

Mission Review for USCB. In accordance with South Carolina Code, 1976, as amended, Section 59-103-45, the Commission on Higher Education is responsible for reviewing and approving all public higher education institutional mission statements. A new mission statement submitted by the University of South Carolina Beaufort (attached) requests a mission change from a two-year to a four-year institution within the USC System. CHE staff has carefully evaluated the proposed new mission statement using the following three criteria.

- 1) What are the compelling needs of the State or region that might warrant such a mission change?
- 2) Does the quality of USCB's planning include financial, academic, enrollment and performance funding projections that insure the viability and academic strength equal or greater than already existing S.C. four-year public institutions of higher education?
- 3) Does the technical nature of the proposed mission statement meet CHE performance funding requirements?

The CHE Staff recommendations will address each criterion with separate recommendation for each. Staff will then render a final recommendation on the mission change.

1. What are the compelling needs of the State or region that might warrant such a mission change? Regarding the need for the State to have another four-year institution in the Lowcountry, the Staff has considered three major questions. a) What is the nature of the change? b) What is the public support and/or opposition for the change? and c) What might be the long-term cost and benefits to the State? Staff's findings are outlined below:

a) What is the nature of the change? The nature of the change is that a two-year regional degree granting institution of the University of South Carolina System is recommending that it become a 4-year degree granting institution within the University of South Carolina System. The proposed change will not add additional public higher education institutions to the State, but will add one more senior institution to the two existing senior institutions of the University of South Carolina. This change would allow the University of South Carolina Beaufort to offer and confer degrees in four-year academic programs, some for which current USCB faculty now deliver all instruction. Currently USCB students are not required to leave the Beaufort campus to complete a four-year degree, although the degree itself is officially granted by another institution in the USC System.

On this issue, the Staff agrees with the unanimous ruling of the USC Board that this shift is appropriately done within the System and as such, is guaranteed by that System to be appropriate to the overall mission of the USC System which states that the "mission of USC as... a multi-campus public institution serving the entire State of South Carolina." If four-year status is granted, USCB must demonstrate similar levels of quality, faculty strength, student services, academic programming and public service as is apparent in the other two four-institutions within the USC System.

b). *What is the public support and/or opposition to the change?* It is critical in contemplating a change such as this that the citizens most affected by it have ample opportunity to comment on it. Therefore, the CHE held public hearings on April 29, 2002, and May 1, 2002, and asked for public comment through newspaper ads, notification to all public higher education institutions, and notification to the S.C. Legislature. Approximately 250 people attended the two public hearings and 330 submitted written viewpoint statements. All views except for four were in support of the mission change. (Summary of testimony are attached.) As strong as the local citizens' voices of support were in oral and written testimony, it is their willingness to fund this institution with no less than \$30M through a Tax Incentive Fund (TIF). This community-supported funding is particularly noteworthy in USCB's quest to become a four-year institution. The county's willingness to tax its citizens in order to support a four-year institution that would most benefit those same citizens while broadly benefiting the State overall is an example of extraordinary local support for USCB's proposed mission change. USCB has further asserted the support necessary will be available to insure no additional burden on the State for a period of at least five years. The evidence and opinions presented by the public regarding the need for this proposed mission change, as well as the financial TIF support and the proposed millage increase, are seen as a community pledges to assure this institution remains fiscally viable.

c). *What may be the long-term effects and benefit to the State?* There are substantial long-term effects critical to the State and the Lowcountry, if this mission change request is approved. This area of the State is the only area that does not have a four-year institution, which provides a strong geographical argument for this mission change. In reviewing the benefits to the State, the following geographic needs in this area of the State were considered.

Access Demands: Some of the State's poorest citizens live in the four counties currently served by USCB: Colleton, Beaufort, Hampton and Jasper. Average per capita income in these counties is \$21,283, with wide disparity between the upper ranges (\$30,765) and lower ranges (\$17,243) (*based on DOC data from the SC State Statistical Abstract, 2000-01, ORSS*). The nearest four-year degree granting institution is at least one hour away from Beaufort either in Charleston or out-of-state in Georgia, with no available public transportation to provide access to either. It is hoped that local access to a public, four-year institution and the economic growth and better jobs that traditionally come with it in this State, will benefit all citizens of the State. Increased access to higher education is critical to this area of the State, not just in enrollment of its young people, but also in providing this area with a strong locally based higher education community committed to improving the quality of life for all.

