

STILL DOING MORE WITH LESS COMMUNITY COLLEGES CONTINUE TO CONFRONT RISING ENROLLMENTS AND ERODING BUDGETS

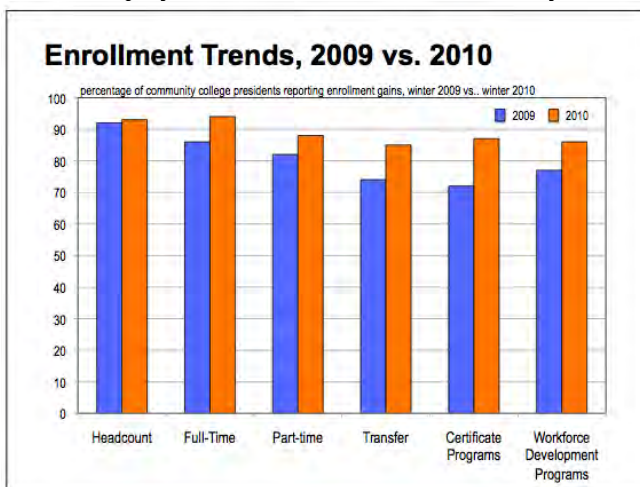
Enrollments continue to explode as institutional budgets continue to erode according to a new national survey of community college presidents and district chancellors conducted by the League for Innovation in the Community Colleges and The Campus Computing Project.

Fully 94 percent of the 128 campus presidents and district chancellors participating in the winter 2010 survey report that headcount enrollment in their districts and on their campuses increased compared to one year ago, about the same as in the 2009 survey. However, the 2010 data show more campuses reporting larger enrollment gain: almost a third (31 percent) of the 2010 survey participants experienced total (headcount) enrollment growth of 15 percent or more from winter 2009 to winter 2010, while another third (32 percent) report enrollment gains of 10-15 percent. In contrast, just over a fourth (28 percent) of the campuses participating in the 2009 survey reported enrollment gains of 10 percent or more. These enrollment gains came as unemployment rose from 7.7 to 10.0 percent from January to December 2009, and as Bureau of Labor Statistics data show that some 14 million Americans were unemployed at the end of the last calendar year.

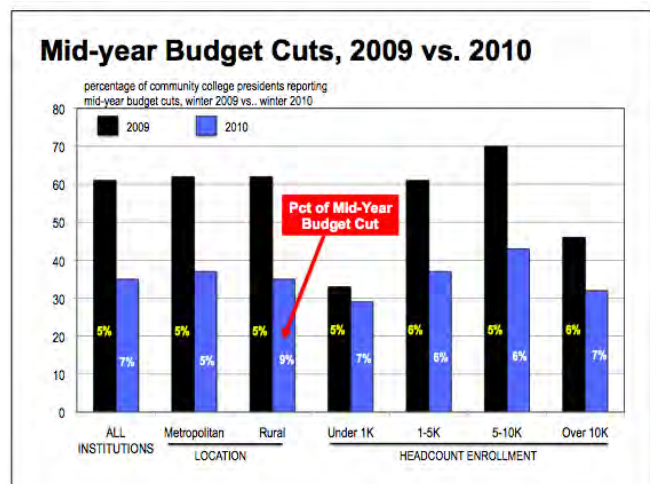
their certificate, workforce, and career enhancement programs; and also among business, health care, and technology majors.

These enrollment gains stand in stark contrast to the budget cuts that continue to affect the nation's community colleges. While the number of community colleges reporting reductions in their operating budgets fell slightly this year (52 percent in 2010 vs. 57 percent in 2009), the number of campuses experiencing budget cuts that exceeded 10 percent more than doubled, from 7 percent last year to 18 percent in 2010. This pattern also appears within specific budget categories: a slight decline in the number of community colleges reporting cuts in their budgets for instruction and administrative services, technology resources, and professional development, coupled with more institutions reporting larger budget cuts in these categories for 2010 than in 2009.

The little good news about campus finances involves mid-year budget rescissions, which declined from 61 percent in 2009 to 54 percent this past year. However, even as a smaller number of community colleges experienced mid-year budget cuts, the average mid-year rescission rose, from 5 percent last year to 7 percent in 2010.



