

The State of Higher Education Enrollments through Fall 2021

With a particular focus on public 2 year
institutions



Ricardo D Torres
CEO

National Student Clearinghouse
February 7, 2022

What is the National Student Clearinghouse?

The National Student Clearinghouse: non-profit with 28-year history of enabling TRUSTED nationwide access to verified education data



Trust: data privacy, security,
transparency

98%
postsecondary
enrollment



19,000 (70%)
high schools



100%
Working with EVERY
STATE's K12 or
postsecondary education
department in a data
sharing / research capacity



Services offered at little to no cost to institutions that leverage NSC data

Growing data insight generating value back to provider

DATA PROVIDERS

**NATIONAL STUDENT
CLEARINGHOUSE®**

**RELEVANT DATA
UTILIZATION**

ROI Proof Points
Learner Enablement
Research for Action
Accountability
Verifications
Compliance

Saving higher ed over 850mln annually in costs and 17 FTE on average

Jan 20, 2022

Higher Ed's Evolutionary — Not Revolutionary — Pandemic Response

The sector is slowly adapting to recent enrollment declines.

“the Clearinghouse (along with its [Stay Informed](#) reports from last fall) point to **worrisome attendance patterns** that will **demand continued transformation** if higher education is to continue **to disprove predictions of demise**”

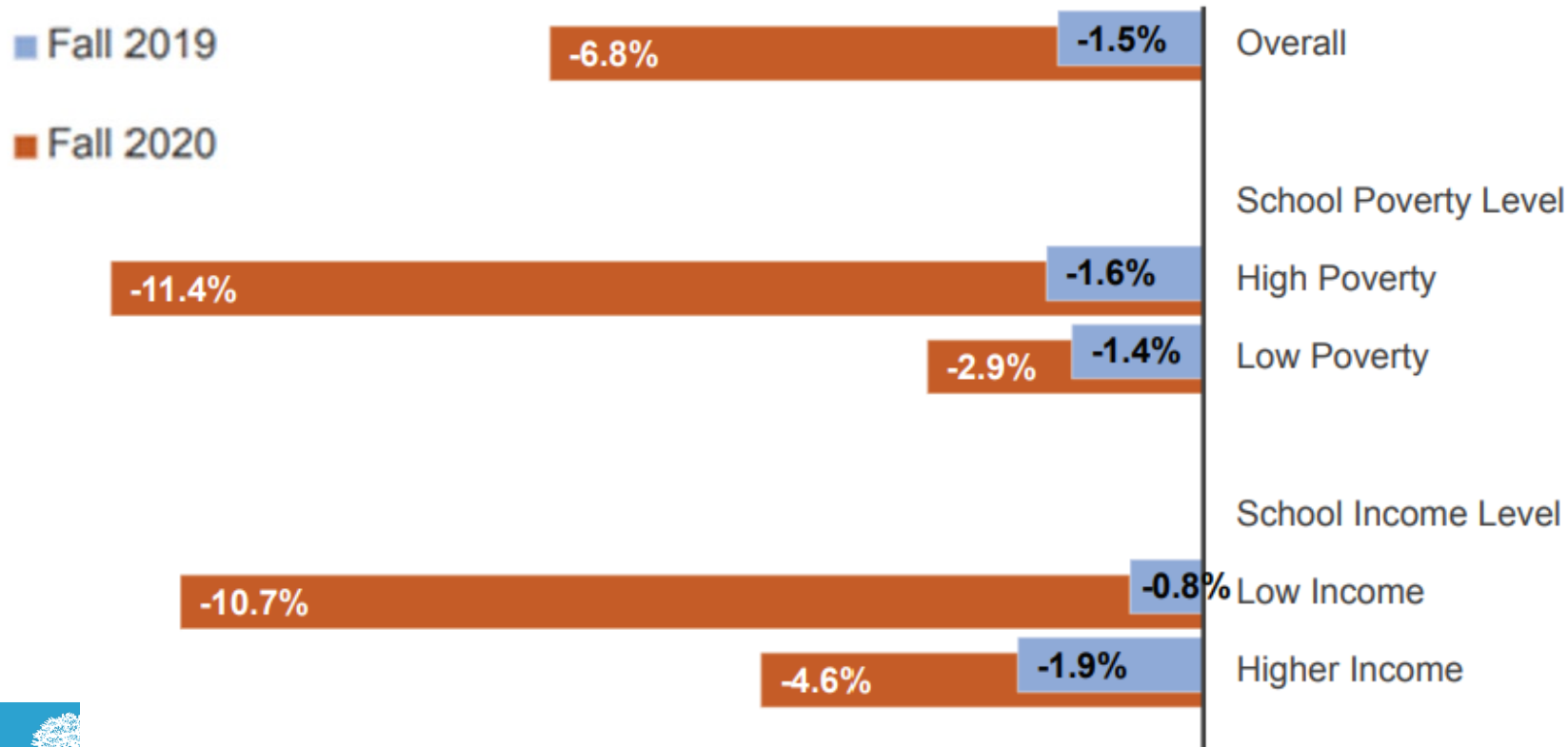
Conversation segments

- Overview of for credit enrollment declines
- Discussion of some correlative factors
- Discussion of the road ahead

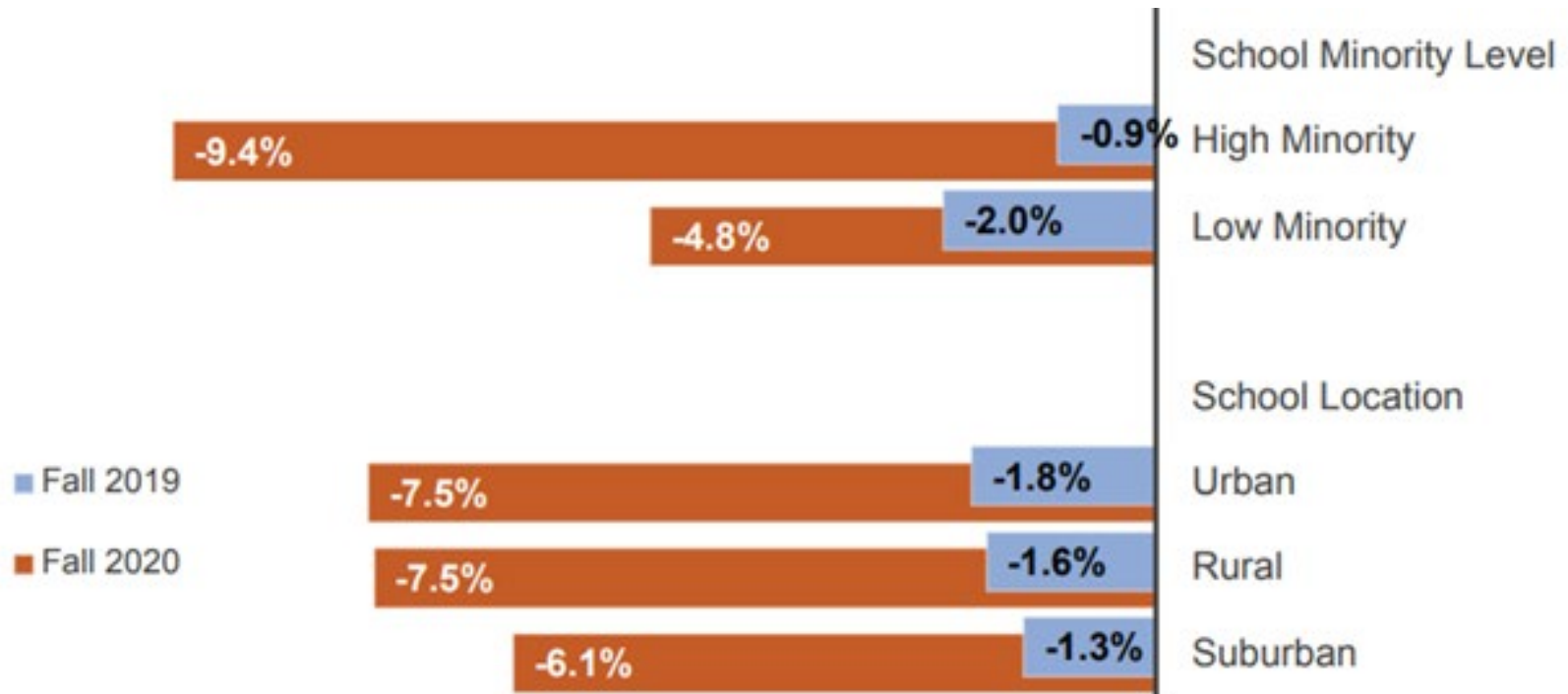
Enrollment declines beginning with traditional learners by sector*

