

# RESEARCH REPORT

JANUARY 13, 2021 | 21-1

## FALL 2020 ENROLLMENT: CHALLENGES AND OPPORTUNITIES

### Introduction

The COVID-19 pandemic has caused significant disruption to enrollment in higher education. The overall shut down of the nation in March of 2020 forced colleges and universities to shift their content delivery primarily online, a context which continued for the remainder of the 2019-20 academic year. As the pandemic stretched on through the summer, many institutions remained mainly closed to in-person instruction and planned to begin the 2020-21 academic year in remote operations.<sup>i</sup> The impact of these decisions on fall semester/quarter of 2020 enrollment was uncertain until preliminary census enrollment counts were gathered in late September/early October. The remainder of this report summarizes observations about enrollment patterns in the 2020-21 academic year both nationally and in Washington state, provides in depth analysis into the key components of enrollment challenges in fall quarter 2020 for the community and technical college (CTC) sector, and details possible opportunities for removing barriers to enroll more students and support those already in the midst of their studies.

Even before the COVID-19 pandemic, enrollment in community colleges has been on the decline ever since the peak observed following the Great Recession. Nationally, community college enrollment has declined steadily about 2 percent each year since 2010.<sup>ii</sup> The pattern of decline over the past decade is also reflected in Washington state (19 percent in total FTE), to the point where an enrollment task force was established in 2017 to come up with strategies to address the challenge. Researchers suggest the primary causes of the pre-pandemic enrollment challenge for community colleges include both strong economic conditions (low unemployment) and a robust state policy for dual credit. The Washington CTC system saw fewer students each year attending for technical programs as the economy recovered following the Great Recession. On the opposite side, the Running Start program (made up primarily of academic transfer courses) increased substantially (see Figure 1). Not only were more high school students taking college courses, but they were also taking a higher course load. This enrollment pattern means more students completing a considerable number of credits while still in high school and therefore more likely to enroll directly in a baccalaureate institution following graduation.<sup>iii</sup> By the end of the 2019-20 academic year, 21 percent of all academic associate degrees were earned by Running Start students.

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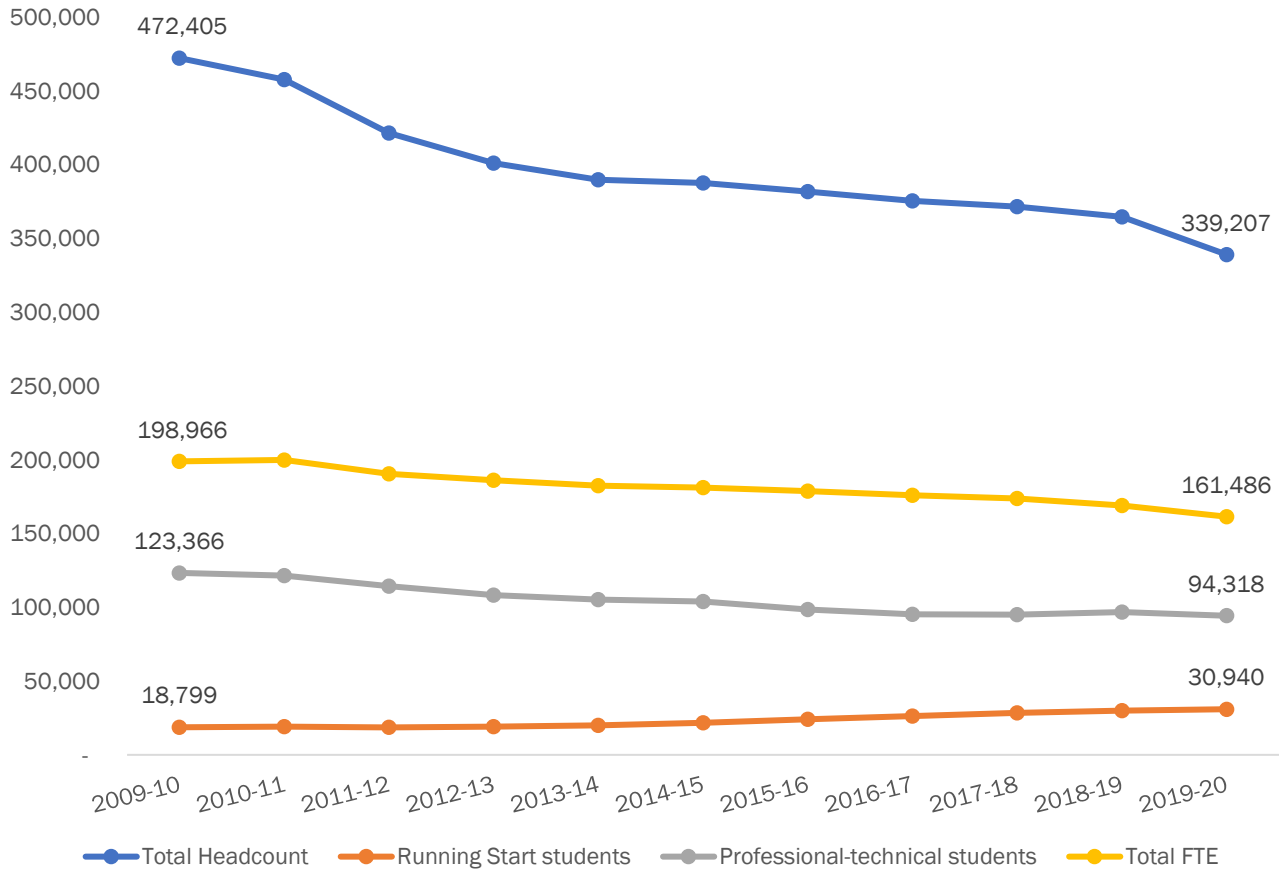
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Fig 1. Enrollment patterns WA Community and Technical Colleges



**Enrollment challenges caused by COVID-19**

As the fall quarter/semester of 2020 got underway, national attention shifted to college opening plans and enrollment as the leading indicator of how much of an impact the current state of the pandemic was having on students, families, and higher education operations. The research overall found differences in the enrollment impact for students of color, urban and rural areas, between the sectors (community colleges and baccalaureate institutions), and level of income.

