

RESEARCH REPORT

SEPTEMBER 2020 | REPORT NO. 20-5

ANNUAL ENROLLMENT SUMMARY 2019-20

Spring enrollment experienced significant declines, but annual enrollment changes were less severe.

It is commonly said that two-year institutions' ability to rapidly skill-up displaced workers generally leads to higher community and technical college (CTC) enrollment during economic downturns. This is evidenced by similar, though lagging, trends between changes in unemployment rates and two-year college enrollments over the last two decades (see Chart 1). So, when governments implemented mitigation measures intended to control the spread of SARS-CoV-2, CTC stakeholders, who had been witnessing consistent enrollment declines since the Great Recession, began considering the effects of unprecedented unemployment benefits claims and substantial increases in unemployment rates caused by these prevention measures. However, those who were hoping that data for the spring quarter, which roughly coincided with the implementation of business shut-downs and stay-home orders in Washington state, would shed light on future enrollment encountered a less-than-clear picture. Complicating this picture were factors as unusual as the virus itself – extraordinary federal fiscal stimulus, diverse conditions across the state and country, and continued uncertainty for what lies weeks or even days ahead.

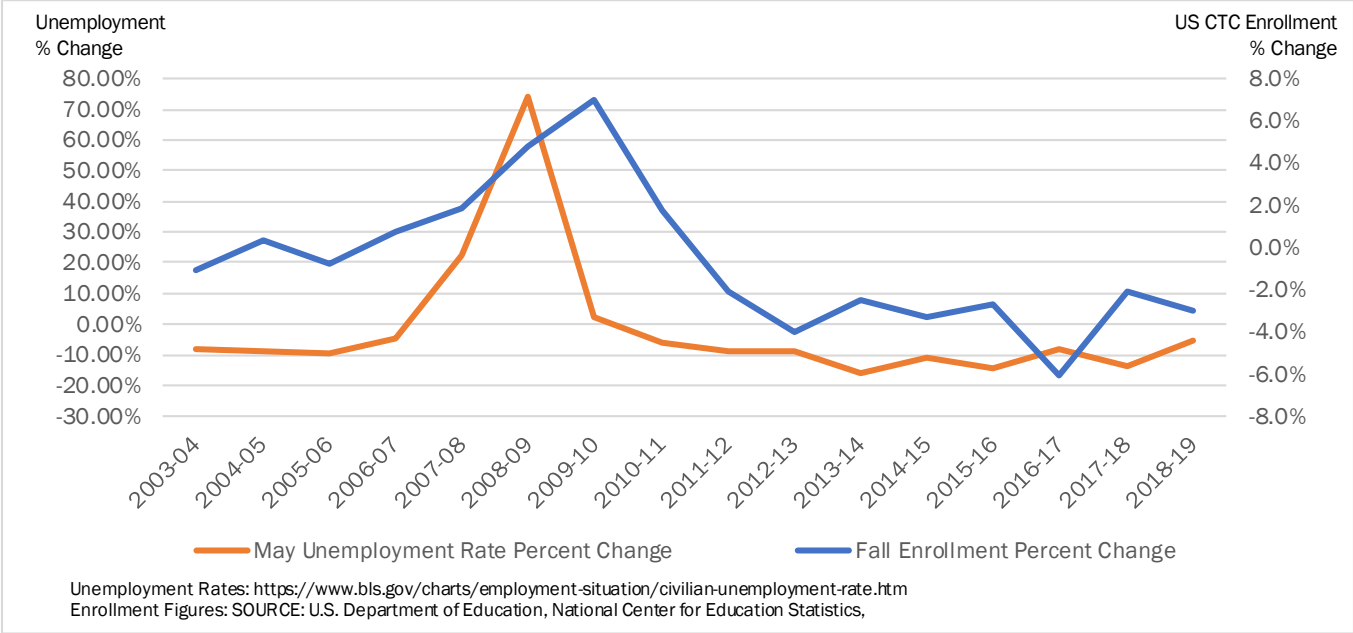
Spring headcount across the system was down 19.4 percent compared with spring 2018-19, while FTE enrollment declined 12.1 percent. As discussed later on in this paper, these declines affected student populations differently. Some programs even experienced increased enrollment under these challenging circumstances, shedding light on opportunities to improve enrollment but also highlighting challenges to the state's most vulnerable populations. Despite dramatic shifts in the spring, annualized enrollment declines were less severe. Washington's CTCs enrolled 337.6 thousand students in academic year 2019-20, down 7 percent from the prior year; FTE enrollments were 161.9 thousand, down 5 percent year over year. Further, certain positive trends continued in academic year 2019-20, such as a higher proportion of students taking more credits each year, giving way to opportunities to close achievement gaps as the system seeks better retention and completion.