* The more detailed sector analysis herein will not reflect the totals that include 2 year institutions that have been recategorized as 4 year schools

Percent change in Immediate Fall Enrollments clearly show the disparate impact effect of COVID: Lower income HS

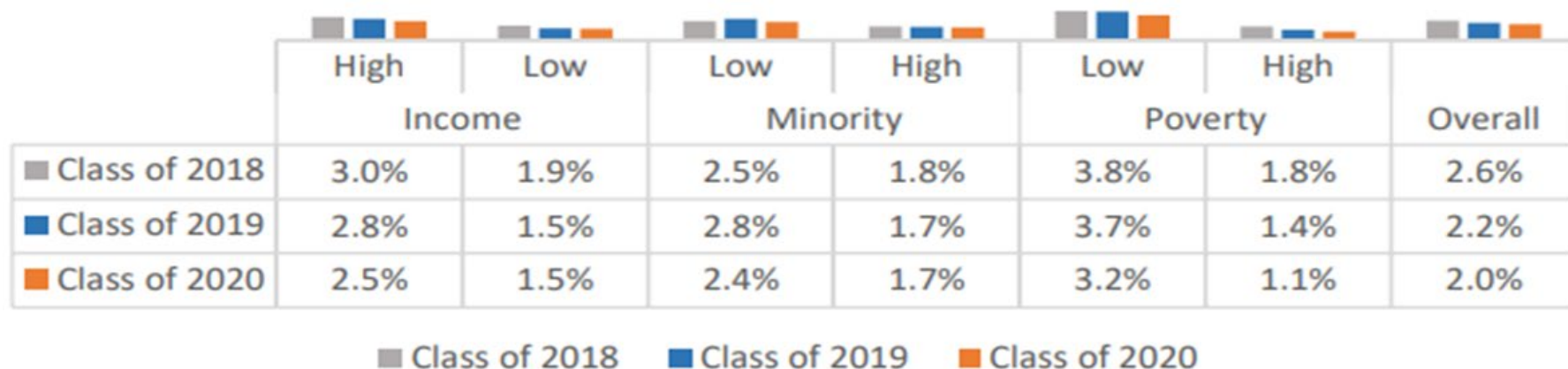


Percent change in Immediate Fall Enrollments clearly show the disparate impact effect of COVID: high minority high schools

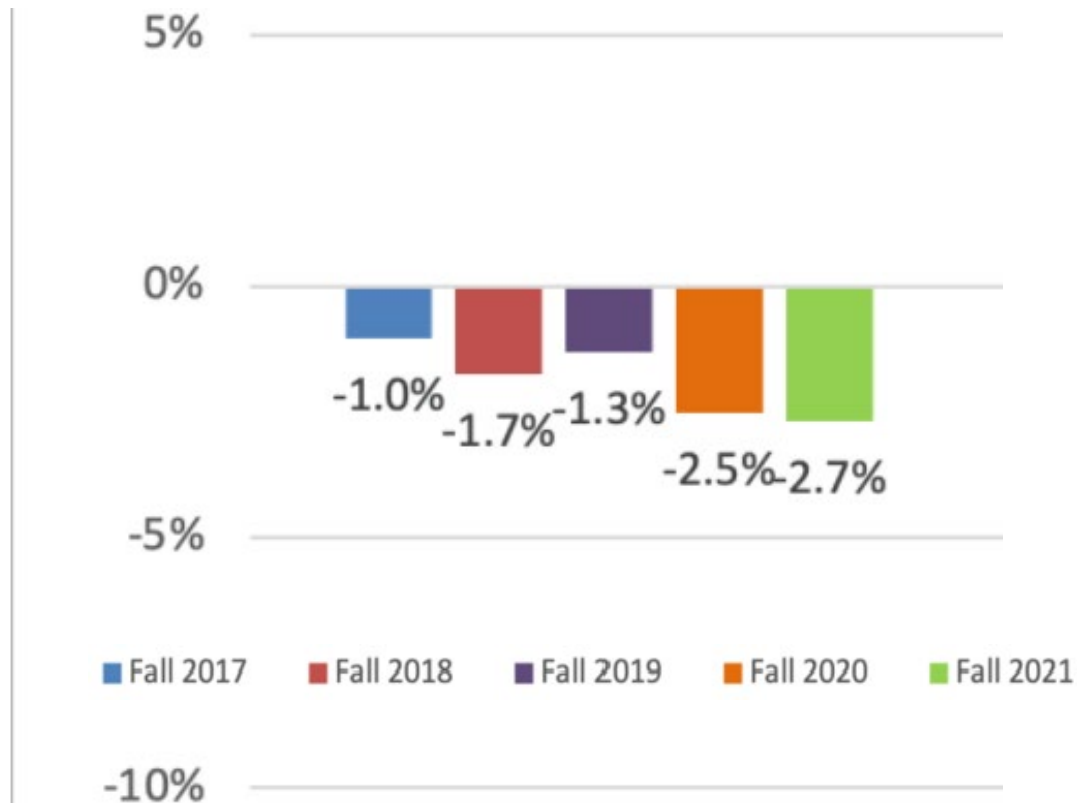


The thought a gap year was a critical factor proved NOT to be true.

