

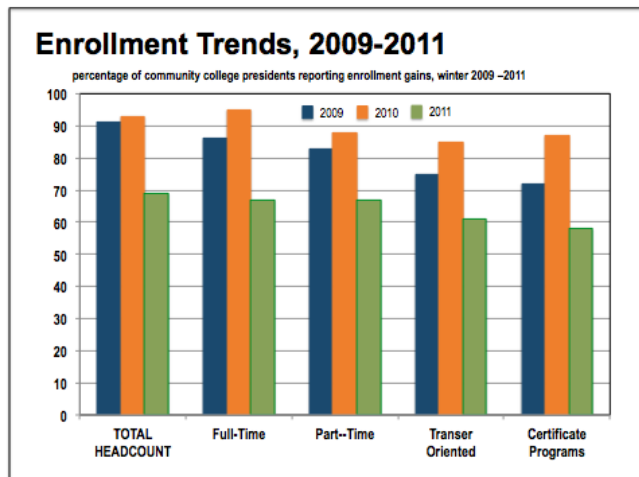
Still Doing More With Less

Community Colleges Report Rising Enrollments and Continuing Budget Erosion

The *2011 Community Colleges and the Economy Survey* reveals continuing enrollment gains coupled with continuing budget reductions. More than two-thirds (69 percent) of the 448 campus presidents and district chancellors participating in the 2011 survey report increased headcount enrollment in winter 2011 compared to winter 2010; concurrently, three-fifths of the presidents participating in the survey report a reduction in the overall operating budget at their institution; two-fifths (41 percent) report that the budget cut was 5 percent or more.

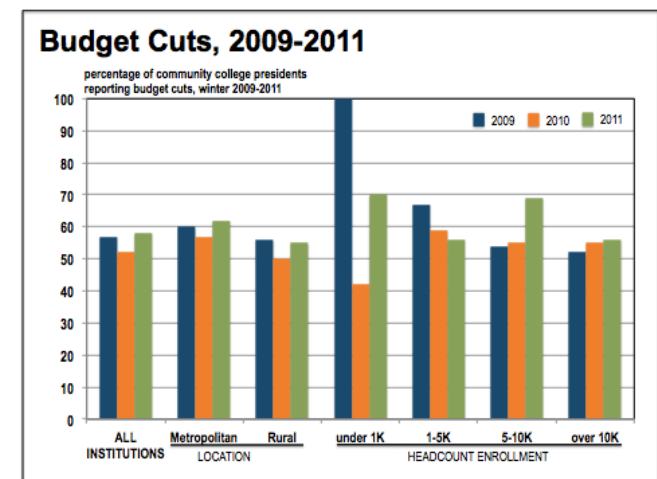
“These new data document the continuing challenges that confront the nation’s community colleges,” says Walter G. Bumphus, president and CEO of the American Association for Community Colleges. “During the current economic downturn, the nation’s community colleges have been called upon to serve many more students and to do so with significantly less resources.”

nation’s community colleges. The proportion of community college presidents reporting reductions in their operating budgets rose slightly this year to 58 percent, versus 52 percent in 2010 and 57 percent in 2009. Moreover, the proportion of campuses experiencing budget cuts that exceeded 10 percent remained in double digits: 16 percent in 2011, compared 18 percent in 2010, and up from 7 percent in 2009. Administrative budgets took the largest hit; three-fifths (58 percent) of the presidents participating in the survey report reductions in the budget for administrative resources and operations, compared to 48 percent who report reductions in the budget for instructional resources.



Although the 2011 survey confirms continuing enrollment gains at community colleges, the enrollment growth appears slower than in 2009 and 2010. Two similar if smaller surveys of community presidents during the first two years of the current economic downturn revealed that more than 90 percent of institutions experienced winter-to-winter headcount enrollment gains, compared to just 69 percent in winter 2011. Moreover, the proportion of campuses reporting headcount enrollment gains of 15 percent or more during the past year declined from 31 percent in the 2010 survey to 12 percent in the 2011 survey.