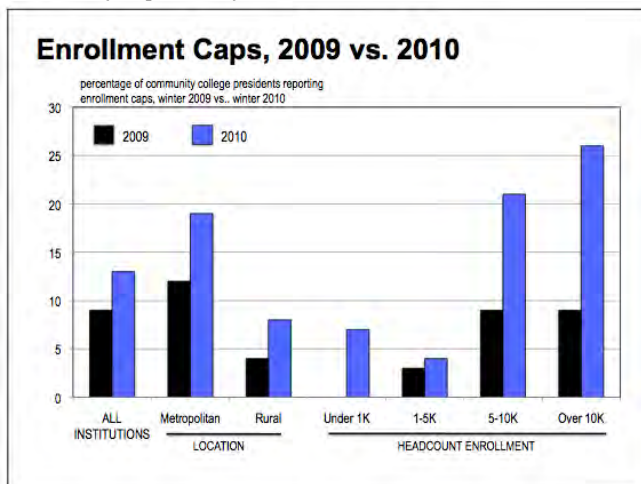
Additionally the 2010 survey reveals that a growing number of community colleges reporting enrollment gains across a range of enrollment categories and curricular areas: compared to the 2009 survey, more campuses report increased enrollments among full-time students, part-time students, and transfer students; in



“The continuing enrollment gains over the past 12 months confirm that the nation's community colleges are at the forefront of both individual efforts and community responses to the economic downturn,” says Kenneth C. Green founding director of The Campus

Computing Project, the organization that designed survey and managed the project. “The 2010 survey also reveals that the community colleges remain on the receiving end of the ‘do more with less and do it better’ mantra that typically accompanies budget cuts and economic upheaval. Community colleges *are* doing and serving a lot more, and are doing it with much less. This has significant consequences for instruction resources, instructional support, and for student support services.”

The combination of rising enrollments and continuing budget cuts led more community colleges to impose enrollment caps this past year. The proportion of campuses experiencing enrollment caps rose from 9 percent in 2009 to 13 percent in 2010. Within sectors, the community colleges that were the most likely to experience enrollment caps were metropolitan campuses (19 percent), and campuses enrolling either 5-10,000 students (21 percent), or more than 10,000 students (26 percent).

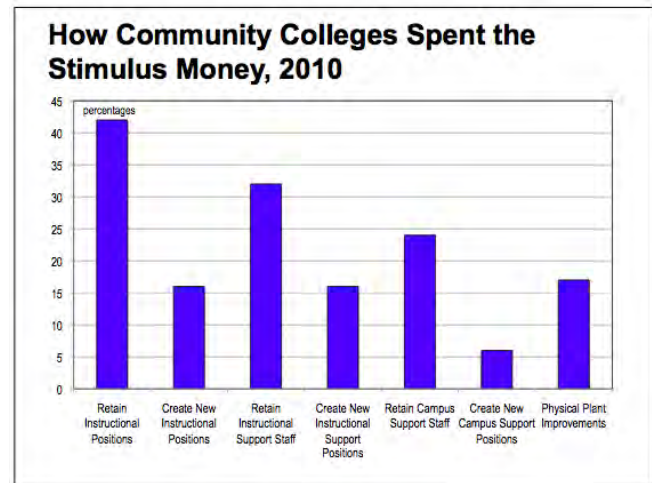


The survey continues to confirm the sustained growth in online courses and enrollments in community colleges over the past year. Almost 9 in 10 of the surveyed presidents (87 percent in 2010, compared to 92 percent in 2009) report increases in student enrollment in the online courses offered by their institution over the past year: a fifth (19 percent) report online course enrollments increased by 5-10 percent, another fourth (25 percent) cite gains of 10-15 percent, while almost a third (31 percent) saw enrollments in online courses rise by 15 percent or more compared to last year. And although the numbers are not as dramatic, more than half the presidents (53 percent vs. 51 percent in 2009) also report gains in the number online certificates offered by their campuses, while 56 percent (vs. 57 percent in 2009) indicated that online degree programs also increased in the past year.

