TEXAS 2036

A STRATEGIC FRAMEWORK FOR TEXAS

SECOND EDITION

“RATHER THAN YIELD THE FUTURE TO A COURSE OF EVENTS IMPOSED FROM THE OUTSIDE, WE ARE CONFIDENT THAT TEXANS WILL CHOOSE TO RELY ON A GREAT, LONG-STANDING ASSET: THE DETERMINATION TO SHAPE THEIR OWN DESTINIES.”

– Preface, *Texas 2000 Commission Report*

East Texas

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NOVEMBER 2022

Houston, Texas

TEXAS 2036 WAS BORN OUT OF A LOVE FOR TEXAS.

INTRODUCTION

In 2036, just 14 short years from now, Texas will celebrate its bicentennial: 200 years of growth, change, adversity, perseverance and achievement, the likes of which have rarely been seen. As we look ahead to Texas' third century, it's time to take stock of where we have been as a state, where we are today and where we want to go in the future.

Texas 2036 was born out of a love for Texas and a recognition that vigilance is required to ensure we enjoy a future that sustains and expands opportunities for all who call this great state home.

Texans today, like the generations before us who wrought by hard and deliberate work the prosperity and quality of life many of us enjoy today, must look ahead to what the future could be, build upon our legacy of success and overcome challenges that lie beyond the horizon in pursuit of a bold vision: Texas as the best place to live and work for another hundred years.

Texas' economy — which if we were a country would rank in the global top 10 — continues to grow, buffeted but never defeated.[1] Texas leads the nation in exports and has for the past 17 years in a row.[2] Texas is the nation's leading producer of both carbon-based and alternative energy.[3] A leading producer of agricultural products, Texans feed and supply ourselves and our nation.

And throughout Texas, businesses — from the Fortune 500 to recent startups — are serving consumers and clients across the country and around the world, financing trade and innovation, building nanotechnology and skyscrapers, and pursuing the next frontiers from the cells in our bodies to space beyond our world.

However, the challenges we face are significant. Our population is big and growing quickly. Today, Texas, with 29 million residents, is the second-most-populous state in the nation, and nearly 10 million more Texans are expected to live here by 2036.[4]

We are diverse and becoming more so, and we are becoming both younger and older at the same time. Our growth has been and will continue to be primarily in our urban areas, yet rural Texas is more populous than 40 percent of U.S. states.[5]

This population growth is a double-edged sword: necessary for sustaining our economic growth and yet straining our state's infrastructure and services. Texas has struggled to effectively prepare all students to be active participants in an increasingly global economy. Health expenditures are ballooning while Texas ranks in the bottom half of U.S. states on many health measures. We must prepare for a radical shift in how people and goods are moved, as alternative types of mobility become commonplace. We must ensure that the utilization of our natural resources balances economic value with stewardship for future generations. We must better protect our most vulnerable populations.

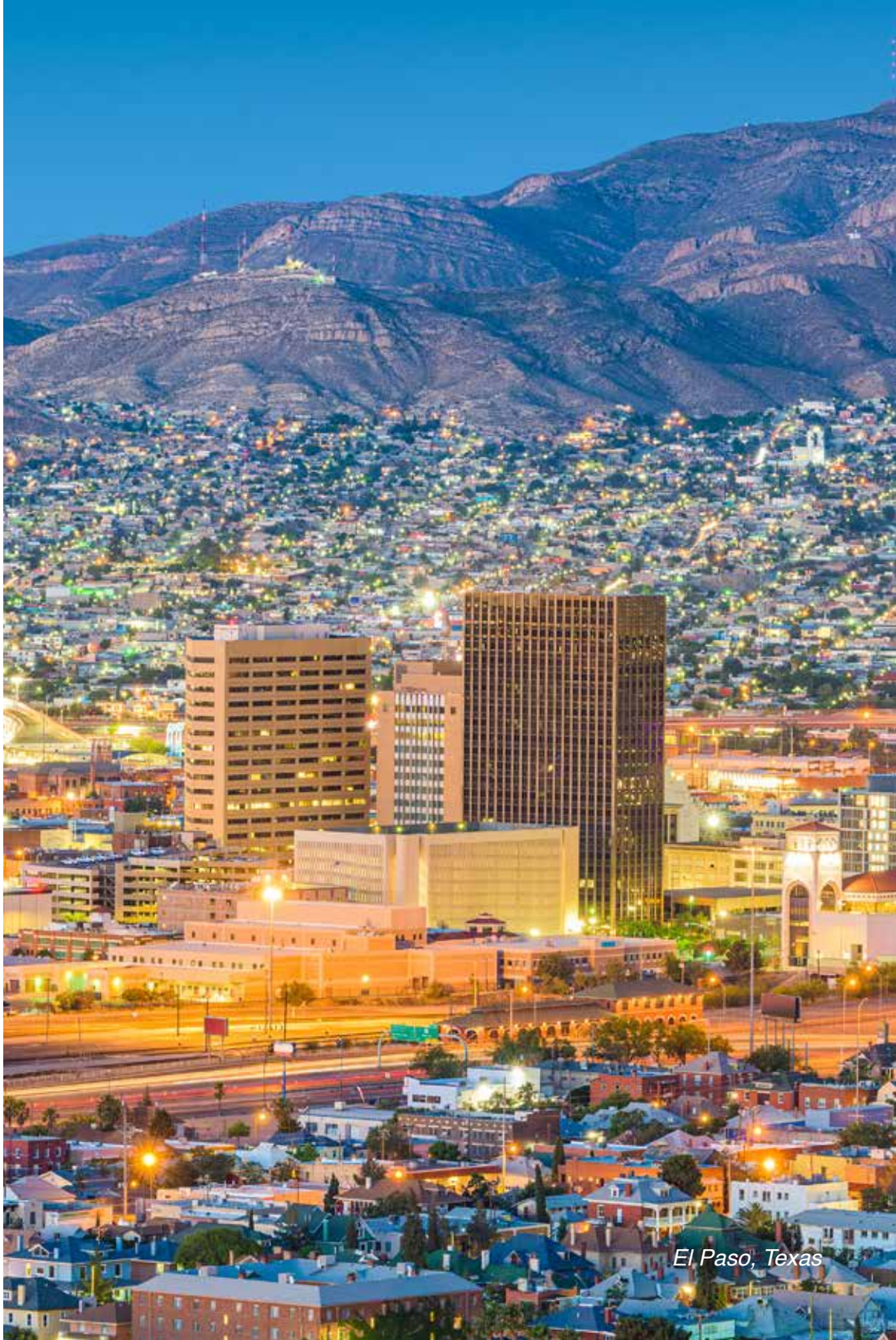
And we must think differently about how this $250 billion enterprise we call the State of Texas best allocates resources to provide the greatest opportunity for the greatest number of Texans.

In pursuit of a vibrant future for Texas, we offer this second edition of *Shaping Our Future: A Strategic Framework for Texas*, rooted in our commitment to tackling the most pressing issues our state faces in the best way we know how: the "Texas way." This is likely the only long-term, comprehensive, statewide strategic assessment of its kind for Texas.

The first edition of the Strategic Framework was a starting point for what has become a robust and growing conversation across Texas about the future of our great state. We have seen firsthand how comprehensive and relevant data can break down party lines to unify Texans, identify pragmatic solutions, and move our state forward. The feedback and ideas we heard over the last two years from Texans across the state have helped shape this second edition as we articulate a clear and compelling future for Texas.

We know this work is audacious, but if anyone can do it, Texans can. We have talent, resources and the will to succeed on our side. But, most importantly, we have each other — Texans determined to leave Texas better than they found it for those who will come after them.

We invite you to partner with us as we pursue a strong future for all Texans.



El Paso, Texas

EXECUTIVE SUMMARY

The second edition of the Texas 2036 Strategic Framework reflects more than six years of research, analysis, conversations and advocacy that have focused on the most important issues facing the state — issues that will shape Texas's future quality of life and shared economic prosperity. The second edition of the Strategic Framework, very much in line with the first edition, holds fast to a compelling vision for the future of Texas:

Through our bicentennial and beyond, Texas is a land of opportunity, prosperity, and well-being for all generations of Texans.

This vision for Texas continues to be built on six broad policy pillars representing the most significant drivers of Texans' prosperity of life and help us monitor "the state of the state."

These pillars are accompanied by 36 ambitious but achievable goals for the future of Texas, updated in this edition to more clearly articulate each goal and the data that will be used to measure Texas's progress towards it. While the policy pillars and goals comprise a wide range of topics, the Framework is not meant to be a comprehensive list of every challenge and opportunity facing Texas. Rather, it is a list of aspirational goals linked directly to our state's prosperity that would matter the most in building a bright future for our state.

The process for updating the Framework's goals and indicators, which were first adopted by the Texas 2036 Board of Directors and released in 2020, involved collaboration across all teams within the organization. It also included significant input from experts outside of Texas 2036, including meetings with 170 members of the Texas 2036 policy advisory groups, external stakeholders and subject matter experts. Ultimately, more than 150 metrics, and their underlying data, were sourced, analyzed and visualized in support of this effort.

