

The background of the slide is a solid red color. In the top left corner, the word "RUTGERS" is written in a large, white, serif font. Below it, in a smaller, white, sans-serif font, are the words "THE STATE UNIVERSITY OF NEW JERSEY". A large, faint, circular seal of Rutgers University is visible in the background, centered behind the text. The seal features a sunburst design and the words "RUTGERS STATE UNIVERSITY" around the perimeter.

RUTGERS

THE STATE UNIVERSITY
OF NEW JERSEY

Rutgers Strategic Planning Fact book

March 6, 2013

About this information

Rutgers has undertaken a strategic planning process to set the university's course for the next 10-15 years.

- A Steering Committee was formed in early December, and the team has been engaging with members of the Rutgers community to gather perspectives on the university's future
- On March 6th, ~200 leaders from across the university community came together to learn about the Committee's work to date and to provide input on the strategic plan

These materials are intended to lay out a base of facts to allow the university community to be prepared for deeper conversations about Rutgers' aspirations and strategic plan

- These materials were prepared with assistance from The Boston Consulting Group (BCG), Rutgers' partner in this strategic planning process
- BCG has conducted almost 120 interviews and 13 focus groups and received more than 5,000 survey responses from Board members, students, faculty, and academic administrators/staff¹
- These slides were informed by these interactions with stakeholders, as well as through research and analysis and BCG's broader experience working in higher education

1. Student survey still open. Alumni survey has been released to 3,000 people

Summary: New Jersey landscape

New Jersey is one of the nation's most populous and prosperous states

- 11th most populous state and number two in median household income
- Large presence of Fortune 500 companies with headquarters in the state

New Jersey produces some of the nation's highest-performing K-12 students but many of the best and brightest leave the state for college

- New Jersey students among the best in the nation in standardized test scores and SAT scores
- Test scores of New Jersey college students do not reflect the test scores of high school students in the state
- New Jersey has a net loss of ~30K college freshmen each year – highest in the U.S.
- Many high-caliber New Jersey students leave the state to study at higher ranked universities, especially in New York and Pennsylvania

Overall quality of New Jersey higher education system lags other states

- Fewer highly-ranked universities in New Jersey compared to states with comparable demographics
- New Jersey colleges have the lowest capacity to meet the state's student demand

State and local governments in New Jersey invest heavily in K-12 education, but less so in higher education

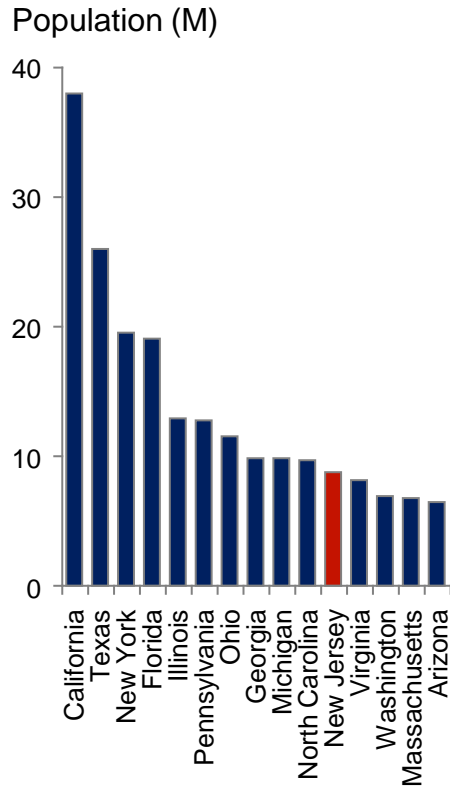
- New Jersey spends more on K-12 education than all other states
- States with comparable K-12 spending spend a proportionally higher amount on higher education

New Jersey invests less in higher education than other states

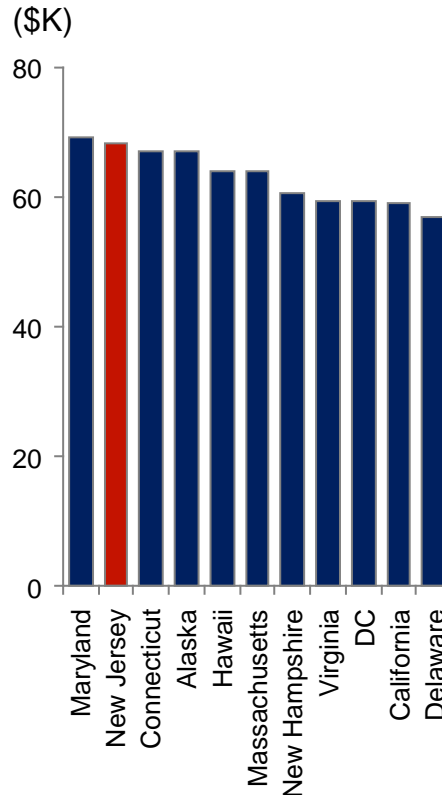
- New Jersey appropriation for higher education in line with other states on a per-student basis, but proportionally lower given the state's prosperity
- Total state appropriation for higher ed in New Jersey relatively flat over the past five years
- For many years, New Jersey has underinvested in capital expenditures for higher education

