



TEXAS²⁰₃₆

The Future of Texas

Enable Texans To Make Policy Decisions Through:



Accessible Data



Long-Term Planning



Statewide Engagement





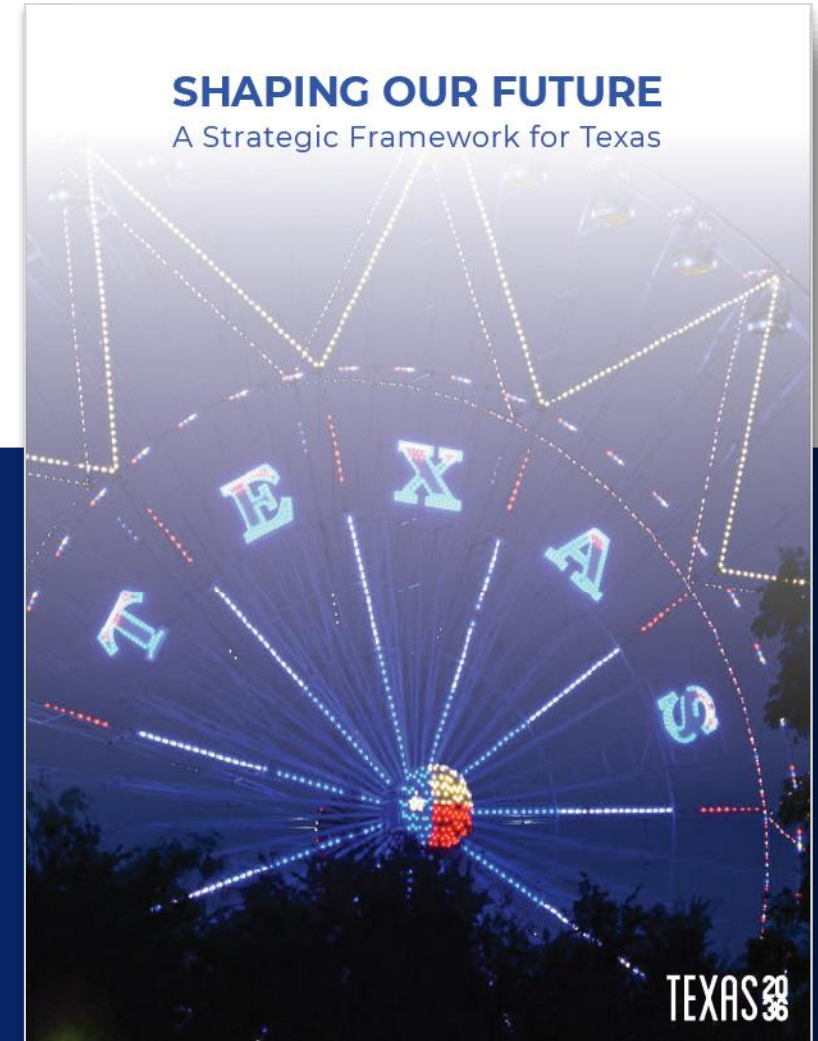
**Data Tells Us Texas Faces Significant
Challenges That Require State Action To
Prepare Us For The Future.**

The Strategic Framework Takes A Comprehensive Look At Forces Shaping Texas' Future

Establishes **36 aspirational goals** that position Texas to be the **best place to live and work**

Assesses **Texas' performance** on each goal and compares them against 11 peer states

Sets targets that **define success** for each goal in 2036



36 Aspirational Goals

PROSPERITY AND WELL-BEING

1. Economic Growth
2. Quality of Life

EDUCATION AND WORKFORCE

3. Early Learning
4. K-12
5. Postsecondary
6. Jobs
7. Workforce Needs

HEALTH

8. Availability of Health Care
9. Affordability of Health Care
10. Population Health
11. Public Health
12. Return on Health Care Investment

INFRASTRUCTURE

13. Mobility of Individuals
14. Mobility of Goods
15. Safety
16. Digital Connectivity
17. Energy Distribution
18. Crisis Readiness

NATURAL RESOURCES

19. Quality of Air
20. Sufficient Water
21. Quality of Water
22. Parks & Wildlife
23. Agricultural Production
24. Energy Production

JUSTICE AND SAFETY

25. Public Safety
26. Protection for the Vulnerable
27. Safety Net
28. Justice System

GOVERNMENT PERFORMANCE

29. Confidence in Government
30. Civic Engagement
31. Broad, Stable Revenue Base
32. Wisely Managed State Spending
33. Talent in Government
34. Proven, Modern Methods in Data
35. Customer Service
36. Aligned Accountability

Assessing Texas' Performance Against Competitor States

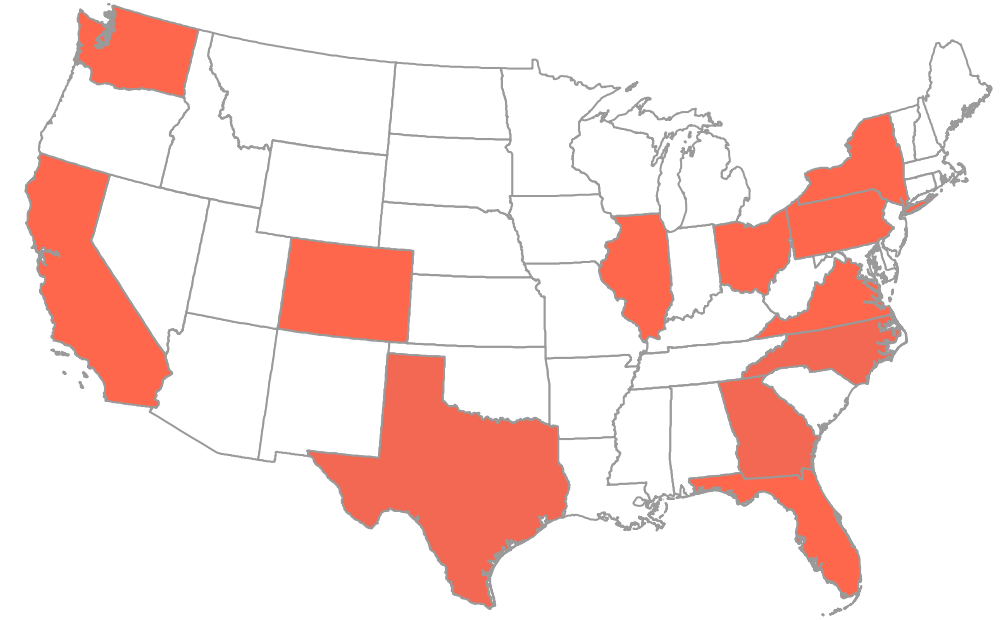
Peer states identified based on index including **15 factors** across 3 domains