The 36 goals identified in the first edition, and subsequently refined for the second edition, were developed using the following criteria. Goals for the Strategic Framework must be:

- **CRITICAL:** *Addressing the biggest challenges for Texas and the issues that matter most to Texans.*
- **IMPACTFUL:** *Driving impact in opportunity, prosperity, and well-being for all generations of Texans.*
- **AMBITIOUS:** *Envisioning a bold, better future for Texas.*
- **UNIFYING:** *Bringing Texans together to support a stronger future for Texas.*
- **ENDURING:** *Remaining relevant in 2036 and beyond, adapting to changing contexts.*
- **MEASURABLE:** *Quantifying progress for Texas over time.*
- **ACTIONABLE:** *Amenable to policy change at the state level.*

Following the refinement of our goals, we reformulated our performance indicators and metrics to allow for more thorough monitoring of progress and the interrelationships of measures. This work resulted in **The Pyramid** – a new approach to metrics that includes for each goal a primary indicator – a "north star" indicator that best represents progress on that goal. The primary indicator includes, where possible, comparisons between key subgroups to track equity and trends over time. In addition, The Pyramid also identifies leading indicators that can signal where the primary indicator is headed and allow our work to course-correct as necessary.

Internally, we track how well state policies are being implemented, and we develop our policy and data efforts to advance Strategic Framework goals. In this way, the updated Strategic Framework serves as our theory of action, driving our data and policy work in a more deliberative manner through measurable, actionable data points tied to our aspirational goals for the state of Texas.

THE PYRAMID

Austin, Texas

36 GOALS FOR THE FUTURE OF TEXAS

Texas 2036's aspirational goals for Texas to reach by the year 2036, along with the primary metrics by which progress towards those goals will be measured, are summarized on the following pages.

To view the historic and current status of these key metrics – within Texas and, when available, across the nation, we welcome you to visit our Strategic Framework platform at framework.Texas2036.org.

 **GOAL**  *Primary Metric*

Education & Workforce

A strong education system today ensures a strong workforce and a prosperous economy tomorrow.

1

Early Literacy: Texas children get a strong early start to succeed in school and life.

Percentage of students at or above "meets grade level" for 3rd-grade reading on the state STAAR exam.

2

STEM: Texans are prepared for careers in STEM fields.

Percentage of students at or above "meets grade level" for the Algebra 1 end-of-course STAAR exam.

3

K-12: Texas students graduate high school prepared to enter college and career.

Percentage of high school graduates deemed college, career, or military ready.

4

Postsecondary: Texas students earn a postsecondary credential to access the jobs of today and tomorrow.

Percentage of high school graduates earning postsecondary credentials within six years.

5

Jobs: Texans are accessing careers that enable economic security through education and training.

Percentage of households earning a living wage per the United Way's ALICE threshold.

6

Workforce Needs: Texans meet the state's current and future workforce needs.

The ratio of unemployed persons to job openings.

Health & Health Care

Because of rising health care prices and relatively poor care outcomes, finding good value in health care remains one of Texas' most profound challenges.

7

Availability of Care: Patients throughout the state have access to a variety of quality care options.

Percentage of residents with a regular source of care.

8

Patient Affordability: Price is not a barrier to needed care for Texans.

Percentage who skipped care due to cost.

9

System Affordability: Health care system costs are sustainable and represent good value.

Per capita health expenditure.

Average total employer-sponsored insurance spending age 18-64.

10

Health Outcomes: Texans live long, healthy, and productive lives.

Percentage of adults self-reporting "fair" or "poor" health.

11

Health Care Quality: Health care services produce positive, measurable outcomes to patients.

Percent of inpatient readmissions, within 30 days of an acute hospital stay, among Medicare beneficiaries age 65 and older.

Rate of hospital readmissions, among adults ages 18-64, with employer-sponsored insurance.

Infrastructure

Reliable and varied infrastructure is the backbone of the Texas economy.

12

Mobility of Goods: Texas enables economic growth by moving goods efficiently.

Total freight moving through Texas.

13 **Transportation Safety & Reliability: Texans can travel to their destinations safely and reliably.**

Estimated total cost of travel on Texas roads and highways.

14 **Digital Connectivity: Texans can digitally participate in economic opportunities and essential services.**

Percentage of households with a broadband subscription of any type.

15 **Electricity Cost & Reliability: Texas maintains a sufficient, reliable, and cost-competitive electricity infrastructure.**

Monthly cost of electricity for residential accounts.

Monthly cost of electricity for commercial & industrial accounts.

Natural Resources

Abundant natural resources have allowed Texas to prosper, but continued success depends on balancing economic growth with stewardship of air, water, and land.

16 **Quality of Air: Texans have clean air.**

Average daily density of fine particulate matter.

17 **Sustainable Water: Texans can rely on a sustainable water supply.**

Projections of existing water supplies + strategic water supplies minus water demand in 2030.

18 **Quality of Water: Texans have clean water.**

Percentage of public water systems with health-based violations.

19 **Parks and Wildlife: Texas enhances and protects its state parks, public and private open spaces, and wildlife.**

Protected acres per capita.

20 **Agricultural Production: Texas leads in agricultural production with responsible natural resource stewardship.**

Market value of agricultural output per capita.

21 **Energy Production: Texas leads in energy production with responsible natural resource stewardship.**

Total energy production from all sources.

Justice & Safety

The Texas justice and safety systems should aim to keep every person safe, especially society's most vulnerable.

22

Public Safety: Texans are protected from threats to their well-being and property.

Rates of violent crime per 100,000 people.

Rates of property crime per 100,000 people.

23

Justice System: Texans are served effectively, efficiently, and impartially by the justice system.

Ratio of disposed criminal cases to incoming cases.

Ratio of disposed civil cases to incoming cases.

24

Protection for the Vulnerable: Texas protects the vulnerable from traumatic experiences.

Percentage of children under age 17 who have experienced two or more adverse childhood experiences.

25

Safety Net: Texans have access to resources to meet basic needs when they are in crisis.

Percentage without liquid assets to subsist for three months without income.

TEXAS 2036 | STRATEGIC FRAMEWORK

Government Performance

High-quality, cost-effective public services drive economic growth, improve Texans' quality of life, and build trust in government.

26

Confidence in Government: Texans have confidence in the public institutions that serve them.

Percentage of the population responding that "Things in my state are on track."

27

Civic Engagement: Texans actively participate in governing their communities.

Percentage of the voting-age citizen population who vote in major (presidential) elections.

Percentage of voting-age citizen population who vote in midterm (congressional) elections.

28

Fiscal Sustainability: Texas needs stable, reliable revenue sources to finance state operations, invest in long-term growth, and minimize liabilities.

State expenditures as a percentage of revenues.

29

Competitive Taxes: State tax rates attract and retain businesses while sustaining government operations and investments.

Individual tax burden – state and local tax revenue as a percentage of personal income.

Business tax burden – index measuring how well states structure their tax systems.

30

Long-Term Obligations: Texas strategically manages state expenditures to deliver the best value to taxpayers.

Long-term liability ratio – noncurrent liabilities divided by total assets.

31

Talent in Government: The public sector attracts and retains the talent needed to deliver excellent service and get results.

State employee turnover rate, not including retirements.

32

Proven Modern Methods: The Texas state government uses data-driven and proven modern methods to drive towards shared goals.

Significant alignment with the Advanced Data Management & Digital Services goal of the Texas Department of Information Resources.

33

Crisis Readiness: Texas is ready to address the human, economic, and environmental consequences of natural disasters.

National Health Security Preparedness Index.

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Prosperity & Well-Being

Increased prosperity and well-being statewide, through 2036 and beyond, ensures current and future Texas generations of Texans will thrive.

34

Economic Growth: Texas spurs economic growth through an innovative and business-friendly climate.

Year-to-year change in GDP, chained to 2012 dollars.

35

Quality of Life: Texas is the best place to live and work.

An index representing people empowerment comparing living conditions, health, education, and the natural environment.