A Community College Research Center (CCRC) study used data from the Census Bureau to assess enrollment attrition and which students were most likely to have cancelled their higher education plans.<sup>iv</sup> The analysis found 40 percent of households reported students cancelling their plans for community college. Fears from contracting and spreading the virus were part of the reason, as community college students are typically older and worried about not only caring for themselves if they got sick but others in their household. They are also more likely to have children not only to care for but that needed help navigating online school as K-12 has remained in remote operations. Students of color, specifically Black/African American and Hispanic/Latino, were also more likely to cancel plans to attend community college as well as recent high school graduates living in urban and high poverty areas.<sup>v</sup> A National Student Clearinghouse Research Center study found income level to be a significant factor in that there was a 32.6 percent decline in higher education enrollment for recent graduates from high poverty schools compared with 16.4 percent of low-

poverty (measured by Free and Reduced Price Lunch). Similar to the CCRC findings, the largest decline for low-income students was at the community college level.

Student and families' financial situations juxtaposed with COVID-19 has resulted in very different enrollment patterns between the community college and baccalaureate sectors. The usual pattern of community college enrollment growth in tandem with high unemployment has not been the reality with this unique form of a recession, nor has the assumption that students might stay closer to home and attend their local community college instead of attending a university. In the CCRC study, the cancellation rate of student's plans for baccalaureate attendance was half that of community college students at just 20 percent. The result is public community colleges have seen significantly larger enrollment drops (9.5 percent) than public baccalaureate institutions (1.9 percent) on a national scale, the majority being first-time students who did not enroll (nearly 20 percent fewer than in fall 2019).<sup>vi</sup>

Not only has enrollment at the baccalaureate institutions stayed steady, vertical transfer (community college to baccalaureate) is also up and reverse transfer down.<sup>vii</sup> It is not clear specifically why this is the case, although researchers suggest the possible easing of requirements for admissions and stronger marketing at the baccalaureate level as factors. Enrollment into baccalaureate programs is the ultimate goal for the majority of community college students so this could be viewed as an opportunity/path of least resistance for those motivated to complete a bachelor's degree. However, the students who are most likely to take advantage of this are those already well-versed in navigating higher education structures (non-first-generation, higher income, non-students of color) and therefore this pattern has the potential to create even larger disparities in equity in access. The impact of enrollment decline at the community college to the pipeline should be concerning to the baccalaureate institutions as it will inevitably impact their future enrollment levels as well.

For the traditional community college student, the family, financial, and health challenges created by the pandemic are tipping the scales of concern above and beyond enrollment in higher education. Community college students, who are more likely to be first generation, low-income, and students of color, have historically struggled navigating higher education, even in the best of times. Shifting educational delivery to a primarily online environment created a new barrier for some students without adequate internet or computer access. Most student support services also had to shift online, which makes navigation for those unfamiliar with higher education even more difficult. Couple these factors with job loss and the ensuing financial concerns, it appears that the people who will ultimately need education the most in order to recover from the multiple crises caused by the pandemic are right now just trying to survive, and taking on education in a constrained environment creates yet another challenge to overcome.

## Washington context

Washington state was considered the original epicenter of the pandemic in the United States, and the community colleges in the Seattle area were the first in the nation to close/shift to remote operations. Washington has taken a highly precautionary approach to reopening educational institutions as compared to other states, with all of the public institutions remaining closed to most in person instruction planned for the 2020-21 academic year<sup>viii</sup>. Further, K-12 has remain closed to full in person instruction with only a limited number of counties open for hybrid learning, and Governor Jay Inslee strongly recommended state agencies to remain in remote operations through June 2021. This scenario means that students and future students will likely continue to have barriers and challenges to enrolling that will play out through the remainder of the

academic year. These are planning assumptions that have been considered when estimating enrollment not only for 2020-21 but in the years ahead and the impact to the future pipeline.

### Enrollment forecast assumptions

A joint technical work group for the Caseload Forecast Council (CFC), including representatives from the K-12, CTC's, and four-year sectors has been working collaboratively to share data and discuss enrollment observations and predictions. This group is focused on College Bound (CB) and Washington College Grant (WCG) recipients, however that includes a large percentage of the students and potential students most affected by COVID-19, especially given that the WCG has a wider range of eligibility than the previous State Need Grant. With that in mind, this work provides a robust foundation for considering the impact of COVID-19 on enrollments in 2020-21 and 2021-22.

Across all sectors, the group identified the factors behind lower college and university enrollments in 2020-21. These align with the national scan outlined above, to include uncertainty about type of instruction and campus access, concerns about health risks, concerns about learning online, and ongoing economic uncertainty. However, all sectors assume that the 2021-22 will be 'operationally normal'. This presumes that either a vaccine is available and/or more is known about treatment options, and that the economy will have moved from "COVID-19 paused" to "recession recovery." The group projected total WCG enrollments (all sectors) to decline 6.9 percent for 2020-21 and recovery to growth of 3.6 percent for 2021-22. CTCs are expected to see the largest drop in enrollments in 2020-21, which compares to national data, but they are also expected to show the most dramatic recovery in 2021-22.

For the CTC sector, factors affecting the enrollment drop for 2020-21 include:

- New students age 18 to 21 are likely to participate at five to 10 percent lower than 2019-20 enrollment, including adjustments for any 'welcome mat' effect of the new Washington College Grant.
- Some students will take a pause because they do not like or do not have the resources for learning online, they missed or avoided financial aid deadlines due to uncertainty in spring and summer of 2020, or they are apprehensive about returning to campus.
- Enrollments of students over 25 are expected to drop based on uncertainty over online learning and campus safety, financial vulnerability, and family responsibilities.
- Apprenticeship and high-contact programs are expected to continue to show dropped enrollment because of COVID-19 restrictions on class sizes, student numbers, and safety concerns.
- With many high schools returning online in fall, Running Start (Washington state's largest dual credit program) is expected to show a three to five percent increase in enrollments. This could reduce state funded enrollments in 2021-22 and 2022-23 (and perhaps longer, given that most Running Start students complete significant credits of an Associate's Degree before graduating from high school).