Together, Texas and its peers account for

58%
of the total U.S.
population

62%
of total
U.S. GDP



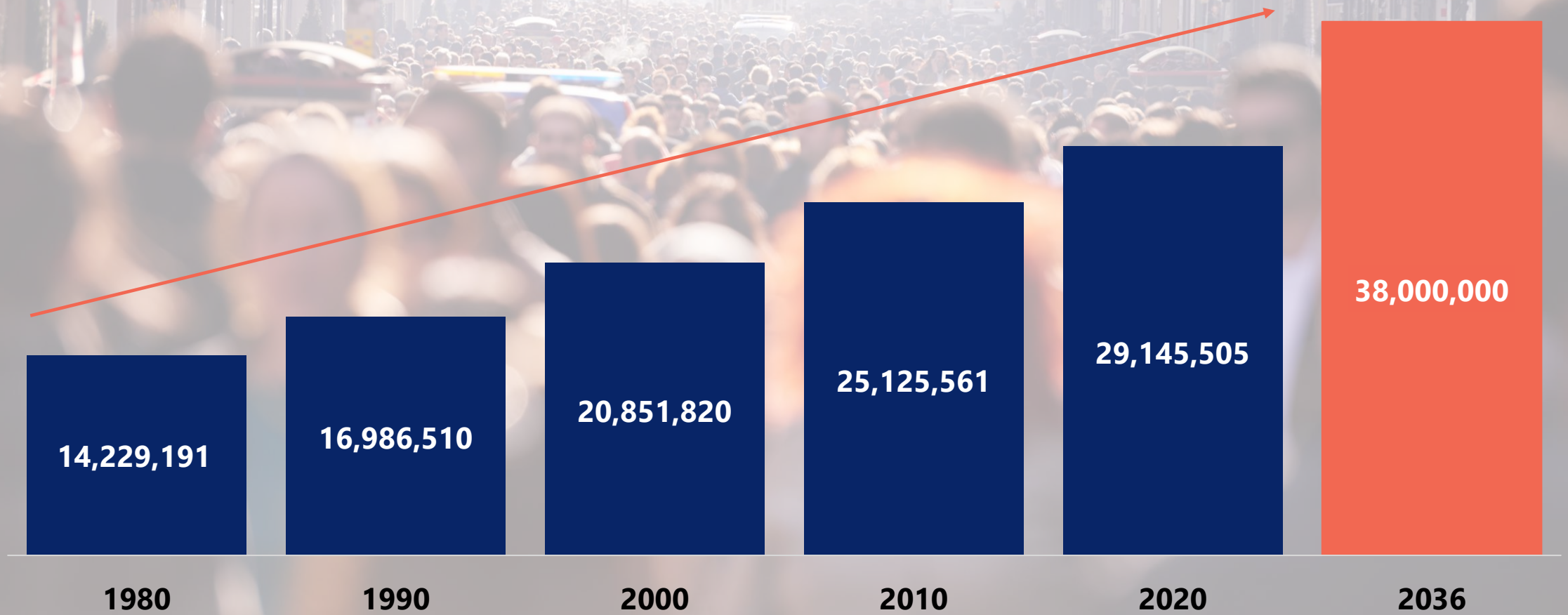
Peer states include:

California
Colorado
Florida
Georgia

Illinois
New York
North Carolina
Ohio

Pennsylvania
Virginia
Washington

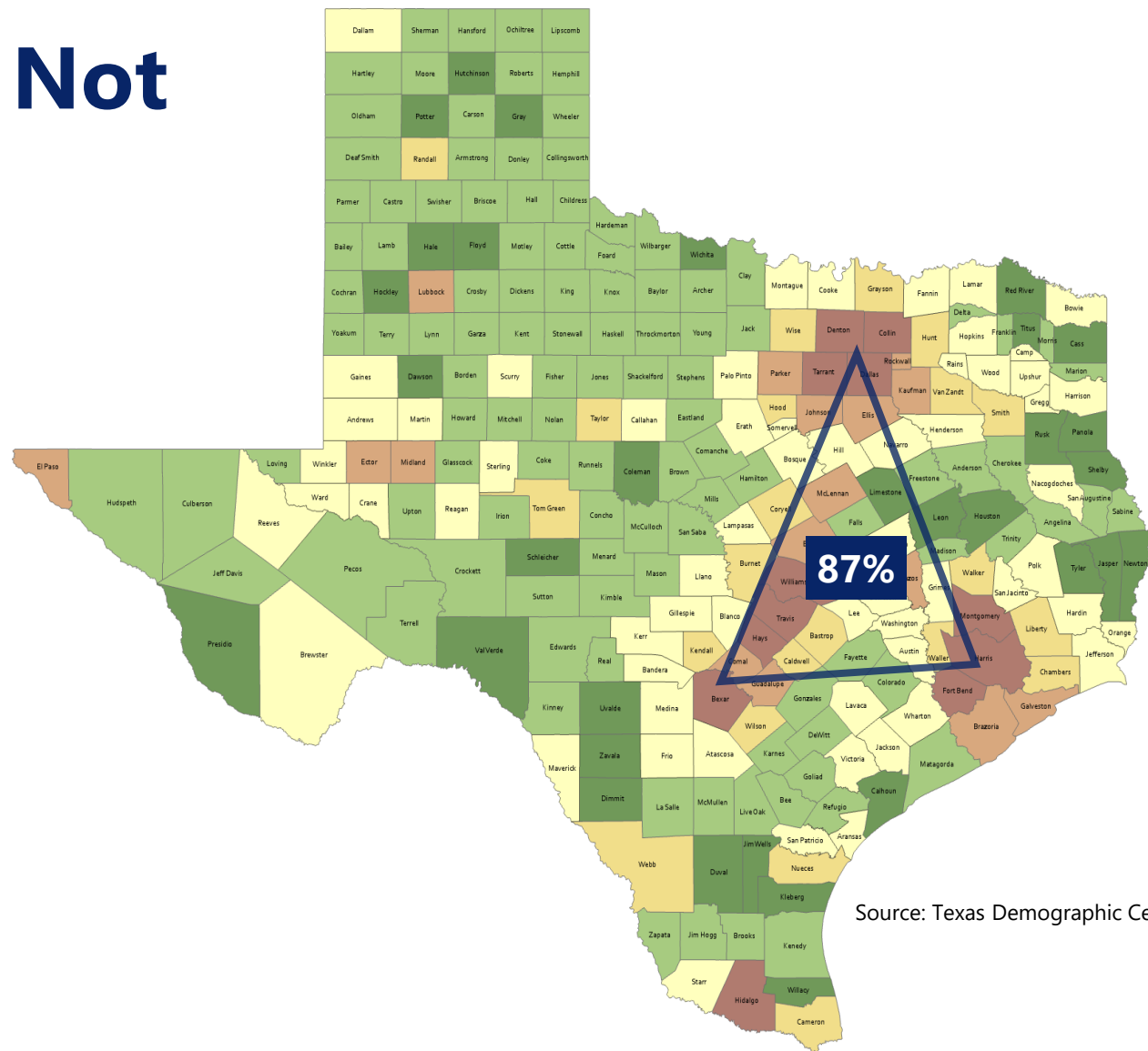
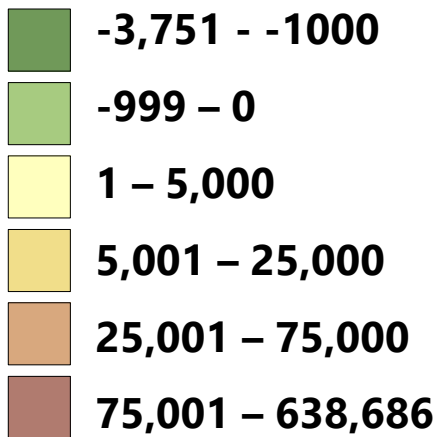
Texas' Population is Booming