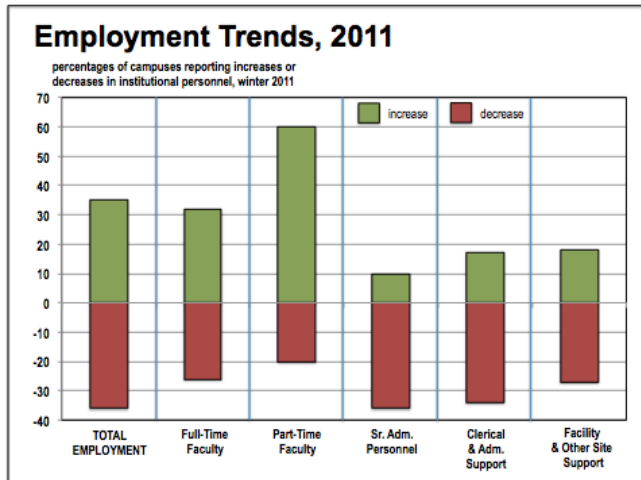
These enrollment gains stand in stark contrast to the budget cuts that continue to plague the majority of the



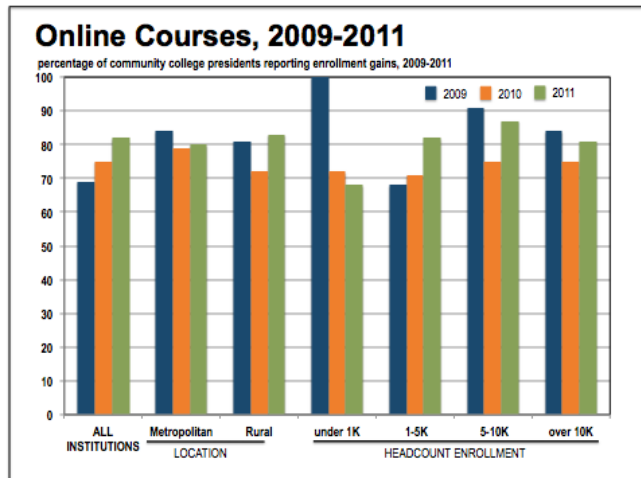
The little good news about campus finances involves mid-year budget reductions, which declined to 31 percent of the surveyed institutions, compared to 61 percent in 2009 and 54 percent in 2010. The average mid-year rescission also declined to 5 percent, compared to 7 percent in 2010.

The 2011 survey also documents a slight uptick in employment in the nation’s public two-year colleges. Just over a third (35 percent) of presidents report that total institutional employment is up at their institutions, compared to 33 percent in 2010 and 26 percent in 2009. Perhaps more striking is that fewer institutions (36 percent) report reduced employment in the 2011 survey, compared to 52 percent in 2010. Although the number of presidents reporting rising employment for part-time faculty is not surprising (60 percent in 2011, compared to 68 percent in 2010), the 2011 survey also reveals some gains in the numbers for full-time faculty positions: more than a quarter (26 percent) of

community college presidents report increased employment for full-time faculty this past year, compared to a fifth (22 percent) in 2010.



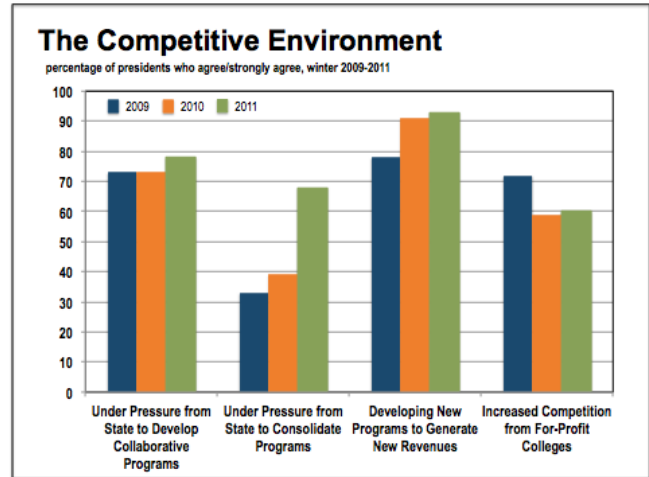
The numbers for online education in community colleges continue to rise. Four-fifths (82 percent) of the presidents report rising enrollments in online courses; an eighth (12 percent) report that the enrollment in online courses at their institutions increased by 15 percent or more during the past year. Similarly, 46 percent of presidents report rising enrollments in online degree programs and 39 percent cite enrollment gains in online certificate programs over the past year.