Aside from the anticipated enrollment declines, students age 18 to 24 that are already enrolled are likely to persist, and some students further along their academic path (including CTC baccalaureate students) will want to complete their program. Students may be less likely to transfer out prior to completing Associate's degrees because of concerns about paying for four-year tuition, four-year campus safety, or avoiding online learning for upper-level classes. This may also be reflected in an increase in Applied Baccalaureate enrollments as some students may prefer the 'known environment' and ease of transition within the CTCs.

The forecast for 2021-22 for the CTC sector is more optimistic. As mentioned above, while CTCs showed the greatest drop in enrollments in 2020-21, they are expected to show the most dramatic recovery. The CTC system benefits from being ‘nimble,’ in that there are multiple enrollment points that enable students to start or reenroll in programs across the quarters, and initial enrollment can be expeditious. In addition, as on-campus operations resume, CTCs can provide a close-to-home and flexible option for students that are uncertain about or unable to relocate to a four-year campus. While the economic forecast does not anticipate long-term high unemployment as in The Great Recession, some industries most hard hit by the pandemic may struggle to recover, or may return to operations with lower or substantially different employment models. In these cases, by 2021-22 there may be an increase in enrollment from people who determine that they either can’t or don’t want to return to their jobs, and would prefer to retrain.

The forecast technical group included economic assumptions that help to explain why there is not expected to be an enrollment spike similar to that associated with The Great Recession. The Washington economic forecasts predict a rapid initial recovery, so while short term unemployment is very high, long term high unemployment is not expected,<sup>ix</sup> and consequently high enrollment growth as seen in the Great Recession is unlikely. In addition, employment volatility may not necessarily create a shift to retraining and higher enrollment. Prospective students may be more willing to wait and see if employment recovers instead of enrolling in higher education to retrain, as they did in the Great Recession.

If economic assumptions hold true, and the pandemic eases or vaccines are widely available, apprenticeship and high-contact programs should recover. It is also expected that the reduction in students who transfer out early will continue in 2021-22. There is also the potential of a delayed ‘welcome mat’ effect from WCG as students feel more confident about returning to campuses or committing to higher education, as well as an increase in CB students who may have taken a year out in 2020-21 due to the turmoil of COVID-19. Furthermore, students will use 2020 income in 2021-22 Financial Aid applications; this may enable more students to be eligible for the higher WCG awards and encourage enrollment. Similarly, 2020 economic disadvantage could increase College Bound eligible populations and drive an enrollment increase in 2025 onward. However, this expected increase is mitigated by the continuation of the lower new enrollments in 2020-21, which creates a reduced population of retained students. In addition, drops in adult basic education enrollments could reduce the pipeline of college-ready students over age 25 in 2021-22.

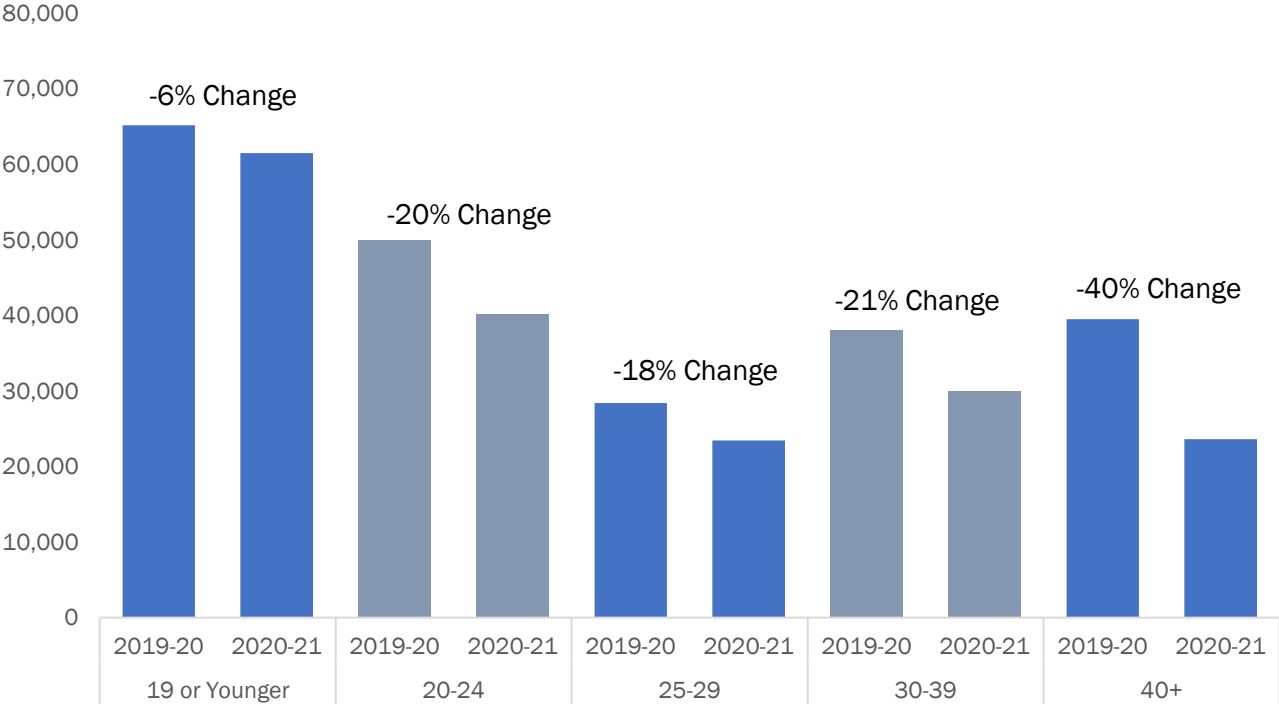
### Fall 2020 enrollment by focus populations in Washington Community and Technical Colleges

The enrollment patterns in the CTCs from fall 2020 reflect what has been observed nationally, where community colleges are suffering enrollment losses. Total headcount across the system was down 19 percent in fall 2020 compared with the prior fall. Full-time equivalent (FTE) enrollment was down 14 percent. As further discussed below, the declines did not occur evenly across the mission areas and populations colleges serve.