But That Growth Has Not Been Universal

143 counties
lost population

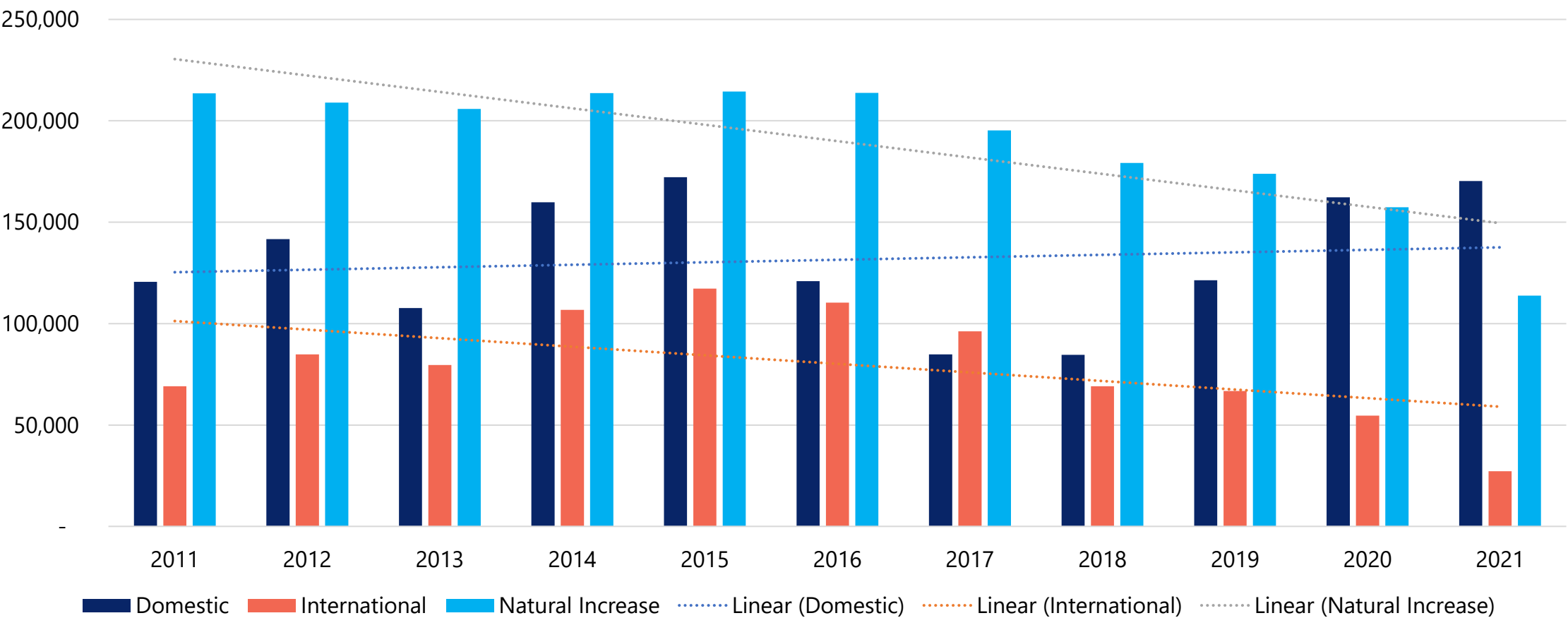
Total Population Change 2010 to 2020



Source: Texas Demographic Center

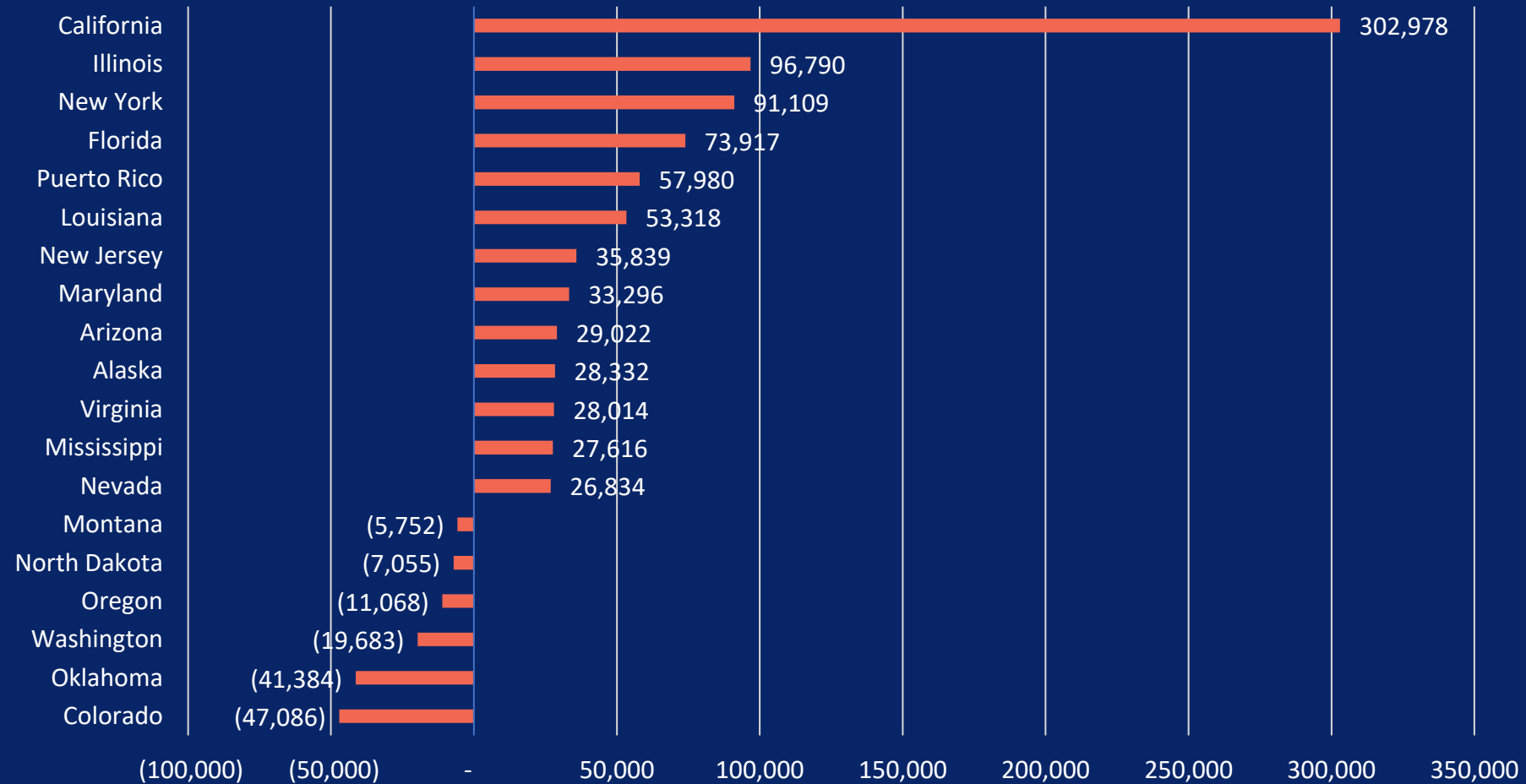
Population Growth Is Driven By In-Migration

Source: U.S. Census Bureau. 2020 Evaluation Population Estimates and 2021 Vintage Population Estimates.



