840	77,442	68,888	69,592	57,277
Architecture and Related Services	115,785	87,713	70,380	71,000	65,682
Area Ethnic, Cultural, Gender and Group Studies	104,985	77,413	67,535	69,875	
Biological and Biomedical Sciences	90,635	76,412	67,882	68,824	57,884
Business Management, Marketing, and Related Support Services	123,379	112,101	108,964	118,327	70,774
Communication, Journalism, and Related Programs	87,126	7,907	61,500	62,250	58,072
Communications Technologies/Technicians and Support Services	89,453	81,983	64,002		
Computer and Information Sciences and Support Services	116,292	97,813	86,929	95,000	66,650
Education	90,969	74,050	63,548	63,003	55,546
Engineering	124,305	88,095	87,858	91,670	66,625
Engineering Technologies and Engineering Related Fields	98,358	83,642	74,420	76,898	58,115
English Language and Literature/Letters	86,111	68,746	60,362	61,317	57,678
Family and Consumer Sciences/Human Sciences	91,819	76,147	65,152	66,984	53,446
Foreign Languages, Literatures, and Linguistics	88,595	69,220	60,331	63,250	53,114
Health Professions and Related Programs	101,409	83,000	72,391	70,667	60,243
History	87,903	70,285	61,200	63,343	56,600
Homeland Security, Law Enforcement, Firefighting, and Related Protective Service	91,307	72,995	62,430	65,000	62,389
Legal Professions and Studies	133,064	108,217	89,592	105,000	
Liberal Arts and Sciences, General Studies and Humanities	88,579	73,577	63,426	57,996	53,289
Library Science	88,579	73,557	63,426	57,996	53,289
Mathematics and Statistics	90,046	73,075	66,406	68,400	54,339
Multidisciplinary Studies	103,004	82,214	69,909	77,197	65,835
Natural Resources and Conservation	104,000	81,751	70,294	73,333	
Parks, Recreation, Leisure and Fitness Studies	88,915	73,228	63,532	63,000	58,496
Personal and Culinary Studies	90,821	69,230	61,419		55,475
Philosophy and Religious Studies	90,611	72,379	62,805	62,000	61,430
Physical Sciences	93,676	75,641	66,018	68,003	57,917
Psychology	90,667	74,498	64,205	64,000	54,142
Public Administration and Social Service Professions	95,874	77,285	65,916	67,000	58,253
Social Sciences	92,203	74,498	65,294	65,000	58,934
Transportation and Material Services	103,505	86,260	69,525	70,000	55,539
Visual and Performing Arts	84,887	69,598	58,592	56,438	59,747

Source: Pritchard, Adam; Fuesling, Melissa; Nadel-Hawthorne, Sarah; Schmidt, Anthony & Bischoff, Jacqueline (2020, March). *Faculty in Higher Education Annual Report: Key Findings, Trends, and Comprehensive Tables for Tenure-Track, Non-Tenure Teaching, and Non-Tenure Research Faculty and Summary Data for Adjunct Faculty for the 2019-20 Academic Year* (Research Report). CUPA-HE. Available from <https://www.cupahighered.org/surveyresults/>.

2023 CHE Presentation to House Legislative Oversight Committee

Source: SREB 2022 Fact Book, South Carolina


23



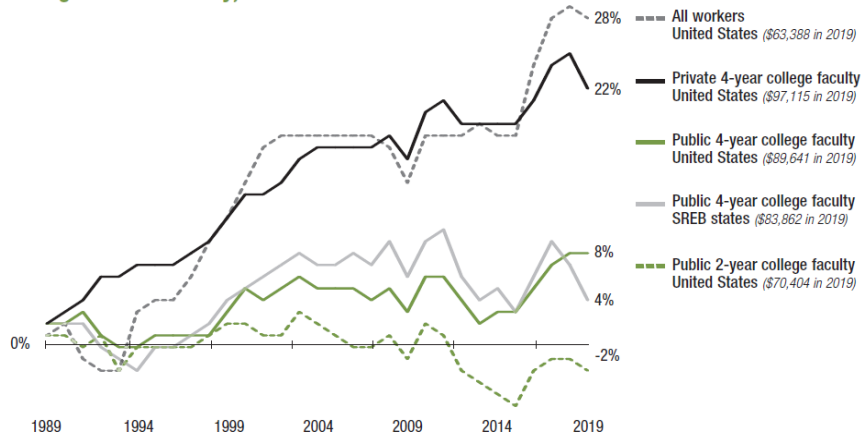
Staff at Public Four-Year Colleges and Universities 2019-20 Percent Distribution														
	Faculty	Graduate Assistants	Librarian, Archivist, Curator	Student/ Academic & Other Services	Management	Business/ Financial Operations	Computer, Engineering, Science	Community Service, Legal Arts, & Media	Healthcare Practitioners and Technical	Service	Sales and Related	Office Administrative and Support	Natural Resources, Constructions, Maintenance	Production Transportation, Material Moving
50 states/D.C.	32.1	16.0	1.0	3.4	6.1	6.7	7.5	4.6	3.5	6.4	0.1	9.5	2.4	0.6
SREB states as % of U.S.	30.0	17.2	0.9	3.4	6.7	6.0	7.5	4.8	2.8	6.4	0.1	10.7	2.9	0.6
South Carolina	30.7	17.5	1.5	2.8	7.6	3.8	5.5	6.9	1.3	6.5	0.1	11.1	4.2	0.6

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Changes in Annual Pay, 1989 to 2019



Note: Adjusted for inflation. Faculty salaries are 9-month or 9-month-equivalent.

Sources: SREB-State Data Exchange and SREB analysis of National Center for Education Statistics and U.S. Census Bureau data.

Source: SREB 2022 Fact Book, South Carolina

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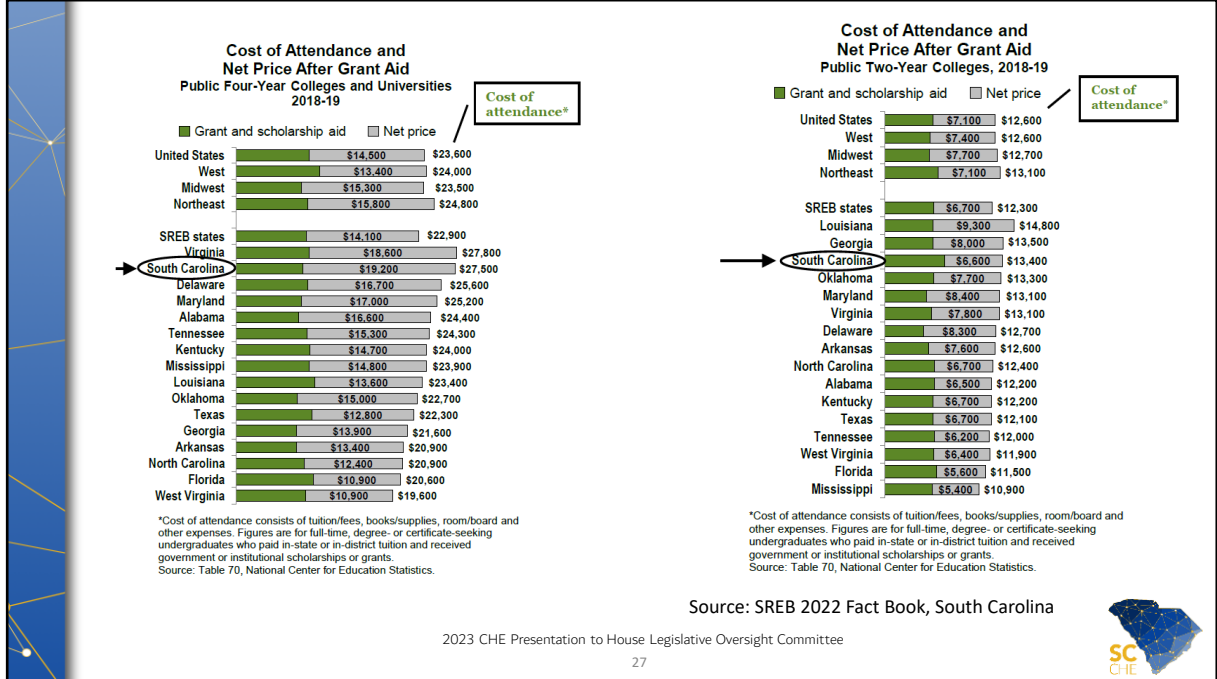