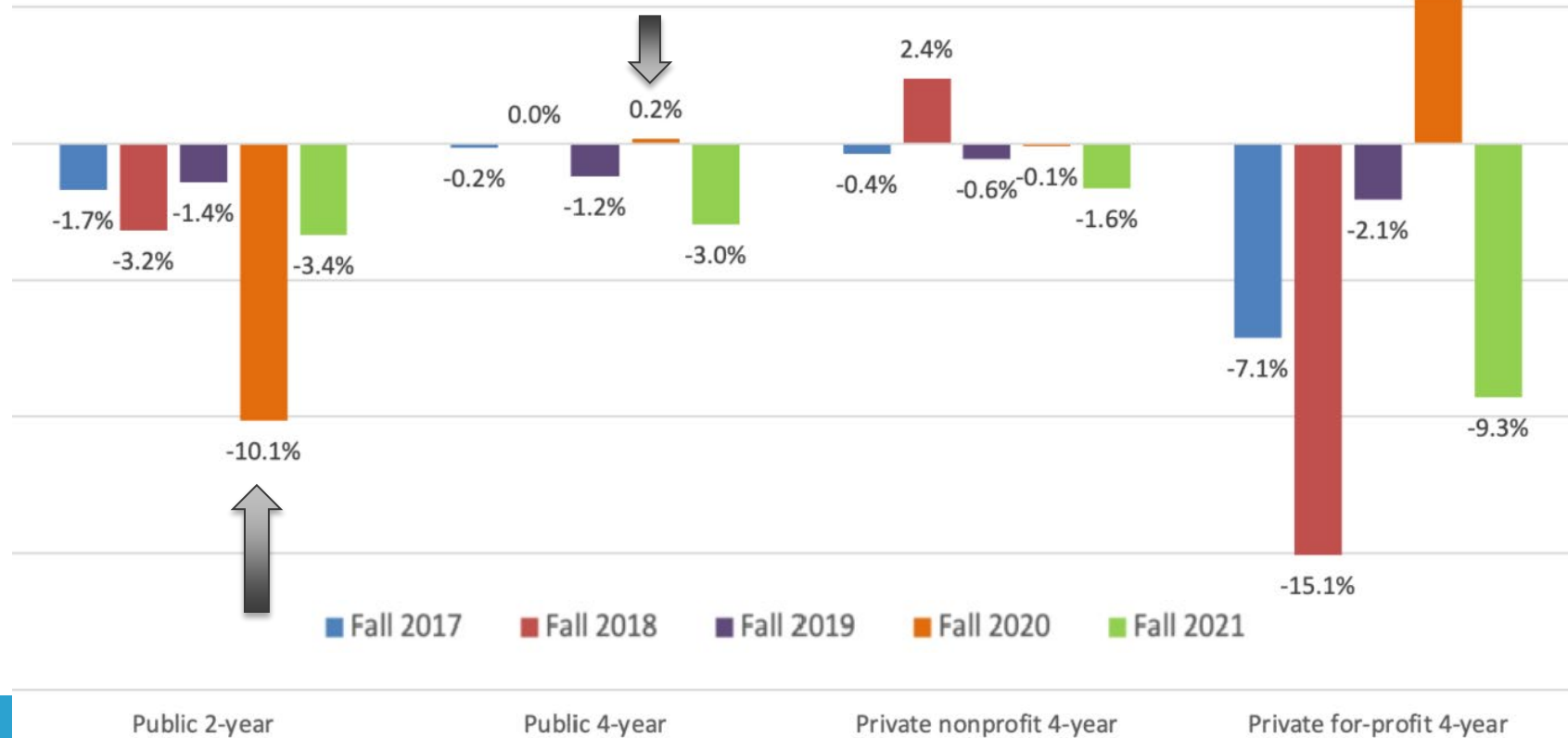
Gap Year Enrollment Rate
(Percent of Those Who Did Not Enroll Immediately)



Overall enrollment declines over time have been a higher ed headline



A closer look shows that the public 4-year sector held up well in general and volatility in the for-profit sector and negative trends in public 2 yr sector



Estimated National Enrollment by Institutional Sector: 2019 to 2021

Sector	Fall 2021		Fall 2020		Fall 2019	
	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
Total Enrollment (All Sectors)	17,302,364	-2.7%	17,778,484	-2.5%	18,239,874	-1.3%
Public 4-year	7,767,617	-3.0%	8,004,360	0.2%	7,989,984	-1.2%
Private nonprofit 4-year	3,776,285	-1.6%	3,839,485	-0.1%	3,842,930	-0.6%
Private for-profit 4-year	716,472	-9.3%	789,888	5.3%	749,885	-2.1%
Public 2-year	4,662,364	-3.4%	4,824,204	-10.1%	5,368,470	-1.4%
Estimated Student Headcount (All Sectors)	17,054,375	-2.5%	17,491,813	-2.6%	17,965,287	-1.3%
Public 2yr with 4yr degrees offerings	332,028					
Total public cc	4,994,392					

First time Freshman estimate shows adult learners over the age of 24 did not look to enroll traditionally as in the past.

Sector	Age Group	Fall 2021		Fall 2020*		Fall 2019*	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
All Sectors	All Ages	2,116,631	0.4%	2,108,579	-9.5%	2,330,022	-1.8%
	24 or Younger	1,955,529	-0.1%	1,957,665	-8.6%	2,143,023	-1.4%
	Over 24	161,103	6.8%	150,914	-19.3%	186,999	-6.4%
Public 4-year	All Ages	907,878	-0.5%	912,840	-5.3%	964,340	-2.0%
	24 or Younger	878,208	-0.9%	885,807	-4.5%	927,723	-1.9%
	Over 24	29,669	9.8%	27,033	-26.2%	36,618	-5.3%
Public 2-year	All Ages	711,717	0.4%	708,735	-18.2%	866,286	-0.1%
	24 or Younger	626,017	-1.4%	634,931	-16.4%	759,649	0.9%
	Over 24	85,700	16.1%	73,804	-30.8%	106,637	-6.8%

For profit sector up 47% over 24 years old



Total enrollments by age and sector show adults declining except in 4yr

Table 5. Estimated National Enrollment by Institutional Sector and Age Group: 2019 to 2021