As was the case in 2009, the survey data also confirm that student demand, not institutional efforts to contain instructional costs, is the primary catalyst for the increase in online courses in community colleges over the past year. Almost all the presidents (91 percent vs. 56 percent last year) report that their campuses are offering more online courses in response to student

interest and demand. In contrast, only two-fifths (39 percent, compared to 34.4 percent last year) confirm that their institutions are moving to expand online programs “as a way to reduce the cost of instruction.”

Almost two-thirds of the campuses and districts participating in the survey received federal stimulus program money this past year, averaging \$1.95 million per campus (range: \$1.35M for rural colleges vs. \$3.03M for community colleges that enroll more than 10,000 students). Presidents report that their institutions typically spent the stimulus dollars to save jobs, particularly instructional positions: more than two-fifths (42 percent) indicate that their institutions spent stimulus money to retain instructional positions; a third (32 percent) used the money to retain instructional support staff, and a fourth spent stimulus money to retain administrative and clerical jobs. In contrast, just 16 percent used the stimulus money to create new instructional positions or to hire additional instructional support personnel, and only 6 percent used the money for new clerical or custodial jobs. Also, a sixth (17 percent) spent stimulus dollars this past year for physical plant improvements.



While presidents are no doubt happy to have the stimulus money, the survey data suggest some tempered optimism about the benefits of the federal money to aid enrollments at their colleges and improve employment in their communities. This year 62 percent of the survey respondents agreed/strongly agreed that the federal stimulus funds would benefit enrollments at their institutions, compared to 68 percent in 2009. Similarly, 55 percent of the presidents participating in the 2010 survey agreed/strongly agreed that stimulus money would benefit employment in their communities, down from 77 percent a year ago.

The League for Innovation/Campus Computing Project survey of community college presidents received financial support from Pearson and SunGard Higher Education. A total of 128 community college presidents and district chancellors participated in the online survey, which was conducted from February 26th to March 25th, 2010.

COMMUNITY COLLEGES AND THE ECONOMIC DOWNTURN

Winter 2010 Survey of Community College Presidents



Kenneth C. Green
THE CAMPUS COMPUTING PROJECT

2010 INNOVATIONS Conference
Baltimore, MD • 30 March 2010



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Context

- Unemployment rate rose from 7.7 to 10 pct from Jan-Dec 2009 (up 29 pct).
- BLS reports number of unemployed rose to 14.26 million in 2009, up from 8.9 million in 2008.
- Stimulus Funds began to flow to states and cities, and on to public colleges & universities
- Early indicators point to another “jobless recovery” during the first phase of the economic upturn.

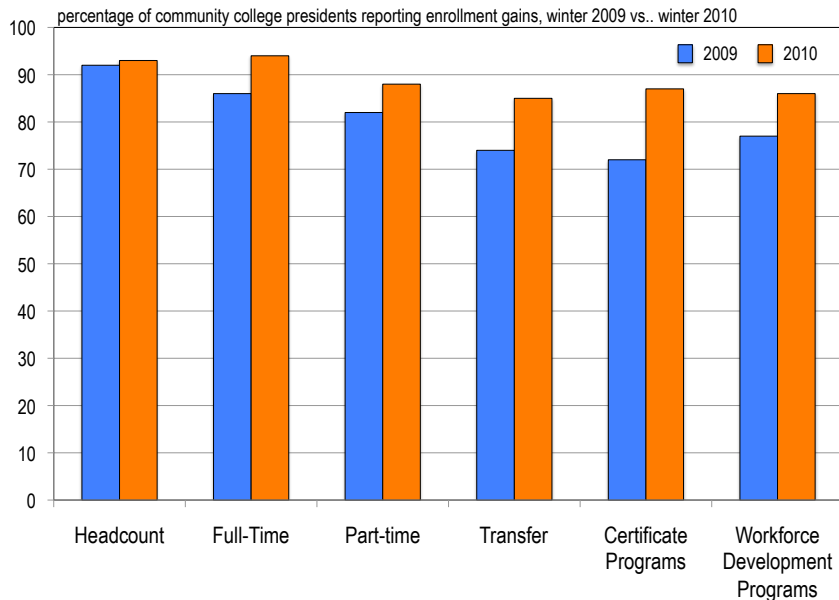
Methodology

- **GOAL:** repeat 2009 survey, 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-February to Mid-March
- 128 respondents; 20 pct response rate