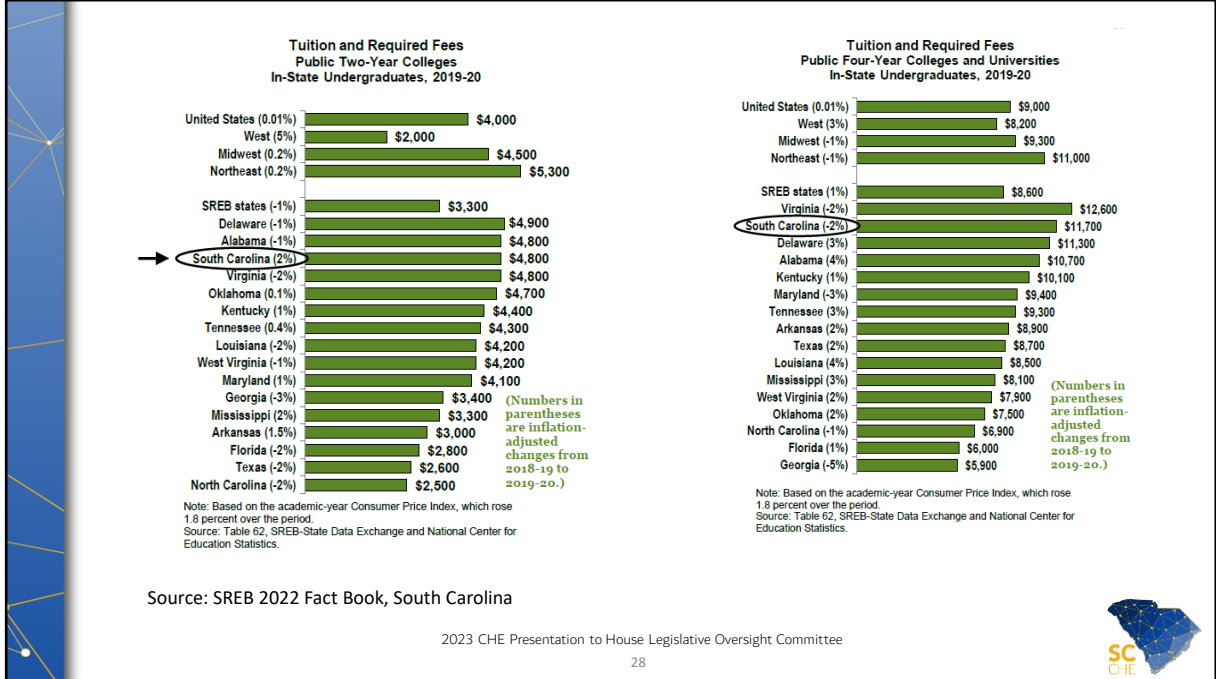


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Funding Higher Education

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Average Tuition and Fees

AVERAGE TUITION AND FEES			
	4-YEAR PUBLIC	4-YEAR PRIVATE	2-YEAR PUBLIC
United States	\$9,825	\$36,897	\$3,613
South Carolina	\$12,760	\$28,129	\$4,944
Georgia	\$7,712	\$33,800	\$3,180
North Carolina	\$7,277	\$38,015	\$2,475

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State Spending on Student Aid

	NEED-BASED GRANTS	NON-NEED- BASED GRANTS	NONGRANT AID	TOTAL STUDENT AID
United States	\$9,542,754,000	\$3,414,123,000	\$1,844,262,000	\$14,801,139,000
South Carolina	\$77,186,000	\$366,053,000	\$2,146,000	\$445,385,000
Georgia	n/a	\$905,516,000	\$33,875,000	\$939,391,000
North Carolina	\$316,862,000	\$10,419,000	\$69,364,000	\$396,645,000

Source: 2022 Chronicle of Higher Education Almanac

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South Carolina's Approach to Funding Higher Education

- Heavily market-oriented
- Financial aid programs are a major source of state subsidy
 - Tuition prices—and institutional dependence on tuition—outpaced most other states
- Not strategic or aligned with state goals
 - Creates affordability challenges for low- and moderate-income students
 - Results in unequal impacts on institutions, especially those that serve low-income and underrepresented populations and adults

SOURCE: Brian Prescott, NCHEMS, South Carolina Council of Presidents, October 6, 2021

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Principles for a Way Forward

- Priority should be given to state and student needs.
- Finance policy is the most flexible and powerful tool for achieving state goals.
 - Appropriations, tuition, and financial aid the integrated framework for designing and implementing policy.
 - Clear incentives can shape the way the market operates.
 - The less state support, the more intentional state policy needs to be.
 - Clarity and specificity can help limit unintended consequences.
- Policies and priorities should reflect the reality that institutions vary according to mission, market, and local conditions.

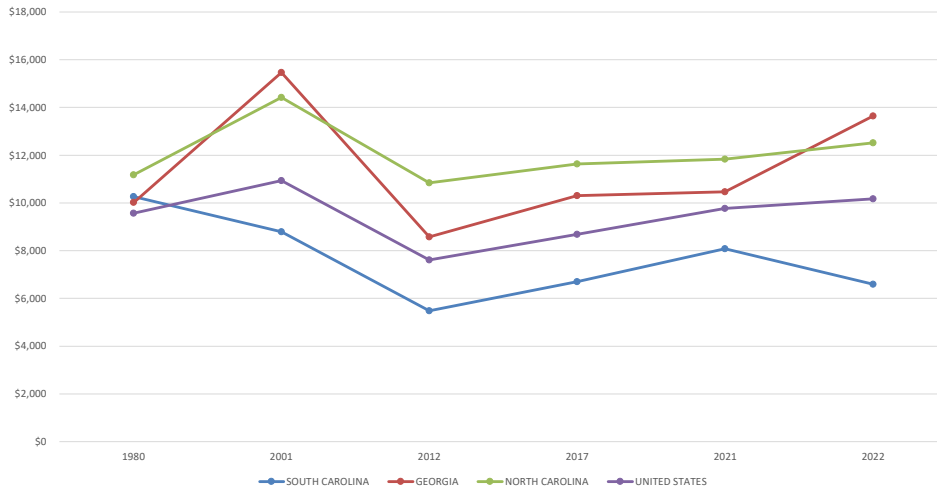
SOURCE: Brian Prescott, NCHEMS, South Carolina Council of Presidents, October 6, 2021