#### Age

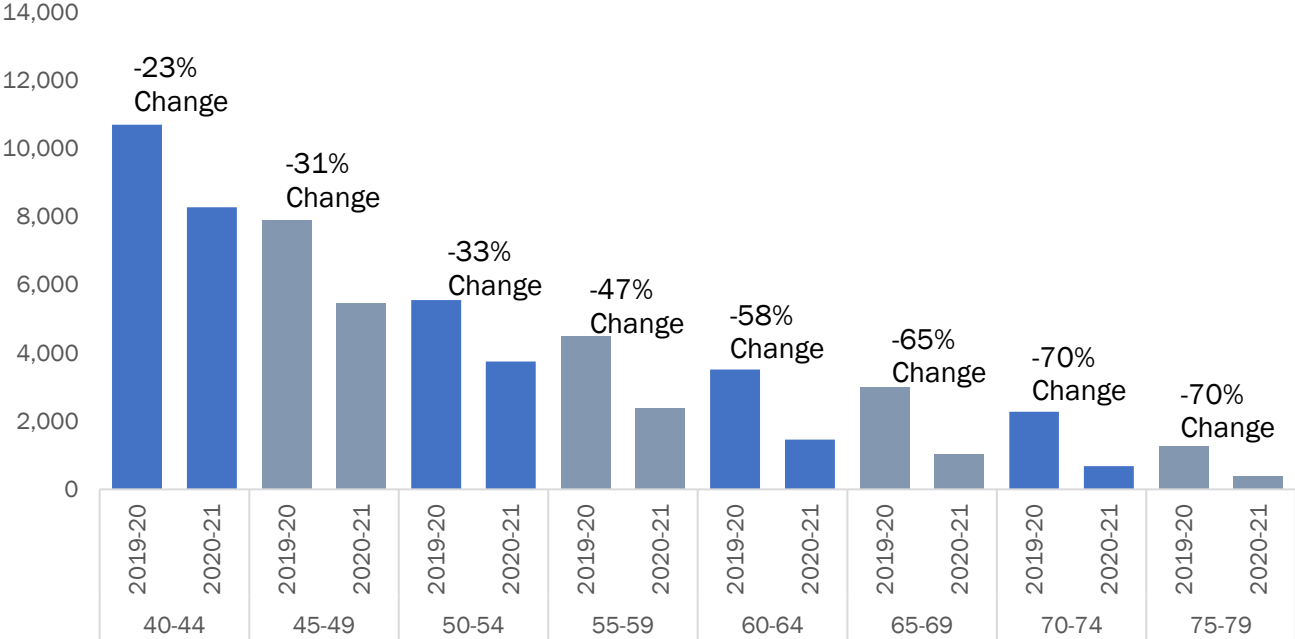
Students’ age is perhaps the most revealing indicator of shifting enrollment caused by the pandemic. Student headcount among those 19 and younger declined by 6 percent, less than the overall average percent change, which was -19 percent. Age groups comprising students ages 20-39 experienced enrollment declines around 20 percent, while student enrollment among those 40 and older dropped 40 percent.

Fig 2. Fall-to-fall headcount change by age group



A closer look at the 40+ age group reveals a steadily increasing drop as age groups increase, although the total number of students also declines significantly in the older age groups. The 40 to 44 age group witnessed a percent change in-line with age groups between 20 and 39.

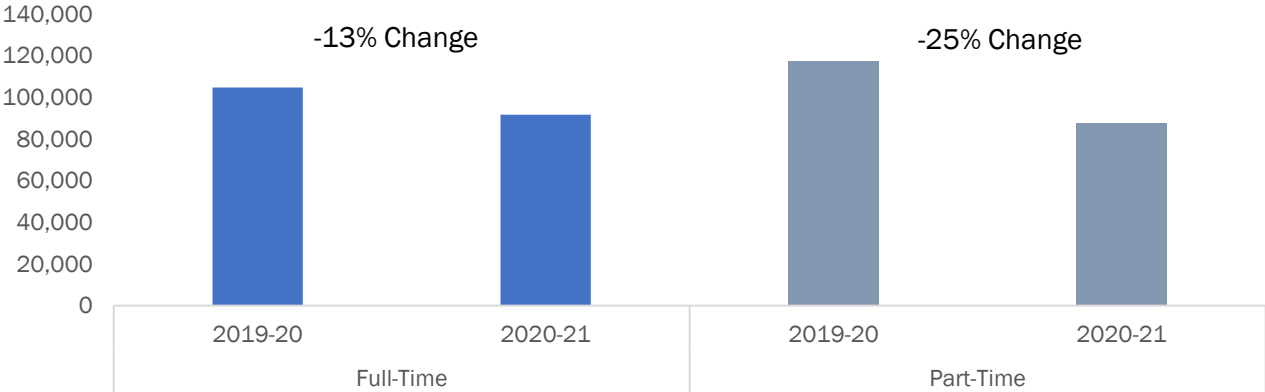
Fig 3. Fall-to-fall headcount change by age group (40 and older)



**Full and part time status**

Younger students are much more likely to enroll full-time, with nearly 70 percent of students ages 19 and younger enrolling in a full-time credit load. The ratio of full-time to part-time students shifts as students get older, and the ratio flips completely in the 30 to 39 age group, with 67 percent of tricenarians enrolled part time. Given the tendency for older students to enroll part time, the 25 percent decline is unsurprising. Full-time student enrollment, by contrast, declined 13 percent compared with last fall.