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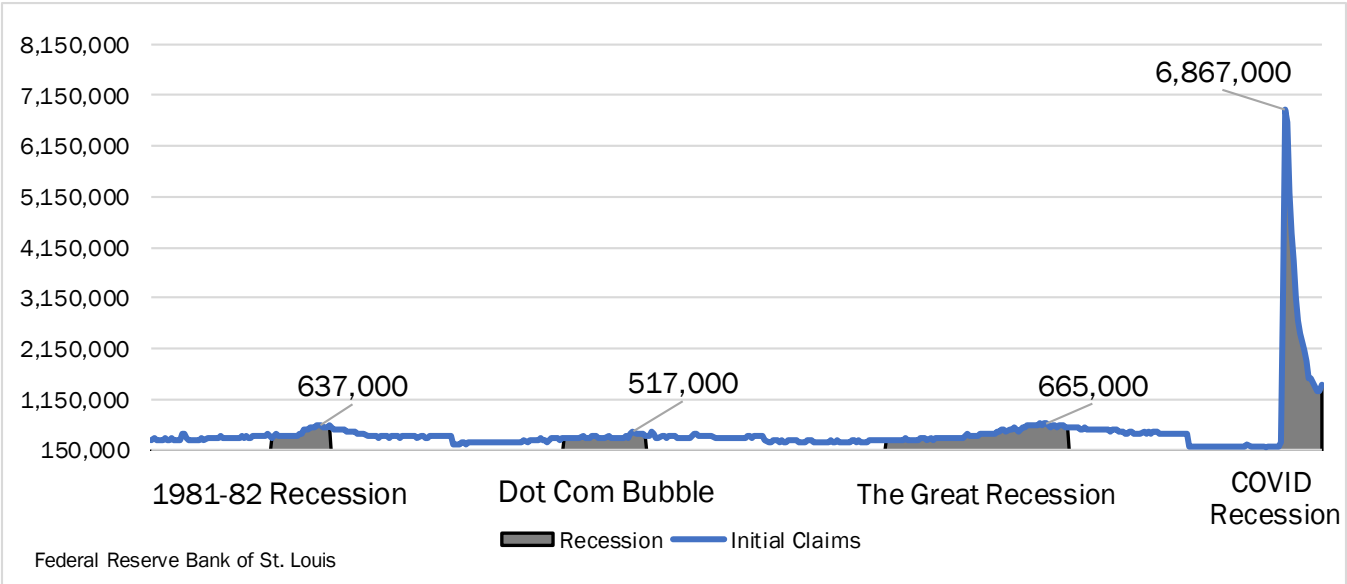
Chart 1. US Community Colleges: Fall enrollment change vs May US unemployment rate change



Employment conditions

One of the most commonly cited leading indicators of economic turmoil is the count of weekly initial unemployment claims. Previous recessions saw a gradual run-up to a peak in claims late in the cycle, usually between 500 thousand and 665 thousand weekly initial unemployment claims. The conditions of the current recession, of course, so far have caused an opposite pattern, with a significant, immediate run-up in weekly initial unemployment claims, followed by a rapid decline, then a gradual tapering in the weeks that followed. More recently, claims have plateaued around 1 million per week, still well above historic highs.

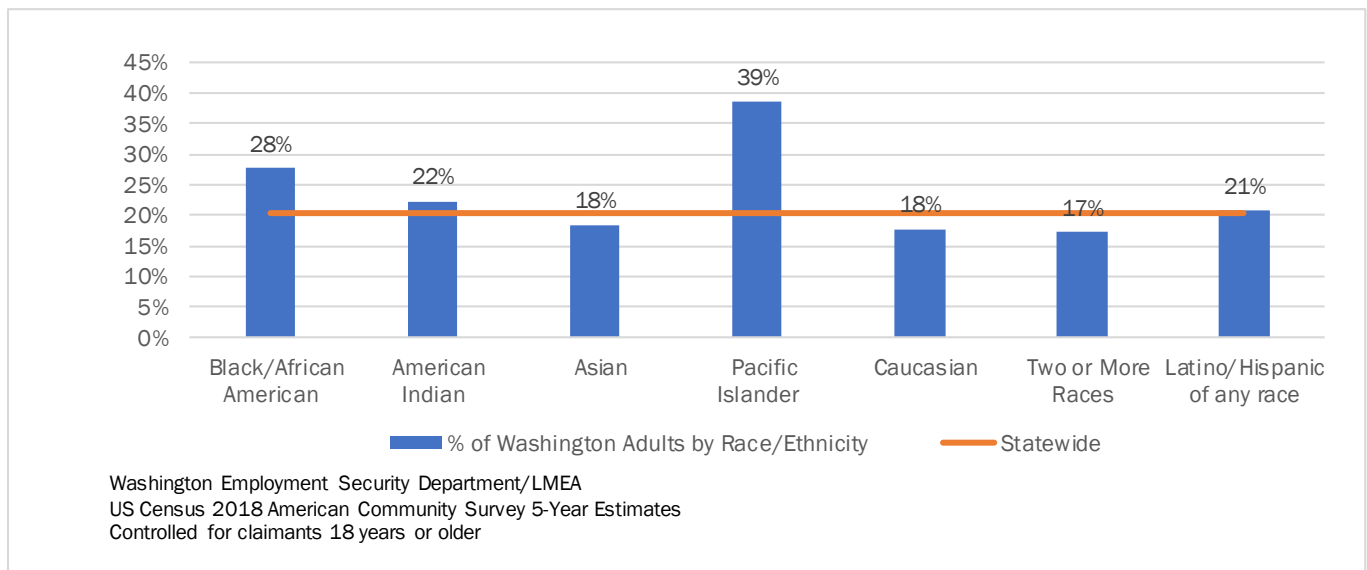
Chart 2. US initial unemployment claims during recessions – comparison to the COVID Recession



The unique circumstances of virus containment measures make unemployment data a less useful predictor of future enrollment demand than in prior recessions. Despite the significant runup of initial claims, stakeholders will need to continue to assess the employment environment and ask critical questions about workforce demand. Are layoffs and furloughs a permanent fixture for employers? Or are most workers facing temporary job insecurity that will ease as employers sort out safe operations and re-opening strategies? Which industries are facing long-term or permanent cutbacks and how can colleges most effectively retrain those workers for new industries? Finally, what does recovery look like for the diverse populations community colleges serve? CTCs and state policy makers will need to continue to assess these points in the months and years ahead rather than assume future enrollment growth will be a repeated fixture of this recession.