There already exists a strong technical college in Beaufort, the Technical College of the Lowcountry. In the event of USCB being granted four-year status, the presence of a two and four-year institution in the same community should allow for close cross-programming in certain academic areas, particularly in transfer of credit programs and in developmental education. Both campus leaders have pledged their institutions' commitment to work together to serve the students and citizens of this region in the most effective and efficient manner for higher education. If the CHE approves the mission change, easy transfer (2+2) programs should be planned as soon as possible.

Growth Demands: As in the past with University of South Carolina Aiken and University of South Carolina Spartanburg, this change of mission from a two-year to a four-year USC degree granting institution has been requested predominately because of new population growth in the local service area. Increased growth is largely attributed to location and recent (within 10 years) economic recruitment efforts of Beaufort, Hilton Head, and surrounding Lowcountry coastal communities. Population is expected to continue to expand in the Beaufort area with concomitant business growth over the next 20 years. Census data show that from 1990 to 2000, Beaufort was the fastest growing county in South Carolina with a 40% increase, growing from a population of 86,425 in 1990 to one of 120,937 in 2000. Jasper County experienced a 34% increase in population as compared to the State increase of 15% in the same time period. *(based on U.S. Census as presented in SC State Statistical Abstract, 2000-01, ORSS)*. In addition, seven new public K-12 schools have been built since 1998 in this four county region *(S.C. Department of Education Facilities Office; County District Offices)* and three new private schools are planned adding to the four existing ones. This expansion attests to the critical growth in younger, potentially college-going citizens, in addition to the more non-traditional, older and retirement population that is also increasing in this area. Currently USCB's students are 73% traditional age and 27% non-traditional working adults for whom mobility and access are often obstacles to college completion. *(Personal Testimony, USCB Students, Public Hearing, March 29 and May 1, 2002)*

It would benefit the State to support USCB as another four-year degree granting institution to accommodate the new and maturing college age K-12 population emerging in this area. Four-year academic programming and planning should begin now in order that burgeoning enrollments do not outstrip institutional abilities.

Economic Demands: USC Beaufort's current economic impact as a two-year degree granting institution is estimated to be \$19.1 million with an employment impact of 286 jobs *(USCB proposal)*. USC Aiken's economic impact, as the smallest of the USC 4-year campuses, is \$60.6 million and 976 jobs. Generally speaking, the presence of a four-year college does increase dollars and job opportunities to a local economy particularly when population continues to expand. CHE Staff anticipates that USCB should contribute heavily to the local economy and provide a stable educational base to partner with new and existing businesses in this area of the State. The Lowcountry area has steadily grown in taxable gross sales of 37% for the four counties from 1995-1999 compared to 31% state growth during the same time. *(based on DOR data from the SC State Statistical Abstract, 2000-01, ORSS)* Indicators are that growth will continue in this area.

Military Demands: Military personnel stationed at Beaufort contribute to the overall strengths and needs of this community, and the military is a critical and valued population for all of South Carolina. This area has three military bases: the Marine Corps Air Station, Parris Island Marine Corps Recruit Depot and Naval Hospital. There are 6,693 active duty personnel and approximately 10,000 military family members stationed in the immediate Beaufort area.

Recommendation on Needs of the State: CHE Staff recommends approval of USCB's mission statement in order to better meet the needs of the State and local

region. CHE Staff particularly supports USCB's stated intent of serving underserved populations in the Lowcountry.

2) Does the quality of USCB's planning include financial, academic, enrollment and performance funding projections that insure the viability and academic strength equal to or greater than already existing S.C. four-year public institutions of higher education?

Recommendation on Planning Review: *If the mission statement change is approved, CHE Staff recommends that USCB must work with CHE staff to prepare a Transitional Plan that will be reviewed by the Commission by September 1, 2002. Transitional issues regarding academic, enrollment, and performance funding projections need continued detail and refinement. The Transitional Plan will address the institutional strategic planning process and will include enrollment projections, admissions requirements, specific termination dates of the associate degree, accreditation schedules, faculty assignments, financial aid and financial solvency statements.*

3) Does the technical nature of the proposed mission statement meet CHE performance funding requirements? According to Performance Funding Indicator 1C: Mission Approval, the South Carolina Commission on Higher Education has adopted guidelines for the recommended format of institutional mission statements (*Performance Funding Guidelines, approved CHE meeting September, 1997*). Mission statement guidelines are based directly on the Southern Association of Colleges and Schools guidelines for mission statements issued prior to 2001. Using these guidelines (attached) to evaluate USCB's proposed new mission statement, Staff determined that USCB meets all the CHE mission statement requirements Performance Funding except one, that is, the mission statement should state the student headcount size of the institution by numeric range e.g., 500-2,500 rather than describing itself as a "small" institution.