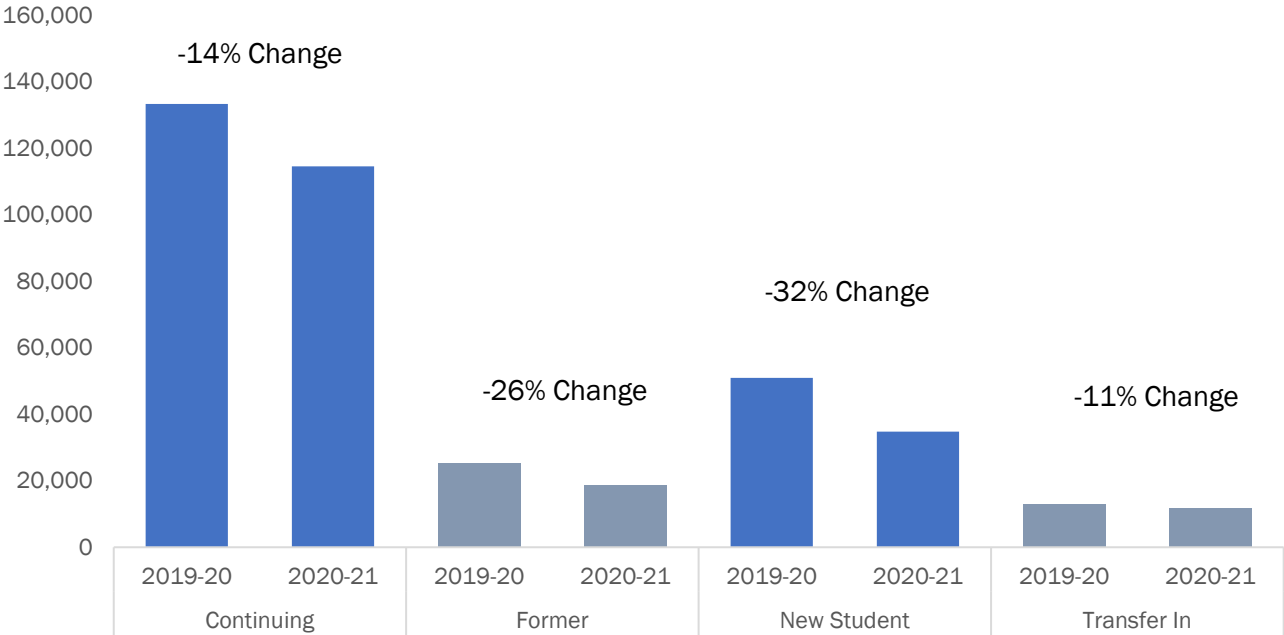
Figure 4. Fall-to-fall headcount by full-time/part-time status



**New or continuing students**

Uncertainty about the near future is a likely factor in the 32 percent decline among new students. Former students enrolling in community and technical colleges saw a drop of 26 percent, while continuing student enrollment and transfers-in experienced less dramatic declines of 14 percent and 11 percent, respectively.

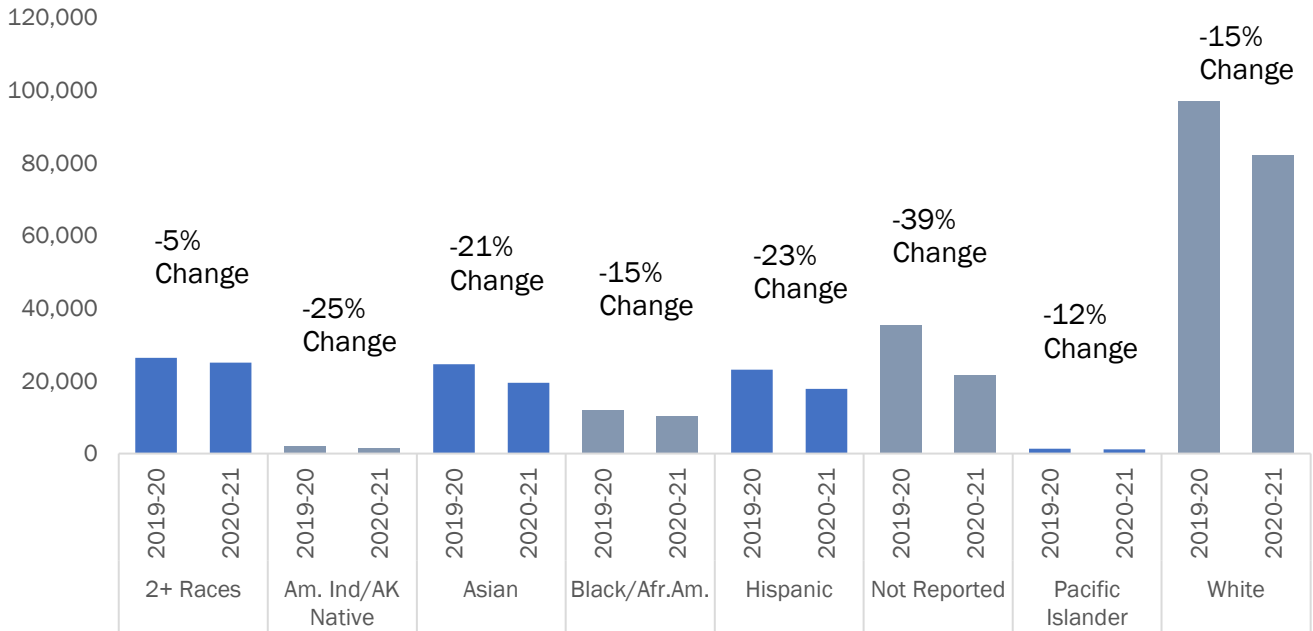
Figure 5. Fall-to-fall headcount by continuing/former/new/transfer status



**Race/ethnicity**

American Indian/Alaska Native, Asian, and Hispanic student headcount declined by more than the average headcount decline across the system. White student headcount and Black/African American headcount declined less than the overall percent change for all students across the system, at 15 percent.

Figure 6. Fall-to-fall headcount by race/ethnicity



**Student type/mission area**

In an SBCTC analysis of spring 2020 quarter enrollment, there was a vast difference in the degree of change by mission area. Academic transfer, which includes the majority of dual enrollment courses, remained relatively constant while professional-technical and Basic Education for Adults (BEa) suffered greater declines. The fall quarter shows similar patterns, and in particular English Language Acquisition (ELA) as part of BEa. The biggest challenges that exist for all students (specifically childcare/supervising school children at home and lack of access to online resources) are exacerbated for students whose first language is not English. This population are more likely to be low-income, come from communities of color, have families to care for, and for those who are not native English speakers the digital divide makes it significantly more difficult to engage.

The more severe declines among BEa and professional-technical students in spring 2020 carried forward to fall, with BEa full-time equivalent (FTE) enrollment down 29 percent year-over-year (FTE enrollment in BEa courses was down 36 percent) and professional-technical student FTE down 17 percent year over year. Academic transfer FTE enrollment, by contrast, declined eight percent. Among BEa students, Adult Basic Education (ABE) enrollment declined 26 percent compared with a 36 percent drop among ESL FTE.