The pandemic has elicited concerns for populations already underserved who are likely to be disproportionately impacted by the virus, and job insecurity is no exception. In order to understand how different populations were affected around the end of the academic year, Chart 3 compares the percent of adults in Washington state who submitted an initial unemployment claim between March 1 and July 18 across race/ethnicity. The chart limits claimants to those 18 years of age and older for a better comparison to the potential CTC student population. According to the Employment Security Department, 1.2 million Washingtonians over the age of 18 filed an initial claim in this time period, or about 20.3 percent of the state adult population¹ (5.7 million). Note, however, this figure is higher for Black/African American (28 percent), American Indian (22 percent), and Pacific Islander (39 percent) populations.

Chart 3. Washington initial unemployment claimants compared with state population over age 18 – Race/Ethnicity (March 1-July 18, 2020)

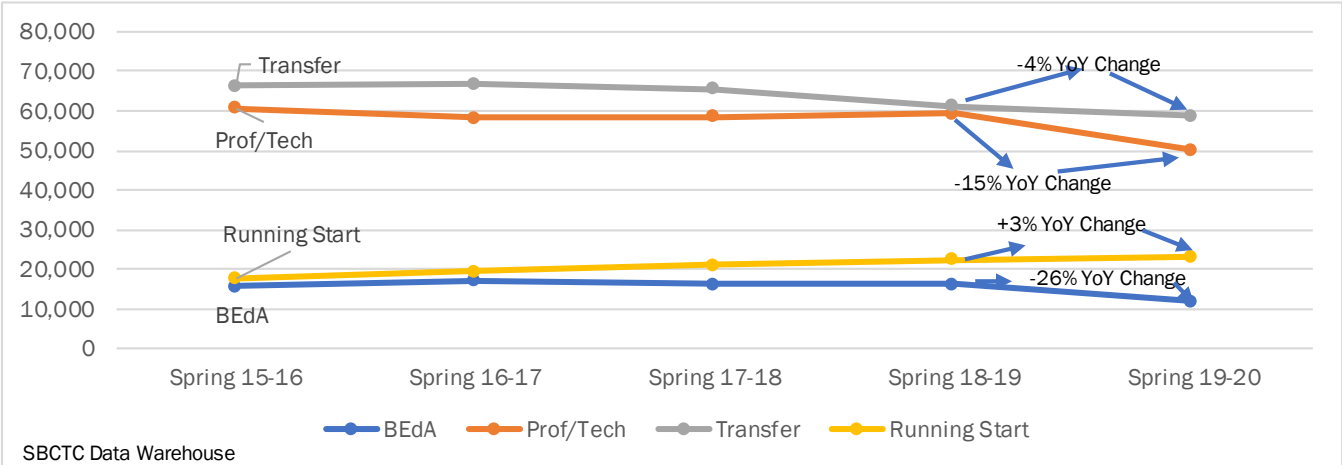


The substantially higher percent of Pacific Islanders filing unemployment claims may be influenced by several factors. First, this population tends to be concentrated around the northwestern part of the state, in

¹ Not to be confused with the unemployment rate, which is a measure of people who are without work, are available for work, and have taken steps to find work, compared with the seasonally adjusted labor force.

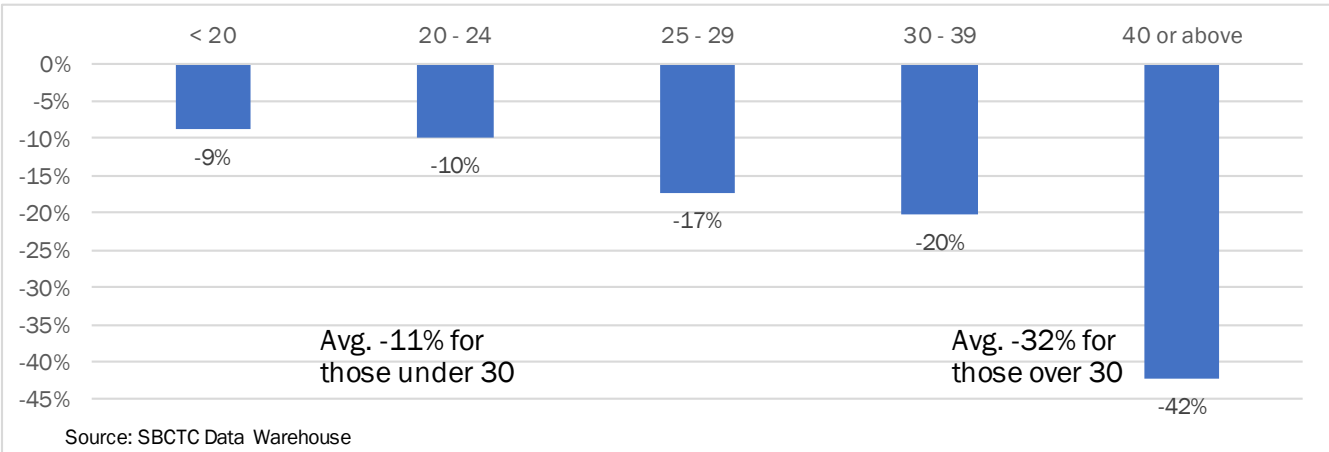
12 percent compared with the prior spring. Some programs' enrollment declines were more severe than others. Basic Education for Adults (BEaA), for example, saw a 26 percent drop in spring-to-spring FTE enrollments; prof/tech programs saw a 15 percent drop. Meanwhile Running Start and transfer education carried forward existing trends, with the former gaining 3 percent in FTE and the latter declining by 4 percent, similar to prior year declines. It is likely that, as instruction shifted online in the face of stay-home orders, the ability to pivot to a remote learning environment was far more practicable for Running Start and transfer education, explaining the relatively minimal impact faced by these mission areas.