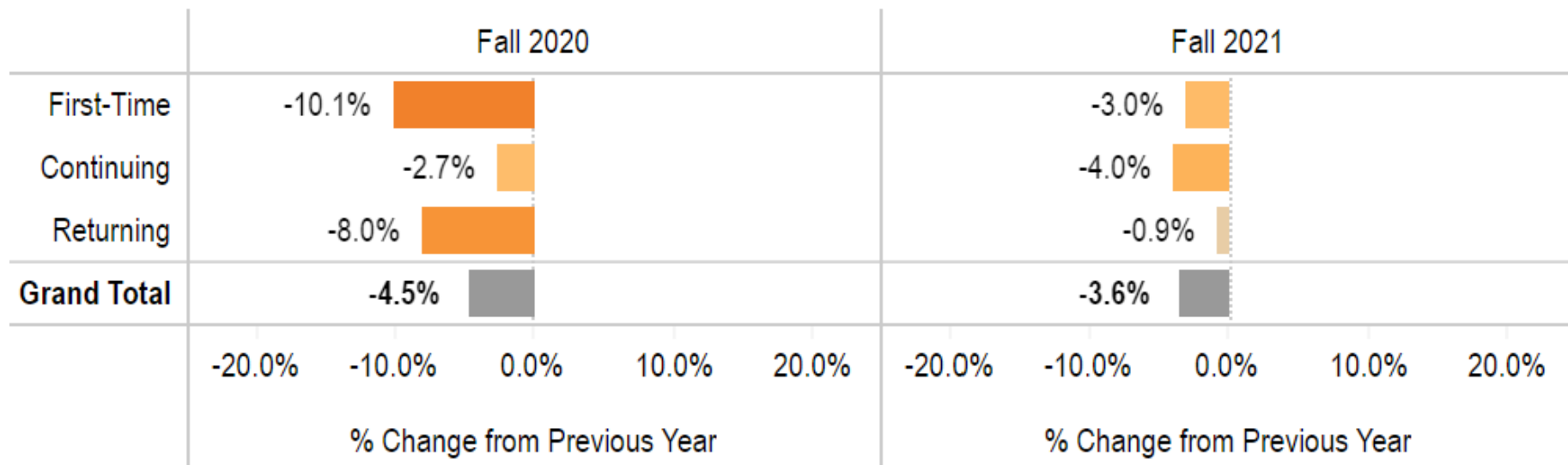
Sector	Age Group	Fall 2021		Fall 2020		Fall 2019	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
All Sectors	Under 18	1,039,737	-1.1%	1,050,968	0.8%	1,042,526	3.4%
	18 to 24	10,339,034	-2.4%	10,593,139	-3.7%	10,999,757	-1.0%
	Over 24	5,923,593	-3.4%	6,134,378	-1.0%	6,197,591	-2.7%
Public 4-year	Under 18	298,076	-6.9%	320,102	3.3%	309,867	0.5%
	18 to 24	5,357,952	-2.6%	5,502,534	-0.7%	5,538,723	-0.7%
	Over 24	2,111,589	-3.2%	2,181,724	1.9%	2,141,394	-2.6%
Private nonprofit 4-year	Under 18	73,409	-1.1%	74,228	-3.0%	76,517	-2.0%
	18 to 24	2,201,437	-1.0%	2,223,668	-1.9%	2,266,855	-0.2%
	Over 24	1,501,438	-2.6%	1,541,590	2.8%	1,499,558	-1.1%
Private for-profit 4-year	Under 18	2,891	6.0%	2,727	12.3%	2,428	-5.1%
	18 to 24	150,938	-2.9%	155,500	10.7%	140,496	-1.3%
	Over 24	562,643	-10.9%	631,661	4.1%	606,962	-2.2%
Public 2-year	Under 18	660,776	1.5%	650,965	-0.5%	654,116	5.9%
	18 to 24	2,438,875	-5.3%	2,574,266	-11.9%	2,923,214	-1.5%
	Over 24	1,562,714	-2.3%	1,598,973	-10.7%	1,791,139	-3.7%

Larger declines in male populations were very clear in the data

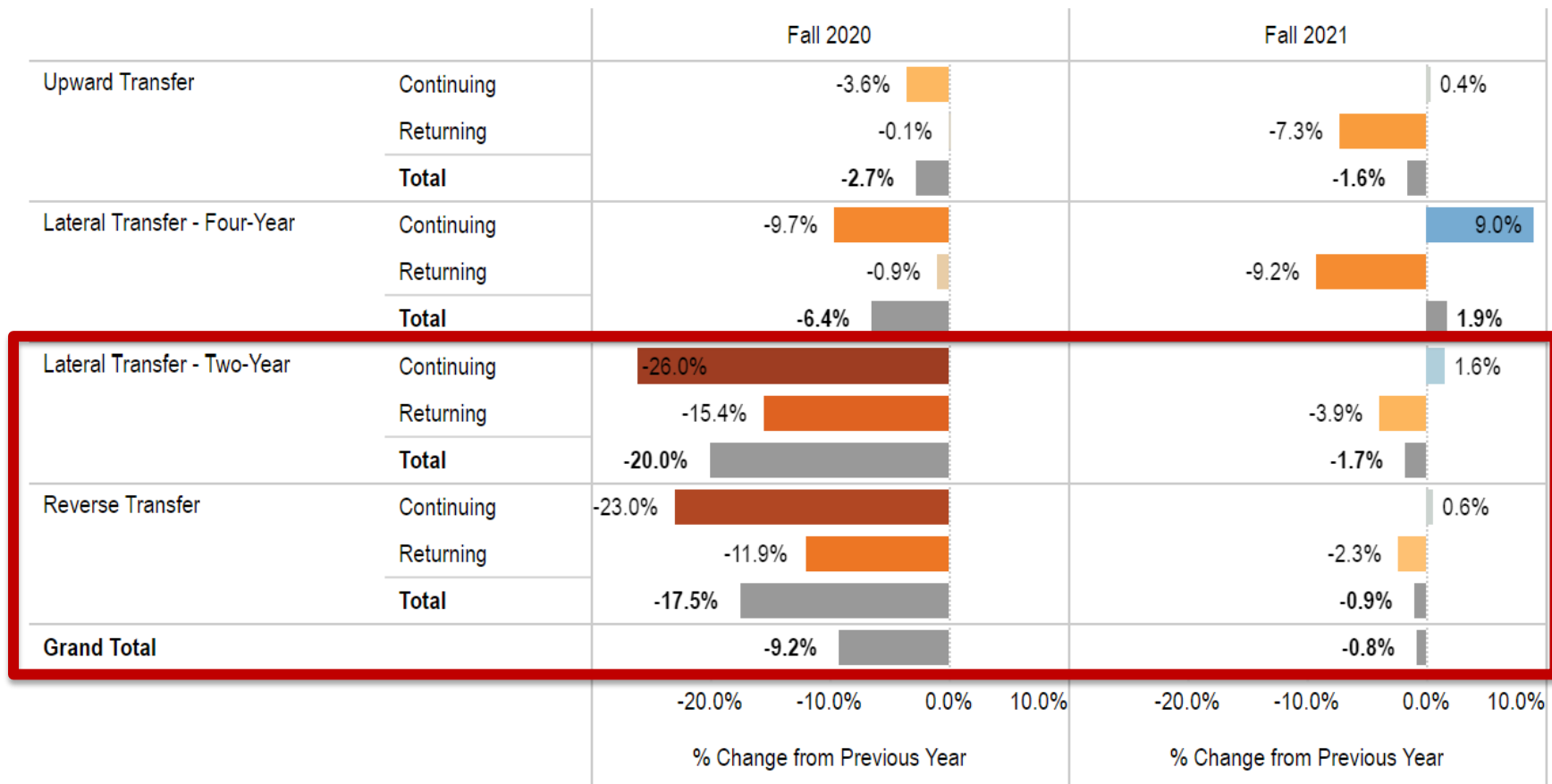
Table 8. Estimated National Enrollment by Institutional Sector, and Gender: 2019 to 2021

Sector	Gender	Fall 2021		Fall 2020		Fall 2019	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
All Sectors	Men	7,059,178	-2.2%	7,217,092	-5.1%	7,606,756	-2.0%
	Women	10,243,187	-3.0%	10,561,392	-0.7%	10,633,118	-0.8%
Public 4-year	Men	3,296,535	-3.6%	3,420,654	-1.6%	3,477,314	-2.0%
	Women	4,471,082	-2.5%	4,583,706	1.6%	4,512,670	-0.6%
Private nonprofit 4-year	Men	1,485,664	-2.3%	1,520,695	-1.0%	1,535,530	-1.2%
	Women	2,290,620	-1.2%	2,318,791	0.5%	2,307,400	-0.2%
Private for-profit 4-year	Men	239,599	-3.6%	248,600	3.2%	240,952	-4.0%
	Women	476,872	-11.0%	541,288	-6.4%	508,022	-1.1%
Public 2-year	Men	1,891,359	-1.7%	1,923,969	-14.7%	2,256,354	-2.2%
	Women	2,771,005	-4.5%	2,900,235	-6.8%	3,112,115	-0.8%