Figure 7. Fall FTE by mission area

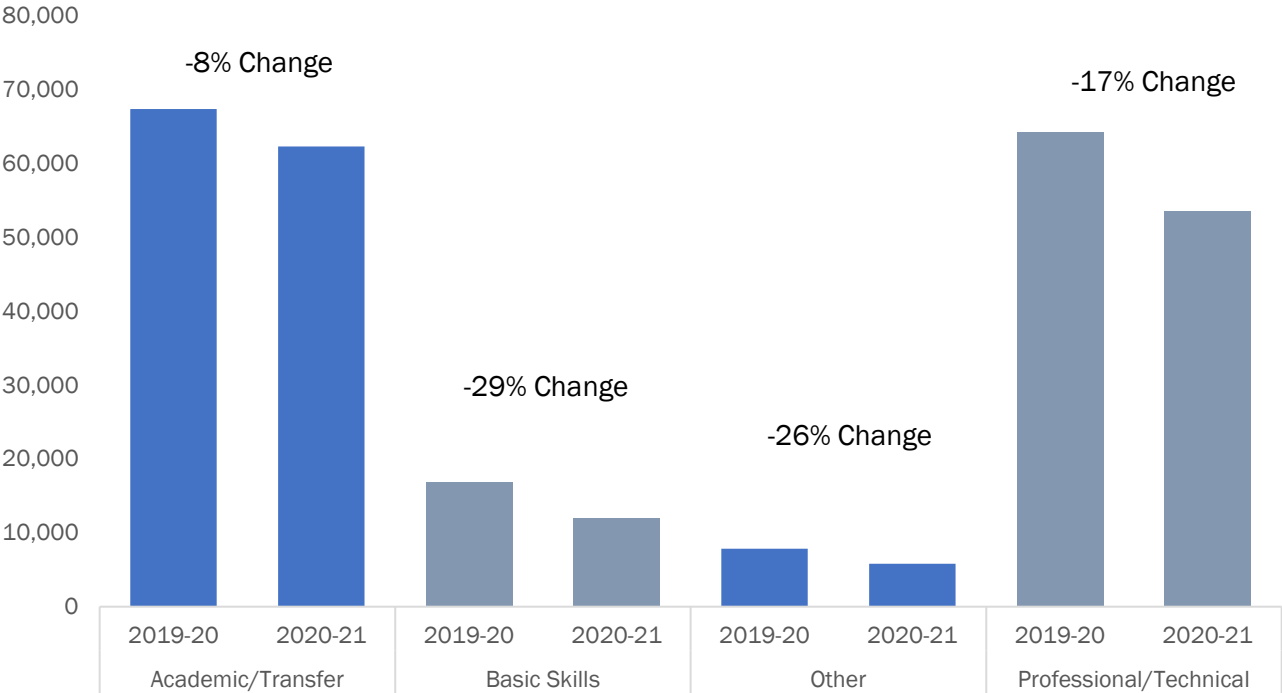
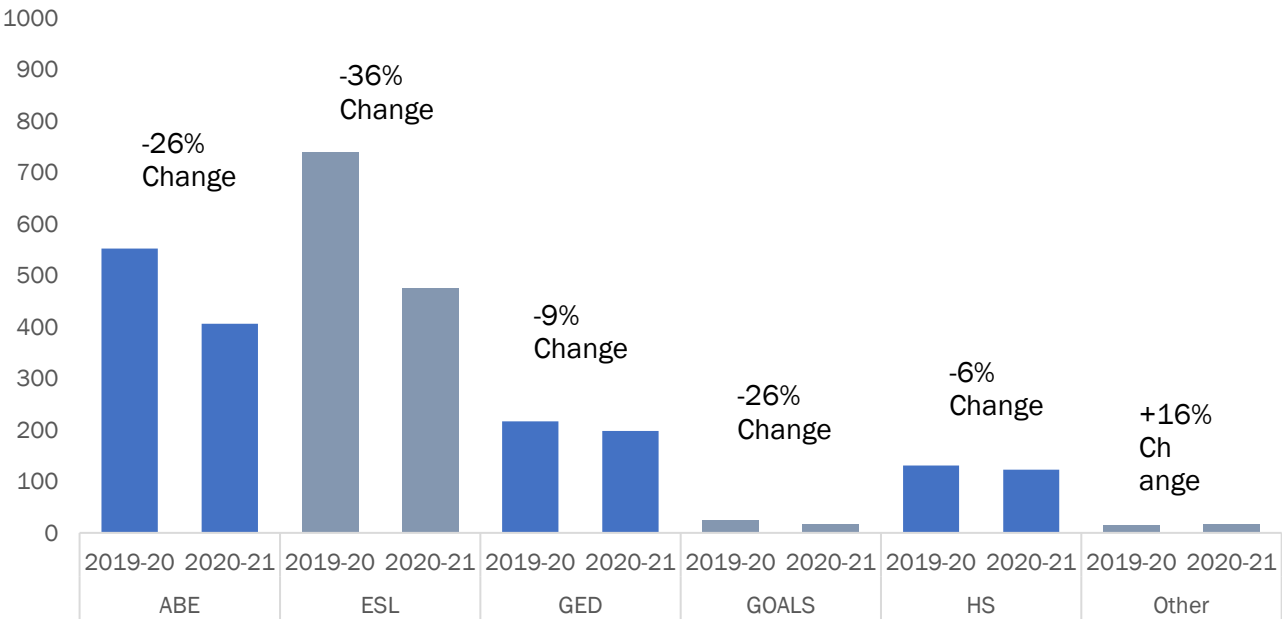