Chart 6. Selected program spring FTE enrollment, 2015-16 to 2019-20



The more significant enrollment changes between transfer and prof/tech education also can be seen in students' age. Transfer students tend to be younger than prof/tech students, with 84 percent of transfer students in 2018-19 under the age of 30, compared with 57 percent for prof/tech enrollees. In spring 2019-20, enrollment of those over the age of 30 declined 32 percent, while those under 30 saw an 11 percent decline. The year-over-year change in enrollment by age group as shown in Chart 7 illustrates this shift in the spring quarter.

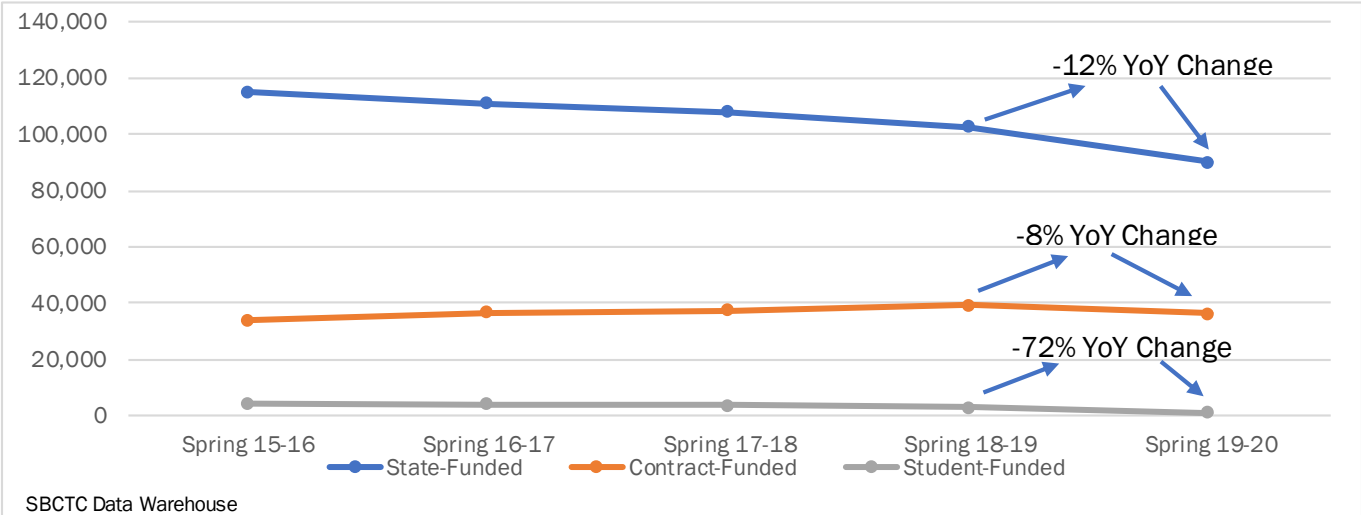
Chart 7. Spring 2018-19 to spring 2019-20 headcount percent change by age group



Age again reveals itself a factor when reviewing the substantial swings in enrollment by fund source. State-funded FTE declined in line with overall enrollment changes, dropping about 12 percent spring to spring. Contract funded FTE were down 8 percent. Student-funded FTE, on the other hand, were down 72 percent. It

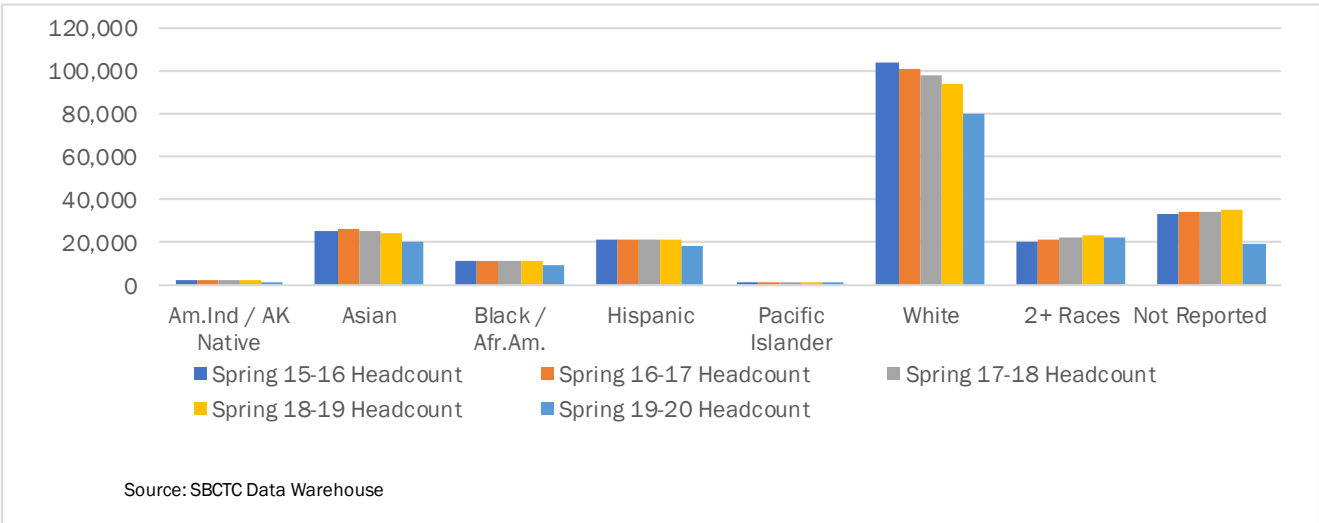
may be important to note; however, student-funded FTE comprise a significantly smaller portion of the student population. Student-funded enrollments tend to be older than contract- or state-funded students – 68 percent of self-funded students are over the age of 30, compared with 15 percent for contract- or state-funded students.