New Jersey is one of the most populous and prosperous state in the nation

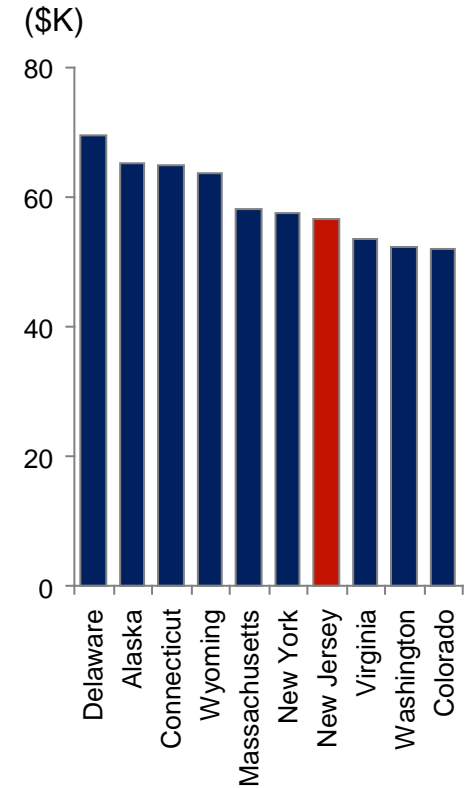
Most populous states



States with highest median household income



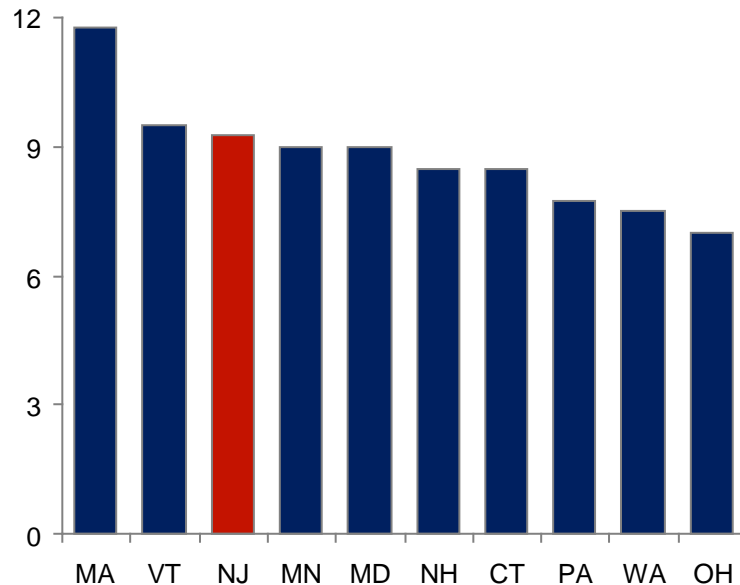
States with highest GDP per capita



New Jersey produces some of the highest-performing K-12 students in the nation

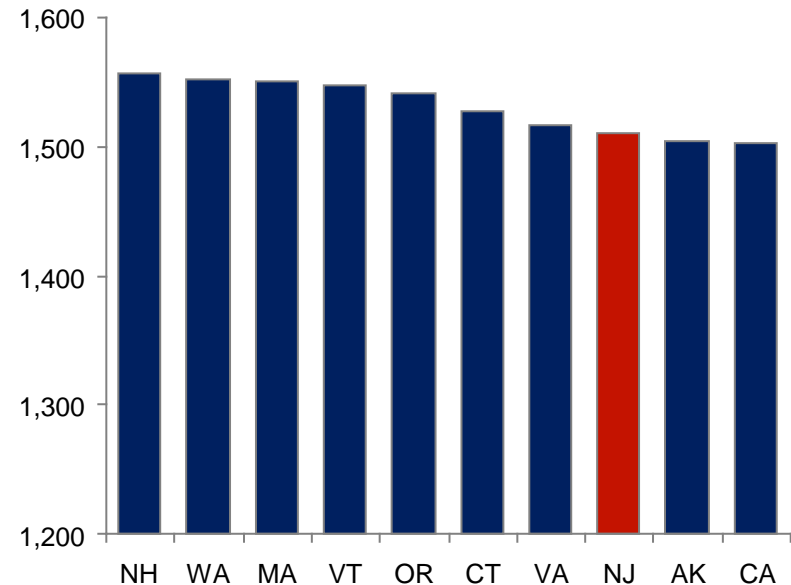
NJ students among best in nation in 4th/8th grade standardized test scores

Students achieving advanced level¹ (%)



New Jersey among top-10 states in mean SAT score

Avg. combined SAT score



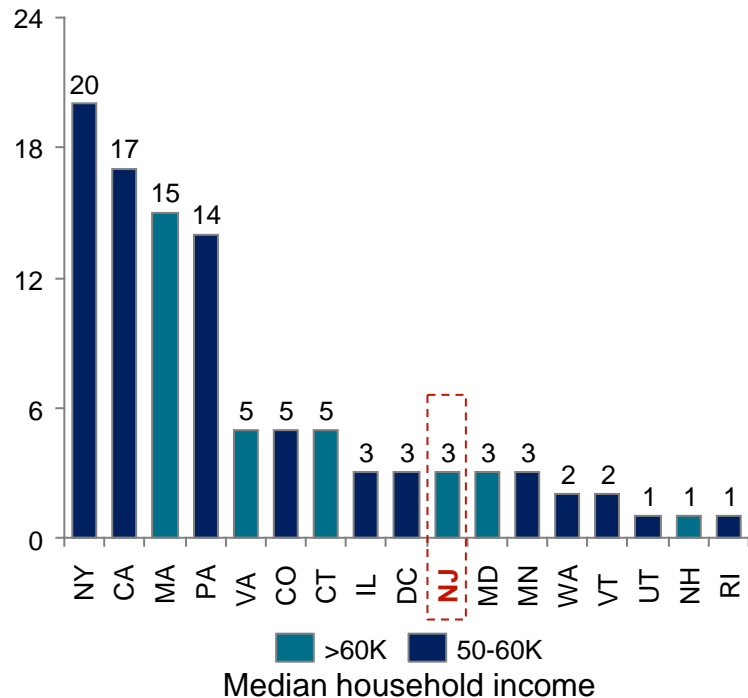
Pool of qualified graduates, with state's size and wealth, could fuel a high-performing higher education system

1. Average percent of students achieving "Advanced Level" on the National Assessment of Educational Progress, 2009. Average of 4th and 8th grade reading and math scores. Methodology measured the percent of students who scored at an advanced level or higher for 4th grade math, 8th grade math, 4th grade reading, and 8th grade reading. Source: US Department of Education. The College Board. NAEP. BCG Analysis.