Recommendation on Technical Review: *The CHE Staff recommends approval of the proposed USCB mission statement on a technical basis with the understanding that when the mission statement again comes up for review in the regular planning process of the institution, that the institution will replace the word "small" with a numerical range that better reflects its size to a general reader.*

Overall CHE Staff recommendation: **The CHE Staff having evaluated all issues pertinent to this review, finds that University of South Carolina Beaufort has satisfactorily met the necessary criteria for a mission change to a baccalaureate degree institution. CHE Staff therefore recommends that University of South Carolina Beaufort be granted baccalaureate degree granting status as of July 1, 2002. This recommendation is based on the condition that the University of South Carolina Beaufort complies with the aforementioned recommendations of the technical change relating to description of size and the completion of the USCB Transitional Plan.**

Attachments Follow including: a) USCB Proposed Mission Statement, b) Performance Funding 1C Guidance; and c) Summary of Public Hearing Comments

PROPOSED

USC BEAUFORT MISSION STATEMENT

The University of South Carolina Beaufort, a small senior campus of the state's largest public university, brings the University of South Carolina's statewide mission of teaching, research, scholarship, and public service to the rapidly growing Lowcountry of South Carolina. USCB offers baccalaureate degrees that respond to regional needs, draw upon regional strengths, and prepare graduates to participate successfully in communities here and around the globe. The campus also supports the USC Extended Graduate Campus, which provides local access to graduate courses and programs.

USCB offers programs in mathematics and the natural sciences, humanities, and professional and social sciences. Its curriculum is designed to promote acquisition of knowledge and, through it, the intellectual dispositions and skills that encourage depth of understanding, tolerance of others and individual accountability. Attracting a racially and culturally diverse student body of varying ages and experiences, the University of South Carolina Beaufort draws its students primarily from the South Carolina Lowcountry, with representation from other parts SC CHE Planning and Implementation Task Force for Higher Education Meeting May 20, 2002-Leaside Conference Center of the state, other states, and foreign countries. The University encourages students to think analytically and abstractly, to explore options, to see similarities, to be open to differences, to communicate effectively, and to respect each individual.

The major intellectual and cultural center for the region, the University enriches the quality of life for area residents of all ages through presentations of the performing and fine arts, community service, symposia, research initiatives, and partnerships with area schools, businesses and organizations.

Performance Funding Workbook Guidance, Sept 2000 version, pp. 67-69

(1) MISSION FOCUS
(1C) APPROVAL OF A MISSION STATEMENT

MEASURE: Mission statement with defined characteristics will be approved by the Commission on Higher Education on a five-year cycle. *(Mission statements were initially approved in 1998 for all institutions and will be reconsidered for all institutions again in 2003. For the defined characteristics, see below.)*

APPLICABILITY

All Four Sectors, all institutions

MEASUREMENT INFORMATION

| | |
|-----------------------------|---|
| General Data Source: | Institutions submit mission statements to the CHE for approval every five years with interim reports on the status of the institution's mission statements. Changes are subject to approval by the CHE. |
| Timeframe: | Complete statements submitted every 5 years. First statements were approved in 1998. Interim reports are requested in early spring term (Jan/Feb). The next full approval process of mission statements will occur in 2003. For Year 5, an interim report is due. |
| Cycle: | Rated annually. |
| Display: | Designation of "Complied" for compliance with requirements or "Fails to Comply" for non-compliance with requirements. |
| Rounding: | Not Applicable |
| Expected Trend: | Institutions are expected to meet all requirements as evidenced by CHE approval of institutional mission statements and revisions. |
| Type Standard: | Compliance |
| Improvement Factor: | Not Applicable |

CALCULATION, DEFINITIONS and EXPLANATORY NOTES

Determining Compliance: Compliance will be determined by CHE staff early in the spring semester (Jan/Feb) and will be dependent on an institution having CHE approval for its mission statement and for any changes to approved mission statements adopted by institutions and approved by CHE in 1998.

PLEASE NOTE: If an institution received an "approval" for their mission statement in February, 1998, it need not apply for re-approval during the five (5) year cycle UNLESS it has changed its mission statement since that time. If there are changes, a new mission statement with the changes noted must be submitted to the Commission. CHE staff will request annually from institutions a report on the status of the approved mission statement. In order to be found in compliance during ratings, changes or revisions must be approved by the CHE. Institutions that have made changes and wish consideration by the Commission prior to the rating period may submit such a request prior to the required status report that will be requested in Jan/Feb. Institutions are encouraged to submit changes as soon as possible in order to provide time to resolve any issues that may arise in the process of CHE review and approval prior to final ratings for a year.