“Student demand rather than efforts to reduce instructional costs clearly drives the gains in online enrollments in community colleges,” says Kenneth C. Green, founding director of The Campus Computing

Project, who designed and managed the survey. “The numbers are clear: 89 percent of presidents cite demand as the driver for more on-line education at their institutions, vs. 46 percent who view online education as a way to reduce instructional costs.”

Although 60 percent of community college presidents “agree/strongly agree” that their institution confronts increased competition from for-profit institutions, 45 percent “agree/strongly agree” that their campus is “experiencing rising enrollments among students who previously attended a for-profit college.”



Community college presidents also report rising pressure from state authorities to develop collaborative programs and to consolidate programs. And the vast majority (93 percent, up from 78 percent in 2009) report that their institutions are developing new programs in order to generate new revenues.

The AACC/Campus Computing Project survey of community college presidents received financial support from Pearson and SunGard Higher Education. The online survey was conducted during March and April 2011. A total of 448 community college presidents and district chancellors participated in the survey. The survey materials are available online from American Association of Community Colleges (www.aacc.nche.edu) and The Campus Computing Project (campuscomputing.net).



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2011 AACC Conference
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Methodology

- **GOAL:** repeat 2009 and 2010 surveys, which provided first national data about the impact of the downturn on community colleges
- Survey presidents and district chancellors
- Email questionnaire: 10 items about enrollments, budgets
- Surveyed from mid-March to early April, 2011
- 448 respondents; 46 pct response rate

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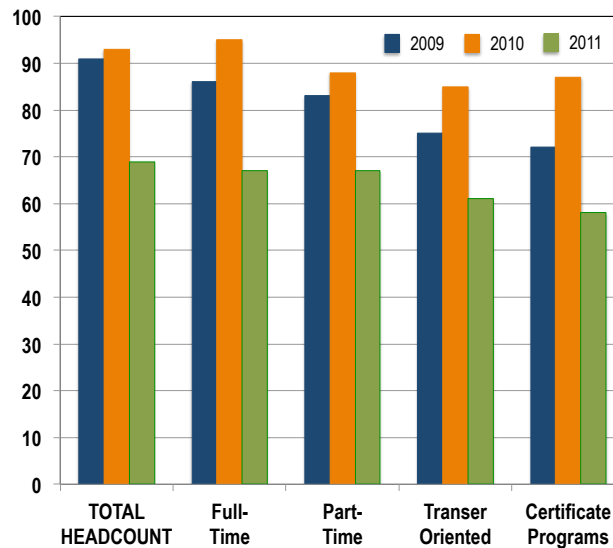
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Key Findings

- **CONTINUING TO DO MORE WITH LESS**
- Enrollment gains continue, but slower than in 2009 and 2010.
- Large campuses most affected by enrollment caps
- Growth in online courses continues
- Budget cuts and hiring freezes cast a shadow over programs and services.
- *The “Potemkin Campus” Effect*: instructional expansion without the necessary instructional infrastructure