Undergraduate enrollment by student group show declines in all major categories of learners: first timers, continuing and stop outs that returned



Normal transfer patterns INTO CC plunged in 2020, no recovery in 2021



LIMITED SUPPLY AND LAGGING ENROLLMENT: PRODUCTION TECHNOLOGIES AND ENROLLMENT CHANGES AT COMMUNITY COLLEGES DURING THE PANDEMIC

Diane Whitmore Schanzenbach
Sarah Turner

Working Paper 29639
<http://www.nber.org/papers/w29639>

NATIONAL BUREAU OF ECONOMIC RESEARCH
1050 Massachusetts Avenue
Cambridge, MA 02138
January 2022

COVID drives enrollment down turns in assembly, maintenance and repair fields of study

COVID disruptions generated supply-side impacts on courses of study requiring significant capital and “hands on” experiential learning, particularly programs that deliver of assembly, repair and maintenance (ARM) skills.

Community colleges that had relative concentrations of credentials in ARM fields pre-pandemic experienced relatively large enrollment declines.

The decline in ARM enrollment explains nearly all the difference in enrollment declines by gender during COVID.

Major (CIP Code)	CIP Family Title	Fall 2021		Fall 2020	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
43	Homeland Security, Law Enforcement, Firefighting, and Related Protective Services	150,032	-7.4%	162,080	-14.7%
50	Visual and Performing Arts	129,780	0.6%	128,999	-14.2%
15	Engineering Technologies and Engineering-Related Fields	101,041	1.5%	99,590	-14.5%
47	Mechanic and Repair Technologies/Technicians	97,587	7.0%	91,201	-15.9%
12	Personal and Culinary Services	56,396	6.2%	53,116	-17.2%
48	Precision Production	52,958	9.9%	48,204	-18.4%
40	Physical Sciences	26,556	-17.5%	32,191	-17.3%
10	Communications Technologies/Technicians and Support Services	26,307	-1.0%	26,572	-16.2%



Large CIP Code categories also experienced declines, Healthcare and IT related fields held their own...IT growing in 2021

Major (CIP Code)	CIP Family Title	Fall 2021		Fall 2020	
		Enrollment	% Change from Previous Year	Enrollment	% Change from Previous Year
24	Liberal Arts and Sciences, General Studies and Humanities (includes undeclared)	1,472,937	-5.0%	1,550,498	-11.9%
51	Health Professions and Related Programs	785,020	-2.2%	802,489	-2.3%
52	Business, Management, Marketing, and Related Support	516,031	-0.6%	518,941	-9.2%
11	Computer and Information Sciences and Support Services	217,705	2.9%	211,488	-4.2%

Summarizing the overall enrollment decline issue

- Large declines in traditional HS pipelines in particular poor and high minority schools
- Gap year “hope” did not materialize
- While CC sector lost 10% of enrollment 4 yr public were flat and for-profit sector gained
- Adult learner over age 24 way down in all sectors except for profit: up 47%
- Heavy declines in full time students for two consecutive years
- Dual enrollment numbers seem to have stabilized
- No recovery from the large decline in men (-15% in 2020)
- Programs linked to ARMS skills particularly hit hard.
- Transfer volumes into CC declined tremendously in 2020 and no recovery in 2021

So what is happening out there?

There is an explosion of quality (job worthy) credentials happening across the country most outside of the traditional higher ed domain

There are **967,734 unique credentials in the U.S.** in 16 detailed credential categories across four types of credential providers:

- Postsecondary educational institutions – **359,713** degrees and certificates
- Massive open online course (MOOC) providers – **9,390** course completion certificates, micro-credentials, and online degrees from foreign universities
- Non-academic providers– **549,712** badges, course completion certificates, licenses, certifications, and apprenticeships
- Secondary schools – **48,919** diplomas from public and private secondary schools

Credential Engine lining up k20w data advocacy at the State level in order to enable easier pathway to jobs visualizations to learners. These efforts are being linked to creating pipelining of high demand skills to jobs.

What Is a P-20W Data System?

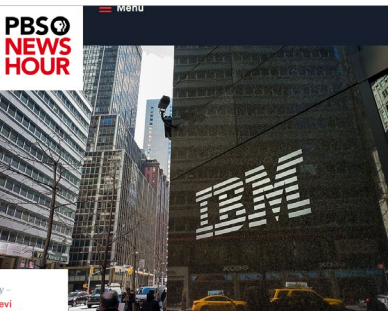
A P-20W data system securely brings together specific data to help enable leaders, practitioners and community members to understand education opportunities and pathways. Key sectors include;

- early childhood
- K-12
- postsecondary
- workforce

Members of the State Policy Partnership include:



US Skilled Trades Worker Shortage Worsening Amid Soaring Demand & Workforce Crisis



There is no question that enterprises are taking matters into their own hands and aggressively pursuing newly skilled labor and pulling from traditional higher ed enrollees

IBM hired over 15,000 workers last year based on skills with NO post-secondary credential & just a HS diploma

Facing skilled worker shortage, U.S. companies try to train their own new labor pools