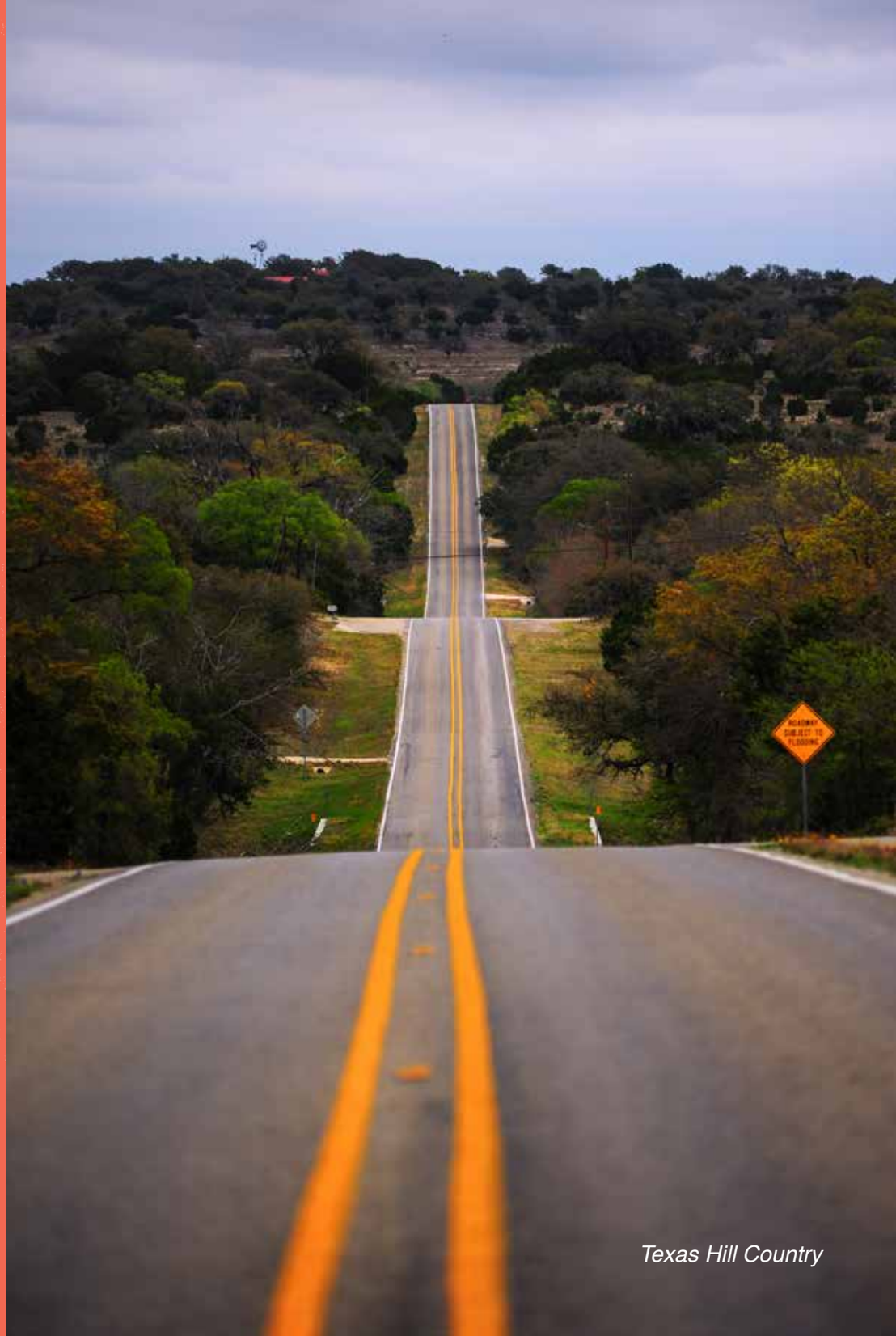
36

Economic Opportunity: Texans have the opportunity to attain a middle-class life.

Cost of living index.

UPDATES TO GOALS SINCE FIRST EDITION

Education & Workforce	• *Addition of a goal focused on STEM (Science, Technology, Engineering, and Math)* • *Revision of Early Learning to Early Literacy*
Health	• *Division of Affordability into Patient Affordability and System Affordability* • *Combination of Population Health and Public Health into one goal: Health Outcomes* • *Division of Value-Driven System into System Affordability and Health Care Quality*
Infrastructure	• *Combination of Mobility and Safety into Transportation Safety & Reliability* • *Revision of Energy Production to Electricity Cost & Reliability (Energy Production goal under Natural Resources was preserved)* • *Crisis Readiness was moved to the Government Performance pillar*
Natural Resources	• *No changes were made*
Justice & Safety	• *Goals were reordered but not revised*
Government Performance	• *Combination of Customer Service into Confidence in Government* • *Division of Broad, Stable Revenue Base into Fiscal Sustainability and Competitive Taxes* • *Revision of Wisely Managed State Spending to Long-Term Obligations* • *Conversion of Aligned Accountability into a cross-cutting theme (see more in the Cross-Cutting Themes section below)* • *Addition of Crisis Readiness from the Infrastructure pillar*



Texas Hill Country

PEER STATES

For Texas to be the best place to live, work and do business, we need to understand how we are doing today. The Strategic Framework measures Texas's performance against all 49 other states and also compares Texas to a competitive peer state group consisting of California, Colorado, Florida, Georgia, Illinois, New York, North Carolina, Ohio, Pennsylvania, Virginia, and Washington.

In 2020, we identified these peer states through an index of 15 metrics across three key categories:

- Which states are our primary competitors for business?
- Which states are our primary competitors for talent?
- Which states are similar in size to Texas?

Competitors for business were identified by factors such as overall economic growth; the number of businesses (including Fortune 500 headquarters, Inc. magazine's 5,000 fastest-growing companies, new small businesses, and venture capital investments); and rankings on national indices assessing how attractive states are to businesses.

Competitors for talent were identified by factors such as an overall increase in the talent pool (including net migration gain); rankings on a national index assessing the quality of life (measuring factors such as cost of living, education, health, crime, commute times, weather, and cultural and recreational opportunities); and measures of per capita personal income.

States similar in size to Texas were identified using both the size of the economy, the size of the population, and the number of major metropolitan areas.

Ultimately, 11 states and Texas were at the top of this index. Texas and these 11 peer states account for 57 percent of the total U.S. population and 61 percent of the nation's GDP.[6]

Throughout the report, where the data is available, we have included benchmarks that indicate where Texas currently ranks among all states and these peers.

We believe there is a significant opportunity for Texas and its peer states to partner on collecting and disseminating data, and to convene for discussions about common challenges and innovative policies and practices.

These actions will allow all states and the nation to move forward on these important goals.

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FINDINGS: THE STATE OF TEXAS

The process of developing aspirational goals for the future of Texas must first begin with an assessment of the current Texas landscape. How well is Texas doing? How does Texas compare to peer states?

The second edition of the Strategic Framework is based on the most relevant and actionable indicators available, showing up to date metrics, trends over time, and group disaggregations. A review of these data shows that Texas is a leader among peer states on measures of energy production and cost of living, but faces significant challenges in the areas of education, health care and justice.

The following section reviews recent data across our 36 aspirational goals. Terms in orange relate to specific goals. Because indicators update frequently, please visit the Strategic Framework platform at framework.texas2036.org to view the most up-to-date trends.

EDUCATION AND WORKFORCE

BY 2036, MORE THAN 70 PERCENT OF JOBS IN TEXAS WILL REQUIRE A POSTSECONDARY CREDENTIAL.

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A strong education system today ensures a strong workforce and a prosperous economy tomorrow.

The Texas economy increasingly depends on a highly educated workforce. By 2036, more than 70 percent of jobs in Texas will require a **postsecondary credential**. But today, fewer than 1 in 3 high school graduates obtain a postsecondary credential within six years of graduation. In 2019, Texas was 11th among 12 peer states in the percentage of population with a postsecondary credential.

A strong education system creates a direct pipeline of highly skilled workers. Early learning is critical to helping students succeed in primary and secondary school, and prepare for college or a career.

Unfortunately, Texas ranks last among our peer states in a measure of **early literacy**, fourth-grade reading, and second-to-last in a measure of proficiency in **STEM** (science, technology, engineering, and math) courses: eighth-grade math achievement, as of the most recent assessment in 2020.

Two-thirds of Texas students are graduating from high school ready for postsecondary education. In addition, achievement gaps based on student income, race, region, and language proficiency persist throughout Texas' education system.

A highly educated workforce is also critical to ensuring economic security for all Texans. Workers with a postsecondary credential are four times as likely to hold a **good job** (earning around $65,000 or more per year) as workers with only a high school diploma — but barely two of five Texas workers have such a credential.

Texas has historically relied on highly educated newcomers to meet its **workforce needs**; Texas must invest in education so current residents can fill these higher-paying jobs.

HEALTH AND HEALTH CARE

OVER HALF OF TEXANS WITH HEALTH INSURANCE REPORT SKIPPING CARE DUE TO COST.

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Because of rising health care prices and relatively poor care outcomes, finding good value in health care remains one of Texas' most profound challenges.

Physical and mental health directly affect our productivity and quality of life. Good health results from a wide range of factors, including health care affordability, access, and quality, as well as non-clinical factors, such as socioeconomic status, contextual factors, and health behaviors.

Health care costs in Texas are unaffordable and continue to rise at unsustainable levels. Total health care spending for Texans enrolled in employer-sponsored plans – nearly half the population – averaged more than $5,800 in 2019, the third-highest among peer states.

Price increases have made care unaffordable, even for the insured: Over half of Texans with health insurance report skipping care due to cost. Meanwhile, 18 percent of Texans lack any health insurance, creating substantial financial challenges for this population.

At the same time, health care availability, outcomes, and system quality need improvement. Only 67 percent of Texans have a dedicated health care provider, and 14 percent of Texans report being in poor or fair health.

Meanwhile, among 12 peer states, Texas ranks just sixth in the percentage of seniors discharged from the hospital who are readmitted within 30 days.

All policy is health policy. While improving access and affordability of quality care is important, so much of what impacts overall health is related to day-to-day factors: what kind of job you have, where you live, the air you breathe, the food you eat, and the water you drink.

By making meaningful improvements in education, workforce, infrastructure, and natural resources, we can have a significant impact on the health of Texans.

INFRASTRUCTURE

TEXAS' POPULATION IS PROJECTED TO INCREASE NEARLY 25 PERCENT BY 2036 TO MORE THAN 38 MILLION RESIDENTS, PUTTING TEXAS' INFRASTRUCTURE TO THE TEST.