Enrollment Trends, 2009-2011

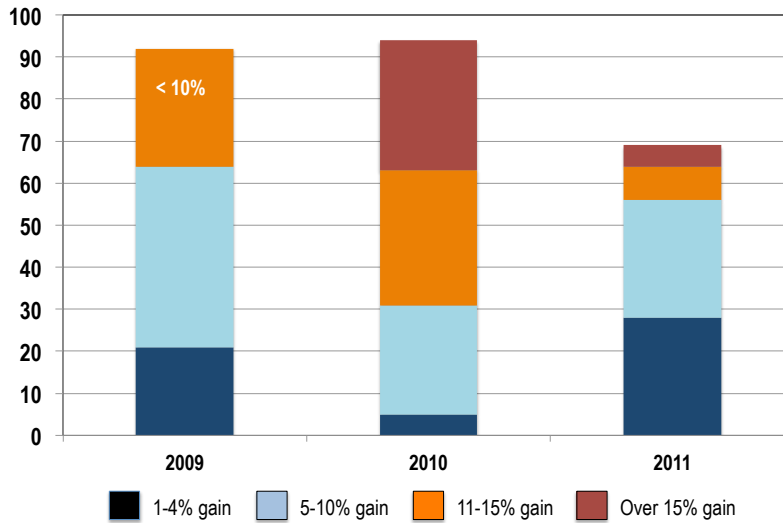
percentage of community college presidents reporting enrollment gains, winter 2009–2011



- **Slowing, but still substantial enrollment growth.**

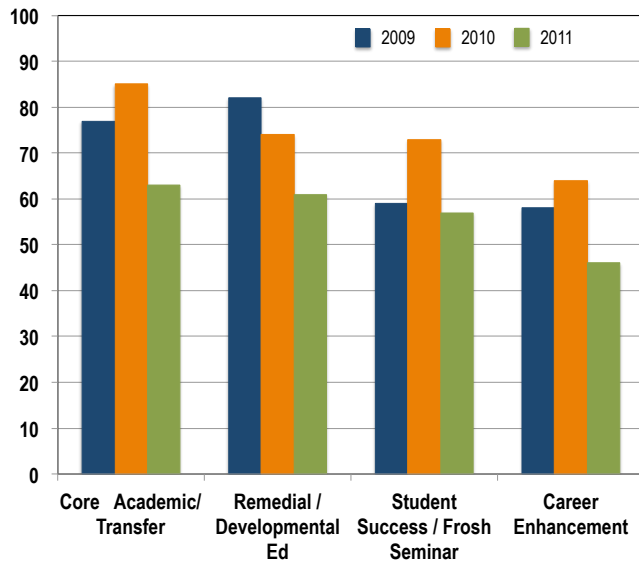
Gains in Headcount Enrollment, 2009-2011

percentage of community college presidents reporting enrollment gains, winter 2009-2011



Key Program Trends, 2009-2011

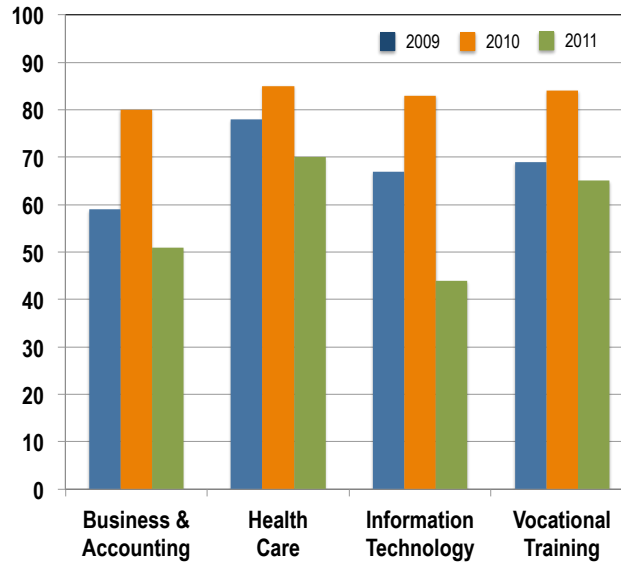
percentage of community college presidents reporting enrollment gains, winter 2009-2011



- Across key areas, slower but still substantial enrollment gains.