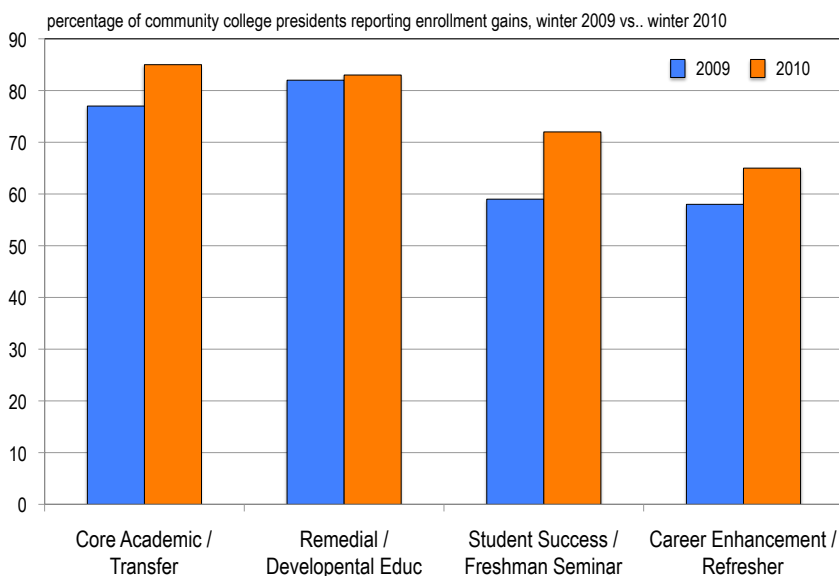
Key Findings

- **CONTINUING TO DO MORE WITH LESS**
- Enrollment increases continue – especially among campuses reporting gains of 15% or more.
- Growth in online programs is “stabilizing”
- Budget cuts and hiring freezes cast a shadow over programs and services.
- The Federal Stimulus Program has delivered less than expected for many community colleges
- The “Potemkin Village” effect continues