Fewer top institutions are located in NJ relative to comparable states

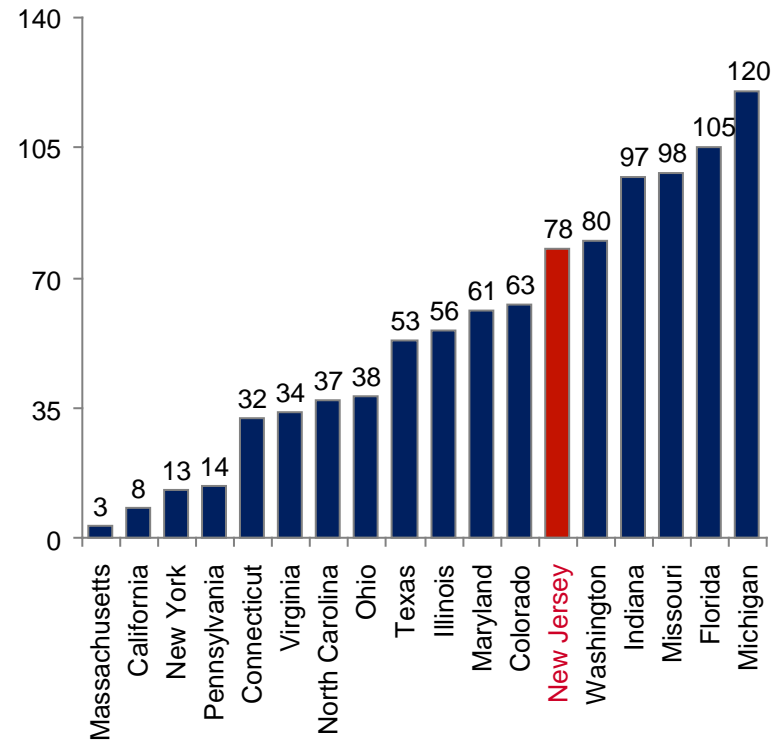
Fewer top institutions are located in NJ relative to comparable states

of Top 150 colleges and universities in each state¹



On average, New Jersey's institutions are ranked lower compared to other states

Mean ranking of top 5 colleges and universities in each state



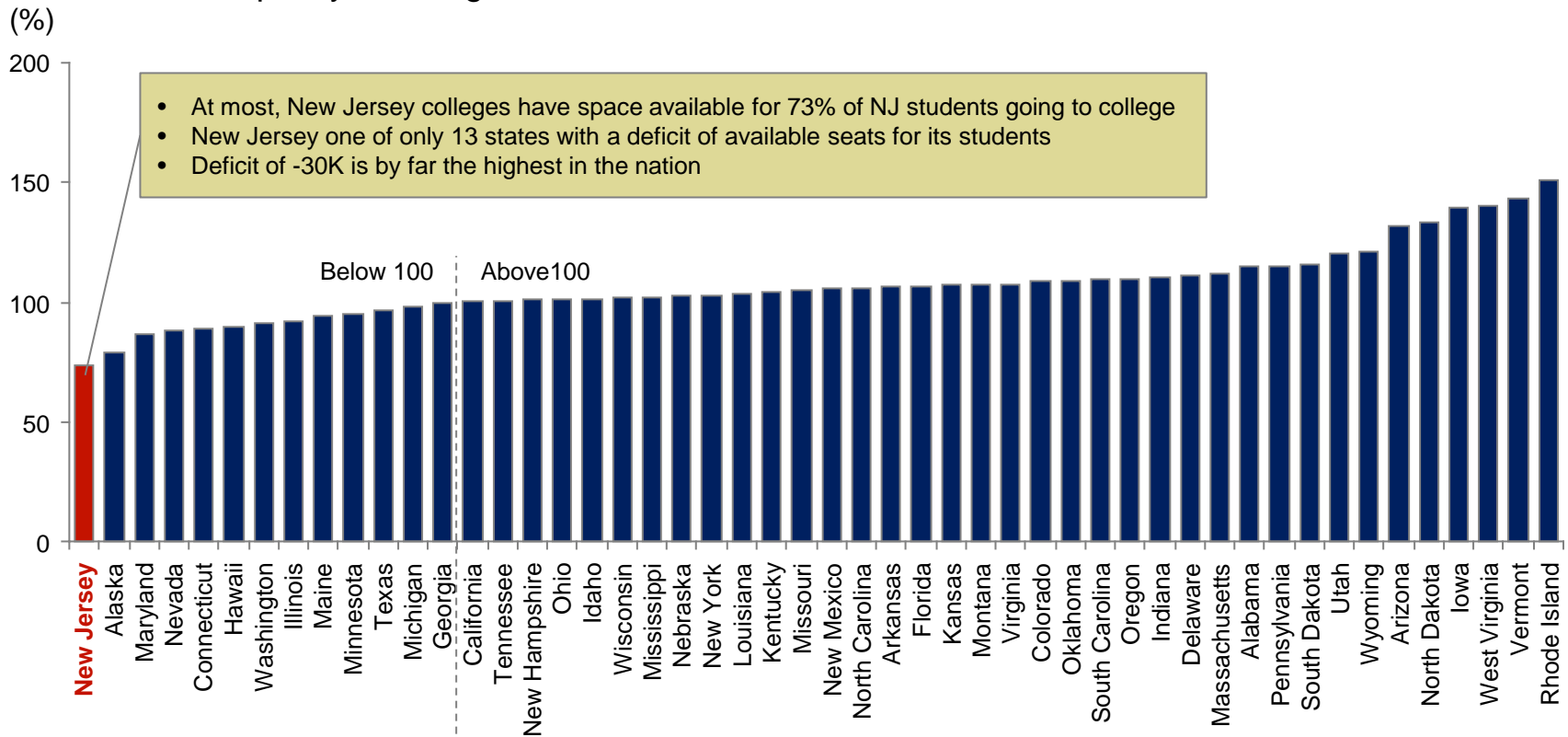
1. "Top 150" includes the top 100 national research universities and top 50 liberal arts colleges

Note: Includes all states who have at least 5 schools among the Top 200 national research universities and top 50 liberal arts colleges. Took mean ranking of the top 5 schools from each state ranked among these top 250 colleges and universities

Source: US News & World Report 2013 annual undergraduate rankings of colleges. BCG Analysis.