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TABLE 3.2 PUBLIC HIGHER EDUCATION APPROPRIATIONS PER FTE BY STATE, FY 1980-2022 (CONSTANT ADJUSTED DOLLARS)



Source: SHEEO State Higher Education Funding, 2022

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**TABLE 3.2 PUBLIC HIGHER EDUCATION APPROPRIATIONS PER FTE BY STATE,
FY 1980-2022 (CONSTANT ADJUSTED DOLLARS)**

	% CHANGE				
	SINCE 2021	SINCE 2017	SINCE 2012	SINCE 2001	SINCE 1980
SOUTH CAROLINA	-18.50%	-1.50%	20.30%	-24.90%	-35.80%
GEORGIA	30.30%	32.40%	59.00%	-11.80%	36.20%
NORTH CAROLINA	5.80%	7.60%	15.50%	-13.20%	12.00%
UNITED STATES	4.20%	17.20%	33.70%	-7.00%	6.30%

Source: SHEEO State Higher Education Funding, 2022

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TABLE 3.2A PUBLIC HIGHER EDUCATION APPROPRIATIONS PER FTE BY SECTOR AND STATE, FY 2019-2022 (CONSTANT ADJUSTED DOLLARS)

	FOUR-YEAR EDUCATION APPROPRIATIONS					
	2019	2021	2022	INDEX TO U.S. AVERAGE	% CHANGE SINCE 2021	% CHANGE SINCE 2019
GEORGIA	\$11,134	\$10,526	\$14,165	1.48	34.6%	27.2%
NORTH CAROLINA	\$13,573	\$12,900	\$13,711	1.44	6.3%	1.0%
SOUTH CAROLINA	\$6,149	\$8,134	\$6,914	0.72	-15.0%	12.4%
UNITED STATES	\$8,866	\$9,226	\$9,539	1.00	3.4%	7.6%

Source: SHEEO State Higher Education Funding, 2022

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TABLE 3.2A PUBLIC HIGHER EDUCATION APPROPRIATIONS PER FTE BY SECTOR AND STATE, FY 2019-2022 (CONSTANT ADJUSTED DOLLARS)

	TWO-YEAR EDUCATION APPROPRIATIONS					
	2019	2021	2022	INDEX TO U.S. AVERAGE	% CHANGE SINCE 2021	% CHANGE SINCE 2019
GEORGIA	\$7,549	\$7,844	\$9,428	0.93	20.2%	24.9%
NORTH CAROLINA	\$8,824	\$9,268	\$9,597	0.95	3.6%	8.8%
SOUTH CAROLINA	\$7,483	\$8,210	\$5,585	0.55	-32.0%	-25.4%
UNITED STATES	\$8,513	\$9,770	\$10,100	1.00	3.4%	18.6%

Source: SHEEO State Higher Education Funding, 2022

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**TABLE 3.3 PUBLIC HIGHER EDUCATION STATE FINANCIAL AID PER FTE BY STATE,
FY 2001-2022 (CONSTANT ADJUSTED DOLLARS)**

	2001	2012	2017	2021	2022	% CHANGE SINCE 2021	% CHANGE SINCE 2017	% CHANGE SINCE 2012	% CHANGE SINCE 2001
GEORGIA	\$1,949	\$1,794	\$2,158	\$2,480	\$2,418	-2.5%	12.0%	34.8%	24.1%
NORTH CAROLINA	\$325	\$505	\$482	\$436	\$435	-0.3%	-9.7%	-13.9%	34.0%
SOUTH CAROLINA	\$540	\$1,912	\$1,936	\$2,329	\$2,231	-4.2%	15.2%	16.6%	313.4%
UNITED STATES	\$552	\$724	\$751	\$971	\$988	1.7%	31.5%	36.4%	78.8%

Source: SHEEO State Higher Education Funding, 2022

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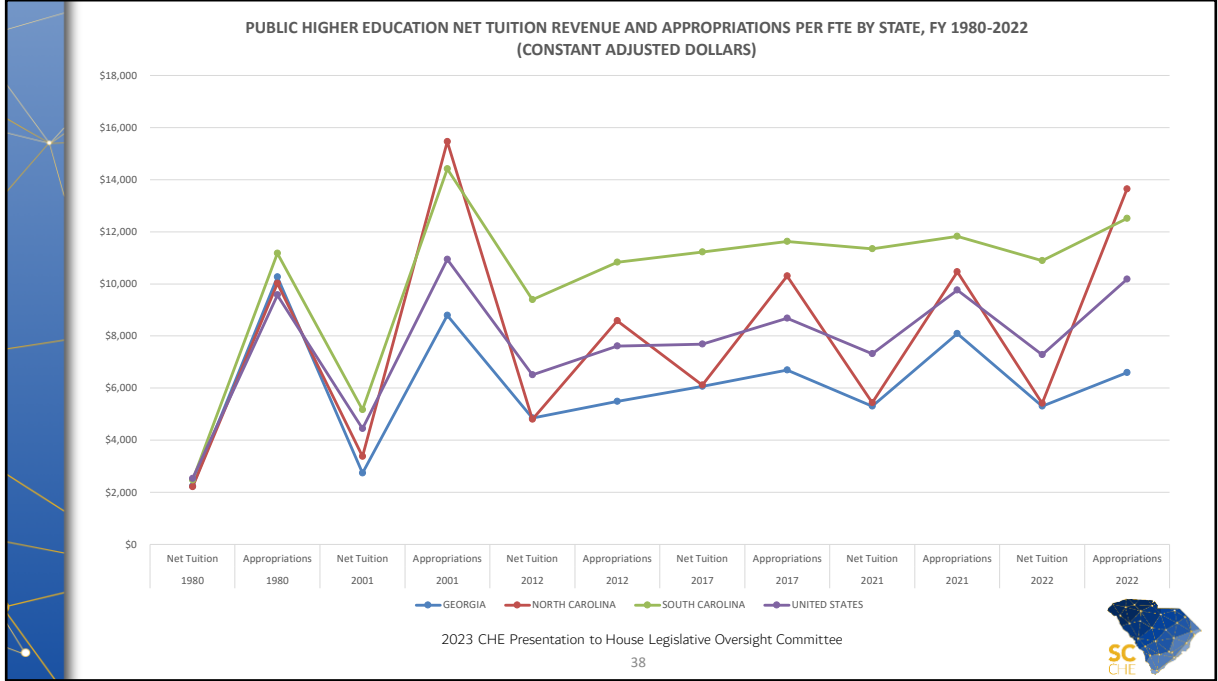


TABLE 4.1 PUBLIC HIGHER EDUCATION NET TUITION REVENUE PER FTE BY STATE, FY 1980-2022 (CONSTANT ADJUSTED DOLLARS)

	1980	2001	2012	2017	2021	2022	% CHANGE SINCE 2021	% CHANGE SINCE 2017	% CHANGE SINCE 2012	% CHANGE SINCE 2001	% CHANGE SINCE 1980
GEORGIA	\$2,235	\$2,739	\$4,853	\$6,064	\$5,298	\$5,308	0.2%	-12.5%	9.4%	93.8%	137.5%
NORTH CAROLINA	\$2,201	\$3,369	\$4,801	\$6,116	\$5,435	\$5,412	-0.4%	-11.5%	12.7%	60.6%	145.9%
SOUTH CAROLINA	\$2,467	\$5,169	\$9,392	\$11,229	\$11,349	\$10,889	-4.1%	-3.0%	15.9%	110.7%	341.4%
UNITED STATES	\$2,530	\$4,447	\$6,511	\$7,691	\$7,320	\$7,278	-0.6%	-5.4%	11.8%	63.6%	187.7%