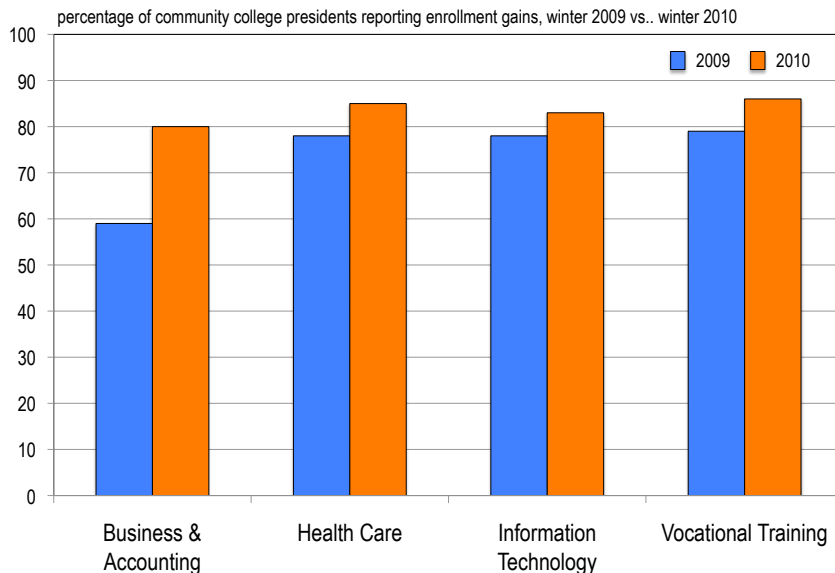
Enrollment Trends, 2009 vs. 2010



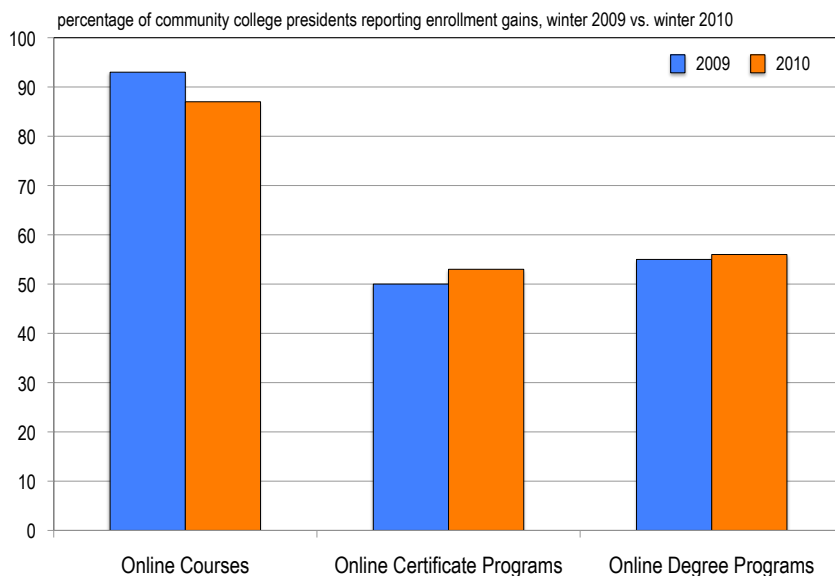
Key Program Trends, 2009 vs. 2010



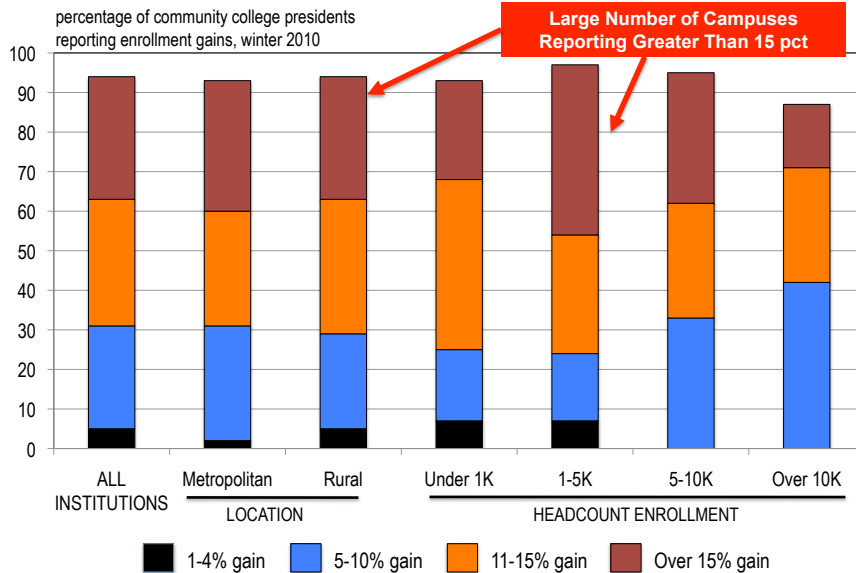
Academic Program Trends, 2009 vs. 2010