Reliable and varied infrastructure is the backbone of the Texas economy.

Texas' critical infrastructure includes roads, bridges, railways, mass transit systems, seaports, airports, pipelines, and lines carrying data and electricity.

Our state's population is projected to increase nearly 25 percent by 2036 to more than 38 million residents — a massive influx of people that will put Texas' infrastructure to the test.

Millions of working Texans — and 1.8 trillion ton-miles of freight — depend on Texas' transportation infrastructure, especially its roads. In 2019, travel on Texas roads cost $194 billion, including time, fuel, and vehicle costs.

But roads alone cannot meet our needs: a diverse, multimodal transit network, including seaports, railways and airports, is essential to Texas' future economic growth and opportunity.

Modern, well-maintained infrastructure also keeps people safe. It is tellingly troubling that Texas ranked second-to-last among 12 peer states for annual traffic fatality rates, with 3,615 deaths in 2019.

Further, digital connectivity, access to broadband and digital literacy should be considered 21st-century infrastructure. These are no longer luxuries, but necessities to participate in the modern-day economy: they are increasingly necessary to access health care, education, and economic opportunity.

However, 7.4 million people — nearly one-quarter of the Texas population — do not have access to broadband.

A reliable, cost-effective electric infrastructure is also critical to power the economy and supply homes and businesses. Today, however, while Texas has low electricity rates, we also have the highest residential electricity bills due to usage ($132 per month on average) and the worst federally rated reliability metrics – including System Average Interruption Frequency Index and System Average Interruption Duration Index – relative to Texas' peer states.

NATURAL RESOURCES

TEXAS' UNMET WATER NEEDS ARE PROJECTED TO EXCEED 4.7 MILLION ACRE-FEET BY 2030.

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Abundant natural resources have allowed Texas to prosper, but continued success depends on balancing economic growth with stewardship of air, water, and land.

Millions of Texans currently lack clean air and water. Our state ranks ninth among peer states on exposure to particulate matter air pollution. Texans, especially children and the elderly, are at increased risk of chronic lung and breathing quality problems.

Nearly 400 public water systems, most in rural areas, are designated as continuing or serious violators of federal water quality standards. These communities have water contaminated with chemicals, heavy metals, and microbes that are public health risks.

Texas industries and municipalities face the risk of water shortages. Texas' unmet water needs are projected to exceed 4.7 million acre-feet by 2030, which is about 27 percent of Texas' total water usage in 2020. That will cost the state $91 billion — each year — in lost economic activity.

In addition, growing water shortages will limit the viability of Texas agriculture, as major groundwater resources are being depleted faster than they can be replenished.

Texas' open spaces and wildlife must also be preserved for future generations to enjoy. For the last 15 years, more than 80 percent of Texans have affirmed that "unless we protect Texas' natural areas, we will lose the very things that make Texas a special place in which to live." Yet Texas ranks 10th among peer states on the preserved lands available to residents per capita.

Outdoor recreation is also a vital economic engine. In 2020, activities related to parks and park visits produced about $32 billion in gross state product and supported 300,000 jobs across Texas.

At the same time, Texas' agricultural and energy production contributes billions to the Texas economy and supports millions of Texas jobs. The state's future hangs in the balance between these industries and the preservation of its natural resources.

JUSTICE AND SAFETY

IN 2020, TEXAS HAD A 91 PERCENT CRIMINAL AND AN 81 PERCENT CIVIL CLEARANCE RATE FOR COURT CASES.

The Texas justice and safety systems should aim to keep every person safe, especially society's most vulnerable.

Over the past few decades, Texas has enjoyed tremendous economic growth and prosperity — but interrelated factors, including unsafe neighborhoods, financial hardship, and traumatic experiences, hold many people back. State leaders should collaborate across justice and safety-net systems to ensure all partners — state agencies, local governments, and private sector entities — spend tax dollars effectively.

Public safety is necessary for Texas institutions and civil society to function. After decades of positive momentum, violent crime has started to increase in some Texas communities. Both violent and property crimes have declined statewide since the 1990s, but Texas still ranks near the bottom among our peer states. The 2020 violent crime rate of 446.5 and property crime rate of 2,245, both per 100,000 persons, place Texas 12th and 10th, respectively.

Increases in court backlogs can delay access to the justice system. Clearance rates under 100 percent indicate a growing backlog, while rates at or above 100 percent indicate a declining one. In 2020, Texas had a 91 percent criminal and an 81 percent civil clearance rate, ranking fifth and seventh, respectively, of nine reporting peer states.

Too many Texas children are vulnerable to experiences that can negatively impact their future. Texas ranks ninth among peer states in the percentage of children (19.1 percent) who have experienced at least two adverse childhood experiences (ACEs), such as violence, abuse, neglect or a household with substance use or mental health problems. These children face negative consequences for their health, educational attainment, employment, and earnings.

The inability to cover basic expenses when income is lost can lead to short-term hardships and long-term impacts on health and well-being. In 2016, more than 42 percent of Texas households were unable to pay basic expenses for three months without income, ranking Texas 10th among peer states.

GOVERNMENT PERFORMANCE

TEXAS RANKS IN THE TOP THIRD FOR STATE BUDGET REVENUE VOLATILITY AMONG ITS 12 PEER STATES.

Currently, long-term liabilities account for two-thirds of state obligations, and Texas ranks in the top third for state budget revenue volatility among its 12 peer states.

Public sector services must reliably address the challenges they are created to solve. Well-administered government services — particularly in the areas of education, workforce development, justice and safety, health care, infrastructure, and natural resources — establish strong foundations for economic growth and prosperity. Moreover, programs that address real problems increase confidence in government and reciprocal civic engagement. Unfortunately, only 36 percent of Texans believe our state is headed in the right direction, and Texas ranks near the bottom on voting rates in the last two election cycles.

Budgets should emphasize operational stability, invest in long-term needs, and minimize liabilities. The state should ensure its revenue structure remains stable and sustainable for wise investments in Texas' future. Volatile and variable revenue sources contribute to unstable budgeting environments, weakening the capacity to consistently fund key government services. Public expenditures should align with long-term needs, and all unfunded liabilities should be addressed responsibly.

Currently, long-term liabilities account for two-thirds of state obligations, and Texas ranks in the bottom third among its 12 peer states on revenue volatility.

State government must prioritize advanced technologies, better data, and a talented workforce to spur growth and innovation. Antiquated information technology systems, insufficient data, and high workforce turnover make the government less capable of providing core services and fixing real problems. State leaders can significantly improve services and accountability by investing in talent and funding proven, modern information technology, enhanced cybersecurity, and better data and analytics.

Texas must be disaster-ready. Texas is prone to a wide range of natural disasters, including hurricanes, tornadoes, floods, wildfires, drought, hail, and severe storms. Disaster events threaten life, property, economic stability, and natural resources. Therefore, Texas must also invest in crisis readiness to plan for increasingly likely natural disasters; the state is currently ranked ninth among peer states on an index of crisis preparedness.

PROSPERITY AND WELL-BEING

TEXANS ENJOYED THE THIRD LOWEST COST OF LIVING AMONG OUR PEER STATES. HOWEVER, RISING HOUSING COSTS MAY THREATEN THIS RELATIVE ADVANTAGE—TEXAS HOME PRICES HAVE RISEN 45 PERCENT SINCE 2020.

Increased prosperity and well-being statewide, through 2036 and beyond, ensures current and future Texas generations of Texans will thrive.

Economic growth, opportunity, and a high quality of life work together to ensure Texas is the best place to work, live, and raise a family. They also enable Texas to attract and retain the talent our state needs.

Indeed, Texas' decades of **economic growth** depended on the talented workforce our state attracts, as well as supportive infrastructure and a business-friendly environment.

Among 12 peer states — those of similar size with which we compete for business and talent — Texas was in the top five for an increase in real Gross State Product (GSP) between 2016 and 2021. But Texas faces increased economic competition from other states.

By 2036, 10 million more people are expected to call Texas home, attracted by a relatively low cost of living and career opportunities.

However, other factors may negatively impact future growth and ultimately limit the economic benefits Texans enjoy.

Texas ranks 11th among 12 peer states in an index of individual autonomy and **quality of life.**

The cost of living, particularly housing affordability, helps determine where people choose to live, and is an important indicator of **economic opportunity** for everyday Texans.

According to a 2021 cost of living index, Texans enjoyed the third lowest cost of living among our peer states. However rising housing costs may threaten this relative advantage – Texas home prices have risen 45 percent since 2020.

For Texas to have a prosperous, growing economy, a strong quality of life and economic opportunity for all the state needs to make significant progress on the goals found across the six policy pillars that define the broader mission and day-to-day work of Texas 2036: education and workforce, health and health care, infrastructure, natural resources, justice and safety, and government performance.

Padre Island, Texas

CROSS-CUTTING THEMES

Some concepts are too broad to fit within a single goal, and instead cut across policy pillars. These through lines, which intertwine across multiple goals, may refer to specific subpopulations that require special attention, the geographic and social forces that shape the distribution of opportunities and resources, or the mechanisms of state and local government.