Academic Program Trends, 2009-2011

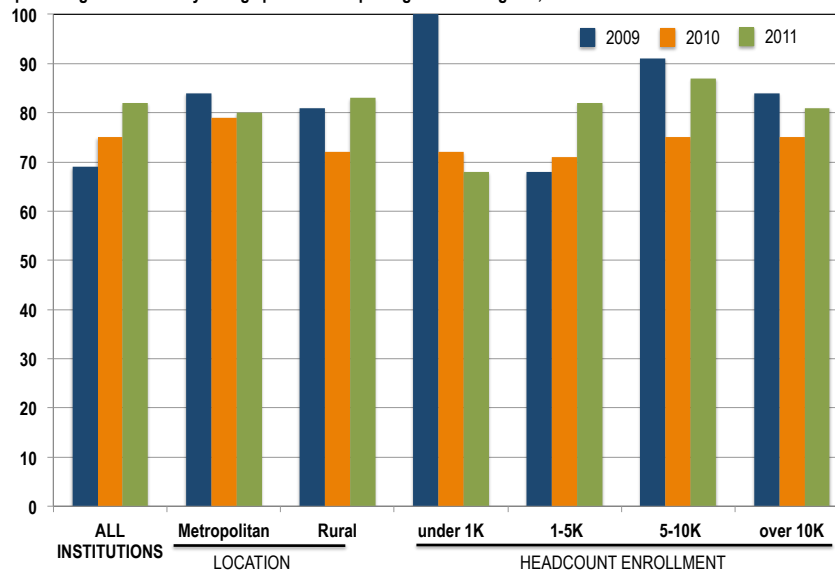
percentage of community college presidents reporting enrollment gains, winter 2009 – 2011



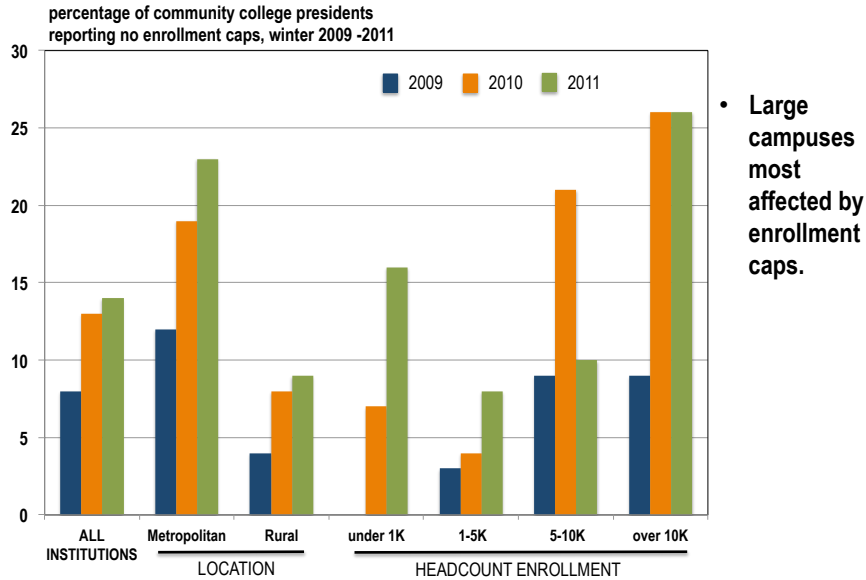
- Health care areas register the greatest growth for three years.

Online Courses, 2009-2011

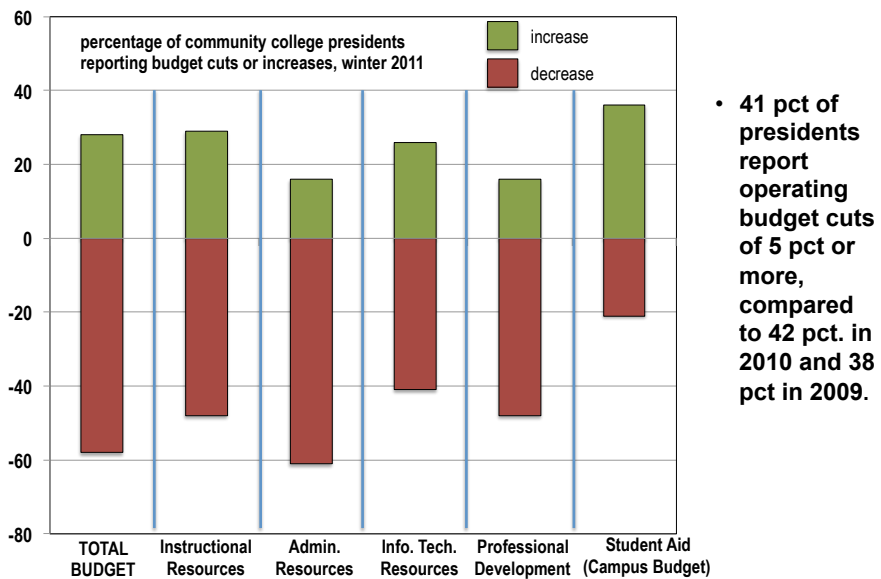
percentage of community college presidents reporting enrollment gains, 2009-2011