Chart 8. Spring 2015-16 to spring 2019-20 FTE by fund source



American Indian/Alaska Native and Hispanic students experienced the most pronounced spring-to-spring enrollment declines, -22 percent and -17 percent respectively. Note that the number of students with race/ethnicity “not reported” declined significantly as well, so some changes in headcount by race/ethnicity may be masked by the higher number of students with a reported race or ethnicity.

Chart 9. Spring 2015-16 to spring 2019-20 headcount enrollment by race/ethnicity



Student gender spring to spring does not appear to have changed as much as other metrics discussed in this report, such as mission area or age. In spring 2018-19, 38 percent of students reported as female, 25 percent male, and 37 percent did not report. This compares to 41 percent female, 22 percent male, and 37

percent not reporting in spring 2019-20. One noteworthy point in student gender data is the constantly increasing percent of students with gender “Not Reported” over the last 10 years. In spring 2009-10, 22 percent of students did not report a gender, compared with the 37 percent this spring.

Spring Enrollment Summary

While the muddled environment CTCs were operating in during the spring quarter reveals a murky spring enrollment picture, a few data points stand out, presenting both opportunities and challenges. First, not all mission areas experienced the same rate of enrollment decline. As higher education institutions grapple with re-opening policies, CTCs’ affordability and accessibility can be an attractive option for academic program students who may benefit from CTCs’ transfer programs. The same can be said for high school students who may benefit from Running Start, particularly as more educational programs go online. The ability for these two mission areas to sustain and grow in an online environment is evidenced in their relatively stable enrollment in the spring quarter.

The pandemic, while so far demonstrating a relatively moderate effect on transfer and Running Start enrollments, appears to have significantly challenged the professional/technical and BEdA mission areas. The drop in professional/technical and BEdA FTE is likely a function of the fundamental challenges faced by these programs, and the populations they serve, to transition to a remote learning environment. State Board for Community and Technical College staff worked with state-level decision-makers to mitigate this impact during the spring quarter, particularly for industries and job areas deemed essential and stressed for workers. Still, these programs will continue to require additional supports moving forward to dampen the effects of the pandemic as the state looks to re-open and recover from the pandemic.

Academic Year 2019-20 Enrollment

Although spring enrollment was an outlier, spring quarter enrollment tends to be lower than fall and winter quarters under ordinary circumstances. Pre-pandemic quarters smoothed out annual enrollment figures, with 337.6 thousand students enrolling in 2019-20 and 161.9 thousand FTE. These represent year over year declines of 7 percent and 5 percent, respectively. For context, prior to the challenges brought by the spring quarter, colleges were on track to enroll 20 thousand more students, about 357.5 thousand, based on the previous five-year trend.