Figure 8. Fall-to-fall FTE by Basic Education for Adults course type



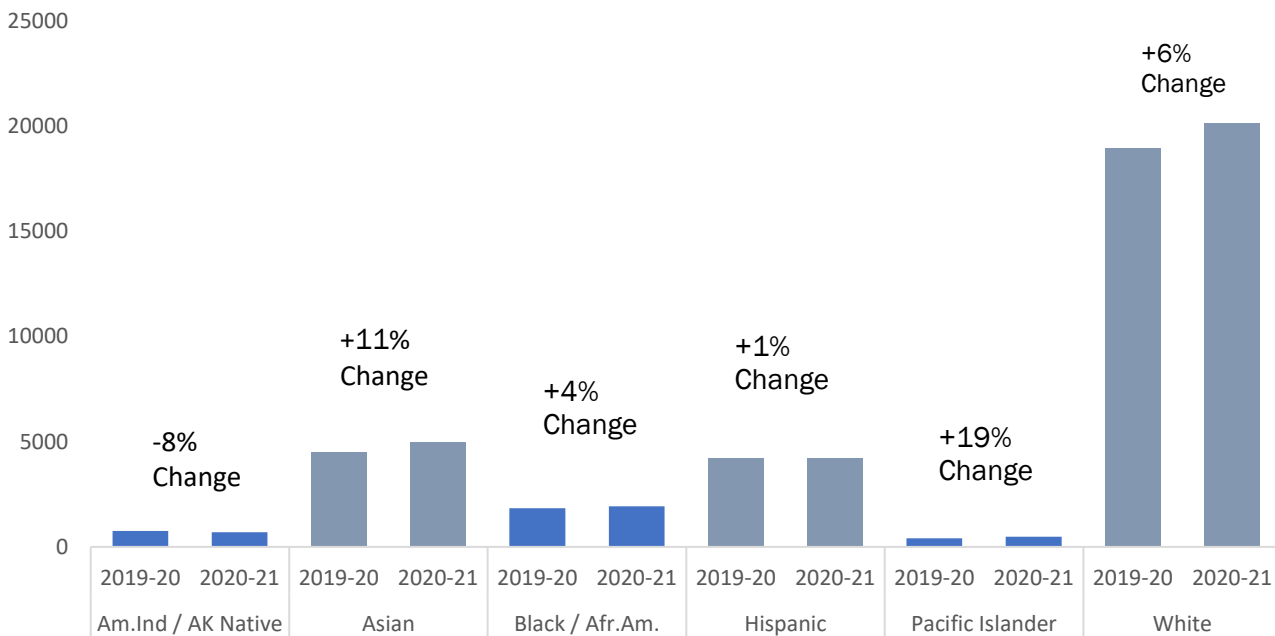
**Running Start and Bachelor of Applied Sciences**

Running Start and Bachelor of Applied Science (BAS) are two programs that have shown resilience in enrollment throughout spring and fall 2020. Full-time equivalent enrollment in Running Start has increased

steadily over the last several years, often seeing three percent to seven percent year-over-year FTE increases. In the face of a 14 percent decline among all FTE across the system, Running Start experienced a four percent increase, with 25,864 FTE in fall 2020-21 compared with 24,951 the prior fall. Students matriculated in a BAS program increased 14 percent, with 4,388 FTE in fall 2020-21 compared with 3,838 the prior fall. As racial equity is a priority in the CTC system, it is imperative to evaluate differential enrollment patterns between programs to assess if the growth is not distributed among demographic groups. This is even more important given the previously identified concerns regarding low-income and students of color being more adversely affected by the pandemic than students from non-historically underserved backgrounds.

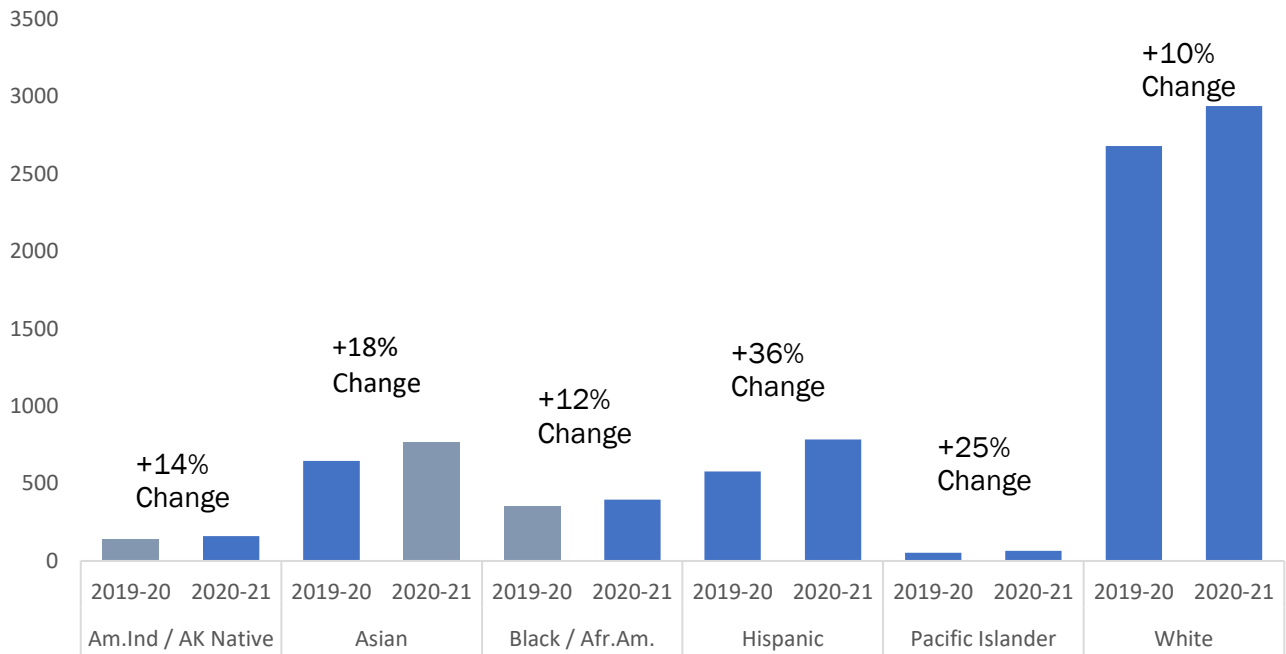
Figures 9 and 10 disaggregate Running Start and BAS fall enrollments by race/ethnicity, respectively.<sup>1</sup> In Running Start the only group that declined was American Indian/Alaska Native, from 754 in fall 2019 to 695 in fall 2020. All other groups increased with white students showing the largest nominal increase from 18,974 in fall 2019-20 to 20,117 in fall 2020-21. BAS student headcount increased in all race and ethnicity categories with the largest percentage increase being Hispanic/Latino at 36 percent (577 in fall 2019-20 to 785 in fall 2020-21). Given the overall declines and concerns about historically underserved students, this is a positive and encouraging pattern to see.

Figure 9. Running Start headcount by race and ethnicity



<sup>11</sup> This analysis grouped students into each race and ethnicity reported if they reported more than one, hence there is no 2+ races category and the counts are duplicated.