Enrollment Caps, 2009-2011



Community College Budgets, 2011

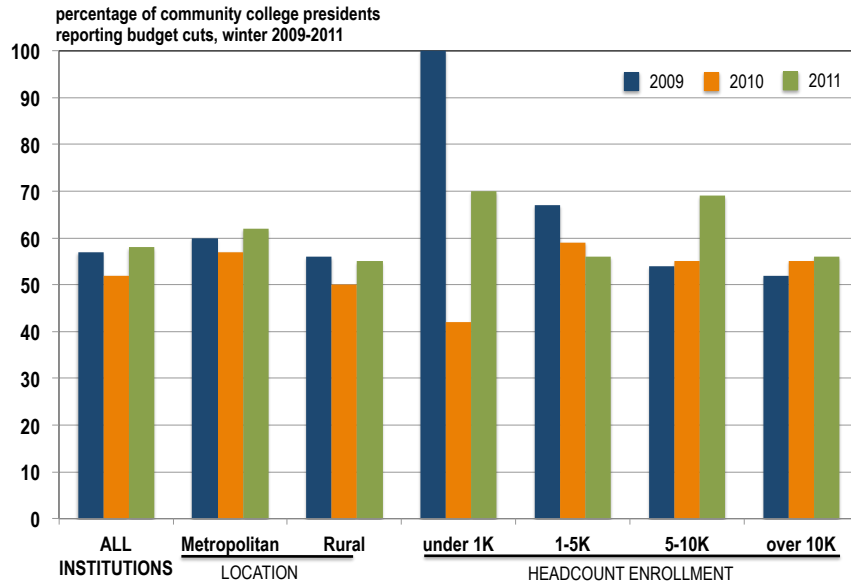




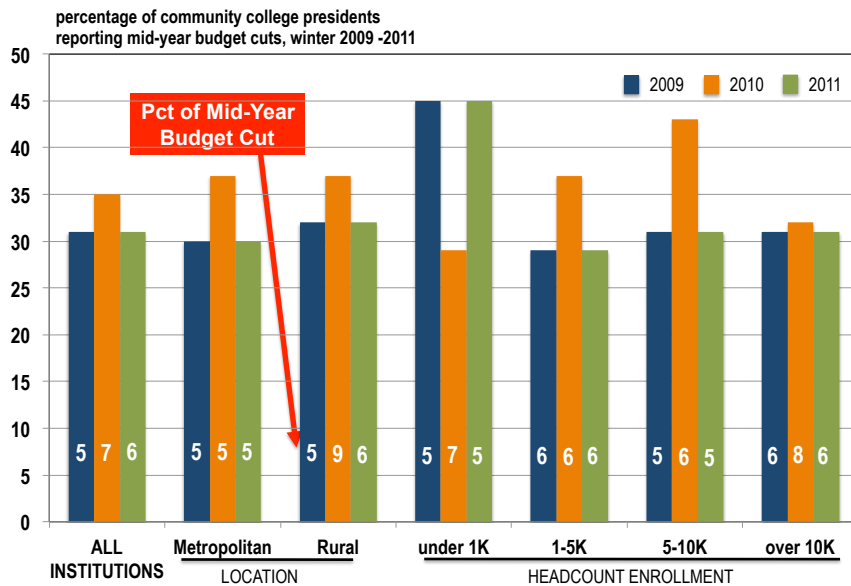
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Budget Cuts, 2009-2011