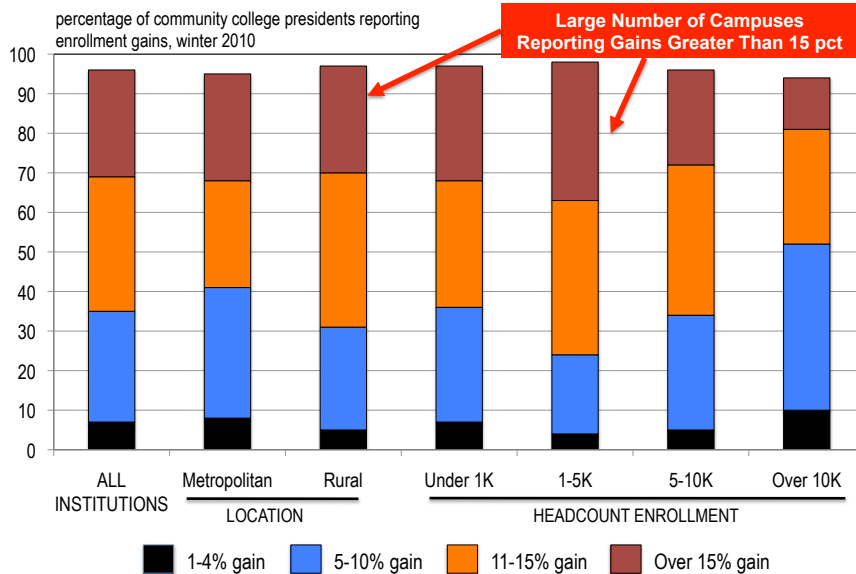
Online Program Trends, 2009 vs. 2010



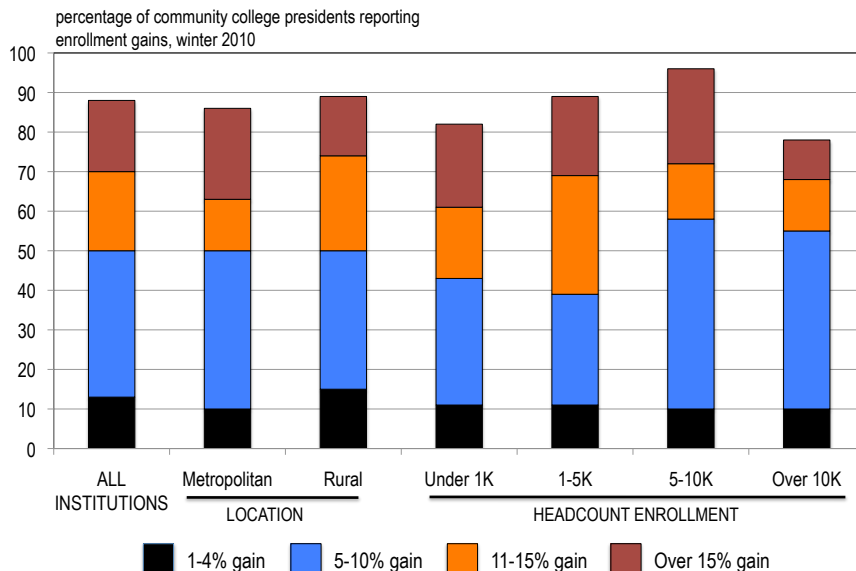
Gains in Headcount Enrollment, 2010



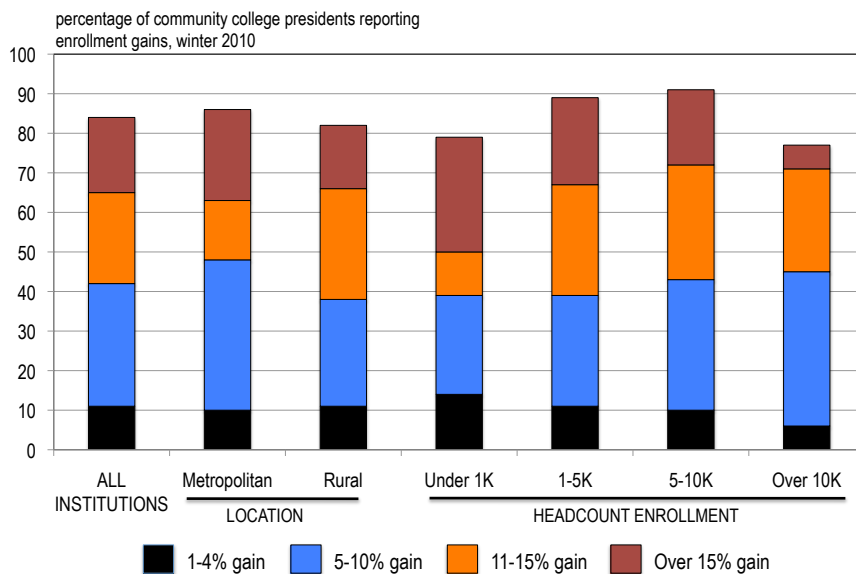
Gains in Full-Time Enrollment, 2010