EQUITY

As state policies and economic growth improve the quality of life for Texans, it's important that all Texans — regardless of their race, gender, age, or zip code — have the opportunity to share in these gains. Although Texas has been a great place to live and work for many people for generations, not all Texans have had the opportunity to equally participate in the growth and success of Texas.

Though all Texans are affected by these forces, decades of structural inequities mean that many communities disproportionately bear the impact. The younger and more diverse population transforming our state's demographics provides Texas an opportunity for innovative, systemic, and sustained approaches for developing our institutions to better serve all Texans.

Education achievement gaps exist by race and economic status. Texas traditionally has had a stratified education system in which some student groups achieve nationally competitive results while others — particularly students of color and those from low-income families — fall behind.

For example, according to the National Assessment of Educational Progress (NAEP), only 19 percent of Black 4th graders and 20 percent of Hispanic 4th graders read on grade level, compared to 44 percent of White 4th graders.[7]

These results indicate a school system in Texas that has historically underserved the very students who rely on it most for economic opportunity and upward mobility. House Bill 3 in 2019 represented a major step by the Legislature to address this historical inequity, driving resources — including both additional funding and access to high-quality teachers — to school districts based on identified student needs rather than the property values surrounding the students' homes. Implementation is still in the early days and progress should be closely monitored.

In advancing a more equitable education system, every student should have access to resources and rigor to help them achieve success, and school districts should be accountable for eliminating equity gaps. Yet gaps in postsecondary readiness, enrollment and completion rates are even more pronounced for disadvantaged student groups in Texas. Only 47.8 percent of 2020 Black high school graduates in

Texas and 60.3 percent of Hispanic graduates meet state criteria to be college, career, or military ready (CCMR), compared to 70.6 percent of White graduates.[8] Similarly, wide disparities exist for postsecondary enrollment and completion, indicating that Texas's education system is not preparing some students for success in postsecondary programs or for the job market.

To ensure Texans have longer, healthier lives, Texas will also have to address health disparities based on race and income. Only 56 percent of Hispanic adults reported having a usual care provider in 2020-21, versus 80 percent of Black adults and 80 percent of White adults.[9]

Additionally, there were 164 deaths from treatable conditions reported per 100,000 among the Black population in 2019-2020, versus only 92 among White and 88 among Hispanic populations. These facts suggest a health care system that is unaffordable or inaccessible to all Texans.[10]

Existing income disparities are reflected in broadband subscription patterns creating digital inequities across the state. Some of this has been caused by a lack of infrastructure in rural areas. Other disparities have been created because of income. Only 74 percent of Texas households earning less than $20,000 have any broadband subscription, compared to 97 percent of households earning more than $75,000.[11] As the COVID-19 pandemic showed, this lack of digital equity can exacerbate pre-existing disparities in educational achievement, health, and employment due to the opportunities for e-Learning, telemedicine, and other services.

As the state continues to evolve, all Texas communities will need access to broadband for residents to fully engage in civic life and to avail themselves of career, educational and health care opportunities. Digital equity and inclusion require strategies that ensure access to cost-effective and robust broadband internet service in both urban and rural areas.

Many performance indicators reflect further inequities. We are committed to disaggregating data in order to bring to view disparities masked by aggregate data. Income inequality indices, housing affordability and Texans living in poverty are a few of the additional indicators we are working to make available to policymakers and the public. Accurate data is critical to understanding and addressing the challenges facing Texans now and in the future.

TEXAS 2036 | STRATEGIC FRAMEWORK

RELATED GOALS

Early Literacy: *Texas children get a strong early start to succeed in school and life.*

STEM: *Texans are prepared for careers in STEM fields.*

K-12: *Texas students graduate high school prepared to enter college and career.*

Postsecondary: *Texas students earn a postsecondary credential to access the jobs of today and tomorrow.*

Jobs: *Texans are accessing careers that enable economic security through education and training.*

Availability of Care: *Patients throughout the state have access to a variety of quality care options.*

Patient Affordability: *Price is not a barrier to needed care for Texans.*

Health Outcomes: *Texans live long, healthy, and productive lives.*

Transportation Safety & Reliability: *Texans can travel to their destinations safely and reliably.*

Digital Connectivity: *Texans can digitally participate in economic opportunities and essential services.*

Public Safety: *Texans are protected from threats to their well-being and property.*

Justice System: *Texans are served effectively, efficiently, and impartially by the justice system.*

Protection for the Vulnerable: *Texas protects the vulnerable from traumatic experiences.*

Safety Net: *Texans have access to resources to meet basic needs when they are in crisis.*

Quality of Life: *Texas is the best place to live and work.*

Economic Opportunity: *Texans have the opportunity to attain a middle-class life.*

RURAL

Rural communities are vital to Texas's economic health, providing food, fiber, energy and talent. Texas's rural population of 3.04 million people is larger than the population of 18 states and the District of Columbia.[12]

From West to East Texas, from the Panhandle to the Valley, Texas's rural communities are home to 10 percent of all Texans, as well as key industries such as agriculture and energy production.[13] In 2021, oil and gas production contributed $166 billion — or 8 percent of Texas' GDP — to the state, with the two largest production fields located in rural Texas.[14] Texas agriculture production, which provides a critical portion of the U.S. food supply, contributed $28.9 billion to the Texas economy in 2021.[15]

Rural communities also frequently demonstrate the entrepreneurial values and economic drive that have made Texas successful. Rural small businesses make up 24 percent of all businesses in the state of Texas, contributing more than 20 percent of the state's economic output.[16]

Nonetheless, Texans in rural communities face unique challenges, and overcoming them will be critical to achieving many of the goals outlined in this Strategic Framework.

Students in rural communities have less access to postsecondary education. Over half of the independent school districts in Texas are located in rural areas, enrolling nearly 840,000 students — the most rural students in the nation. However, these students do not always have access to the advanced coursework they need to be postsecondary-ready. 41 percent of rural districts do not offer Advanced Placement or International Baccalaureate courses.[17] Similarly, rural students have additional challenges accessing higher education institutions; for example, in West Texas, the average distance from a high school to a higher education institution is 39 miles — but in some areas, that distance can be as much as 141 miles.[18]

Texas leads the nation in the number of rural hospital closures from 2005-2020.[19]

As of 2021, 71 Texas counties have no hospitals, and 27 have no primary care physicians.

For these reasons, health outcomes are poor, with diabetes rates one-third higher in rural areas than in non-rural areas. Health behaviors leading to obesity — and obesity itself — are more common in non-metro vs. metro counties.[20]

Lack of broadband internet access prevents rural areas from tapping into critical services and economic opportunities. Broadband access is central to improving health, education, and economic outcomes in rural areas, delivering telemedicine, online learning, and remote work services.

In 2019, about 16 percent of all rural Texans lacked internet access at the federal standard (as defined by the Federal Communications Commission), compared to just 2 percent of Texans in urban areas.[21]

Rural areas often lack the infrastructure and resources they need. Rural roads see twice the rate of traffic fatalities compared to other road types.[22] Small public water systems, which often serve rural areas, have fewer financial resources for monitoring and reporting on water quality.[23] Limited investment in water management projects reduces the water supply available for agriculture.

RELATED GOALS

Economic Opportunity: *Texans have the opportunity to attain a middle-class life.*

Early Literacy: *Texas children get a strong early start to succeed in school and life.*

STEM: *Texans are prepared for careers in STEM fields.*

K-12: *Texas students graduate high school prepared to enter college and career.*

Postsecondary: *Texas students earn a postsecondary credential to access the jobs of today and tomorrow.*

Availability of Care: *Patients throughout the state have access to a variety of quality care options.*

Health Outcomes: *Texans live long, healthy and productive lives.*

Transportation Safety & Reliability: *Texans can travel to their destinations safely and reliably.*

Digital Connectivity: *Texans can digitally participate in economic opportunities and essential services.*

Sustainable Water: *Texans can rely on a sustainable water supply.*

Quality of Water: *Texans have clean water.*

Safety Net: *Texans have access to resources to meet basic needs when they are in crisis.*

Crisis Readiness: *Texas is ready to address the human, economic, and environmental consequences of natural disasters.*

CHILDREN

Texas depends on the well-being and success of its children. There are currently 7.7 million children in Texas — 25 percent of the state population.

Children are at the forefront of a major ongoing demographic shift toward a more diverse population. Nearly 30 percent of the state's children are Non-Hispanic White, compared to 43 percent of Texas adults.[24]

Too few children are prepared for the jobs of the future, which will require a highly educated workforce. By 2036, more than 70 percent of jobs will require a postsecondary credential, but many Texas children are not being equipped to access these economic opportunities.[25] Only 63 percent of Texas high school students are college, career or military ready, and only 31 percent actually go on to complete a postsecondary credential from a Texas higher education institution within six years of graduation.[26]

Children face unique health challenges.