NJ colleges have the lowest capacity to meet its student demand

Capacity of colleges in each state relative to demand from students in that state¹



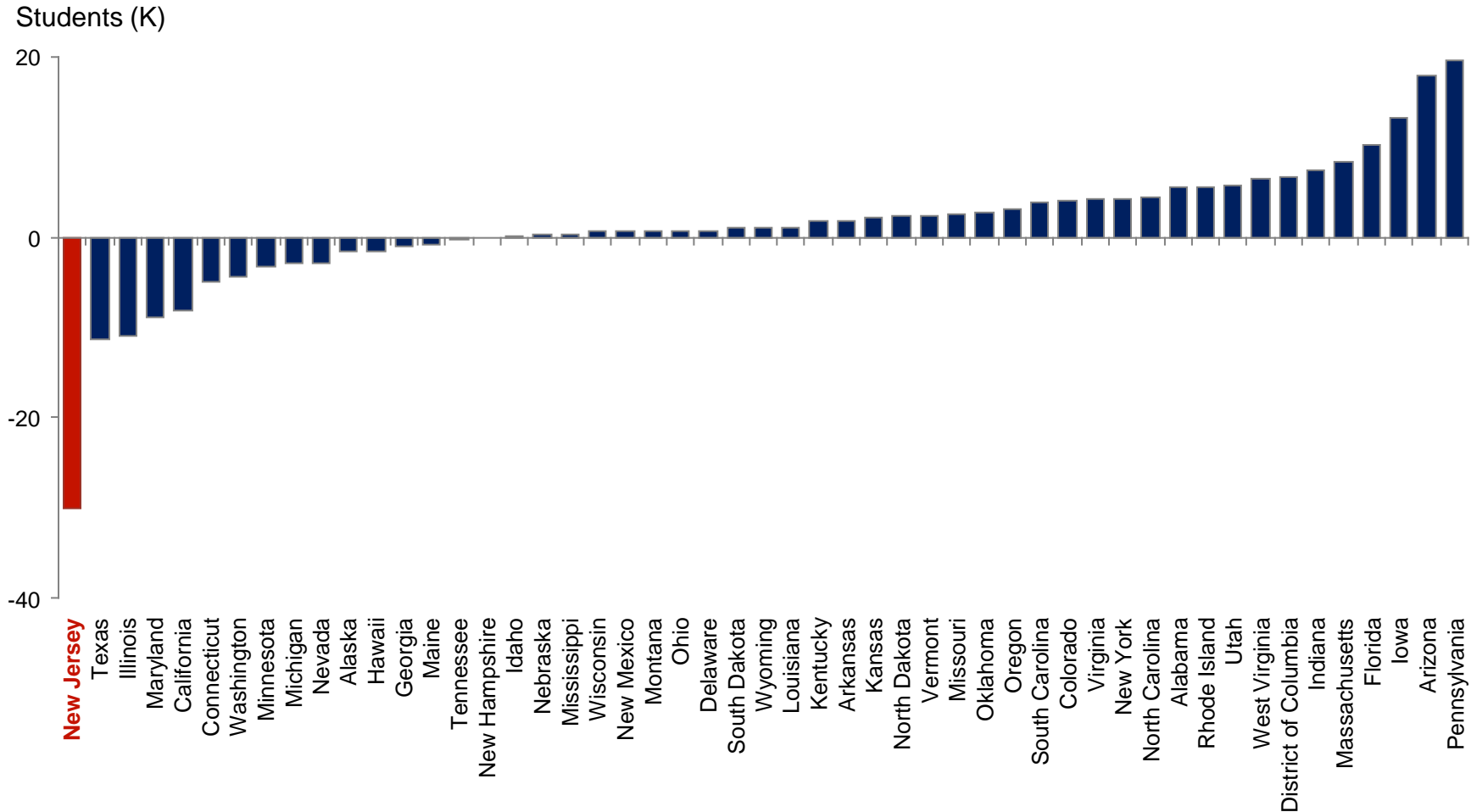
1. Information specific to Fall 2010

Source: National Center for Education Statistics: Enrollment in Postsecondary Institutions, Fall 2010 (<http://nces.ed.gov/pubs2012/2012280.pdf>). BCG Analysis

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NJ has a net loss of ~30K college freshmen each year—highest in the nation...