Chart 10. Total headcount from 2010-11 to 2019-20

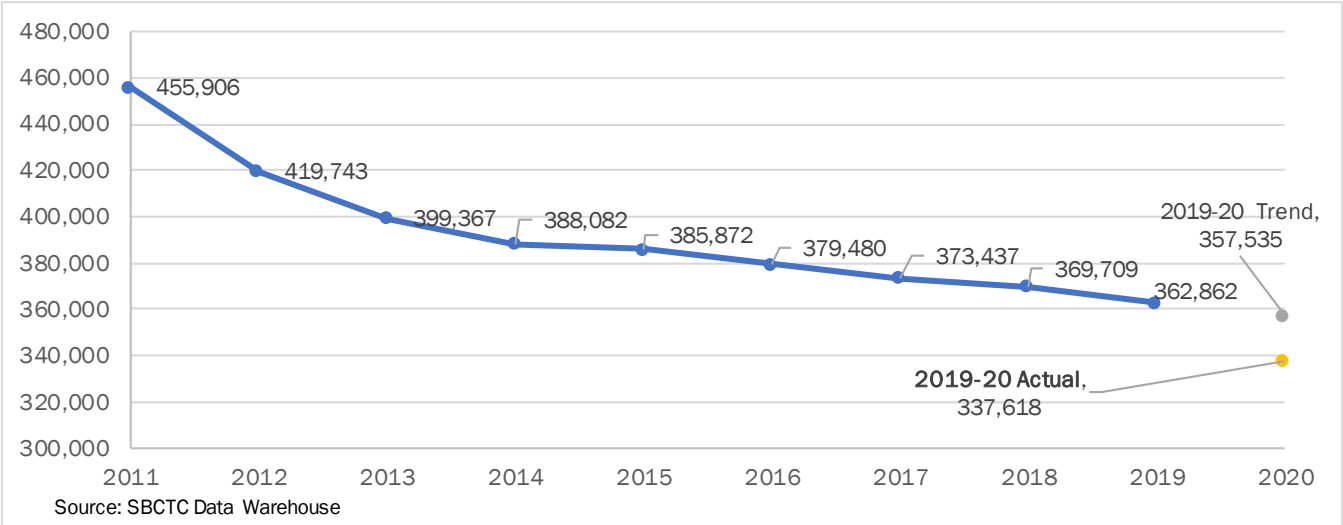
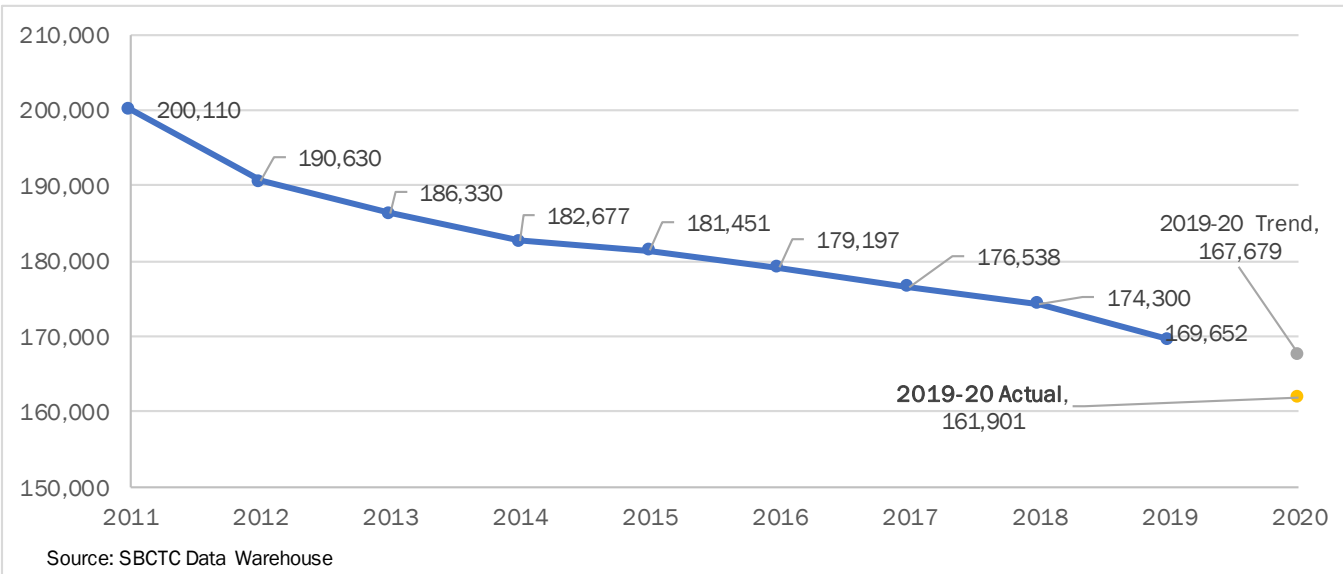
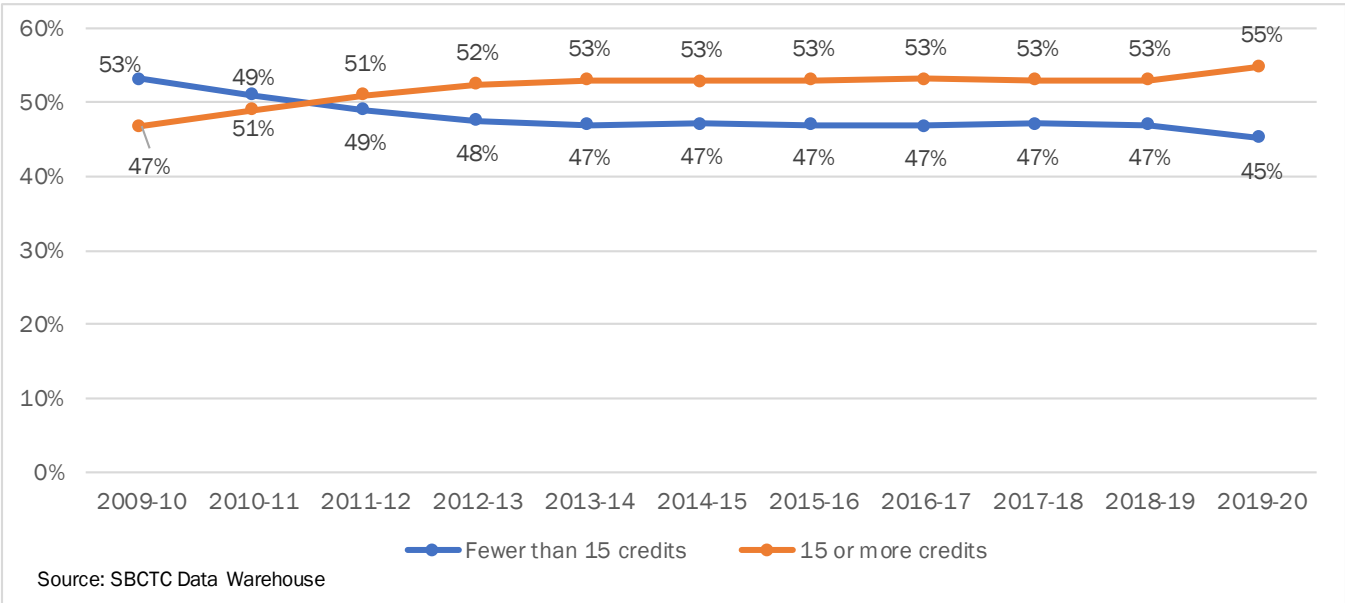