Gone To Texas

Source: U.S. Census Bureau, State-to-State Migration Flows, 2010-2019



Texas Has Depended On Migration To Meet Workforce Demand

Nearly half of the state's workers are **not native Texans**

Newcomers hold **higher levels of education** than native Texans

But **migration has slowed** in recent years



To Support Our Growing Population, Texas Needs to Create More Jobs

Source: Bureau of Labor Statistics, non-farm employment, November 2017



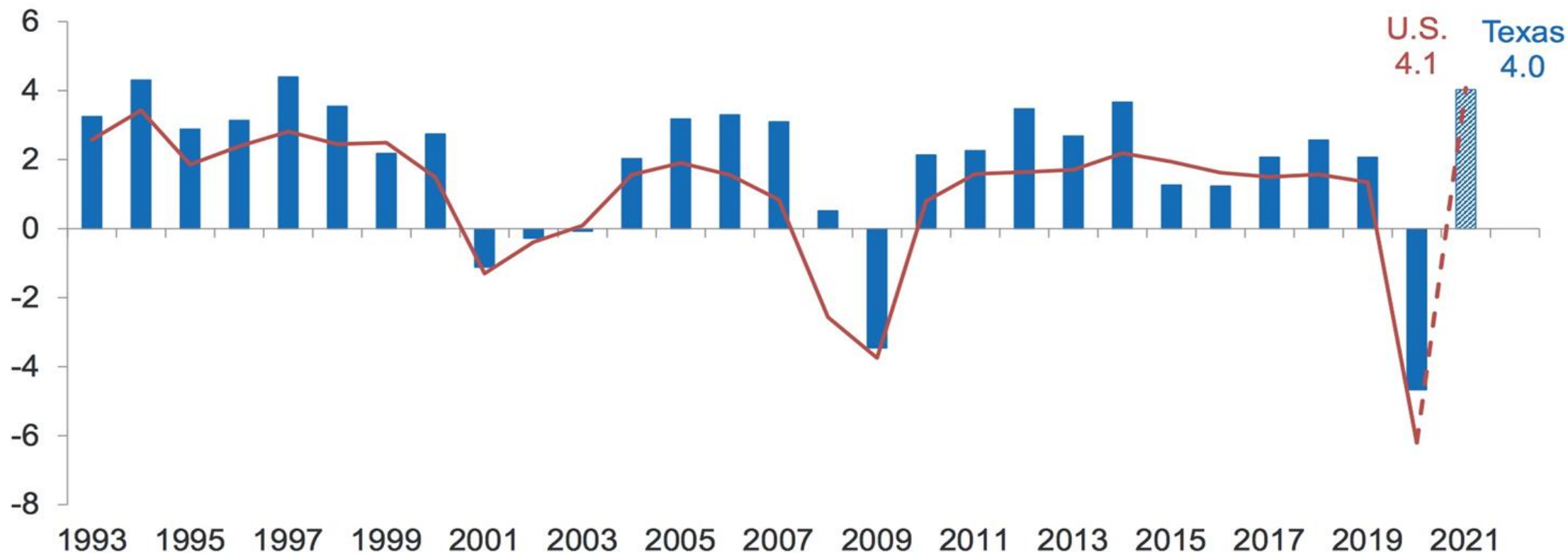
Texas must add nearly **8 million new jobs by 2036** to keep up with population growth.



That's like adding the equivalent of **the number of jobs in DFW and Houston metro areas** today.

Texas Has Strong Job Growth...

Job growth (percent), Dec./Dec.*



*Seasonally adjusted, annualized rate.

NOTE: Last data points are annualized job growth for Texas and U.S. (May 2021/Dec. 2020).

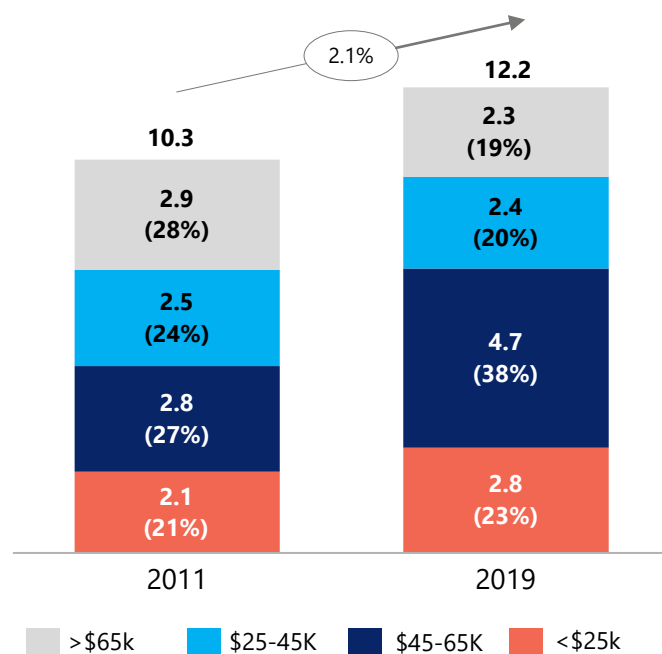
SOURCES: Bureau of Labor Statistics; Texas Workforce Commission; seasonal and other adjustments by FRB Dallas.

DATA: <https://www.dallasfed.org/research/econdata/tae000000.aspx>

...But Less Growth In Higher Wage Jobs Than The U.S. Average

TX: Wage Bands

Total employment (M)

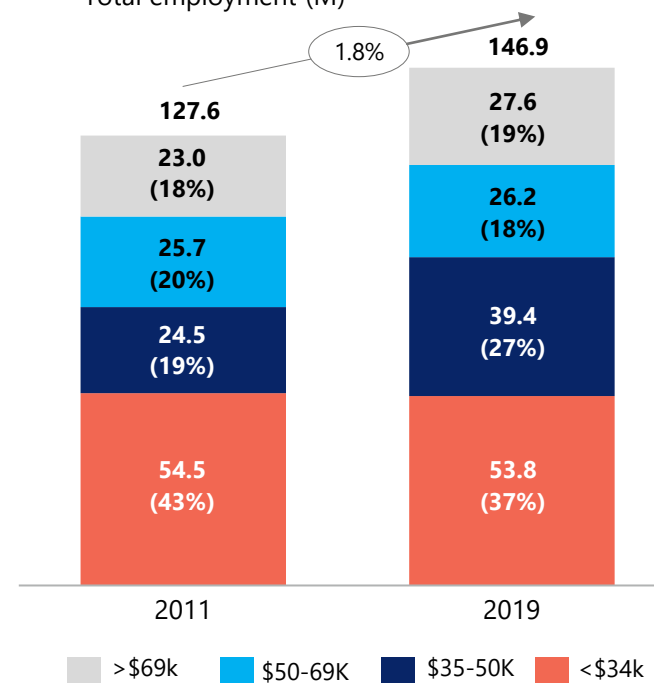


TX '11-'19 CAGR vs US '11-'19 CAGR

-2.5%	2.3%
-0.6%	0.2%
6.8%	6.1%
3.3%	-0.2%

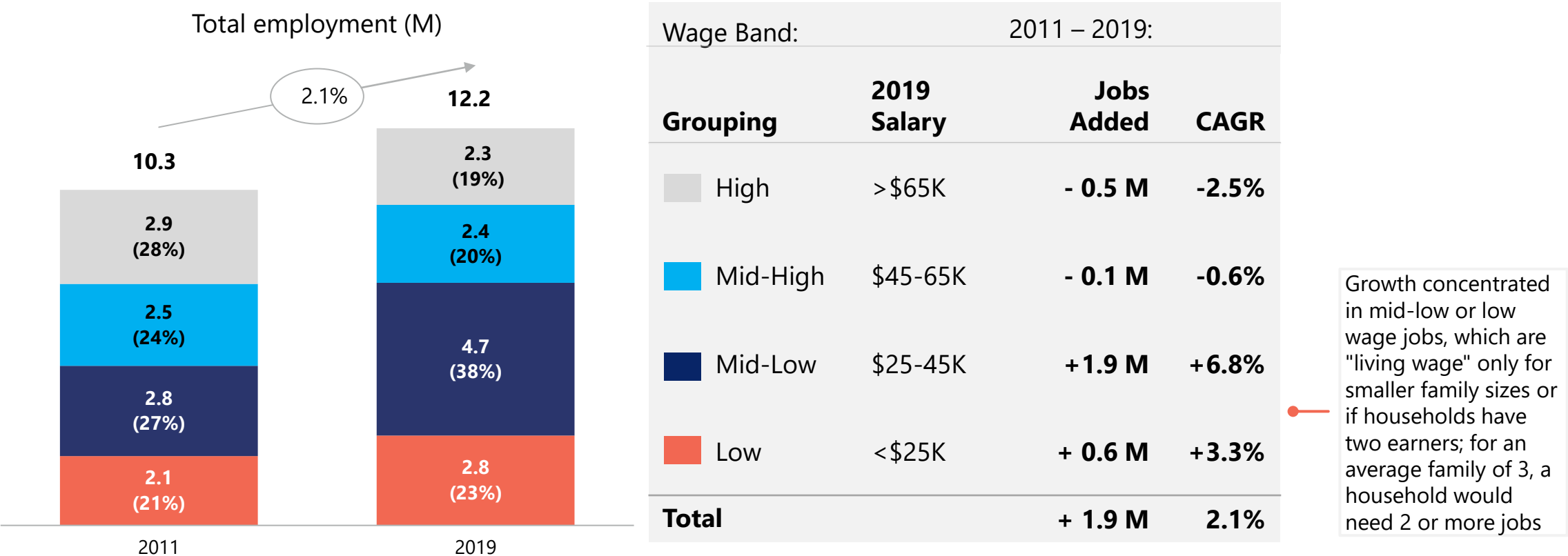
US: Wage Bands

Total employment (M)