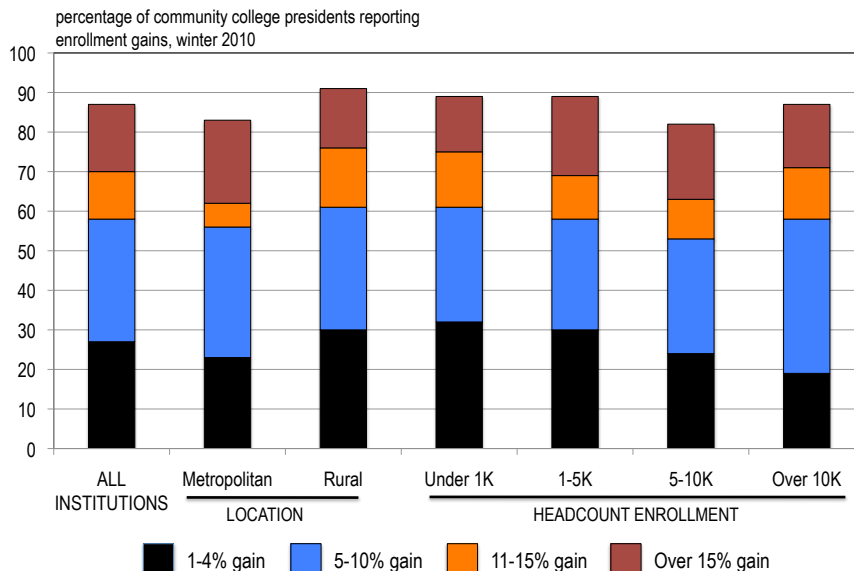
Gains in Part-time Enrollment, 2010



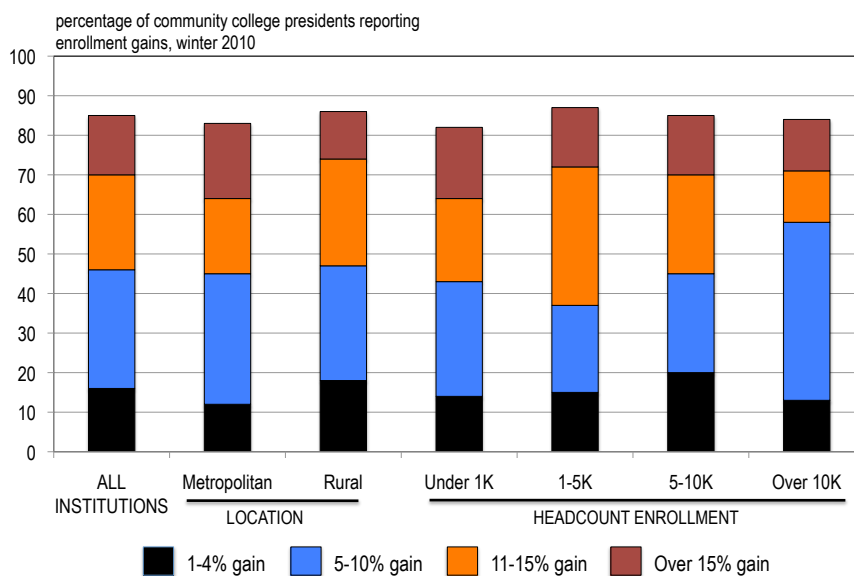
Gains in Transfer Enrollments, 2010



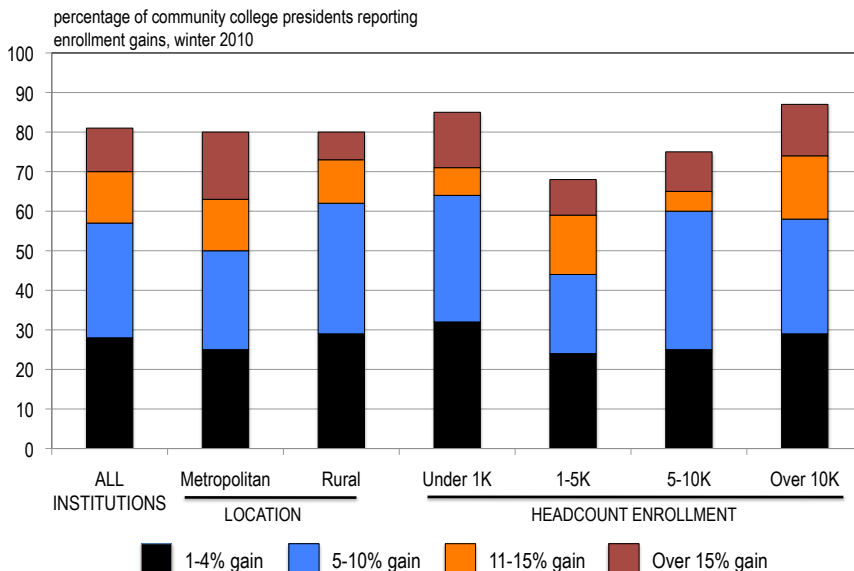
Certificate Program Enrollment Gains, 2010