Chart 11. Total FTE from 2010-11 to 2019-20



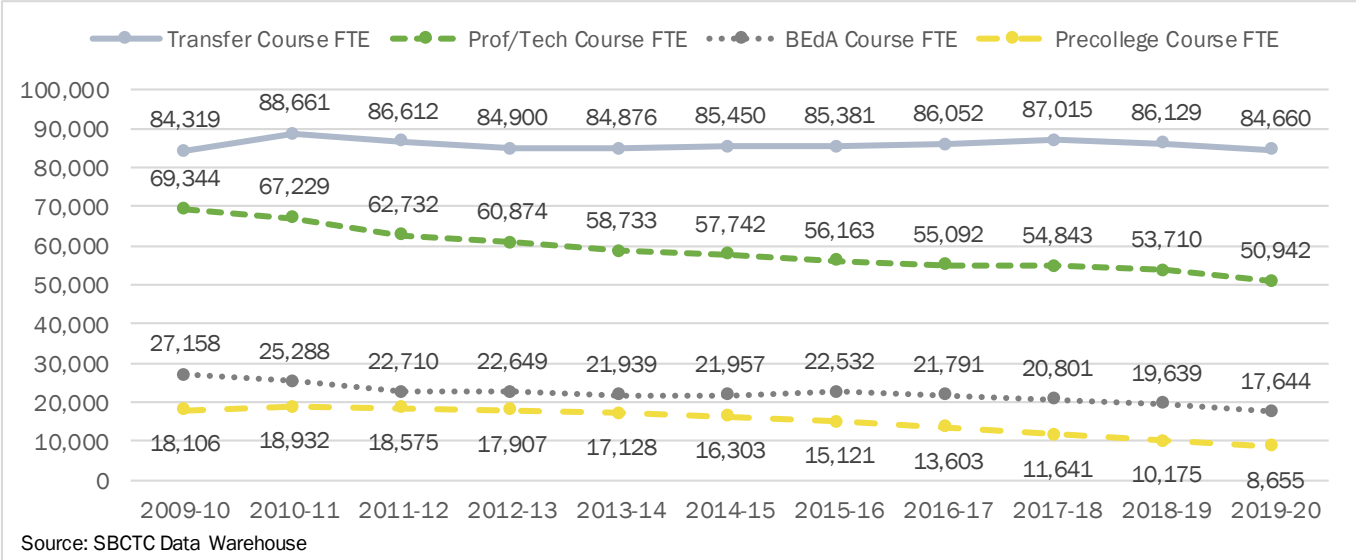
The steeper decline in headcount compared with FTE enrollment is a function of current students enrolling in more course credits. Starting in academic year 2011-12, a higher proportion of students have been taking 15 or more credits. This remained relatively stable over the last several years, but appears to have accelerated in 2019-20, with 55 percent of students at CTCs taking 15 or more credits.

Chart 12. Headcount by credits enrolled



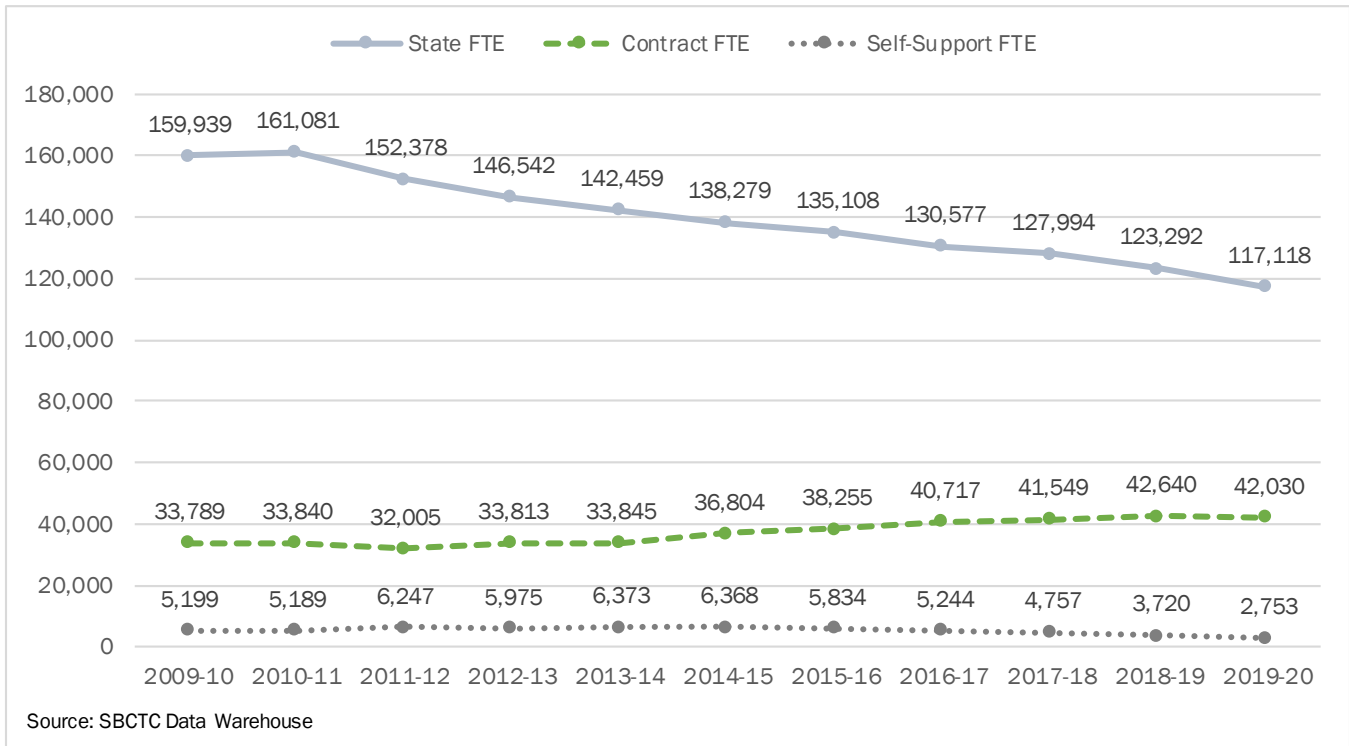
As seen in spring quarter enrollments, transfer course FTE in 2019-20 were more consistent year to year than other mission area course FTE. Precollege FTE continued to slide, dropping below 10 thousand. This decline is likely attributable to a re-thinking of educational programs and course structures rather than a lack of need or demand for these courses.