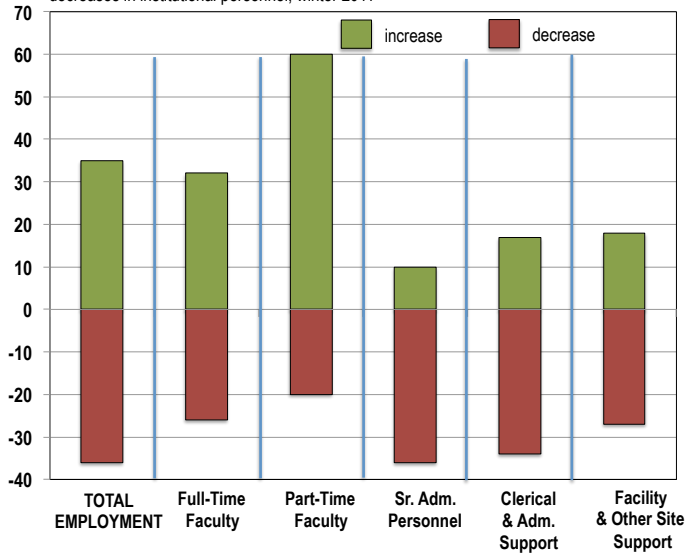


Mid-Year Budget Cuts, 2009-2011



Employment Trends, 2011

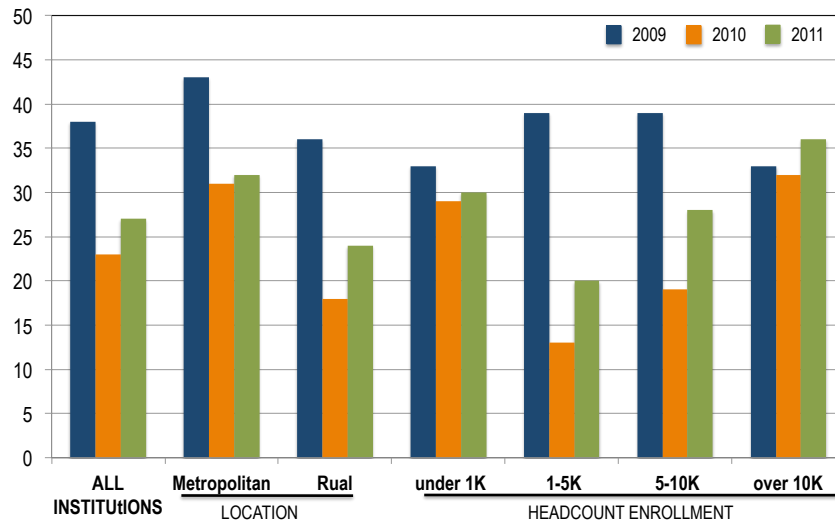
Percentages of campuses reporting increases or decreases in institutional personnel, winter 2011



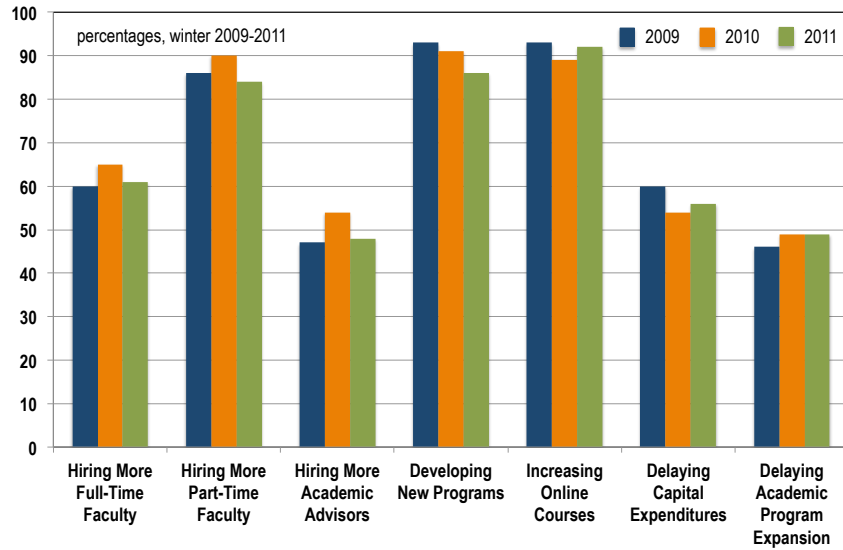
- Slight gain in the hiring full-time faculty in 2011: 32 vs 30 pct in 2010)
- Number of presidents reporting increased hiring of part-time faculty fell from to 60 pct. in 2011 vs. 68 pct. in 2010.