Nearly half of American companies say they are short on skilled workers

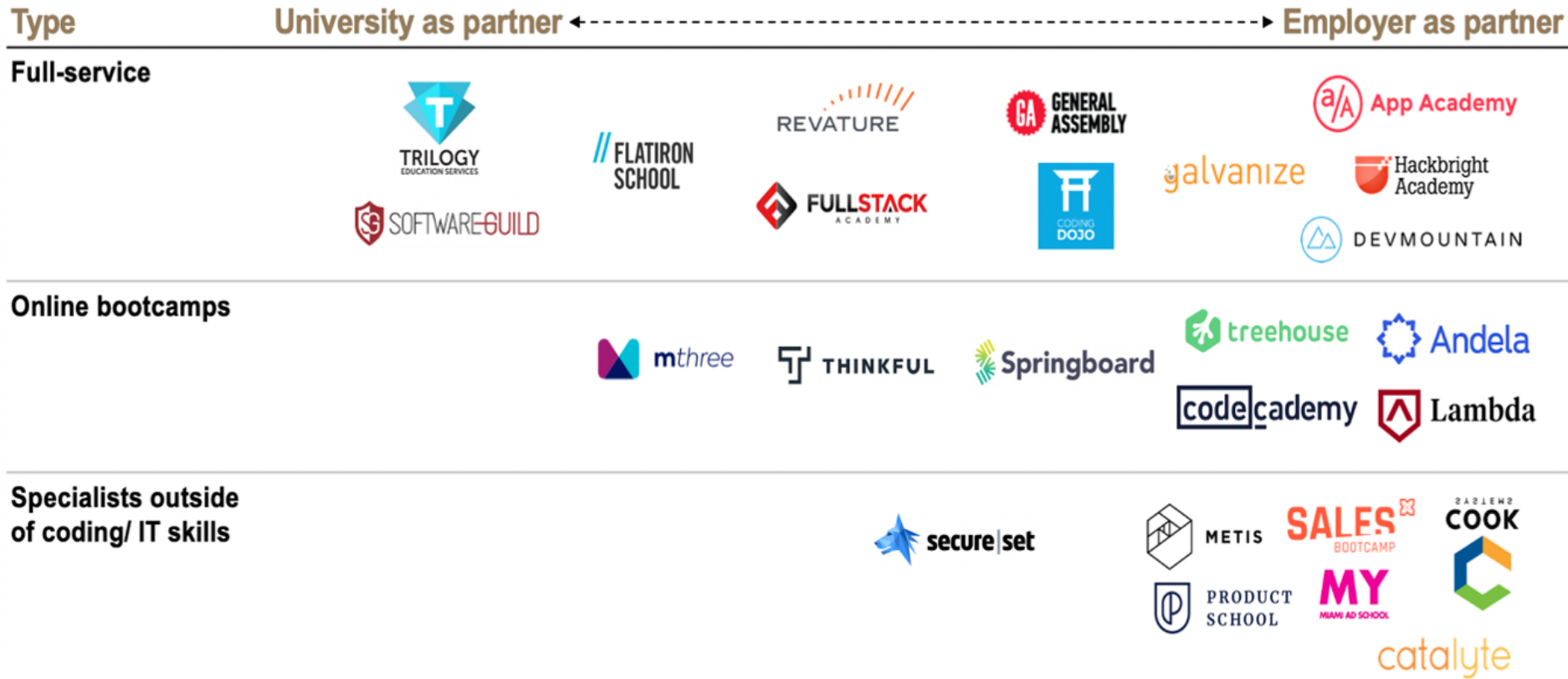


By [Anneken Tappe](#), [CNN Business](#)

Updated 12:01 AM ET, Mon October 25, 2021

From Tyton Partners an example of the continuum of skill building businesses

March 31, 2021



Implications and actions to be considered

- Tighter collaboration with industry (direct or with indirect skill building businesses)
- Becoming heavily involved in the State efforts to identify high demand skill clusters and your role in developing job pipelines
- Push for short form credential attainment and support
- Use of Pell Funds to support non-traditional credential training uses.
- Leverage credential engine to understand the skill clusters identified for non education sourced credentials and determine your institution's ability to meet those requirements

Opportunities: What can the sector do to help itself?

There are new enabling tools and data-oriented products and services that can help enable an institution and its' learners to thrive in this environment

Non-credit continuing education – adult market

Kevin E. Drumm | President, SUNY Broome Community College

Done right, **non-credit education** can not only help maintain enrollment rates but keep lifelong learners at the institution.

Need to continue!

Traditional
transfers

1,2 year
certs and
degrees for
jobs

Grow in partnership with businesses
identifying high demand skills

Continuing
education
for adults

+

Short form
credentials:
traditional
age and
adults

An accelerated move to hybrid learning models...

Researchers at the Urban Institute identified the **likely permanent shift to hybrid models in programs like nursing, manufacturing technologies, HVAC servicing and auto repair**

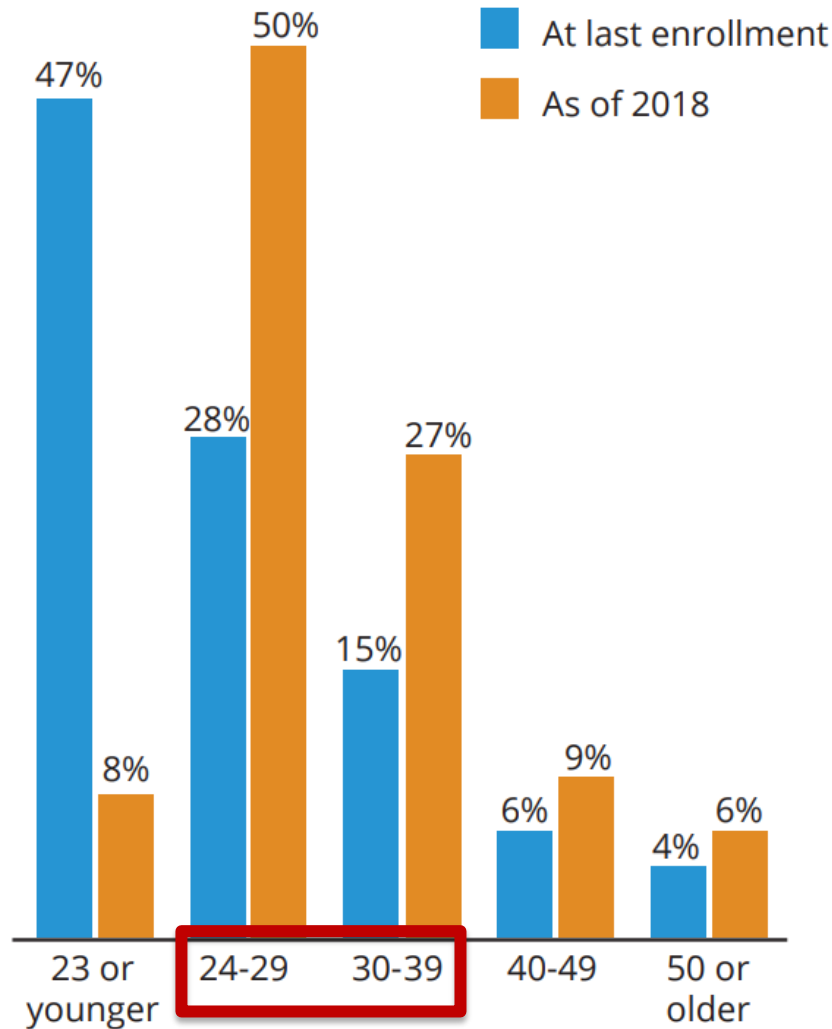
...there is **evidence of new adoption of simulation technologies and learning tools which will likely persist post-COVID.**

pandemic disruptions may provide some of the **impetus to adopt new instructional technologies, eventually “bending the cost curve”** to reduce the expense of program delivery in fields that have traditionally required fully on-site instruction

Re-engaging with stop outs: there is a large opportunity here

- **36m**In Americans hold some postsecondary education and training but no completion and are no longer enrolled
- **10% of this population are “potential completers”**: made at least two years’ worth of academic progress up until their last enrollment.
- About **940K** students identified five years ago, **have since re-enrolled and are now new completers**. More than a million are still enrolled as of December 2018, for a combined success and progress rate of **54%** among re-enrollees.
- **Returning students were more likely to have reenrolled at public institutions**. But online enrollees were more likely to have returned to online institutions.
- **Completers tend to finish at the institution and state where they first re-enrolled** and complete within two years of re-enrolling, without stopping out.

**The near completer group is mostly adults
(At least two full semesters of enrollments and no credential)**



AASA - AACCC project: working on building more robust traditional pipelines through better prepared HS students leading to higher enrollments at CC

- How can both sectors work together to escalate or create movement where simultaneous high school/college degree attainment is happening at a large scale?