Source: SHEEO State Higher Education Funding, 2022

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TABLE 4.1A PUBLIC HIGHER EDUCATION NET TUITION REVENUE PER FTE BY SECTOR AND STATE, FY 2019-2022 (CONSTANT ADJUSTED DOLLARS)

	FOUR-YEAR TUITION REVENUE					
	2019	2021	2022	INDEX TO U.S. AVERAGE	% CHANGE SINCE 2021	% CHANGE SINCE 2019
GEORGIA	\$6,485	\$5,973	\$6,043	0.60	1.2%	-6.8%
NORTH CAROLINA	\$8,862	\$8,049	\$8,019	0.79	-0.4%	-9.5%
SOUTH CAROLINA	\$16,443	\$15,592	\$15,100	1.49	-3.2%	-8.2%

Source: SHEEO State Higher Education Funding, 2022

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**TABLE 4.1A PUBLIC HIGHER EDUCATION NET TUITION REVENUE PER FTE BY
SECTOR AND STATE, FY 2019-2022 (CONSTANT ADJUSTED DOLLARS)**

	TWO-YEAR TUITION REVENUE					
	2019	2021	2022	INDEX TO U.S. AVERAGE	% CHANGE SINCE 2021	% CHANGE SINCE 2019
GEORGIA	\$3,379	\$3,560	\$3,296	1.28	-7.4%	-2.5%
NORTH CAROLINA	\$2,038	\$1,872	\$1,793	0.70	-4.3%	-12.0%
SOUTH CAROLINA	\$3,697	\$3,723	\$3,439	1.33	-7.6%	-7.0%

Source: SHEEO State Higher Education Funding, 2022

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TABLE 4.2 PUBLIC HIGHER EDUCATION TOTAL EDUCATION REVENUE PER FTE BY STATE, FY 1980-2022 (CONSTANT ADJUSTED DOLLARS)

	1980	2001	2012	2017	2021	2022	% CHANGE SINCE 2021	% CHANGE SINCE 2017	% CHANGE SINCE 2012	% CHANGE SINCE 2001	% CHANGE SINCE 1980
GEORGIA	\$12,254	\$18,150	\$13,410	\$16,361	\$15,763	\$18,948	20.2%	15.8%	41.3%	4.4%	54.6%
NORTH CAROLINA	\$13,374	\$17,789	\$15,637	\$17,744	\$17,263	\$17,925	3.8%	1.0%	14.6%	0.8%	34.0%
SOUTH CAROLINA	\$12,734	\$13,555	\$14,127	\$17,213	\$18,783	\$16,867	-10.2%	-2.0%	19.4%	24.4%	32.5%
UNITED STATES	\$12,102	\$15,364	\$14,045	\$16,298	\$16,990	\$17,365	2.2%	6.6%	23.6%	13.0%	43.5%

Source: SHEEO State Higher Education Funding, 2022

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TABLE 4.3 NET TUITION AS A PERCENTAGE OF TOTAL EDUCATION REVENUE BY STATE, FY 1980-2022

	1980	2001	2012	2017	2021	2022	CHANGE SINCE 2021	CHANGE SINCE 2017	CHANGE SINCE 2012	CHANGE SINCE 2001	CHANGE SINCE 1980
GEORGIA	18.2%	15.1%	36.2%	37.1%	33.6%	28.0%	-5.6	-9.1	-8.2	12.9	9.8
NORTH CAROLINA	16.5%	18.9%	30.7%	34.5%	31.5%	30.2%	-1.3	-4.3	-0.5	11.3	13.7
SOUTH CAROLINA	19.4%	38.1%	66.5%	65.2%	60.4%	64.6%	4.1	-0.7	-1.9	26.4	45.2
UNITED STATES	20.9%	28.9%	46.4%	47.2%	43.1%	41.9%	-1.2	-5.3	-4.5	13.0	21.0

Source: SHEEO State Higher Education Funding, 2022

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**CAPITAL TABLE 1. TOTAL PUBLIC CAPITAL APPROPRIATIONS BY STATE,
FY 2020-2022 (UNADJUSTED DOLLARS)**

	2020	2021	2022	% CHANGE SINCE 2021	% CHANGE SINCE 2020
GEORGIA	\$367,255,000	\$300,190,000	\$383,875,000	27.9%	4.5%
NORTH CAROLINA	\$104,057,580	\$130,942,786	\$569,129,266	334.6%	446.9%
SOUTH CAROLINA	\$119,240,256	\$1,500,000	\$512,727,133	34081.8%	330.0%
UNITED STATES	\$18,068,688,865	\$13,570,399,621	\$19,901,080,033	46.7%	10.1%

Source: SHEEO State Higher Education Funding, 2022

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Student Loan Debt

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Student Loan Debt

- South Carolina's total student loan debt of \$28.1 billion, a 1.5 percent increase from 2021
- South Carolina's student loan debt is higher per borrower, and its population has a higher proportion of indebted student borrowers.

"Student Loan Debt by State" EducationData.org, April 3, 2022 <https://educationdata.org/student-loan-debt-by-state>

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Student Loan Debt

- In 2021, South Carolina had a per capita student loan debt balance of about \$6,110, while the national balance was \$5,640.
- When compared to neighboring Southern states, South Carolina has the second largest per capita student loan debt balance (only GA was higher at \$7,700). This includes educational loans provided by banks, credit unions, and other financial institutions as well as federal and state governments.

Student Loan Debt by State" EducationData.org, April 3, 2022 <https://educationdata.org/student-loan-debt-by-state>

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Student Loan Debt

- 731,500 student borrowers live in South Carolina.
- 14.3% of South Carolina residents have student loan debt.
- 51.8% are under the age of 35.

Sources: U.S. Department of Education, National Center for Education Statistics, "Integrated Postsecondary Education Data System (IPEDS) 2021"
<http://nces.ed.gov/ipeds/datacenter/>

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Student Loan Debt

- In 2020–2021, average net price of attendance for students in South Carolina:
 - \$5,719 - public two-year
 - \$12,536 - public four-year
 - \$15,791 - private four-year
 - \$19,596 - for-profit

Sources: U.S. Department of Education, National Center for Education Statistics, "Integrated Postsecondary Education Data System (IPEDS) 2021"
<http://nces.ed.gov/ipeds/datacenter/>

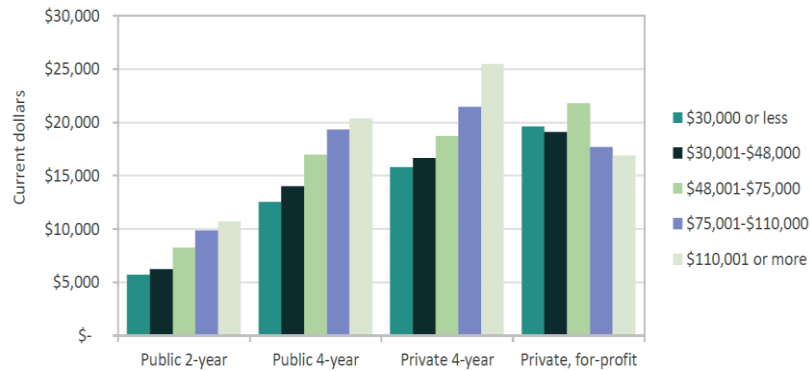
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Net Price of Attendance for Full-time, First-time Undergraduates in South Carolina by Sector and Income

Average Net Price for Full-time, First-time Undergraduates in South Carolina by Sector and Income Quintile (AY 2020-2021)



Sources: U.S. Department of Education, National Center for Education Statistics, "Integrated Postsecondary Education Data System (IPEDS) 2021"
<http://nces.ed.gov/ipeds/datacenter/>

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Student Loan Debt

- According to the State of Student Aid and Higher Education in South Carolina May 2023, the majority of federal direct student loan volume went to students in the public four-year sector, at 68%, with 22% going to students in the independent four-year sector.
- A majority of the students worked while enrolled at least 20 hours per week, thereby potentially affecting academics and time to degree.