Figure 10. BAS headcount by race and ethnicity



**Next steps**

As noted above, until some level of virus control is realized, there will continue to be factors impacting enrollment outside the institutions’ control. Once the state of the world returns to some level of “normalcy,” it is possible that students who took a gap year will begin to enroll and possibly even at higher numbers than expected. Further, the recovery from the pandemic recession will likely reveal where certain jobs and industries are not coming back, after which the community college system may start to see a more traditional increase in enrollment of students looking to retrain for new careers. Despite the documented challenges for community college students, the growth in BAS program enrollment is also encouraging as it demonstrates a structure that can work in these circumstances. BAS programs are by nature designed to be flexible for the working adult with multiple obligations, so there is a foundation and example that colleges can build upon.

In the meantime, the CTC system has a strong policy framework to support the strategies that are critical to students’ ability to achieve and succeed through the barriers caused by the COVID-19 pandemic. The system’s vision of leading with racial equity is reflected in the key policy goals already supported by the Washington state legislature as they begin the 2021 session. The Workforce Education Innovation Act (WEIA), funded based on a surcharge on state business-and-occupation tax and passed in the 2019 session, is fundamentally designed to resource community colleges to raise educational attainment for historically underserved students. The largest component is the Washington College Grant, which provides an entitlement-based financial aid opportunity to enable more low- and middle-income students to go to college. It also supports colleges in their Guided Pathways investments to provide students with the resources and services they need complete credentials and move on to further education and careers.

## Student Services Support

**“Half our 337,000 students are students of color and 60 percent experience hunger and housing insecurity. This is our system’s top priority.” ~SBCTC 21-23 Operating Budget Request~**

Since the pandemic began, colleges have been significantly focused on supporting student’s basic needs by setting up food pantries and creating one-stop student services to help with housing support, financial counseling, and other critical needs. The longer that colleges remain closed to majority in-person instruction, a continual challenge will be figuring out how to deliver services online and provide for the adequate student-faculty interaction that is critical to student success. Online or distance learning has long been considered a risk factor in enrollment management studies.<sup>x</sup> This derives from the concepts of engagement and connection to the campus community; which research has shown to be one of the most significant factors in retention in higher education. In a study of differing attrition rates between online and face-to-face courses, researchers discovered the major factors for attrition were isolation, academic challenge, ownership of one’s work, and acquiescence. The isolation factor was defined by the idea of a surreal classroom, lack of student-faculty interaction, and lack of student-to-student connection.

With the pandemic forcing most operations online, the concern about resources and opportunities for students to access are exacerbated, not just for students but for faculty and staff as well. The state infrastructure is not designed to provide high speed internet access in particularly rural areas, which makes the ability to provide high quality instruction and services challenging. Part of the CTC system’s operating budget request for the 21-23 biennium includes “46 million to ensure all students are successful in an online environment by integrating virtual simulation technologies into the delivery of courses and programs.”<sup>xi</sup> This and other outreach strategies designed to ensure equitable outcomes for students will be critical for colleges to ensure students are able to enroll in and complete their programs, even if remote operations continue.

## Washington College Grant and Ability to Benefit

The national research cited in this report pointed to college cost and student and family financial concerns as one of the most significant barriers for enrollment. This theme was reflected in student feedback at a Washington State Board for Community and Technical Colleges retreat in August 2020. The level of disruption to families’ economic stability caused by the pandemic creates a scenario where, unless going to school will essentially be free, the concern about cost will keep students from engaging. This concern was also confirmed in a market research study of college-going culture in the summer of 2020, conducted by EMC research for the CTC system.<sup>xii</sup> The survey focused on low-income adults (ages 24 to 44) who were not current students nor did they have a college degree, who were employed or recently unemployed due to COVID-19. A similar survey was conducted for potential students who had not completed a high school credential or GED.

The findings for both groups revealed that future earning potential and serving as a positive model for children were motivators for going back to school, but the concern about college cost and how to go to school in the midst of other family concerns were significant barriers. There was also confusion about financial aid opportunities, in particular regarding Washington state specific financial aid, and concerns about the difficulty of the process for things like FAFSA/WAFSA completion. The researchers tested messaging to find out what would resonate the most with overcoming the financial barriers and found that speaking to how the CTC’s can make college more affordable and accessible had the greatest impact. This

suggests a significant opportunity for the system to engage in an information outreach campaign about the Washington College Grant to try and alleviate what is seemingly the largest barrier for low-income students, those who need further education the most to recover from this crisis, to engage in college at this time. This includes possibilities for students without a high school diploma or GED as the Ability to Benefit program allows for access to federal and state financial aid to help pay for college.



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- <sup>i</sup> <https://www.chronicle.com/article/heres-a-list-of-colleges-plans-for-reopening-in-the-fall/>
- <sup>ii</sup> <https://www.aacc.nche.edu/wp-content/uploads/2019/08/Crisis-in-Enrollment-2019.pdf>
- <sup>iii</sup> <https://www.sbctc.edu/resources/documents/colleges-staff/research/enrollment-research/19-6-enrollment-trends-final.pdf>
- <sup>iv</sup> <https://www.insidehighered.com/news/2020/12/10/analysis-low-income-community-college-students-most-likely-report-canceling-college>
- <sup>v</sup> <https://www.chronicle.com/article/the-real-covid-19-enrollment-crisis-fewer-low-income-students-went-straight-to-college>
- <sup>vi</sup> <https://nscresearchcenter.org/stay-informed/>
- <sup>vii</sup> <https://www.chronicle.com/article/in-another-blow-to-student-equity-transfers-to-2-year-colleges-plunge>
- <sup>ix</sup> <https://erfc.wa.gov/sites/default/files/public/documents/publications/nov20pub.pdf>
- <sup>x</sup> <https://www.sbctc.edu/resources/documents/colleges-staff/research/research-briefs/strategic-enrollment-management-for-community-and-technical-colleges.pdf>
- <sup>xi</sup> <https://www.sbctc.edu/resources/documents/colleges-staff/programs-services/legislative-outreach/2021/2021-23-op-budget-request-one-pager.pdf>
- <sup>xii</sup> EMC research. "College-Going Culture: Washington Statewide Survey." June – July 2020.