The presidents and superintendents concurred that the collective efforts undertaken by the associations must have as a **central theme dual enrollment and early college programs that embrace the strategic theme of creating productive citizens and responding to the workforce needs for tomorrow.**

“K-12 districts and higher education have two funding laws (ESSA and HEA) that work against us – we must erase these lines. We need seamless architecture where laws and regulations don’t work against us. We need more connection between the institutions.”

Daniel A. Domenech
AASA Executive Director

NSC Industry Credentials Project: Using data to demonstrate the growing value proposition of the institution

The road to telling a more holistic story about your institutions and the sector's contributions to the economy



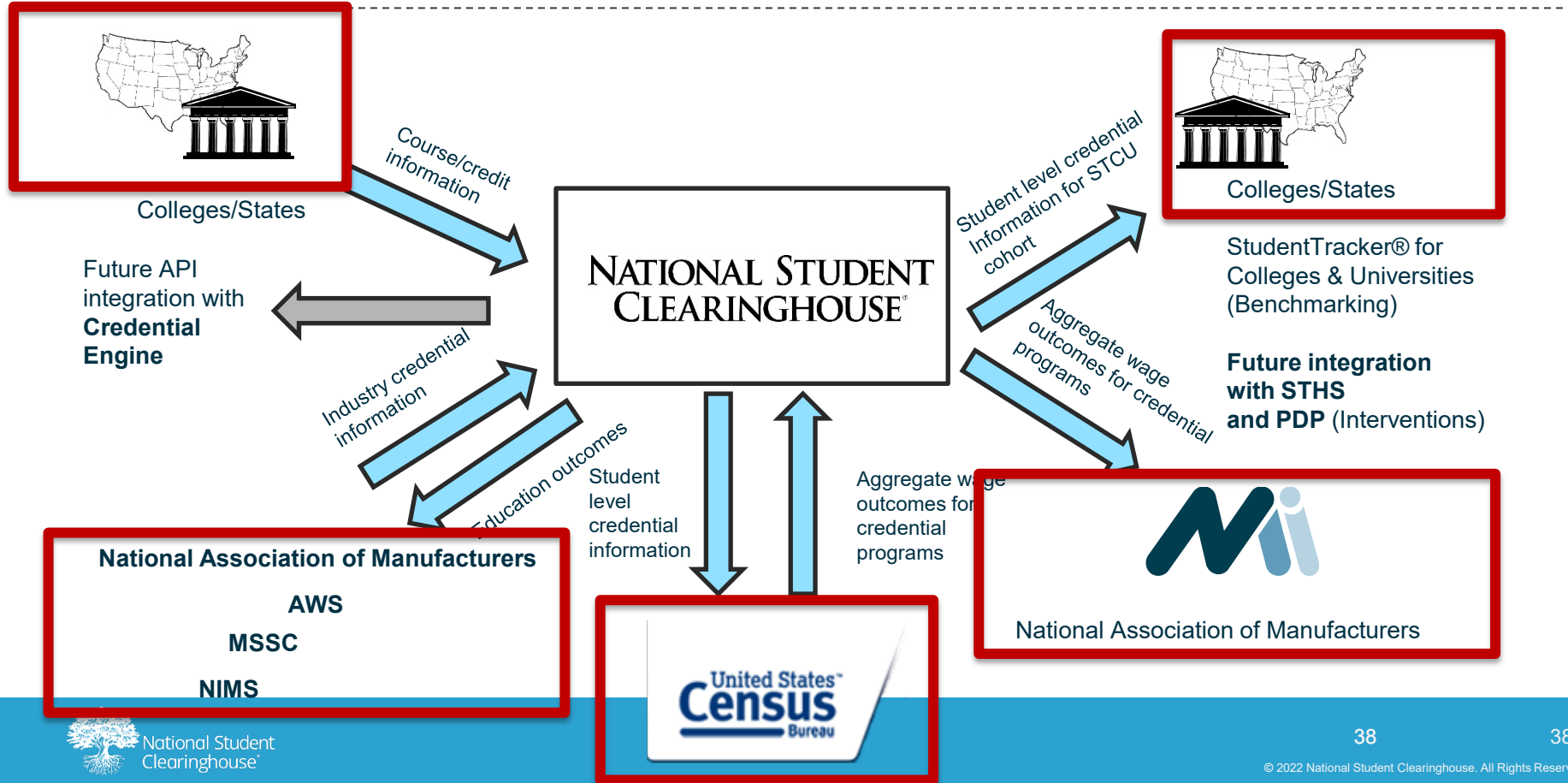
Industry Certification and Education Performance Data System – Preliminary Project Results

October 2020



National Student
Clearinghouse

How the Industry Certification and Education Performance Data System Works



Matching Industry Credentials & Postsecondary Education: MSSC

File Creation Date	2/28/2019
Postsecondary Education (PSE) Outcomes Tracking Period	2011-2019
Any Degree	
Any Degree - PhD	0.05%
Any Degree - Professional	0.02%
Any Degree - Masters	0.71%
Any Degree - Bachelors	2.32%
Any Degree - Associates	6.14%
Any Degree - Certificate	8.17%
Any Degree - PSE Credential	0.44%
Any Degree - No Degree	86.39%
PSE Enrollment, No Degree	28.64%
No PSE Enrollment, No Degree	57.76%

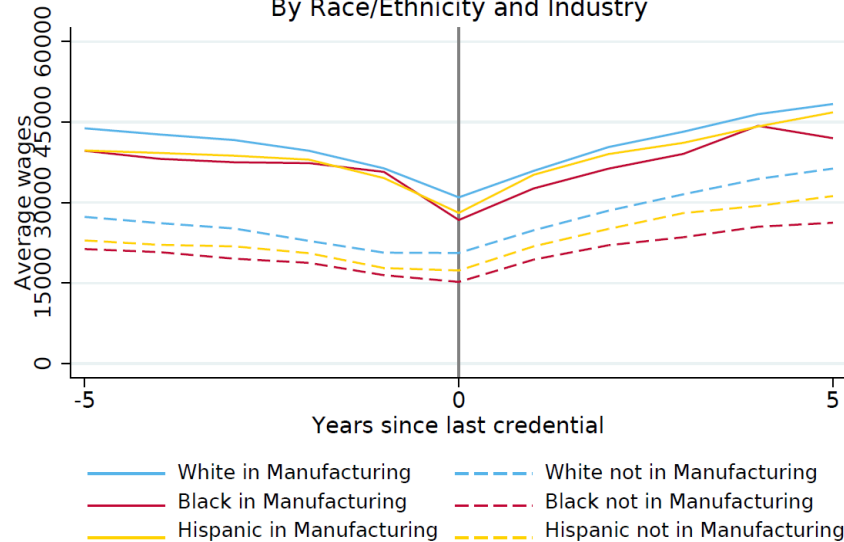
Disclaimer

Any opinions and conclusions expressed herein are those of the authors and do not reflect the views of the U.S. Census Bureau.

The Census Bureau's Disclosure Review Board has approved all statistics and estimates presented today for public release under approval numbers CBDRB_FY2020-CES010-007 and CBDRB-FY2020-CES010-012.