State of Student Aid and Higher Education in South Carolina, May 2023, Trellis Research, C. Fletcher, A. Cornett, M.J. James, C. Knaff

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Student Loan Debt

- Among SC's indebted student borrowers, 14.7% owe less than \$5,000.
- 22.2% owe \$20,000 to \$40,000 (\$28,651).
- 2.2% owe more than \$200,000.
- South Carolina ranks 6th on Federal Student Loan Debt per state with an average borrower debt of \$38,414.

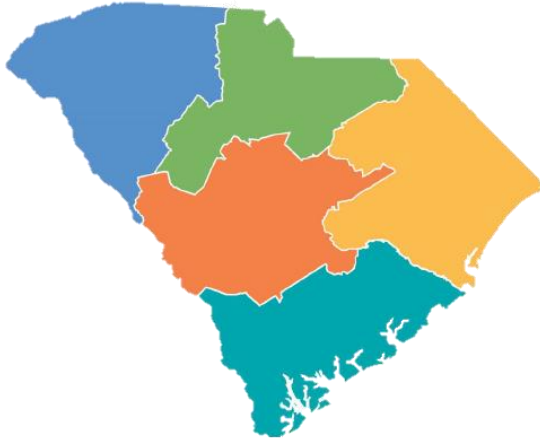
Student Loan Debt by State" EducationData.org, April 3, 2022 <https://educationdata.org/student-loan-debt-by-state>

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Federal Direct Loan Volume Concentrated in Rural Areas, More Widely Distributed in Urban Area



Top Schools by Region (AY 2020–2021)

Upstate

1. Clemson University \$111 Million
2. University of South Carolina Upstate \$28
3. Anderson University \$23
4. Sherman College of Straight Chiropractic \$23
5. Lander University \$20

** Top 5 Schools Account for 65% of Volume*

U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports <https://studentaid.ed.gov/sa/about/datacenter/student/title-iv>

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Federal Direct Loan Volume Concentrated in Rural Areas, More Widely Distributed in Urban Area

Top Schools by Region (AY 2020–2021)

Upper Central

1. Winthrop University \$41 Million
2. Limestone University \$15
3. Newberry College \$10
4. University of South Carolina - Lancaster \$2
5. York Technical College \$2

** Top 5 Schools Account for 95% of Volume*

U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports <https://studentaid.ed.gov/sa/about/datacenter/student/title-iv>

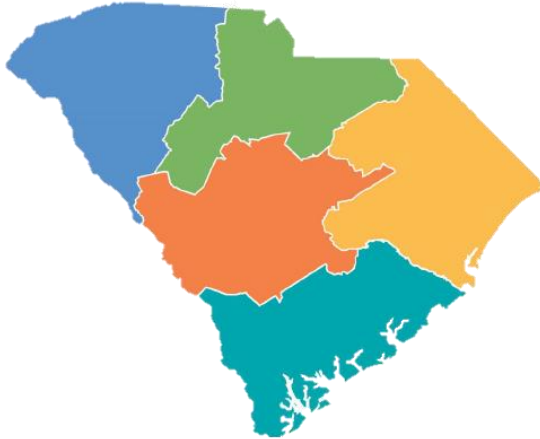
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Federal Direct Loan Volume Concentrated in Rural Areas, More Widely Distributed in Urban Area

Top Schools by Region (AY 2020–2021)



Midlands

1. University of South Carolina – Columbia \$240 Million
2. South Carolina State University \$17
3. University of South Carolina – Aiken \$17
4. Claflin University \$16
5. Benedict College \$12

** Top 5 Schools Account for 84% of Volume*

U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports <https://studentaid.ed.gov/sa/about/datacenter/student/title-iv>

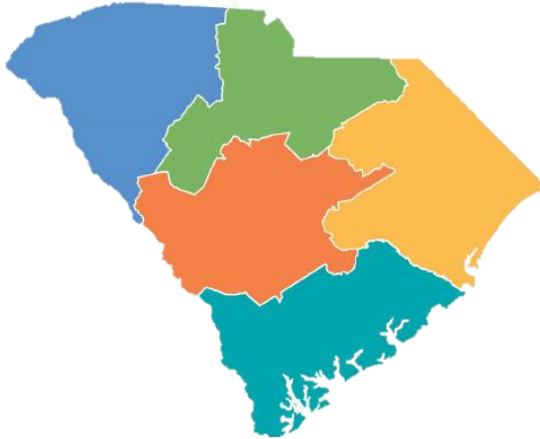
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Federal Direct Loan Volume Concentrated in Rural Areas, More Widely Distributed in Urban Area

Top Schools by Region (AY 2020–2021)



Pee Dee

1. Coastal Carolina University \$67 Million
2. Francis Marion University \$23
3. Horry Georgetown Tech \$14
4. Coker University \$7
5. Florence-Darlington Tech \$3

** Top 5 Schools Account for 100% of Volume*

U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports <https://studentaid.ed.gov/sa/about/datacenter/student/title-iv>

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Federal Direct Loan Volume Concentrated in Rural Areas, More Widely Distributed in Urban Area

Top Schools by Region (AY 2020–2021)

Lowcountry

1. Medical University of South Carolina \$91 Million
2. College of Charleston \$46
3. Charleston Southern University \$22
4. Citadel Military College of South Carolina \$21
5. Charleston School of Law \$20

** Top 5 Schools Account for 88% of Volume*

U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports <https://studentaid.ed.gov/sa/about/datacenter/student/title-iv>

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Student Loan Debt

- The buying power of the federal Pell Grant, has declined over the last three decades.
- In 2020–2021, the average Pell grant in South Carolina covered only 15 % of the average cost of attendance (COA) – i.e. tuition, fees, room, board, and other basic expenses -- for eligible undergraduates at public four-year universities, and 18% at public two-year colleges in South Carolina.

Cost of attendance: U.S. Department of Education, National Center for Education Statistics, IPEDS Data Center (Author's calculation: Total cost of full –time undergraduate attendance weighted by FTE in-state undergraduate enrollment) (<http://nces.ed.gov/ipeds/datacenter/>); Pell: U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports (<http://studentaid.ed.gov/about/data-center/student/title-iv>); Maximum Pell: U.S. Department of Education, Federal Student Aid (<https://studentaid.ed.gov/sa/types/grants-scholarships/pell>).