Net migration of college freshmen in/out of each state¹



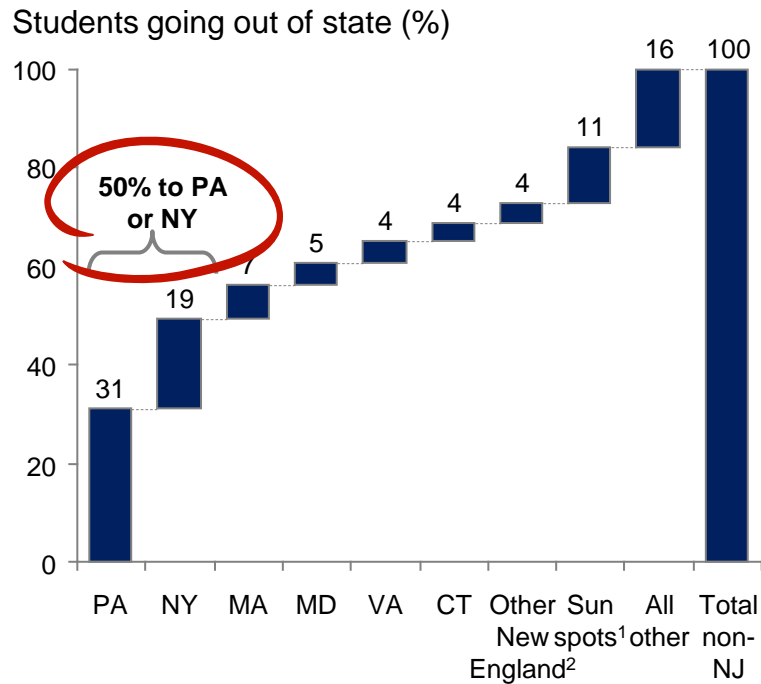
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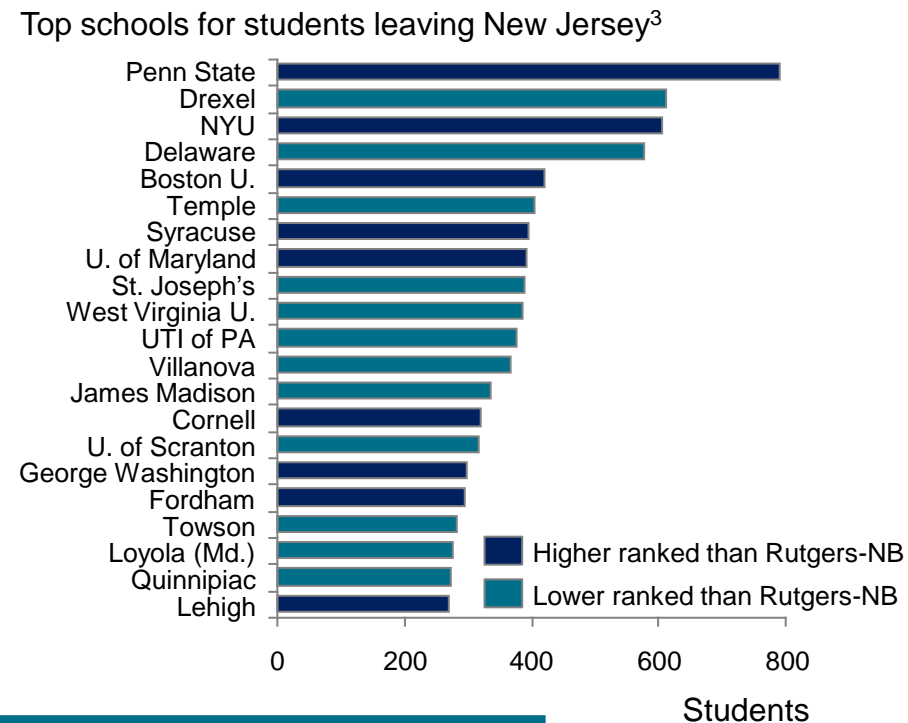
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...With many high-caliber students leaving New Jersey for schools in Pennsylvania and New York

Half the students leaving NJ go to schools in PA or NY



With many students going to schools ranked lower than Rutgers⁵



~30% of NJ students who leave NJ attend one of the top 60 universities or top 50 liberal arts colleges⁴

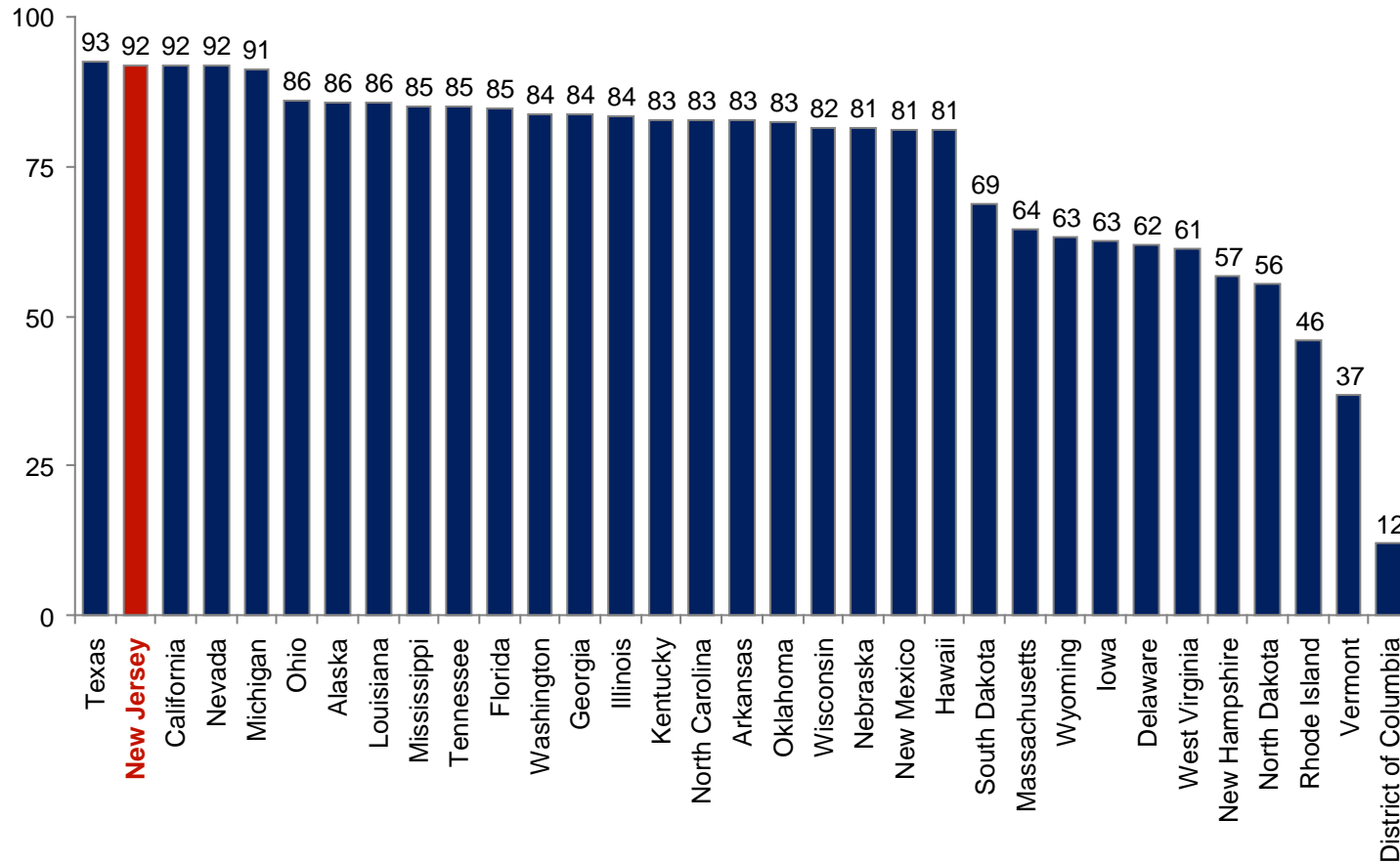
1. Includes FL, CA, AZ, NC, SC, GA 2. includes ME, NH, VT, RI 3. Top schools for 2010 4. Students attended either a top-60 national universities or top-50 liberal arts college, as defined by US News and World Report 5. "Lower-ranked schools" are either ranked lower than Rutgers-New Brunswick in the US News rankings (# 68) among national universities or are identified as a "regional university"

Source: National Student Clearinghouse. US News and World Report. BCG analysis.