Texas has the highest rate of uninsured children in the country.[27]

Over the last 30 years, the state has seen an increase in the number of newborns with low birth weight, which is a predictor of poor health outcomes later in life.[28] Child vaccination rates have been declining in Texas since 2015, and Texas ranks last among peer states.[29]

Lifetime opportunities for many Texas children are limited by poverty, trauma and other adverse experiences that lead to major challenges in adulthood. Twenty percent of Texas children live in poverty, last among peer states, with gaps in basic needs such as food and housing.[30] Additionally, almost one-in-five children have experienced multiple traumas that are likely to lead to chronic health issues, mental illness and job instability later in life.[31]

Prudent state budget practices will necessitate that lawmakers pursue strategies with the highest returns on taxpayer investment. Investing in children can save the state significant costs in the long run. On average, a person with a bachelor's degree earns roughly $1 million more ($2.3 million) in their lifetime than someone with just a high school diploma ($1.3 million).[32]

Healthy, educated children become productive, taxpaying adults.

TEXAS 2036 | STRATEGIC FRAMEWORK

RELATED GOALS

Early Literacy: *Texas children get a strong early start to succeed in school and life.*

STEM: *Texans are prepared for careers in STEM fields.*

K-12: *Texas students graduate high school ready for postsecondary success.*

Postsecondary: *Texas students earn a postsecondary credential to access the jobs of today and tomorrow.*

Health Care Quality: *Health care services produce positive, measurable outcomes for patients.*

Protection for the Vulnerable: *Texas protects the vulnerable from traumatic experiences.*

Safety Net: *Texans have access to resources to meet basic needs when they are in crisis.*

Humble, Texas

SOCIAL DETERMINANTS OF HEALTH

Good health is determined by much more than just health care.

In fact, it is estimated that 80 percent of health is determined by non-clinical factors, such as socioeconomic status, physical and social environment, health behaviors and biology.[33]

While improving access to and the affordability of quality care is important, overall health is largely shaped by our jobs, our communities, our resources and the social contexts in which we live. By making meaningful improvements in education, workforce, infrastructure and natural resources, we can have a significant impact on the health of Texans.

This state has much work to do to improve the social determinants of health for all Texans. An educated population is better able to navigate the health care system and to engage in healthy behaviors. Yet, Texas is 11th among 12 peer states in the percentage of the population with a postsecondary credential, at 58.2 percent.[34]

Employment and income provide access to and improve the affordability of health care, as well as the ability to purchase additional social and economic resources that support better health, such as housing, education and food. About 56 percent of Texans earn a living wage and there were 0.7 unemployed persons per job opening in 2021; Texas ranks 6th among peer states on both metrics.[35]

Infrastructure can support health by providing public health and safety resources such as clean air and water, safe roads, and a reliable and affordable electric grid. The rate of particulate matter in Texas' air has declined almost ten percent since 2017, and Texas is in the top three peer states on the percentage of public water systems with health-based violations.[36] Road fatalities have declined by about one-third since the mid-1990s but Texas still has a fatality rate higher than all but one peer state.[37] Texans benefit from relatively low electricity prices but due to our much higher electricity usage, Texas ranks last among peer states on average residential electricity bill cost.[38] And Texas consistently ranks dead last among all states on electric reliability metrics.[39]

Safe communities with shelter and food access can support health by providing residents with basic amenities, encouraging outdoor exercise, and supporting social connections with neighbors. Texas has long prided itself on providing an affordable standard of living. In 2022, the state ranked 5th among peer states on the rate of residents with housing costs more than 50 percent of their monthly income, but this is a decline from 3rd place in 2019.[40] More worrisome, 14.1 percent of Texans lack adequate access to food, ranking last among peer states.[41] And Texas ranks near the bottom among peer states on violent and property crime rates, which can discourage residents from engaging in healthy outdoor and social activities.[42]

TEXAS 2036 | STRATEGIC FRAMEWORK

RELATED GOALS

Early Literacy: *Texas children get a strong early start to succeed in school and life.*

STEM: *Texans are prepared for careers in STEM fields.*

K-12: *Texas students graduate high school ready for postsecondary success.*

Postsecondary: *Texas students earn a postsecondary credential to access the jobs of today and tomorrow.*

Jobs: *Texans are accessing careers that enable economic security through education and training.*

Workforce Needs: *Texans meet the state's current and future workforce needs.*

Transportation Safety & Reliability: *Texans can travel to their destinations safely and reliably.*

Electricity Cost & Reliability: *Texas maintains a sufficient, reliable and cost-competitive electricity infrastructure.*

Quality of Air: *Texans have clean air.*

Quality of Water: *Texans have clean water.*

Public Safety: *Texans are protected from threats to their well-being and property.*

Safety Net: *Texans have access to resources to meet basic needs when they are in crisis.*

Economic Opportunity: *Texans have the opportunity to attain a middle-class life.*

ALIGNED ACCOUNTABILITY

Texas has more local government units than any other state, many of which have overlapping jurisdictions and responsibilities.[43] While the state government has considerable power to impact the daily lives of its residents, broad-scale reforms are more comprehensively implemented when state and local governments work jointly toward shared goals. Major systemic change can be impeded when state and local governments work against each other, resulting in poorer outcomes for their shared constituents.

Across nearly every goal, meaningful state reforms require local government support. In education, the state can establish standards and funding, but independent school districts will ultimately hire teachers and manage schools. State leaders can impact property taxes, but local governments assess them. State leaders can set policing standards, but local law enforcement agencies employ the police and sheriffs that keep our communities safe. State leaders can help finance major infrastructure projects, but without local actions, logjams will inevitably arise. This symbiotic reliance on one another has at times created tensions, but with shared responsibility comes the opportunity for mutual accountability for achieving shared goals.

The cross-cutting theme of Aligned Accountability focuses on goals with underlying metrics that indicate the effectiveness of government programs across all levels. This includes the Government Performance pillar, but also goals within all other pillars where government agencies set the policies and procedures that contribute to the metrics associated with those goals. This encompasses 26 of our 36 goals, a sign of the importance of government efficiency and alignment for the daily lives of Texans.

RELATED GOALS

Early Literacy: *Texas children get a strong early start to succeed in school and life.*

STEM: *Texans are prepared for careers in STEM fields.*

K-12: *Texas students graduate high school ready for postsecondary success.*

Postsecondary: *Texas students earn a postsecondary credential to access the jobs of today and tomorrow.*

Availability of Care: *Patients throughout the state have access to a variety of quality care options.*

System Affordability: *Health care system costs are sustainable and represent good value.*

Health Care Quality: *Health care services produce positive, measurable outcomes to patients.*

Transportation Safety & Reliability: *Texans can travel to their destinations safely and reliably.*

Digital Connectivity: *Texans can digitally participate in economic opportunities and essential services.*

Electricity Cost & Reliability: *Texas maintains a sufficient, reliable, and cost-competitive electricity infrastructure.*

Quality of Air: *Texans have clean air.*

Sustainable Water: *Texans can rely on a sustainable water supply.*

Quality of Water: *Texans have clean water.*

Parks and Wildlife: *Texas enhances and protects its state parks, public and private open spaces, and wildlife.*

Public Safety: *Texans are protected from threats to their well-being and property.*

Justice System: *Texans are served effectively, efficiently and impartially by the justice system.*

Protection for the Vulnerable: *Texas protects the vulnerable from traumatic experiences.*

Safety Net: *Texans have access to resources to meet basic needs when they are in crisis.*

Confidence in Government: *Texans have confidence in the public institutions that serve them.*

Civic Engagement: *Texans actively participate in governing their communities.*

Fiscal Sustainability: *Texas needs stable, reliable revenue sources to finance state operations, invest in long-term growth and minimize liabilities.*

Competitive Taxes: *State tax rates attract and retain businesses while sustaining government operations and investments.*

Long-Term Obligations: *Texas strategically manages state expenditures to deliver the best value to taxpayers.*

Talent in Government: *The public sector attracts and retains the talent needed to deliver excellent service and get results.*

Proven Modern Methods: *Texas government uses data-driven and proven, modern methods to drive toward shared goals.*

Crisis Readiness: *Texas is ready to address the human, economic, and environmental consequences of natural disasters.*

INFLUENCES SHAPING THE FUTURE OF TEXAS

While some things have changed since the release of the first edition of the Strategic Framework, many things have remained constant, including the most important factors that are shaping Texas today and into the future. Texans must take heed of these powerful drivers of change.

GEOGRAPHY AND A CHANGING GLOBAL ECONOMY

Texans have a strong shared identity spread across dramatically different regions. In water supply and agriculture, or in health care and education, needs are very different in East Texas and West Texas, or in the Panhandle and the Valley. These very different regions all need access to world markets, but it is harder for "one size fits all" solutions to work in Texas, given the tremendous variety among the places Texans live and work.

DEMOGRAPHICS

Population growth helps drive economic growth. By this measure, Texas is successful. It is the second-most-populous state in the country and has five of the 15 fastest-growing cities in the nation. By 2036, Texas is expected to add nine million people, increasing our state population to 38 million. Shifts within the Texas population will have major impacts on state government services such as education and infrastructure.

ADAPTABILITY AND RESILIENCE

Texas cherishes tradition but has excelled at change throughout its history. With a modest economic start in cotton and cattle, the Texas economy has vaulted into leadership in fields such as medical research, telecommunications, energy production, and space exploration, among many others. Each of these key industries is facing competitive pressures to adapt and change, and so must Texas.