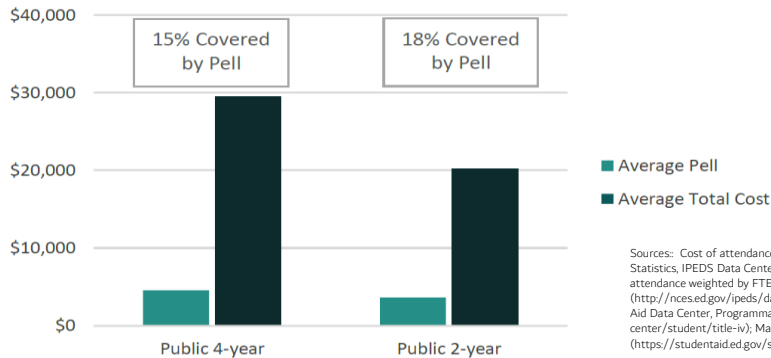
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The Federal Pell Grant covers just 15 percent of average Public Four-Year Costs

Total Cost of Attendance for Two Semesters Full-time Attendance
at South Carolina Public Institutions Covered by Average Pell Grant
Amount, by Sector
(AY 2020-2021)



The maximum Pell grant for 2018-2019 was \$6,095 and increased to \$6,195 for 2019-2020.

Sources: Cost of attendance: U.S. Department of Education, National Center for Education Statistics, IPEDS Data Center (Author's calculation: Total cost of full-time undergraduate attendance weighted by FTE in-state undergraduate enrollment) (<http://nces.ed.gov/ipeds/datacenter/>); Pell: U.S. Department of Education, Federal Student Aid Data Center, Programmatic Volume Reports (<http://studentaid.ed.gov/about/data-center/student/title-iv>); Maximum Pell: U.S. Department of Education, Federal Student Aid (<https://studentaid.ed.gov/sa/types/grants-scholarships/pell>).

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Student Loan Debt

- The state's level of degree attainment will have a direct impact on the ability to pay back loans, default, and quality of life.
- As of 2022, the percentage of citizens aged 25 or older in South Carolina who had obtained a bachelor's degree or higher was 32%.

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Student Loan Debt

- Bachelor's degree attainment:
 - 36% among white residents
 - 21% among Black/African American and Hispanic residents
- Six-year graduation rate has increased by 5% over the last 10 years and is now at 65%

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Student Loan Debt

- In earlier decades, many students financed an undergraduate education by taking a full course load while working enough hours to cover living and educational expenses.
- From 1966 to 1981, an industrious undergraduate could have paid for a year of education at a public university — including tuition, food, and housing — by working about 24 hours per week at a minimum wage job.

U.S. Minimum wage: U.S. Department of Labor, Employment Standards Administration, "History of Federal Minimum Wage Rates" (<http://www.dol.gov/whd/minwage/chart.htm>); U.S. Data: Postsecondary Education Opportunity, "I worked my way through college. You should too," 2008 update to Research Newsletter, Issue Number 125 (November 2002) (www.postsecondary.org); South Carolina Minimum Wage: U.S. Department of Labor, Minimum Wage (<https://www.dol.gov/agencies/whd/minimum-wage>); South Carolina College Costs Data: U.S. Department of Education, National Center for Education Statistics, IPEDS Data (<http://www.nces.ed.gov/ipeds/>.)

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Student Loan Debt

- Over two-thirds attending public two-year and 64% attending public and private, non-profit four-year institutions reported that they worked for pay during the fall 2021 semester.

Source: Fletcher, C., Cornet, A., & Webster, J. Student Financial Wellness Survey: Fall 2021 (unpublished tables).

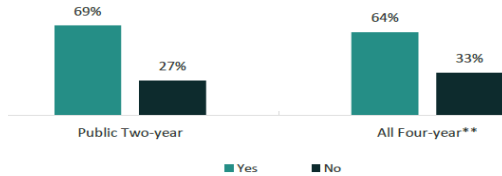
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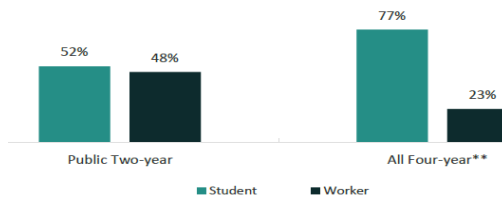


Working While Enrolled

Q23: Do you work for pay?*



Q126: Do you consider yourself a student who works or a worker who goes to school? (of respondents who reported they work for pay)



Source: Fletcher, C., Cornet, A., & Webster, J. Student Financial Wellness Survey: Fall 2021 (unpublished tables).

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- 77% of four-year students considered themselves to be students who worked.
- Nearly half of public two-year students considered themselves to be workers who go to school.

Student Loan Debt

- In 2020-2021, an in-state, residential undergraduate would have had to work every week:
 - 83 hours to pay for two semesters at a South Carolina public university
 - 122 hours for two semesters at a South Carolina private university
 - 57 hours for two semesters at a South Carolina community college

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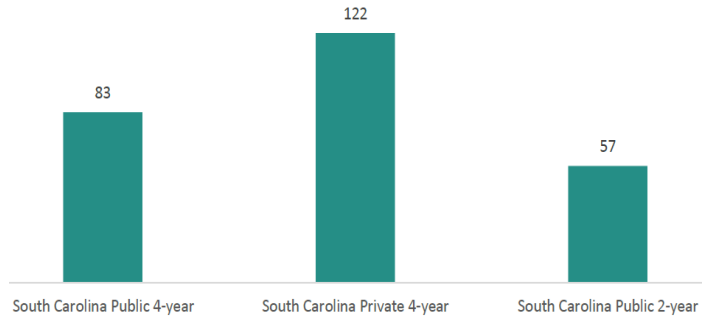
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Student Loan Debt

- Paying for a Bachelor's Degree through work alone would require 83 hours per week at minimum wage

Hours of Minimum Wage Work per Week Needed to Pay for an Average Undergraduate Education in South Carolina, by Sector (AY 2020-2021)



U.S. Minimum wage: U.S. Department of Labor, Employment Standards Administration, "History of Federal Minimum Wage Rates" (<http://www.dol.gov/whd/minwage/chart.htm>); U.S. Data: Postsecondary Education Opportunity, "I worked my way through college. You should too," 2008 update to Research Newsletter, Issue Number 125 (November 2002) (www.postsecondary.org); South Carolina Minimum Wage: U.S. Department of Labor, Minimum Wage (<https://www.dol.gov/agencies/whd/minimum-wage>); South Carolina College Costs Data: U.S. Department of Education, National Center for Education Statistics, IPEDS Data (<http://www.nces.ed.gov/ipeds/>).

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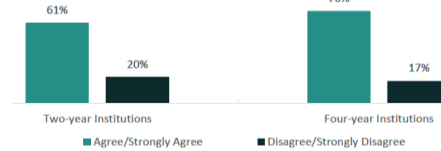
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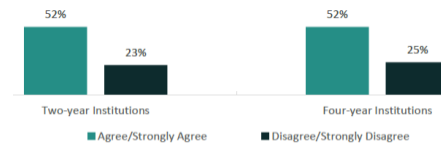
More than half of students have concerns about affording college

- 61% at two-year institutions and 70% of respondents at four-year institutions either agreed or strongly agreed that they worry about having enough money to pay for school.
- 23% at two-year institutions and 25% of respondents at four-year institutions either disagreed or strongly disagreed that they knew how they would pay for college next semester.

Q49: I worry about having enough money to pay for school.*



Q50: I know how I will pay for college next semester.*



Source: Fletcher, C., Cornet, A., & Webster, J. Student Financial Wellness Survey: Fall 2021 (unpublished tables).