New Jersey schools have the second highest percentage of in-state students

Spaces in each state's schools occupied by in-state residents

Seats occupied by in-state residents¹ (%)

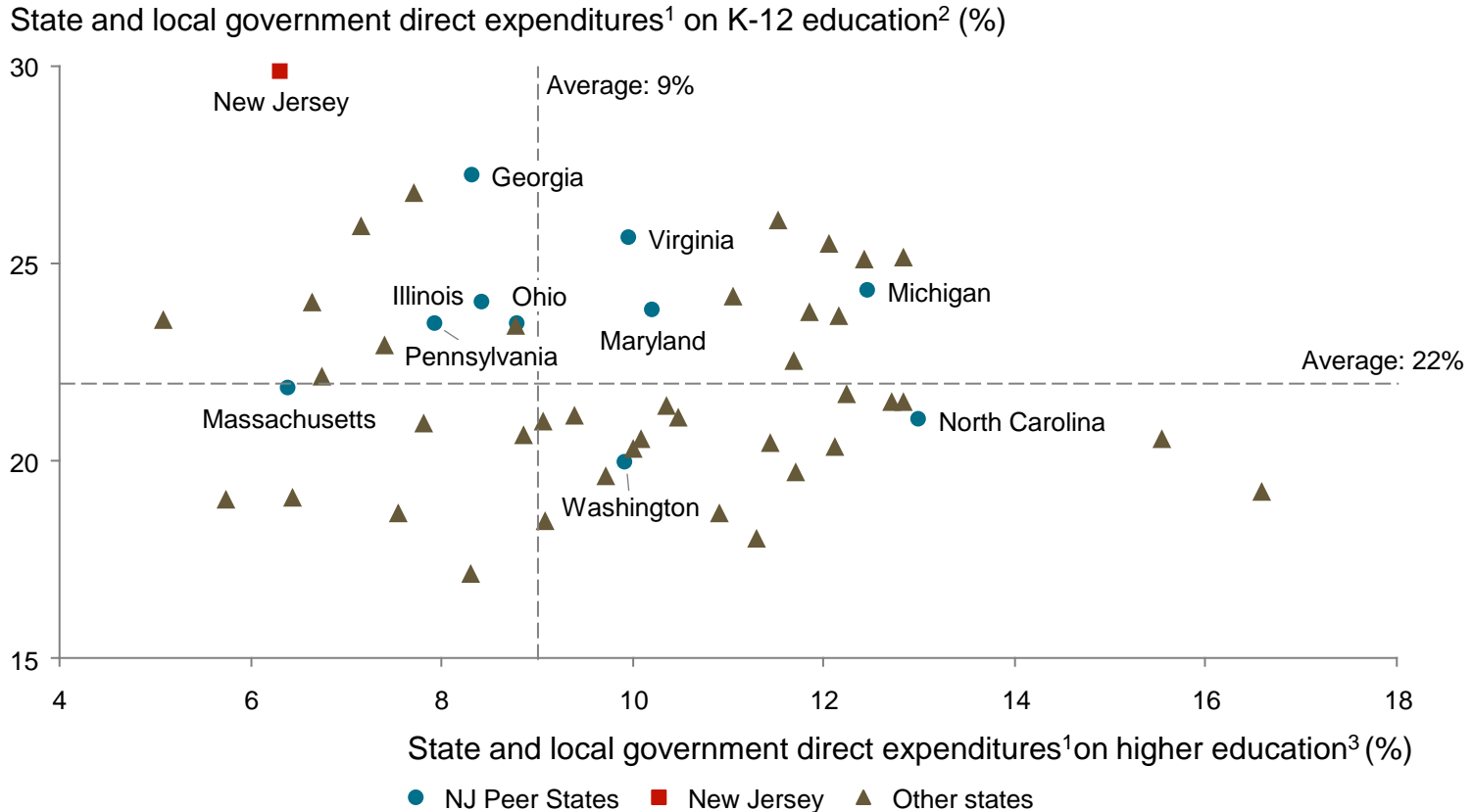


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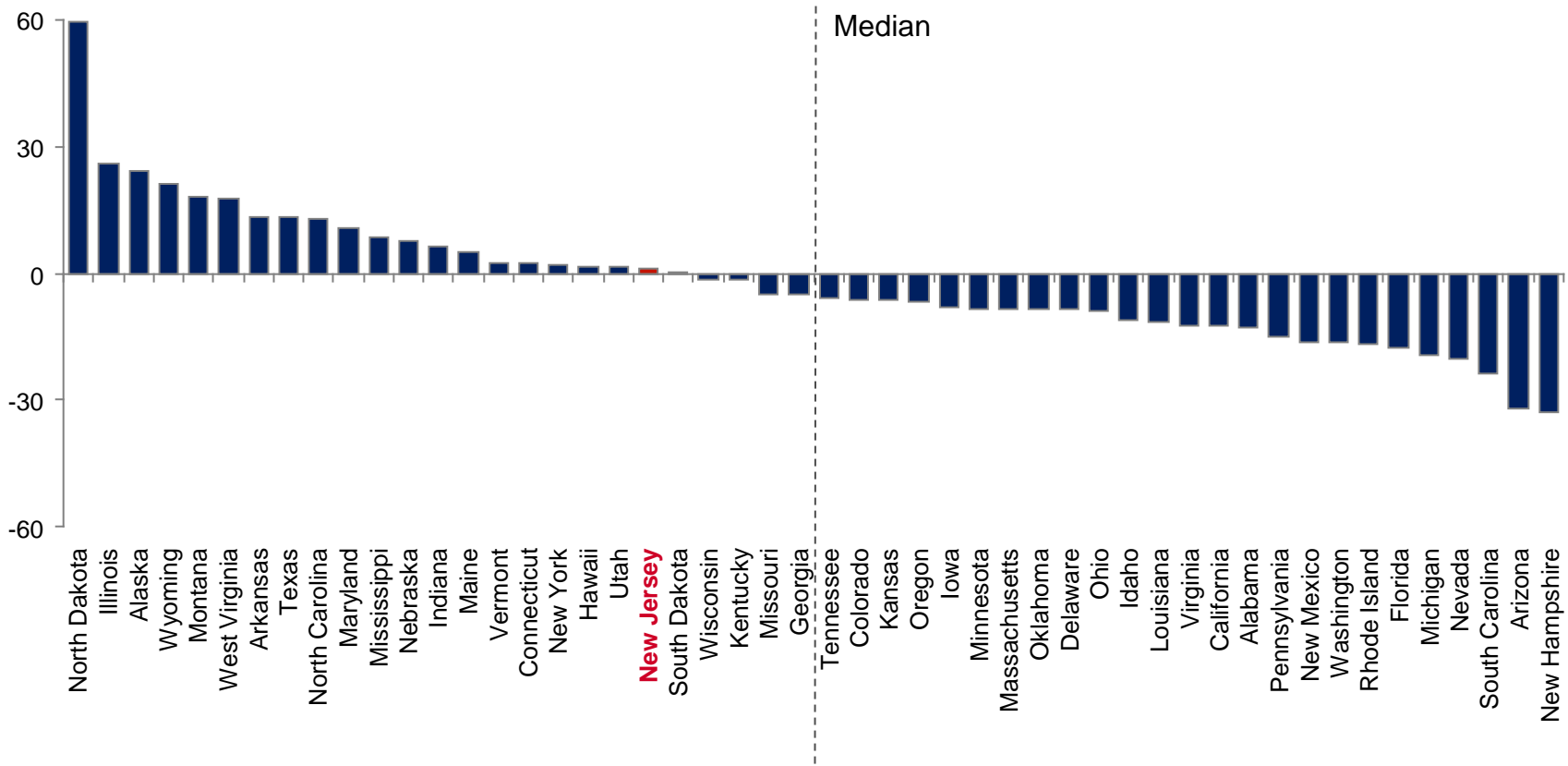
New Jersey is spending more in K-12 than all other states, but less in higher education



1. Direct expenditures relate to external payments of a government and excludes amounts transferred to funds or agencies of the same government. In this analysis, all capital expenditures have been excluded 2. Covers fiscal operating support given to degree-granting institutions operated by state or local governments that provide academic training beyond the high school (grade 12) level, other than for auxiliary enterprises of the state or local institution 3. The operation and maintenance of public schools and facilities for elementary and secondary education (kindergarten through high school), vocational-technical education, and other educational institutions except those for higher education. Covers operations by independent governments (school districts) as well as those operated as integral agencies of state, county, municipal, or township governments. Also covers financial support of public elementary and secondary schools 4. Similar in terms of GDP. States include: Georgia, Illinois, Maryland, Massachusetts, Michigan, North Carolina, Ohio, Pennsylvania, Virginia and Washington Source: US Department of Commerce. BCG Analysis.

Total state appropriation for higher ed in NJ relatively flat over the past five years

Change in total state appropriations for higher education between 2007 and 2012 (%)