Hiring Freeze, 2009-2011

percentage of community college presidents reporting a hiring freeze, winter 2009-2011

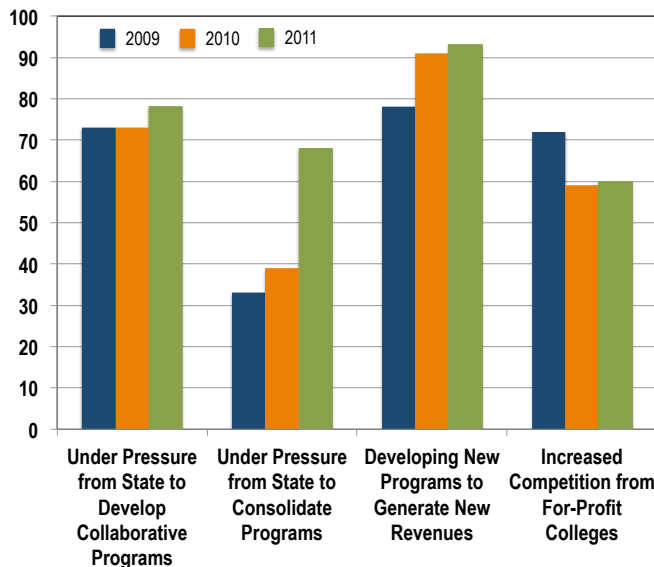


Strategies for Coping with the Changing Environment



The Competitive Environment

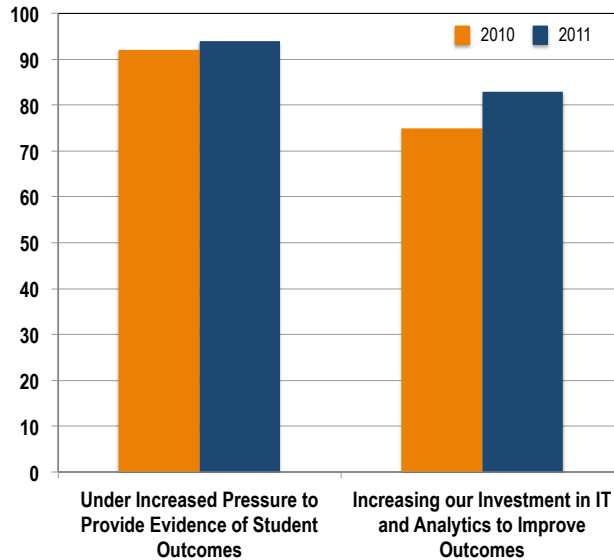
percentage of presidents who agree/strongly agree



- Continuing pressures from for-profits, plus state pressure to consolidate and collaborate
- Presidents searching for new sources of revenue

The Pressures for Assessment

percentage of presidents who agree/strongly agree



- Continuing pressures for assessment and outcomes despite budget cuts.
- IT investments play an increasingly important role in assessment.

Critical Issues

- Continuing to do much more with a lot less
- The critical importance of infrastructure
- *Potemkin Campuses*: Rising enrollments mean increased demand for institutional services and support
- Move beyond an *ad hoc* strategy for online education
- ASSESSMENT: use data as a resource, not a weapon



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