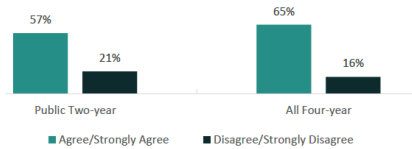
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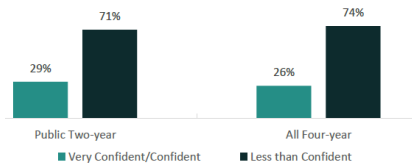


More than two-thirds of students are less than confident they can pay off the debt acquired

Q75: I have more student loan debt than I expected to have at this point. (of those who indicated having a student loan they took out for themselves)*



Q76: How confident are you that you will be able to pay off the debt acquired while you were a student? (of those who indicated having a student loan they took out for themselves)



- In the Fall 2021 more than half of respondents who borrowed at two-year institutions and 65% of respondents at four-year institutions agreed or strongly agreed with the statement that they had more student loan debt than they expected at this point.
- Many students borrow with no confidence in their ability to repay. More than two-thirds of respondents who borrowed at two-year institutions and 74% of respondents at four-year institutions were not at all confident or only somewhat confident they would be able to pay off the debt acquired while they were a student.

Source: Fletcher, C., Cornet, A., & Webster, J. Student Financial Wellness Survey: Fall 2021 (unpublished tables).

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Student Loan Debt Recommendations

- Consider key factors that influence student outcomes such as academic performance, retention, graduation rates, net price of attendance, etc., when SC students and families plan for postsecondary education.

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Student Loan Debt Recommendations

- Continued support for tuition mitigation funding for public institutions.
- Provide student outcomes/ROI information for students and families (i.e., certificate/degree completion, average student loan debt, post-college success) across all programs.

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Student Loan Debt Recommendations

- Review student loan entrance counseling processes including active student participation in entrance counseling each award year.
- Review availability of federal student loans leading students to take out rising amounts of debt.

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Resources

- Hanson, Melanie. "Student Loan Debt by State" EducationData.org, April 3, 2022 <https://educationdata.org/student-loan-debt-by-state>
- U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) 2021 (<http://nces.ed.gov/ipeds/>)
- U.S. Census Bureau, 2021 American Community Survey 1-Year Estimates, (<https://data.census.gov/>); Census Reporter, South Carolina Profile ([https://censusreporter.org/profiles/04000US29-South Carolina/](https://censusreporter.org/profiles/04000US29-South+Carolina/))
- State of Student Aid and Higher Education in South Carolina, May 2023, Trellis Research, C. Fletcher, A. Cornett, MJ James, C. Knaff
- All Costs and Enrollments for 2020–2021: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) 2020 (<http://nces.ed.gov/ipeds/>); All Costs and Enrollments for 2019–2020: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS) 2019 (<http://nces.ed.gov/ipeds/>); All other: U.S. Department of Education, National Postsecondary Student Aid Study – Administrative Collection (NPSAS-AC) 2018 (<http://www.nces.ed.gov/das>)

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Competency-Based Education (CBE)

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What is Competency-Based Education (CBE)?

- Varied definitions exist in the field, however the core aligned components include:
 - Curriculum designed around the mastery of competencies.
 - Flexible course or program pacing with varying time for student demonstration of competency.

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Who's Leading CBE?

- The Competency-Based Education Network (C-BEN)
 - Leading network of institutions and employers working to realize the full potential of competency-based learning.
- The Aurora Institute
 - Lead in research around fully defining CBE, implementing standard practices, and preparing and sustaining educators
- Western Governors University
 - Leading institution using CBE

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Who's Leading CBE?

- CBE has been adopted most widely in the K-12 setting.
- According to the *2019 National Survey of Postsecondary Competency-Based Education*:
 - 64 institutions operating a total of 588 full CBE programs.
 - 76% of responding institutions expect an increase in the number of CBE programs over the next 5 years.
 - Course-level rather than program level adoptions.

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Prior Learning Assessments at SC Institutions

Assessment Type	Percent of Usage
Advanced Placement (AP)	100%
Institutional Baccalaureate (IB)	100%
College Level Examination Programs (CLEP)	100%
American Council on Education (ACE) Military Evaluations	100%
Dantes Subject Standardized Tests (DSST)	29%
Cambridge International Assessment	38%
Student Portfolio Evaluations	24%
Departmental or Institutional Exams	71%
Individualized Assessments (informal)	14%
Locally Developed Articulation Agreements	24%

*CHE Spring 2023 PLA survey

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CBE in South Carolina

- CHE Spring 2023 CBE survey with 20 responding institutions:
 - **One** technical college indicated current utilization of CBE to award credentials in electrical, machine tool, CDL, welding, and nursing.
 - **One** 4-year institution indicated plans to develop a non-credit CBE program.

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Potential Solutions

- The central emerging theme was that more training is needed in the following areas:
 - Best practices in CBE
 - Step-by-step guidance on implementation
 - Leveraging technology and curriculum design
- Further feedback recommended the need for removal of professional accreditation barrier and exploration of financial aid implications.

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Summary

- CBE has the potential to be a solution to increased degree and certification attainment for adult learners, nontraditional students, minority, and underserved populations.
- Consistent with the CHE's *Ascend 60x30* plan, implementation of CBE efforts could provide the flexibility students need to earn degrees and certifications faster filling critical state workforce needs.
- Training, financial support, and infrastructure for scaling CBE as a primary institutional model present ongoing barriers to statewide implementation.

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Massive Open Online Courses (MOOCs)

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Massive Open Online Courses (MOOCs)

- Originally developed in 2008, MOOCs are online courses provided by parties associated with domestic or international higher education entities.
- These courses are available for little to no cost and are characterized by open-enrollment and asynchronous delivery.

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A Brief History of MOOCs

- 2008-2011
 - The first companies to deliver MOOCs at scale were established and typically partnered with higher education institutions (Stanford, MIT, Harvard, etc.).
 - Millions worldwide enrolled but completion rates were very low.
- 2012-2016
 - Companies focused more on non-credit professional development.
 - Institutions focused on growing online course and program offerings in response to student demand.

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MOOCs: Present

- 2016-2023
 - Institutions are leveraging online capacities through third-party enterprises (e.g., 2U, Pearson, Anthology, Wiley, etc.) in exchange for shared revenue.
 - Recruitment and enrollment management
 - Increased revenue through high enrollment
 - Brand integrity of university programs
 - Companies (Google, Amazon, etc.) are offering non-traditional certifications and training programs to bring more individuals into specialized fields.
 - State Governments have begun to de-emphasize traditional four-year academic degrees as requirements for employment. MD, UT, CO, PA, AK, NC, NJ, VA are now favoring job skills, experiences, and certifications over traditional academic degrees.

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MOOCs: Present

- 2023 New Directions
 - Arizona State announced an initiative to offer credit-bearing coursework via YouTube.
 - Students can complete courses free of cost and pay for the credits after completion once they earn the grade they prefer.
- In South Carolina, there are minimal university offerings through MOOCs
 - Many universities around the state offer access to MOOCs, or similar products through their libraries or Continuing Education programs.

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Expansion Possibilities

- Increase access to general education and commonly transferred courses.
- Bolster Continuing Education opportunities.
- Expand dual credit possibilities.
- Provide career pathways to high-demand careers in underserved counties.
- Earn credits for knowledge gained from MOOCs through Credit for Prior Learning processes.