Chart 13. Annual FTE by course type



Annual FTE by fund source revealed nearly flat contract-funded FTE, a 5 percent decline among state-funded FTE (consistent with annual overall FTE changes), and a 26 percent decline in self-funded FTE. Running Start students are included in contract-funded FTE, which at least partially explains the relatively small change among this fund source.

Chart 14. Annual FTE by fund source



Enrollment continues to increase for two programs

Applied baccalaureate and Running Start FTEs were positive year-over-year, with applied baccalaureate increasing 19 percent. Running Start’s more modest increase of 3 percent is lower than in prior years, but still noteworthy given the headwinds colleges faced this year. eLearning FTEs were likely to increase in 2019-20, but the shift to online-learning in the spring quarter, combined with variance in how colleges coded courses as they shifted online, makes the change in FTEs difficult to objectively analyze.

Table 1. FTEs enrollment for selected program areas 2014-15 to 2019-20

Total FTE by Program (Source: SBCTC Data Warehouse)	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	1 Yr change
Applied Baccalaureate	1,036	1,627	2,307	3,138	3,759	4,455	19%
Apprenticeship	2,797	3,292	3,505	3,827	4,419	4,112	-7%
Basic Education for Adults	19,448	19,898	18,994	18,072	16,751	15,113	-10%
Basic Food Employment and Training	6,381	6,736	6,120	5,579	5,278	4,799	-9%
Corrections	3,811	3,545	3,636	3,558	3,411	3,056	-10%
eLearning FTES	44,990	47,443	50,068	54,690	57,630	70,052	22%
I-BEST	2,178	2,493	2,661	3,031	3,210	3,054	-5%
International	15,380	14,922	14,154	13,056	11,385	9,530	-16%
International Contract	7,253	7,314	8,573	8,203	7,787	6,506	-16%
Running Start	16,371	18,335	20,207	21,992	23,447	24,207	3%
WorkFirst	3,370	2,823	2,453	2,223	1,994	1,593	-20%

Work Retraining	6,751	7,206	7,297	6,843	7,045	6,958	-1%
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Enrollment for select demographic groups

Demographic trends have been similar for the past few years, with little change in female students (56 percent), new students (28 percent), full-time students (46 percent), veteran or active duty students (3 percent), and students with a reported disability (4 percent). Students over the age of 25 declined in 2019-20, as noted earlier. The percent of students receiving need-based aid has recovered in recent years, and may continue to do so as the state implements and promotes the Washington College Grant.

Students of color and historically underserved students of color continue to increase as a percentage of total student population, comprising 49 percent and 31 percent of students in the system, respectively. Hispanic or Latino students account for much of this growth, with consistent enrollment year over year despite system-wide total enrollment declines. Native Hawaiian or Other Pacific Islander students are the only race/ethnicity group that experienced an increase in students in academic year 2019-20, up 2 percent. Finally, the share of students with children or other dependents is mixed year to year. This field relies on student-reported data, and a significant percentage of students do not report a family status. In 2019-20, of those who did report, 27 percent indicated they have children or dependents.

Table 2. Percent of total headcount for select demographic groups 2014-15 to 2019-20

% of headcount by studentgroup (Source: SBCTC Data Warehouse)	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Age 25 and over	54%	54%	54%	54%	53%	51%
Female	54%	54%	54%	55%	55%	56%
Students of color	44%	44%	46%	47%	48%	49%
% of headcount by studentgroup (Source: SBCTC Data Warehouse)	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
HU students of color	27%	28%	29%	29%	30%	31%
With children or other dependents	27%	26%	25%	26%	25%	27%
With reported Disability	3%	3%	4%	4%	4%	4%
Veteran or active duty	4%	4%	4%	4%	3%	3%
Received need based financial aid (percent of students in aid eligible programs)	43%	40%	39%	37%	38%	40%
Enrolled full-time	46%	45%	45%	45%	44%	46%
New students	28%	29%	28%	28%	28%	28%



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