San Antonio, Texas

THE STATE OF THE DATA

Texas 2036 is committed to helping build the strongest future for Texas through research grounded in clear, valuable data. This report (and our Strategic Framework platform) draws on more than 150 indicators used to measure our progress, backed by the Texas 2036 Data Lab (datalab.texas2036.org), which contains more than 500 data sets. But the current data landscape in Texas has limitations.

Data is not always collected frequently and in an analyzable format. In some cases, the best data we want to use may not exist (such as a detailed audit of state data system capabilities). In others, such as the USDA Irrigation and Water Management Survey, it is not reported frequently — which makes it challenging to measure progress consistently.[44]

Moreover, some data is inaccessible or not in a format that can be easily analyzed (e.g., pdfs rather than machine-readable data files).

Benchmarking against peer states is sometimes difficult due to a lack of comparable data methods. Understanding Texas's performance relative to our peer states is important. But comparable data is not available for some indicators, either because no standardized methodology exists or because data simply aren't available for each state. Where comparable data is available, it may not be as up-to-date as Texas-specific datasets.

The COVID-19 pandemic highlighted Texas's need to collect valid and reliable data.

In the beginning, public health case reports were submitted to the Texas Department of State Health Services (DSHS) through fax machines, delaying contact tracing and data checking.[45]

Fortunately, legislation passed in 2021 to improve public health data tracking.[46] School districts struggled to track student attendance during remote learning, and standardized testing was paused in 2020, leaving a two-year gap in the assessment of students' progress.

Once the STAAR resumed in 2021, we learned that students had fallen far behind and are just now starting to recover.[47] The state must take the hard-earned lessons of the COVID-19 pandemic to improve data systems throughout state agencies, to prepare for the next public health crisis.

Additional data and indicators will be necessary as Texas progresses through the 21st century. The indicators we have selected represent the best data currently available. The interactive data platform is designed to make it easy to seamlessly integrate new or better data into the Strategic Framework as better data becomes available.

EDUCATION AND WORKFORCE DATA

Standards set by the state may be overestimating progress. When comparing student outcomes on state assessments versus national assessments, the Texas Education Agency (TEA) shows much higher student performance than its national counterparts.

The National Assessment of Educational Progress (NAEP) assessment rated only 30 percent of fourth graders at or above Proficient in reading, while in that same year the Texas State of Texas Assessments of Academic Readiness (STAAR) assessment estimated that 52 percent of third graders were reading on grade level.[48]

It is important to track how national and state assessments relate to each other.

Comparable data is not collected across peer states. On some measures, methodologies differ by state. For example, many states have an indicator to measure postsecondary readiness but differ on how they define it.

On other measures, data is not collected completely. For example, while postsecondary completion may be tracked for all students at an institution, few states distinguish between state high school graduates and out-of-state students. Given such limitations, we are using Texas-specific indicators in the near term but believe there would be value in aligning measures across states.

The data we want is not always available. Seamless, longitudinal education data is needed to understand the performance of all participants — students, teachers, and institutions — but isn't widely available. And although organizations such as the Bureau of Labor Statistics and the Texas Workforce Commission publish projections, data is available only at the occupation level, not the skill level.[49]

Available data also may not reflect the complexities of the changing labor market. Evolving factors such as gig occupations, in-demand skills and competencies, emerging industries and occupations, and automation risks are not uniformly captured in data. The Texas Tri-Agency Workforce Initiative has adopted the publishing of education and workforce outcomes data disaggregated by income, race, ethnicity, gender, and region as a state workforce development goal.[50]

However, they have given themselves until June 2024 to complete this work. Texas 2036 can help highlight the need to make these important datasets more comprehensive, relevant, actionable, and readily available.

Data on Texas teachers is limited. Teachers are the single largest in-school factor contributing to student achievement. However, limited publicly available data exists on important topics such as the quality of teacher preparation programs and up-to-date estimates of teacher shortages. Better data would help Texas to attract, develop, and retain high-quality teachers — which is critical to improving student achievement.

HEALTH AND HEALTH CARE DATA

Because of privacy concerns, it is difficult to evaluate health care system value. Data exchange is an important source of value creation in the health care system. The past decade has seen a consistent push for nationwide interoperability — the ability to exchange, access, and edit data — as a way of promoting value in the health care system.

At the same time, concerns about health data privacy are increasing. Health Insurance Portability and Accountability Act (HIPAA) regulations allow for electronic data sharing but also impose necessary barriers that protect patient privacy. However, particularly cautious interpretations of these regulations can make it needlessly difficult for health care organizations to use data efficiently.

There is currently little public access to data on health care costs at the state level, a critical piece of the value equation. One of the most useful measures of state health care spending estimates is published inconsistently by the Center for Medicare and Medicaid Services (CMS) and relies on a combination of survey data and billing rates to make projections.[51] More timely data releases could help to spot rising health care costs.

Recent federal and state laws requiring transparency in prices from both hospitals and insurers, as well as the recent establishment of a Texas All-Payor Claims Database (APCD) can shed light on true health care costs.[52]

Despite these promising advances, challenges remain – hospital compliance has been uneven, the insurer files are enormous and complex, and there are restrictions on how the data in the APCD can be used and reported.

Publicly available data has not kept pace with innovations in health care delivery. Telemedicine and other means of health care are improving access to care for Texans across the state. The COVID-19 pandemic has necessitated the development of innovative forms of delivery that are becoming more widely adopted by providers and patients. Yet Texas does not adequately track access to and participation in such innovative forms of care, meaning we know little about the state's changing health care landscape.

INFRASTRUCTURE DATA

Digital connectivity indicators could be improved with a more nuanced methodology.

The current Federal Communications Commission broadband data likely overestimates the population with high-speed Internet coverage.[53]

The data uses census blocks as the unit of measurement, which assumes the entire census block can access high-speed Internet service if at least one customer does.

Additionally, Census data on broadband Internet subscriptions does not capture the speeds received by respondents.[54] Texas-based organizations such as Connected Nation Texas have filled the gap in this state, but we do not have state-comparable data of similar quality. Filling this data gap is critical to tracking progress.[55]

Detailed transportation data should be available across all states. The Texas A&M Transportation Institute has compiled detailed data on road congestion, speed, and costs across metropolitan areas.[56]

But this kind of detailed analysis is not always available nationwide, limiting our ability to compare Texas to other states and track relative progress.

NATURAL RESOURCES DATA

Water quality monitoring may be incomplete or underreported. The Environmental Protection Agency has stated that the existing data may not reflect all monitoring done at the state level. Furthermore, not all water systems reported data or received site visits. Some water systems in Texas fail to conduct monitoring or submit required samples to laboratories. Even so, the federal Enforcement and Compliance History Online database represents the most complete and detailed dataset publicly available.[57]

JUSTICE AND SAFETY DATA

There are many organizations supporting vulnerable and at-risk Texans across the public, private, and non-profit sectors. Better data-sharing practices would allow organizations to better serve the needs of Texans in crisis, but technological limitations, data privacy restrictions, and the lack of interoperable data systems prevent clear access to necessary data.

For instance, Texas' Department of Family and Protective Services currently uses an outdated and often inaccurate data system, the Information Management Protecting Adults and Children in Texas (IMPACT).

Texas had the opportunity to upgrade our data system to the new federal standard - a Comprehensive Child Welfare Information System (CCWIS) - by 2018 but chose to remain with IMPACT.[58]

Because the cutoff was missed, the current IMPACT system has less federal funding and IT support to integrate with new technologies.

At this point, an entirely new CCWIS-compliant system would need to be built. But Texas should not let a sunken cost fallacy, where several million is thrown at the problem every two years, get in the way of innovation and improved care of children in the state's care.[59]

Across the country, data on the criminal and civil justice systems and their outcomes are full of gaps. This is partly due to the sheer numbers, with thousands of counties — each often with multiple agencies — storing data in their own siloed databases.

Even in the best-case scenario, where information is available from law enforcement, judicial, and post-conviction systems, the data is likely aggregated and disconnected. To make matters worse, standard definitions of key concepts do not exist in Texas or across the nation, which makes data classification and access extremely challenging. As a result, it is difficult to evaluate the performance of justice systems in any kind of comprehensive manner.

For example, to monitor potential disparities among motor vehicle stops by Texas peace officers, law enforcement agencies are required to submit annual, aggregate, bivariate figures on stops conducted in their respective jurisdictions to the state's regulatory agency, the Texas Commission on Law Enforcement.[60]

However, a lack of clear reporting instructions or a data dictionary leads to inconsistent reporting from agencies, and a lack of capacity among state regulators means glaring errors in reporting go uncorrected. Even if the quality issues were resolved, the lack of key variables on stops, demographics, and officer behavior, and the inability to conduct multivariate analyses means the utility of the data is minimal at best.

In the judicial context, we have just enough data to know that courts across Texas have seen their backlogs dramatically increase since the pandemic, but we know very little about specific local circumstances.

To address some of these data gaps, the Texas Criminal Justice Coalition has begun posting data on court dispositions in Dallas and Harris counties to an online dashboard, which offers details on key disparities and trends among specific judges for public stakeholders and policymakers to explore.[61]

Along the same lines, the Texas Judicial Council – the state's policymaking body for the judiciary – has called for the collection of case-level statistical data from district and county courts across civil and criminal dockets. But this is just a first step in tracking and analyzing usable data throughout the judiciary.