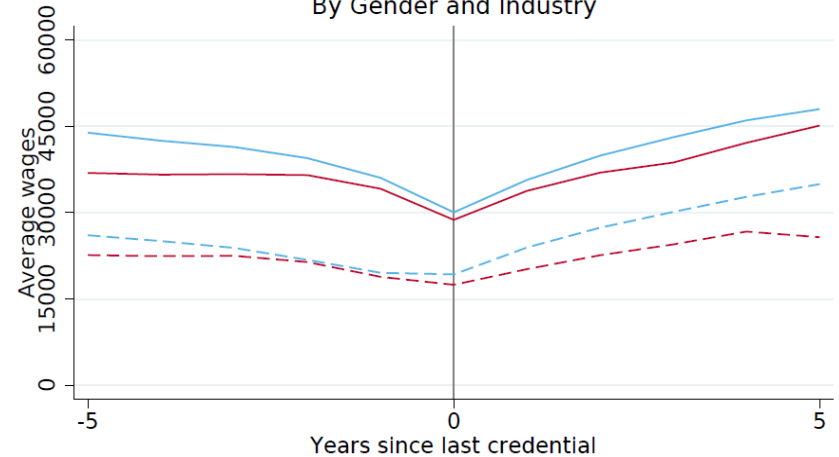
ROI and breakdowns by age, gender, ethnicity and degree stacks also part of the program development

Average wages since last manufacturing credential
By Race/Ethnicity and Industry



CBDRE-FY2020-CES014-001

Average wages since last manufacturing credential
By Gender and Industry



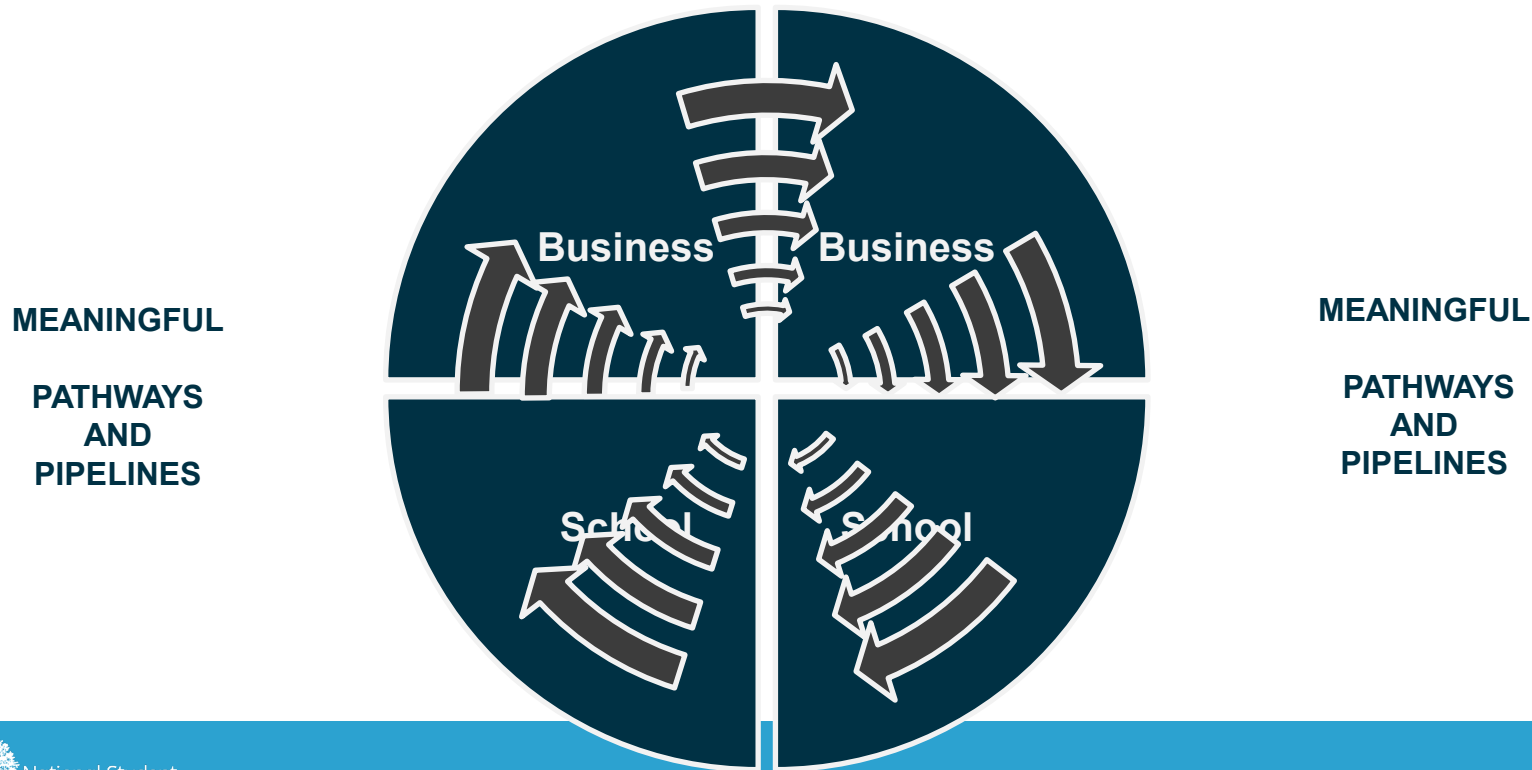
CBDRE-FY2020-CES014-001

New Pell grant eligibility for short term training programs

- The amendment would make programs between **150 and 600 clock hours (over at least 8 weeks) potentially Pell-eligible.**
- Programs would have to meet several criteria before becoming eligible, and not all short-term programs should expect to qualify.
- Among the requirements:
 - programs would have to demonstrate a **wage increase of 20% for those completing the program (approximately six months after completion).**
 - **Non-credit programs that articulate into credit courses and otherwise qualify can become eligible for Pell.**

Learning and Employment Record: A tool that enables pipelines

Progressive Eco-system of school and workforce based skill attainment and growth – pipelines to jobs



New tools to close the skills gap are becoming available with large federal and state scaling efforts supporting them

- Department of Commerce: Good Jobs grant
 - \$25mln minimum per grant.; BIPOC focus; scaling skilling, reskilling and upskilling with direct connections to jobs.
- **National Governors Association Welcomes 6 States To 2nd Phase Of Workforce Innovation Network**
 - *Hawai'i, North Carolina, North Dakota, Oklahoma, Pennsylvania And Rhode Island Join Network To Close Workforce Achievement Gaps*
- NGA hosted event covering **State Strategies for skills and life long learning systems**
 - **Featured Indiana Achievement Wallet:** [State Strategies for Skills and Lifelong Learning Systems - National Governors Association \(nga.org\)](#)

Tell a more holistic data story:

Noncredit education, workforce development and credential issuance is coming of age as part of accountability measures

- Not for credit and workforce programs along with ROI calculations are integral to the overall contribution of community colleges.
- IPEDS contracted with RTI to explore adding non-credit enrollment and activity to IPEDS in 2021
- **As an industry you need to work together to move away from only traditional FTE measures as a yardstick for value and success**

The community college sector has a much larger story to tell... It needs to be told.

The community college sector is a force for learner – worker enablement....

proactivity and measurement will be key to evolving the sector to its' full potential.

Thank you