Note. Assigned each detailed SOC code to a wage band based on available data then summed for each band. Derived 2019 bands fusing aligned wage band definitions, based on United Way's ALICE Project for Texas and MIT Living Wage calculator for the United States and adjusted to get to 2011 using cost of living adjustment of 3.4% and 1.8% annually for Texas and the United States, respectively over the last decade. Detail for ~200k mostly low wage job employees for Texas become unavailable with the added granularity to the data pull of industry by occupation.
Source: [TWC OES report](#) (2019), [BLS OES Texas database](#) (2011 for Texas in 2011 and 2019 for the US)

Since 2011, Texas Added Mostly Low and Mid-Wage Jobs



Note. Assigned each detailed SOC code to a wage band based on available data then summed for each band. Derived 2019 bands for Texas using aligned wage band definitions, based on United Way's ALICE Project and adjusted to get to 2011 using cost of living adjustment of 3.4% annually over the last decade for the Texas. Detail for ~200k mostly low wage job employees become unavailable with the added granularity to the data pull of industry by occupation.

Source: Texas Workforce Commission (TWC) Occupational Employment Statistics (OES) report (2019) and Bureau of Labor Statistics (BLS) OES Texas database (2011)

Educated Texans Are Employed Texans Earning Moreover Their Lifetime

Only **32%** of Texas, high school graduates obtain a postsecondary credential within six years of graduation.

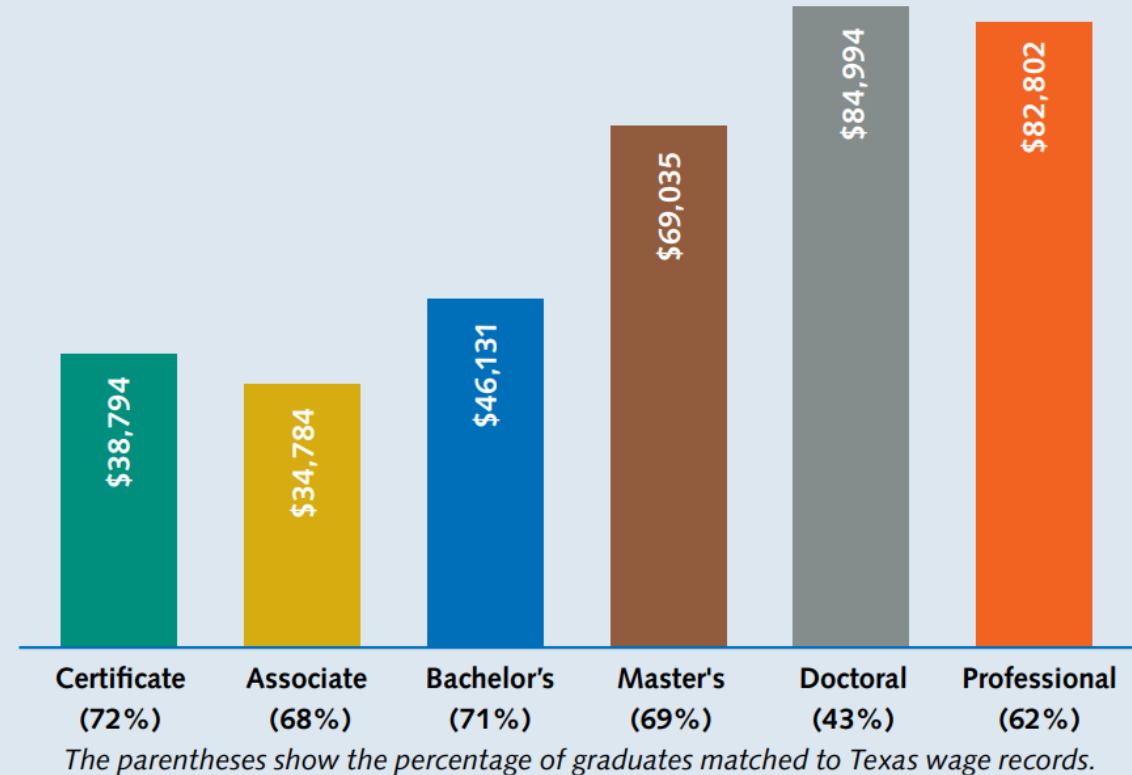
By 2036, **71%** of all jobs will require a postsecondary credential.



Higher Wage Jobs Are Typically Held By Those With Greater Educational Attainment

First-Year Earnings of 2018 Graduates

Highest degree earned, first-year actual wage

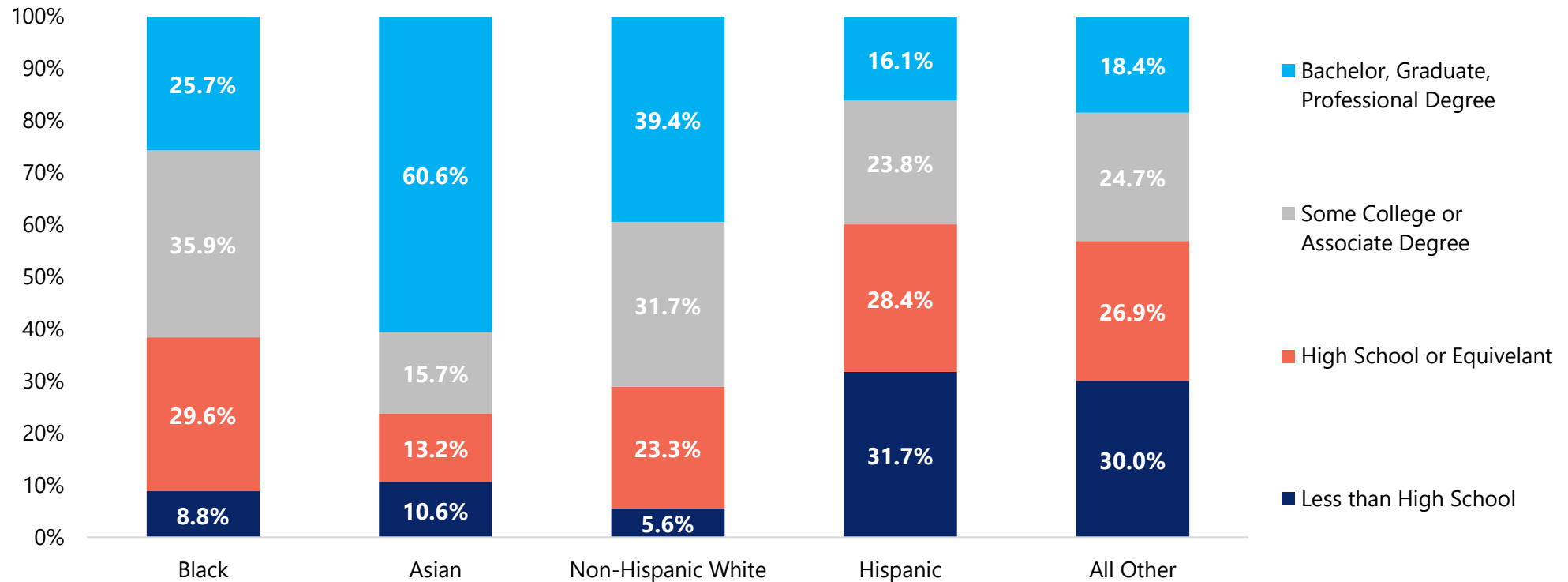


Source: 2021 Texas Public Higher Education Almanac

This Poses Challenges For Equity

Educational Attainment of Persons Age 25 Years and Older by Race/Ethnicity, Texas, 2019

Source: US Census Bureau, American Community Survey, 1-Year Sample, 2019



A large crowd of students, mostly in blue and white clothing, are gathered on a paved area to form the outline of the state of Texas. The students are densely packed within the state's borders, with some standing on the surrounding pavement. Many students have their arms raised in the air, suggesting a celebratory event.