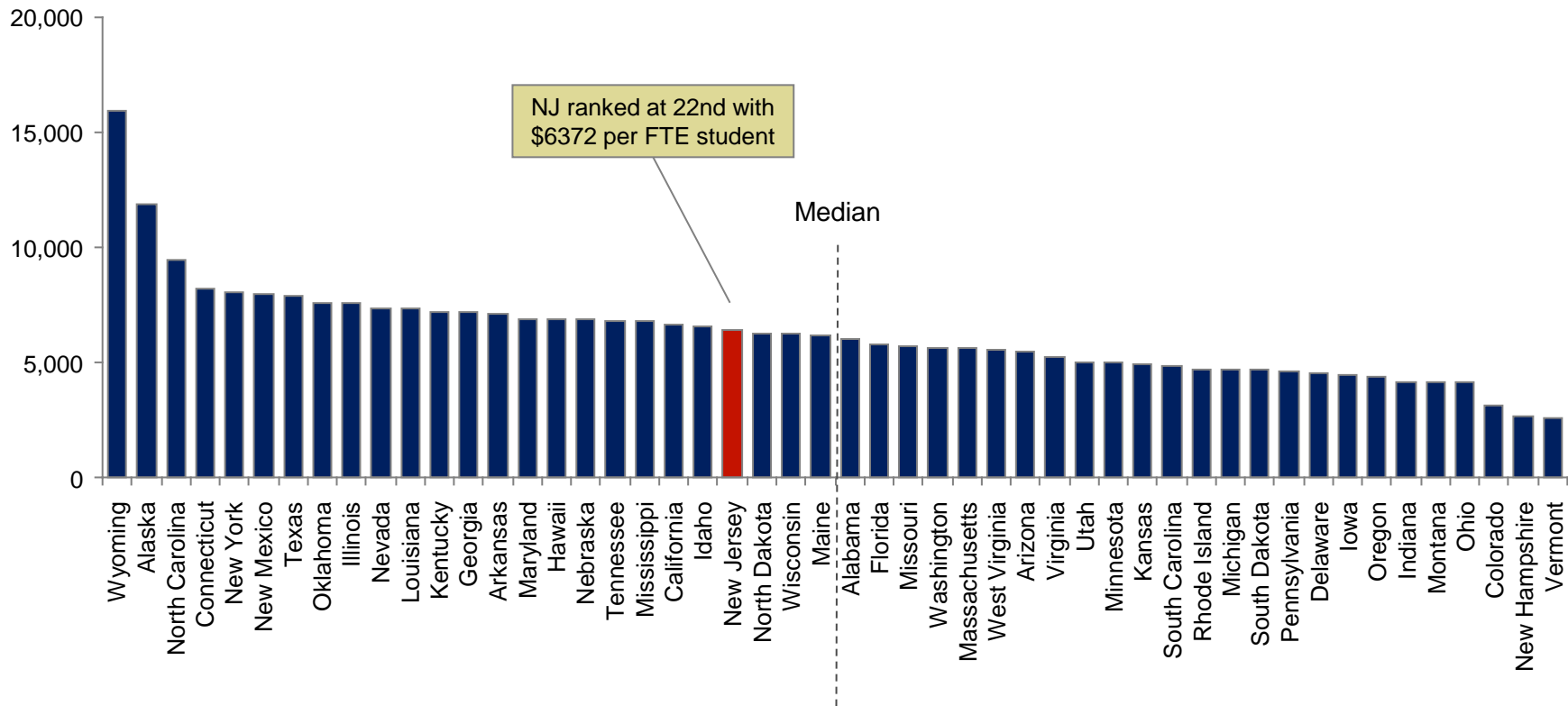


Note: State appropriations include state tax appropriations and other state funds allocated to higher education and exclude government services funds used for modernization, renovation, or repair

Source: Center for the Study of Education Policy, BCG Analysis.

NJ state appropriation for higher ed in line with other states on per student basis...

Amount of higher education appropriations per FTE student enrolled in public institution in 2011 (\$)



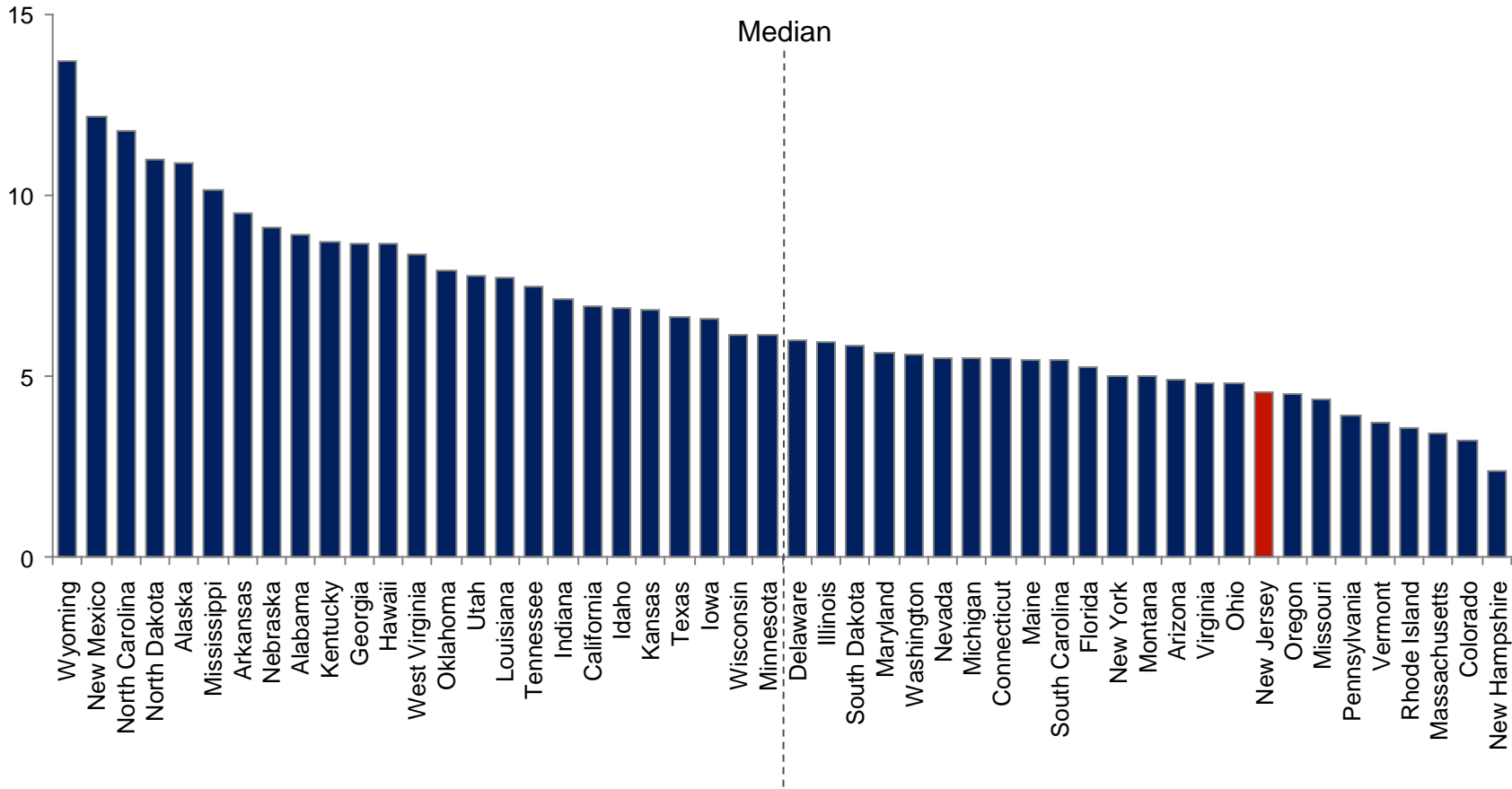
Note: Higher education appropriations include state and local support available for public higher education operating expenses including ARRA funds and excludes appropriations for independent institutions, financial aid for students attending independent institutions, research, hospitals, and medical education.

Source: State Higher Education Finance FY 2011, State Higher Education Executive Officers. BCG Analysis.

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...but proportionally lower given the economic prosperity of the state

State appropriations per \$1,000 in personal income in 2011 (\$)



Note: State appropriations include state tax appropriations and other state funds allocated to higher education and exclude government services funds used for modernization, renovation, or repair.

Source: Center for the Study of Education Policy, BCG Analysis.

For many years, New Jersey has underinvested in capital expenditures for higher education

State appropriations for higher education capital expenditures