GOVERNMENT PERFORMANCE DATA

There are data problems across government functions. Some datasets are not linked longitudinally or across service populations. Moreover, datasets often include self-reported agency data without quality checks.

The Texas Department of Information Resources (DIR) tracks the progress of state agencies toward modernizing data management and upgrading IT security, but measures this progress with self-reports from agencies rather than with objective audits of data systems.[62]

These drawbacks limit the ability of policymakers and public stakeholders to assess public services.

In many cases, significant data gaps emerge because legacy technology systems cannot interact smoothly with new business and data formats.

A 2020 report from the Texas Department of Information Resources (DIR) estimates that the cost to replace legacy systems and improve cybersecurity vulnerabilities would total about $898 million.[63]

This is an 86 percent increase over the 2018 estimate of $482 million, suggesting that the state is falling further behind in efforts to modernize IT systems.

Texas Capitol

Dallas, Texas

WAYS TO USE THIS FRAMEWORK

The Strategic Framework, with its composite goals and metrics, is a robust resource for Texas policymakers and leaders as they consider what it will take for Texas to be a place of shared opportunity for decades to come. The structure of the framework also allows all Texans to consider what it might take to ensure the long-term economic prosperity and quality of life of our state. Therefore, we encourage you to consider these questions as you read this document and use the Strategic Framework website to see where Texas stands on each goal.

TEXAS 2036 | STRATEGIC FRAMEWORK

1. **What would it mean for Texas, and for individual Texans, if our state achieved these goals? What would it mean if it failed to?**

2. **Where is Texas doing better than I thought it was? Where is it doing worse?**

3. **Am I holding the elected officials who represent me accountable for ensuring that the state, and even my community, is making progress on these goals and metrics? How should these goals shape how I vote?**

4. **How is this information helpful to me? How should these goals, and Texas' current progress towards them, shape how I use my professional, civic and personal networks and engagements to influence action on them?**

5. **What are ways that I can help Texas achieve these goals?**

METHODOLOGY

The development of the second edition of the Strategic Framework involved engaging with content experts on the selection and prioritization of metrics, selecting the most relevant data available from a variety of public sources, developing an online platform to track Texas' progress through data visualizations, and creating a data ingest system to keep the Strategic Framework platform up-to-date and adaptable to changes in the Texas data landscape.

MOTIVATION

We began in the summer of 2021 with a plan to update the values of the metrics in the original Strategic Framework. That included a review and calculation of over 60 metrics across our six policy areas. As part of this process, we had meetings with our internal policy team and gave presentations to our external Policy Advisory Groups to get feedback on these metrics.

This process highlighted the challenges of tracking rapidly changing data points within a static document. Moreover, some goals had no metrics while others had several, making it difficult to track Texas' status and progress toward improvement. With generous support from the Michael and Susan Dell Foundation, we undertook a more substantive process to revise and reorganize our goals, metrics, and data sources.[64] We developed The Pyramid (see Executive Summary) as our theory of action: We set priorities among our metrics to more clearly show how we are operationalizing our goals and included leading indicators that serve as benchmarks and allow us to course-correct as necessary. This reorganization allows us to align goals more closely to data and policy work, curate best-available data metrics to operationalize goals, and create an interactive platform to track and update data regularly.

METRIC CRITERIA

We set clear goal standards: Goals have to fit well within a policy pillar, be amenable to policy change at the state level, and be quantifiable. An important rule is that all goals have existing data to represent them. Goals that did not have relevant publicly available data were revised or replaced.

As an organization focused on grounding policy in data, we also set extensive criteria when selecting metrics to operationalize the goals:

- **Relevance -** We focused on indicators that can be influenced by policy at the state level, and that have broad appeal among state policy actors (legislature, state agencies).
- **Comparability -** Where possible, we prioritized metrics that are comparable across states, particularly our 11 peer states. Sometimes, the most relevant metric is one that is specific to Texas; in those cases, we tried to source a different metric to serve as a state comparison.

Still, six metrics do not have any state comparison data available.

- **Availability -** We selected metrics that are expected to be updated regularly and frequently, to show the most up-to-date data and track progress over time.
- **Accessibility -** We selected publicly available data so that we could access the data easily, and to allow users to verify sources. Many data sources were available through API, data mining, or other automated data science methods.
- **Source Reliability and Reputation -** Where possible, we prioritized data from government agencies, academic institutions, and nonprofits. Our goal was to draw from nonpartisan sources with a reputation for providing objective data with clear methodologies.
- **Measurement -** We prioritized metrics with raw values (e.g., percent living in a Health Professional Shortage Area), or composite scores with clear methodologies and specified dimensions (e.g., Prosperity Index), as opposed to state ranks.[65]

  Data sources providing modeled estimates should publish standard errors or confidence intervals. All data sources should clearly explain data collection and analysis.
- **Disaggregation -** Where available, we show disaggregations among key sub-groups (e.g., age, race/ethnicity) and sub-state geographic breakdowns (county, MSA). These provide comparison points to ensure that progress is available for all Texans, and are consistent with our cross-cutting themes.

PROCESS

We engaged in more than 30 meetings with our internal policy team for each pillar to rethink our goals and assess metrics. We also consulted with external stakeholders and subject matter experts (such as the Texas A&M Transportation Institute) to source data and develop metrics. We reworked goals to emphasize key constituencies (e.g., individuals and systems within the Health pillar), revised titles to describe the focus of the goal more accurately, and split or combined goals as necessary to reflect organizational priorities. We previewed this process for our Board of Directors at our Spring meeting in March of 2022, and the Board approved the final slate of goals at our Fall meeting in September of 2022.

Once our team had a substantial list of goals, we worked to source data metrics to operationalize those goals. An important requirement for this revision is that we have, at minimum, one Primary Indicator and one Leading Indicator for each goal. We sourced data from federal and state government websites (U.S. Census, Texas Comptroller), organizations that rank metrics across states and other geographic areas (America's Health Rankings), and organizations that create indices from multiple metrics (Legatum Institute Prosperity Index).[66]

In the end, the Strategic Framework tracks over 150 metrics from 80 different sources.

Some data come from organizations that track, compile, and analyze large numbers of metrics across many topic areas (such as County Health Rankings and Roadmaps, and Child Trends).[67] While these data do have an original source, we cite the provider from which we draw the final data metric, and users can track back from that provider to find the original source of the data.

Some metrics were not available in the calculation we wanted to track (counts rather than population rates) or were not aggregated to the state level. In those cases, our team created custom metrics from publicly available sources for the platform, with a link to the original source data. For example, FEMA presents indices of Expected Annual Loss, Social Vulnerability, and Community Resilience at the county level.[68] For our Crisis Readiness goal under Government Performance, we calculated measures of the percent of a state population that lives in counties with high Expected Annual Loss and Social Vulnerability and low Community Resilience scores.

PLATFORM DEVELOPMENT

Once our list of data sources was compiled, we set about creating the Strategic Framework website (framework.texas2036.org). We contracted with January Advisors, a data science consulting firm, to develop the platform.[69]

An important technical requirement was progress bars to track our 36 goals. These bars show whether Primary Indicators were improving or worsening over the two most recent years of data.

Metrics with only one year of data uploaded to the platform do not yet have a progress bar, but one will automatically appear once at least two years of data are available.

We also developed an Indicators Dashboard, organized by each goal. Each goal page shows the pyramid identifying the Primary and Leading Indicators for this goal.

Our default visualization is a line chart showing trends over time for each Primary and Leading Indicator, with additional buttons for disaggregations for key subgroups or county-level data.

In addition, we show a separate tab for state comparisons, with a heat map and chart showing how Texas stands up against other states, particularly our 11 peer states.

Downloadable info sheets are automatically updated along with the data on the platform.

Underlying the data platform is a data ingest system that compiles and automatically updates the source data.

This system is powered by the Texas 2036 Data Lab (datalab.texas2036.org), a data repository of more than 500 state, national and global datasets.

Once the Data Lab has ingested the data from the original source, it can automatically update, structure, and manage the data into the format necessary to be uploaded to the Strategic Framework. On the platform, each metric includes a link to the dataset on the Data Lab as well as a link to the original source.

FUTURE UPDATES

The Texas 2036 Strategic Framework is a living document that sets an aspirational vision for the state of Texas to be the best place to live and work by 2036.

We expect Texas to grow and change over time, and the Strategic Framework is built to do the same. As new and better metrics emerge, the platform can easily ingest these metrics and calculate Texas' progress and rank relative to other states.

Measurement of existing metrics may change or additional years/ disaggregations can become available; these changes can be easily incorporated into the existing platform.

Future updates may include setting targets for where Texas should be in 2036 on the Primary Indicators, as well as interim targets to track progress.

Texas Coast

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Texas 2036 is a non-profit organization building long-term, data-driven strategies to secure Texas' continued prosperity for years to come. We engage Texans and their leaders in an honest conversation about our future, focusing on the big challenges. We offer non-partisan ideas and modern solutions that are grounded in research and data to break through the gridlock on issues that matter most to all Texans. Smart strategies and systematic changes are critical to prepare Texas for the future.

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