Texas Future Workforce Is In Our Public Schools Today

Approximately

5.4 million

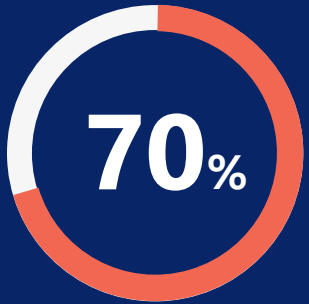
students attend Texas
public schools.

Approximately

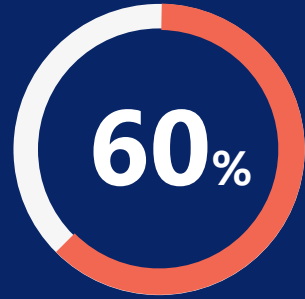
1.7 million

students attend Texas
**public higher
education institutions.**

Texas' Students Have Fallen Behind

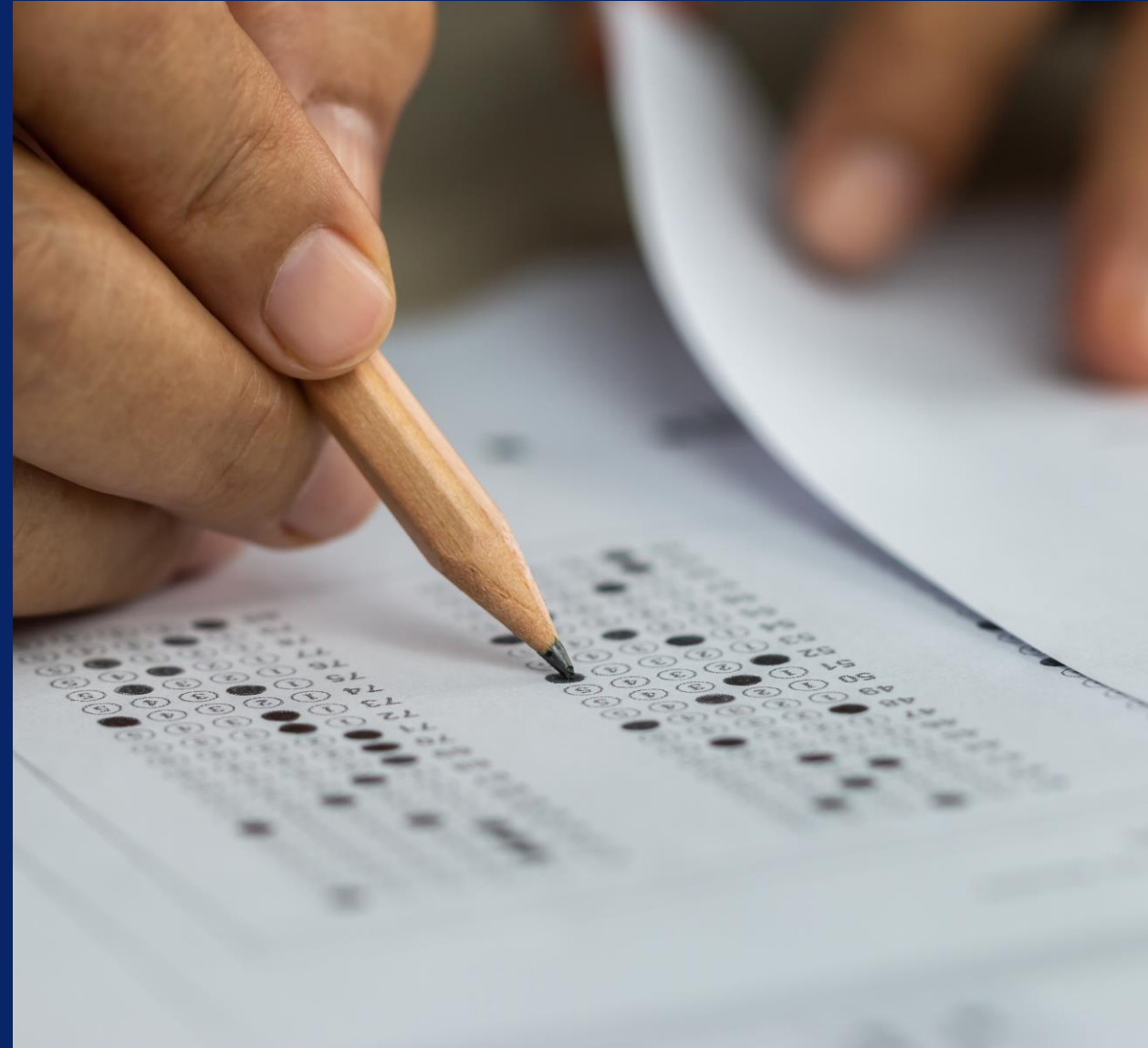


of 4th graders **cannot read** at grade level.



of 4th graders **cannot perform math** at grade level.