In order to receive CHE approval, mission statements must have the characteristics listed below as well as conform to the CHE's guiding principle for evaluation of mission statements, also listed below:

The **DEFINED CHARACTERISTICS OF A MISSION STATEMENT** were taken from the SACS Criteria for what is suggested for inclusion in an institutional mission statement and are as follows:

- 1) Must relate the mission of the institution to the state and sector missions as stated in Act 359 of 1996 (§59-103-15, SC Code of Laws, 1976, as amended);

Must address, as appropriate, the major functions of teaching, scholarship/research and service (*with service is defined as (a) service to the public including community service, (b) service to other institutions, (c) service to the discipline, and (d) service to the institution*).

- 2) Must address the size of the institution in general terms, and
- 3) Must address the following:
 - a) pertinent description of information (e.g., public/private, two-year/four-year university, rural/suburban/urban, etc.);
 - b) delineation of the geographic region for which the institution intends to provide services;
 - c) description of types of students which the institution hopes to attract, accompanied by statements about the types of occupations or endeavors which graduates will be prepared to undertake;
 - d) statements expressing essential beliefs, values or intent of the institution;
 - e) outline of the major functions of the institution (e.g., general education, developmental education, vocational and technical education, professional education, student development, community or public service, research, continuing education, etc);
 - f) general description of the skills, knowledge, experiences, and attitudes ideally to be acquired or developed by the institution's students; and
 - g) be approved by appropriate bodies, (e.g., boards of trustees, state boards, etc.)

THE GUIDING PRINCIPLE FOR THE CHE EVALUATION OF MISSION STATEMENTS

An institutional mission statement should accurately reflect what the institution is authorized to do and should be specific enough so the general public can easily read and understand the differences among and between the institutions of higher education in the State even when the institutions might be from the same sector as defined by Act 359 of 1996.

GENERAL GUIDELINES AND EXPLANATION: It is important to understand that enough specificity should be used to signify differences, but not so much specificity that an institution would have to change its mission statement on a yearly basis. Three general recommendations, accepted by the Commission on Higher Education in October, 1997, to assist the institutions in formulating a mission statement include:

GENERAL RECOMMENDATION 1, SIZE OF INSTITUTION: The institutional mission statement should explicitly state the approximate size of the institution i.e. the size of Performance University is approximately 10,000 - 15,000 FTE student (fall semester count). Saying that an institution is of "moderate size" or a "small size" was generally not believed to be specific enough for the general public to ascertain size.

The institution should indicate whether its enrollment is FTE or headcount, annual or fall only.

GENERAL RECOMMENDATION 2. MAJOR FUNCTION OF THE INSTITUTION:

More specificity was needed by many institutions regarding the type and level of degrees which the institution confers upon graduation. For example, it is not sufficient to state that an institution has undergraduate degrees since "undergraduate" by definition could or could not include an associate's degree. If an institution offers any degrees, it should specify the level of degree it confers, e.g., associate's degrees, certificates, and/or baccalaureate degrees. The same specificity is needed at the graduate level, e.g., a Performance University offers master degrees, first-professional degrees, and Ph.D. level degrees. This is critical since many of the teaching institutions offer some Ph.D. level degrees and many do not.

GENERAL RECOMMENDATION 3. STYLE, GRAMMAR, AND READABILITY:

Although not a part of the direct evaluation, an institution's mission statement should be grammatically correct and highly readable in nature. An overall observation is that some institutions' mission statements had misspellings, subject/verb agreement problems or verb tense problems. In so far as the public nature of an institution's mission statement, an overall observation is that they should be carefully edited for typographical, grammar, and style errors.

STANDARDS USED TO ASSESS PERFORMANCE

| STANDARDS ADOPTED IN 2000 TO BE IN EFFECT FOR PERFORMANCE YEARS 5 (2000-01), 6 (2001-02) AND 7 (2002-03) | | |
|---|---|---|
| Sector | COMPLIANCE INDICATOR | |
| All Four Sectors | COMPLIANCE as indicated by the approval of institutional mission statements by the CHE. | Institutions are expected to be in compliance. For those performing as expected, the indicator is not factored in to the calculation of the overall performance score. For institutions failing to comply, a score of 1 is earned on this indicator and contributes to the overall performance score. |

Improvement Factor: Not Applicable

NOTES No Changes have been made to this indicator's measurement definitions since its implementation.