This all presumes access to high-speed broadband internet throughout South Carolina.

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Return on Investment for Public Bachelor Degrees in SC

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Return on Investment

- The higher level of educational attainment an individual in South Carolina achieves, the greater their median lifetime earnings and economic premium than an individual with only a high school diploma.

Degree	Median Lifetime Earnings	Lifetime Economic Premium
High School Diploma	\$1.5 million	--
Associate	\$2.0 million	\$500,000
Bachelor	\$2.6 million	\$1.1 Million
Master	\$2.7 million	\$1.2 Million
Doctoral	\$3.9 million	\$2.4 Million
Professional	\$4.7 million	\$3.2 Million

Source: Georgetown University Center on Education and the Workforce analysis of the US Census Bureau, American Community Survey (ACS), 2009–2019.
Note: The figure is based on data for 25- to 64-year-olds working full-time, full-year.

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Top ROI Programs

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5-Year Post-Graduation

- Advanced Manufacturing Management
- Engineering
- Computer Sciences/Information Technology
- Health Care
- Engineering Technology

2

10-Year Post-Graduation

- Advanced Manufacturing Management
- Engineering
- Mathematics/Statistics
- Paralegal/Legal Studies
- Computer Sciences/Information Systems

In Spring 2023, the Commission on Higher Education (CHE) collaborated with the Department of Employment and Workforce (DEW) to develop ROI metrics. Data included wage records by year and census earnings data.

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Highest 10-Year ROI (Net Present Value) at public SC Institutions

	Institution	10-Year NPV
1.	USC-Lancaster	\$223,000
2.	Spartanburg Community College	\$153,000
3.	USC-Sumter	\$152,000
4.	Greenville Technical College	\$152,000
5.	Trident Technical College	\$152,000
6.	Midlands Technical College	\$148,000
7.	Tri-County Technical College	\$137,000
8.	Aiken Technical College	\$136,000
9.	The Citadel	\$133,000
10.	Florence-Darlington Technical College	\$131,000

Source: Georgetown University Center on Education and the Workforce, *A First Try at ROI: Ranking 4,500 Colleges*, 2020.

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Highest 10-Year ROI (NPV) at all SC Institutions

Institution	10-Year NPV
1. USC-Lancaster	\$223,000
2. Remington College-Columbia	\$154,000
3. Spartanburg Community College	\$153,000
4. USC-Sumpter	\$152,000
5. Greenville Technical College	\$152,000
6. Trident Technical College	\$152,000
7. Southeastern Institute-Columbia	\$151,000
8. Midlands Technical College	\$148,000
9. Tri-County Technical College	\$137,000
10. Aiken Technical College	\$136,000

Source: Georgetown University Center on Education and the Workforce, *A First Try at ROI: Ranking 4,500 Colleges*, 2020.

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Highest 40-Year ROI (NPV) at public SC Institutions

Institution	40-Year ROI (NPV)
1. The Citadel	\$1,197,000
2. Clemson	\$1,106,000
3. USC-Lancaster	\$1,065,000
4. USC Columbia	\$ 930,000
5. College of Charleston	\$ 832,000
6. Coastal Carolina	\$ 796,000
7. USC-Sumter	\$ 795,000
8. USC Upstate	\$ 774,000
9. USC Aiken	\$ 771,000
10. USC Beaufort	\$ 754,000

Source: Georgetown University Center on Education and the Workforce, *A First Try at ROI: Ranking 4,500 Colleges*, 2020.

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Highest 40-Year ROI (NPV) at all SC Institutions

Institution	40-Year ROI (NPV)
1. The Citadel	\$1,197,000
2. Clemson	\$1,106,000
3. USC-Lancaster	\$1,065,000
4. Wofford College	\$1,050,000
5. Furman University	\$1,022,000
6. Strayer University	\$ 955,000
7. USC Columbia	\$ 930,000
8. University of Phoenix	\$ 921,000
9. Presbyterian College	\$ 920,000
10.College of Charleston	\$ 832,000

Source: Georgetown University Center on Education and the Workforce, *A First Try at ROI: Ranking 4,500 Colleges*, 2020.

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Limitations

- Employment data is currently based on a generic Standard Occupational Code (SOC code) that is determined by the nature of the work of the employer and not the work of the employee specifically.
- Academic Programs are clustered by Classification of Instructional Program code (CIP code). All programs within a CIP code are treated as equal.

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Future Exploration

- Ensure that all academic programs have an appropriate CIP code and that CIP codes for equivalent programs at different institutions are the same.
- Develop a unified definition for an academic program's ROI.
- Work with DEW to improve data collection and understanding.
 - Add institution attended and demographic data to salary data to allow for additional analysis.

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Workforce Shortages and Future Needs

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Workforce Pipeline Context

- According to a 2017 study by Dell Technologies and Institute for the Future, “85% of the jobs that today’s learners will be doing in 2030 haven’t been invented yet.”

https://www.delltechnologies.com/content/dam/delltechnologies/assets/perspectives/2030/pdf/SR1940_IFTFforDellTechnologies_Human-Machine_070517_readerhigh-res.pdf

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Health Care Shortages

	2020-2030 Projected Annual Job Openings	2021 Program Completers	Percentage of openings filled
Registered Nurses	3067	1605	52%
Nurse Practitioners	353	28	8%
Physician Assistants	161	63	39%

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Education Shortages

	2020-2030 Projected Annual Job Openings	2021 Program Completers	Percentage of openings filled
Kindergarten Teachers	334	20	6%
Elementary School Teachers	1,689	672	40%
Middle School Teachers	707	216	31%
Secondary School Teachers	1000	385	39%
Teachers and Instructors, All Other	527	124	24%
Special Education Teachers	390	260	72%

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Other Shortages

The following jobs require at least a Bachelor's degree.

	2020-2030 Projected Annual Job Openings	2021 Program Completers	Percentage of openings met
Occupational Health and Safety Specialists	150	1	1%
Information Security Analysts	195	28	14%
Clinical Lab Technologists/Technicians	337	43	13%
Network/Computer System Administrators	461	104	23%
Financial Managers	649	132	20%
Computer Programmers/Software Developers	1189	411	35%
Accountants and Auditors	1764	817	46%
Engineers (Environmental, Industrial, Electrical, Civil, Mechanical)	1854	656	35%

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Workforce Shortages

The following jobs require at least a graduate degree.

	2020-2030 Projected Annual Job Openings	2021 Program Completers	Percentage of openings met
Pharmacists	256	78	49%
Physical Therapists	220	43	20%
Librarians & Media Collection Specialists	196	54	28%
Speech Language Pathologists	182	63	35%
Social Workers, Rehabilitation Counselors and Mental Health Workers	426	103	24%
Dentists	83	29	35%

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Future Workforce Needs

- South Carolina's economy is rapidly changing and becoming increasingly competitive in industries requiring increased attainment of bachelor's and graduate degrees.
- Five of the six top products or services receiving billions of dollars in investment and thousands of jobs created are from industries requiring bachelor's and graduate degrees:
 - Automotive engineering
 - Office, Headquarters, and Research and Development
 - Alternative Energy and Fuels
 - Consumer Product Development
 - Life Sciences

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Preparing for the Future

- Identify critical labor market deficits and determine future trends.
- Provide funding for students who pursue education in high-demand occupations.
- Provide funding for institutions to develop and expand programs in these critical need fields.

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