Persistent achievement gaps persist across **race, ethnicity, & income.**

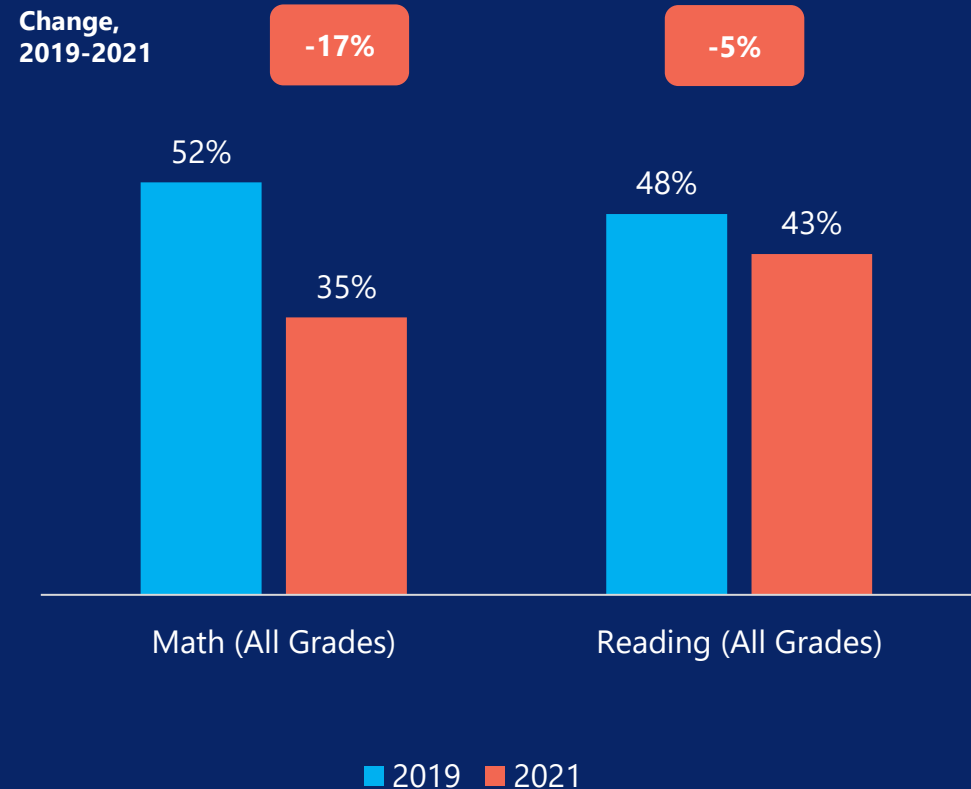


The COVID Pandemic Exacerbated These Trends

COVID Brought Sharp Declines in Student Outcomes, Especially in Math

STAAR Reading/ELA and Math "Meets Grade Level" Rates, 2019 and 2021

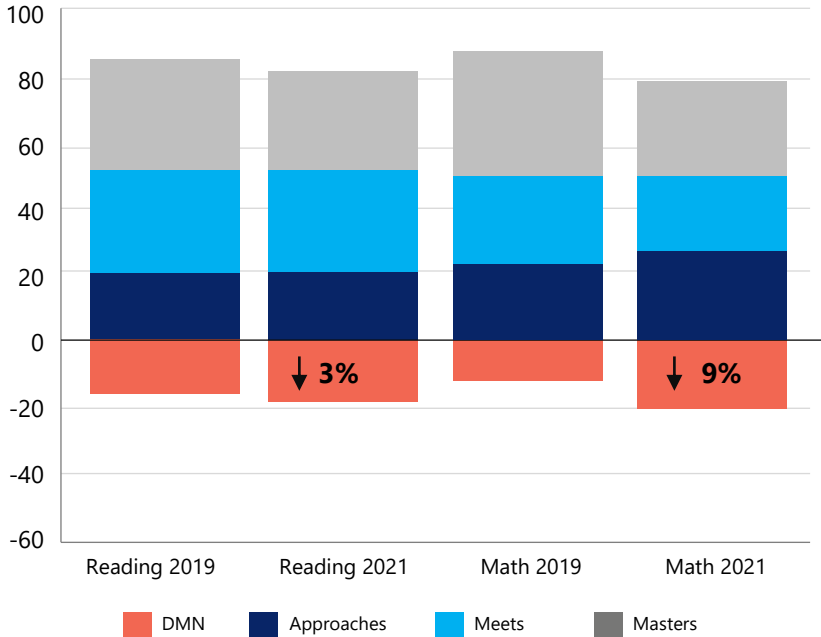
Source: Texas Education Agency



Economically Disadvantaged Students Were Disproportionately Impacted

Source: Texas Education Agency

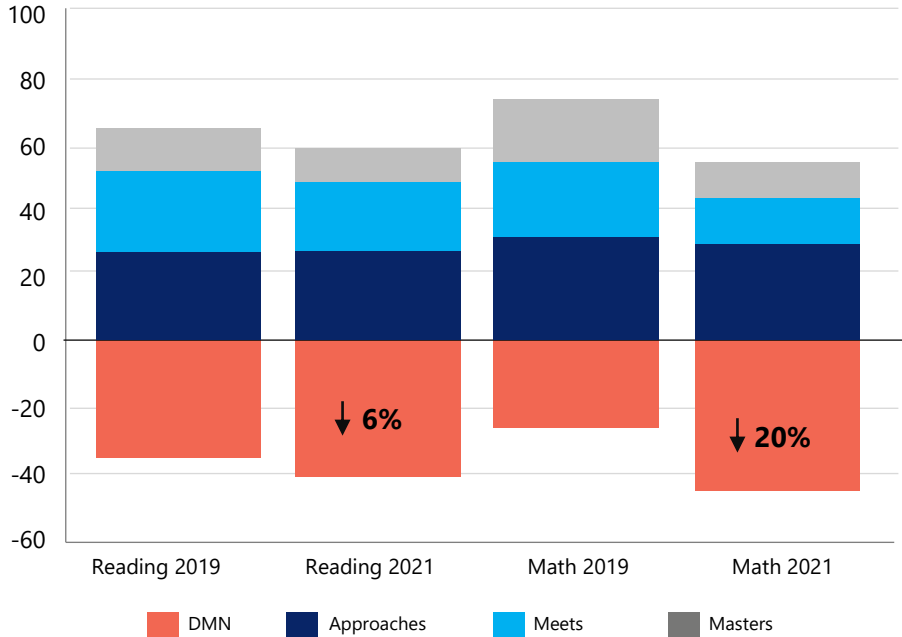
Non-Economically Disadvantaged



In 2021, non-economically disadvantaged students represent 41% of all tested students.
87% of non-economically disadvantaged students tested.

vs.

Economically Disadvantaged

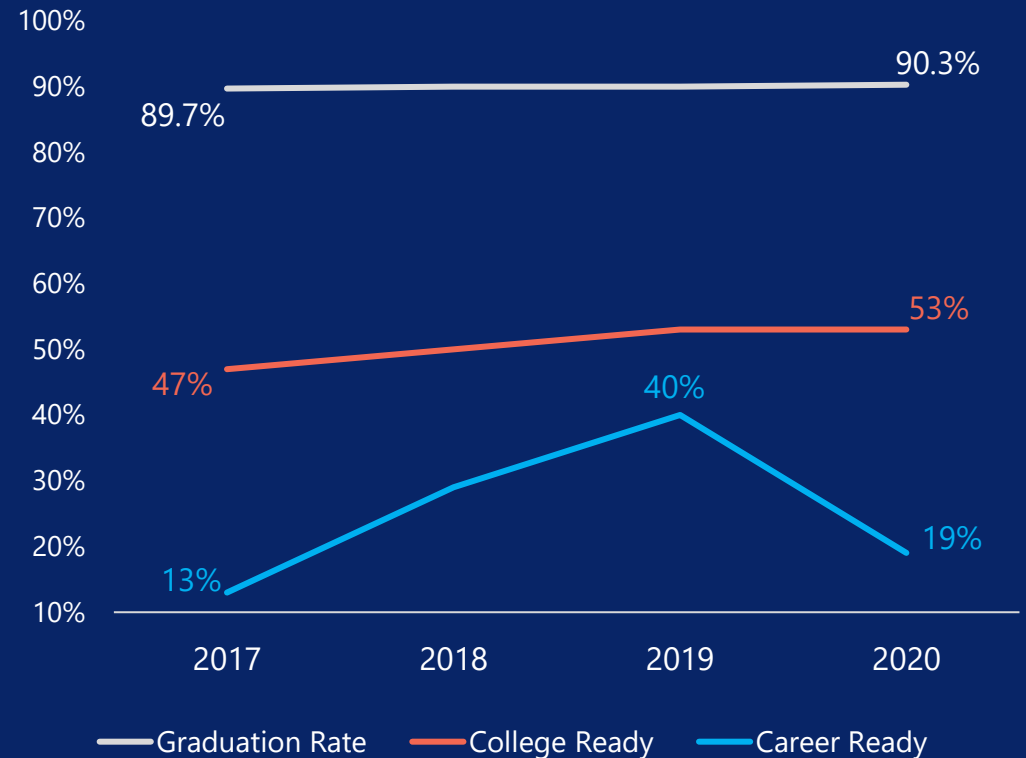


In 2021, economically disadvantaged students represent 59% of all tested students.
86% of economically disadvantaged students tested.

Texas Students Are Not Career Ready

Texas Students Are Not Graduating College Or Career Ready

Source: Texas Education Agency





Texas Faces a Broad Set of Challenges

Health Care Costs Are Rising, And Nearly 5 Million Texans Remain Uninsured



of Texas, households reported skipping or delaying needed care due to cost.

More than **\$20,000** per year is the average total cost of employer-sponsored insurance for a family.