**USC Beaufort's Proposal To Become a 4-yr Baccalaureate Granting Institution
Staff Summary Notes of Speakers and Written Comments at the Hearings on April 29 and May 1, 2002**

Written notes were taken for each speaker. As the written notes were taken, tick marks notes were made for each speaker to record whether the speaker was pro, con, or other. Additionally, tick marks were made as to a category of the major points being made by each speaker. The categories used for recording major points/comments were developed based on the Dean's opening remarks with new categories added as they were identified in testimony or submitted comments. Major points made more than once by a speaker or submitted comments were only recorded once. The opinion of those opposing the proposal, as well as the Dean's remarks, are reflected in the summary table below. Those persons who did not support the proposal offered negatives related to economic impact for higher education and explained alternatives available to provide access. The summary results are presented in the table below.

- A total of 54 speakers with 2 against the proposal and 52 for the proposal spoke on April 29. A total of 119 written comments were submitted with 4 against the proposal prior to April 29.
- A total of 30 speakers with all for the proposal spoke on May 1. Two speakers initially requesting to speak declined with each voicing support. A total of 38 written comments were submitted prior and during the May 1 hearing with 2 against the proposal.
- Status forms were provided to persons who did not wish to speak but wanted their views recorded. A total of 148 forms were filled out and all supported the USCB proposal to become a 4-year university offering selected 4-year baccalaureate degrees on April 29. On May 1, 25 status forms were completed and all supported the proposal.

| Point Addressed | Meeting Used for Point Recording | Total number of times point made at least once by a speaker | | | Total number of times point made at least once in written comments | | |
|---|----------------------------------|---|-----|-------|--|-----|-------|
| | | 4/29 | 5/1 | Total | 4/29 | 5/1 | Total |
| Goal for some time | 4/29, 5/1 | 4 | 2 | 6 | 1 | | 1 |
| General Need | 4/29, 5/1 | 5 | 4 | 9 | 6 | 2 | 8 |
| Pride issue relate to having own 4-yr (e.g., degree will states USCB) | 5/1 | | 2 | 2 | 1 | 2 | 3 |
| Commitment of Community | 5/1 | | 8 | 8 | 6 | 3 | 9 |
| Access/Equity issues related to Geography | 4/29, 5/1 | 27 | 13 | 40 | 10 | 7 | 17 |
| Access/Equity issues related to Costs | 4/29, 5/1 | 13 | 14 | 27 | 7 | 6 | 13 |
| Problems in using 2-yr resources to provide 4-yr degrees | 4/29, 5/1 | 1 | 1 | 2 | 0 | 0 | 0 |
| Degrees not available | | | 1 | 1 | 5 | 3 | 8 |
| Problems in competing with local technical college as a two year | 4/29, 5/1 | 1 | | 1 | 0 | 0 | 0 |
| Influx/increases in population | 4/29, 5/1 | 5 | 1 | 10 | 7 | 1 | 8 |
| Keep people in Beaufort for college education and afterwards | 4/29, 5/1 | 16 | 5 | 21 | 8 | 4 | 12 |
| Positive Economic Impact | 4/29, 5/1 | 20 | 8 | 28 | 11 | 4 | 15 |
| Better Prepared Workforce | 4/29, 5/1 | 15 | 9 | 24 | 8 | 2 | 10 |
| Preparation of Teachers/Increase this segment of workforce | 4/29, 5/1 | 8 | 1 | 9 | 3 | 0 | 3 |
| Preparation of Nurses & healthcare prof/ increase this segment | 4/29, 5/1 | 7 | 4 | 11 | 0 | 0 | 0 |
| Serve or Keep Military | 4/29, 5/1 | 3 | 2 | 5 | 4 | 1 | 5 |
| Enable to fully or better develop available resources | 4/29, 5/1 | 8 | 8 | 16 | 0 | 1 | 1 |
| Collaboration/Partner with public schools (K-12) | 4/29, 5/1 | 0 | 0 | 0 | 2 | 0 | 2 |
| Negative Economic Impact (Tax increase/congestion) | 4/29, 5/1 | 0 | 0 | 0 | 4 | 1 | 5 |
| Tax Increment Finance | 4/29, 5/1 | 0 | 0 | 0 | 0 | 1 | 1 |
| Limited Financial Resources (Inadequate) | 4/29, 5/1 | 0 | 0 | 0 | 5 | 1 | 6 |

Recorded and Summarized: Julie C. Wahl & Sandra Carr, 5/2/02