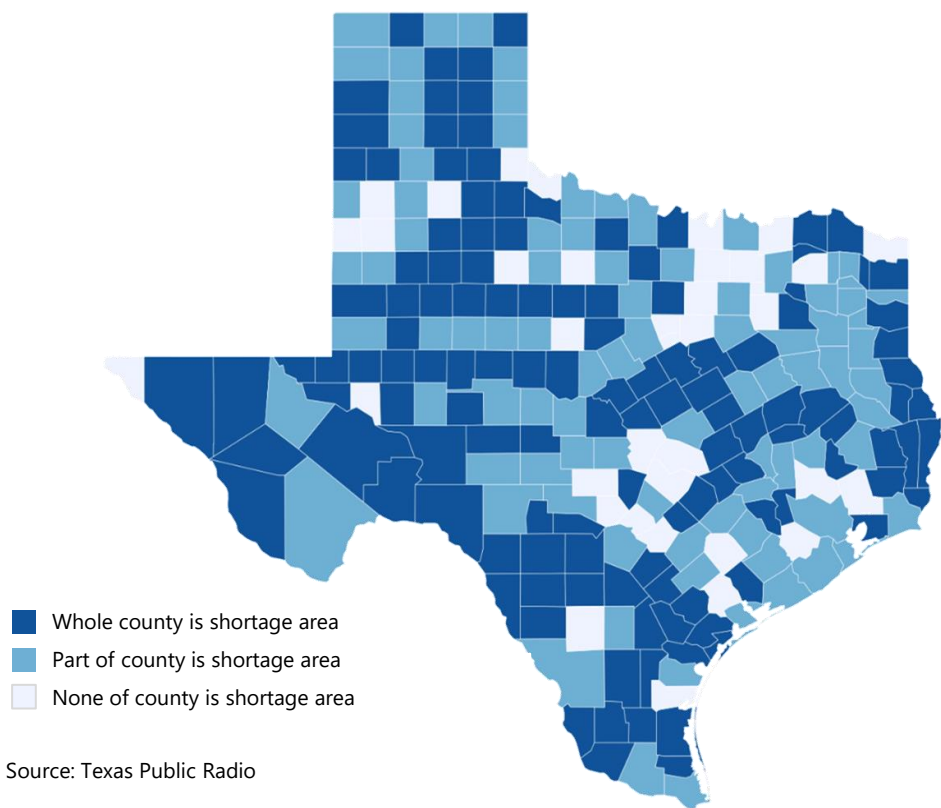
of the increases in employer health benefits are due to price increases alone – not utilization or demographic changes.

Nearly **5 million** Texans are **uninsured**.



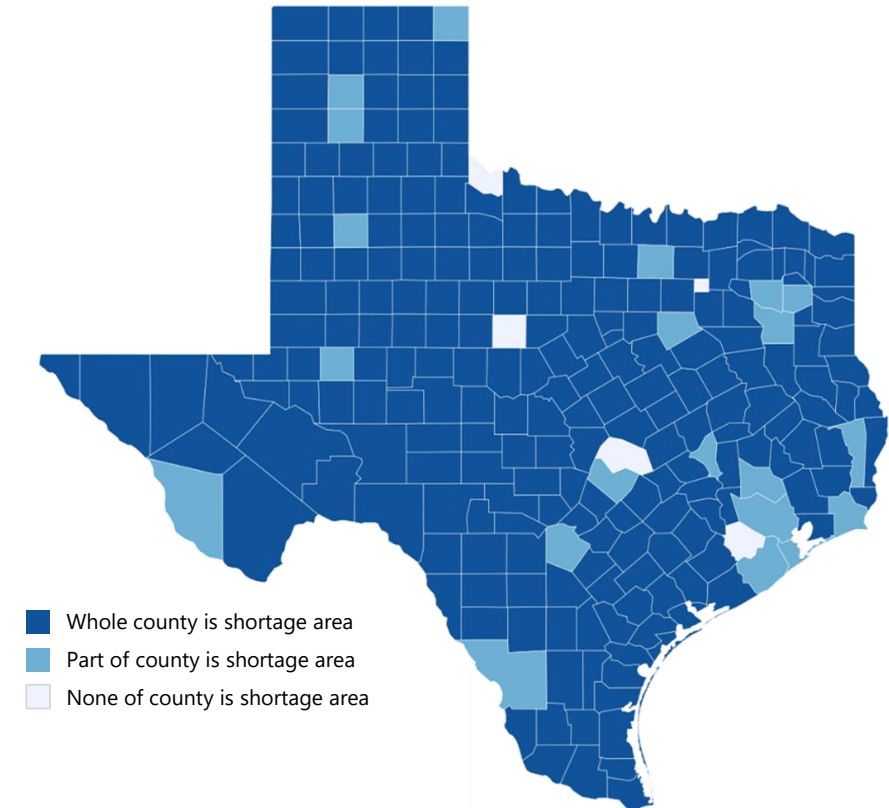
Meanwhile, Primary Care Physicians Are Becoming More Scarce

Primary Care Shortage Areas, 2019



Source: Texas Public Radio

Primary Care Shortage Areas, 2021



Lack of Broadband Limits Opportunities for Millions of Texans

165,353

Texas Households

do not have infrastructure to support broadband speeds.
(Connected Nation Texas, 2022)

3.2 million

Texas Households

do not subscribe to broadband services.
(U.S. Census Bureau, 2019)

48 million

U.S. Workers

lack foundational digital skills to meet future
technological shifts. (National Skills Coalition, 2020)

\$2 billion-\$4 billion

Estimated amount of Federal Funding Texas will receive for broadband expansion and digital inclusion.



Extreme Weather Events Are Forecast To Increase

The number of **100-degree days has more than doubled** over the past 40 years and could nearly double again by 2036.

The expected **average temperature in 2036 will be about 3 degrees warmer** than the average over the last half of the last century – and Texans should expect extreme monthly summertime temperature trends to increase.

Extreme rainfall has become more frequent and severe and is expected to worsen. As a result, there will be **a significant increase in urban flooding** — as much as 30-50% more than occurred over the last half of the 20th century.

Hurricane intensity is expected to increase significantly. Due to sea-level rise, the risk of hurricane storm surge in some places along the Texas Gulf Coast may in 2050 be twice as high as it was around 1900.

Texas faces **increased drought severity**, as higher temperatures increase evaporation rates.

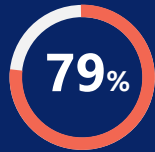
Areas such as East Texas are at **increased risk for wildfires.**



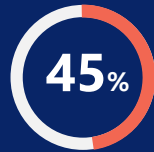
These Problems Can Be Solved.

**We Know,
Because We're Doing It.**

Texas Voters Share Concerns, And Priorities



of Texas voters are **extremely or very concerned** about Texas **elementary school students'** low reading scores.



of Texas voters expressed **extreme concern** about Texas **elementary school students'** low reading scores.



are very or extremely concerned that the state's **\$100 billion yearly investment in education and workforce** doesn't lead to well-paying jobs.



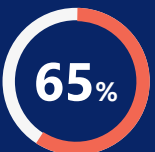
are extremely or very concerned about the **historic backlog of criminal cases** in Texas courts.



are **extremely or very concerned** about the **extreme weather trends** Texas faces.



Additional described themselves as **somewhat concerned** about the **extreme weather trends** Texas faces.



are **very or extremely concerned** that given current trends, Texas will not be able to meet a significant amount of its future water needs, meaning some communities may **lose access to water** in an extreme drought.



are **somewhat concerned** that given current trends, Texas will not be able to meet a significant amount of its future water needs, meaning some communities may **lose access to water** in an extreme drought.

TEXAS VOTER POLL



Only **10%** described themselves as **"very confident"** in Texas' electric grid, while 24% said they were "not that confident" and 25% said they were "not at all confident."

We're Connecting With Texans Across The State

We have hosted -

5 Texas Road Shows

18 Speaking Engagements

14 Legislative Meetings
in members' home districts

We've traveled across the state with stops in **San Antonio, the Rio Grande Valley, El Paso, Houston, Corpus Christi, DFW, Longview, Amarillo, Bryan/College Station...**

...And we're just getting started.



And We're Connecting With State Leaders At The Capitol

During last year's Legislative Sessions, **45 bills** that we engaged on passed. These included critical improvements in:

Workforce Development

Health Care

Education Funding

Broadband Expansion

Pension Reform

Cybersecurity and IT Modernization



Texas Unique Characteristics Present Challenges, And **Amazing Opportunities**



Join Us in Making Texas the Best Place to Live, Work, and Raise a Family

Engage with us on working towards these shared goals of making Texas the best place to live and work.

Advocate for building civic demand on issues that matter for Texas.

Stay connected by subscribing to our email list.



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