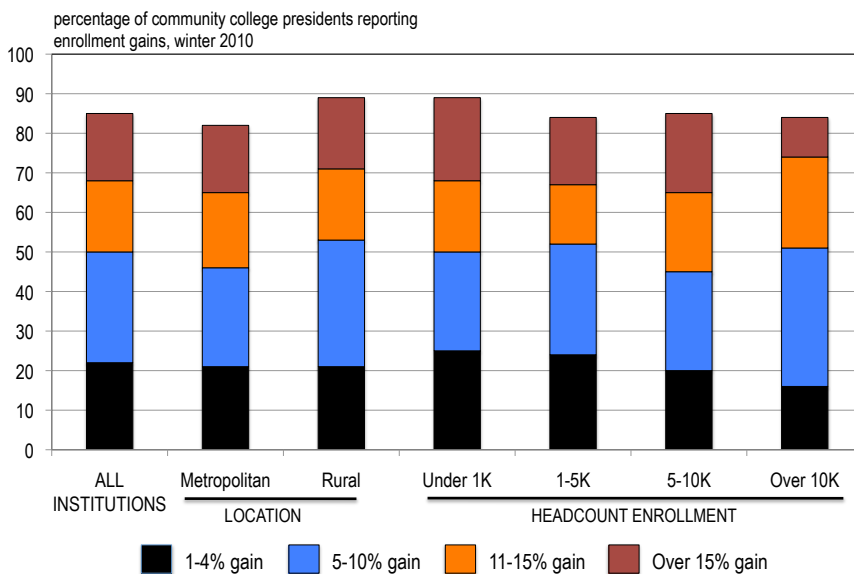
Core Academic Program Enrollment Gains, 2010



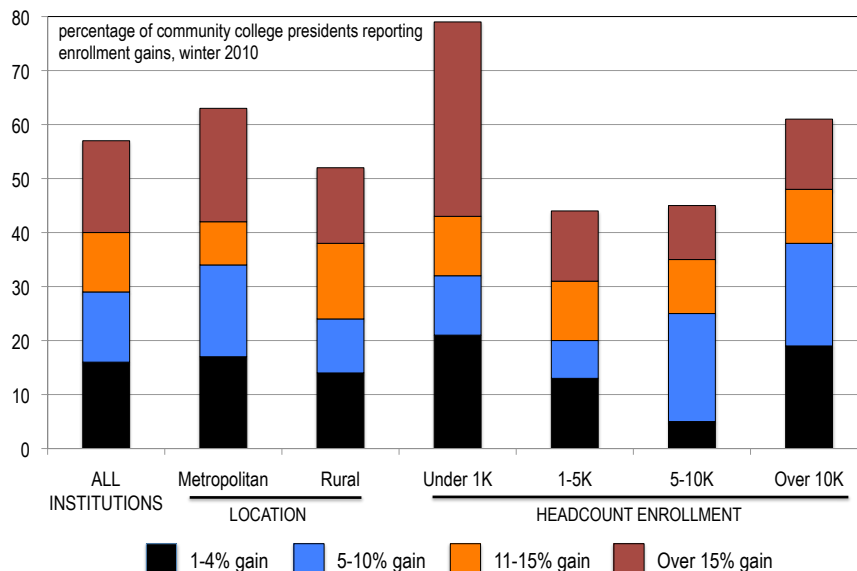
Enrollment Gains in Business Programs, 2010



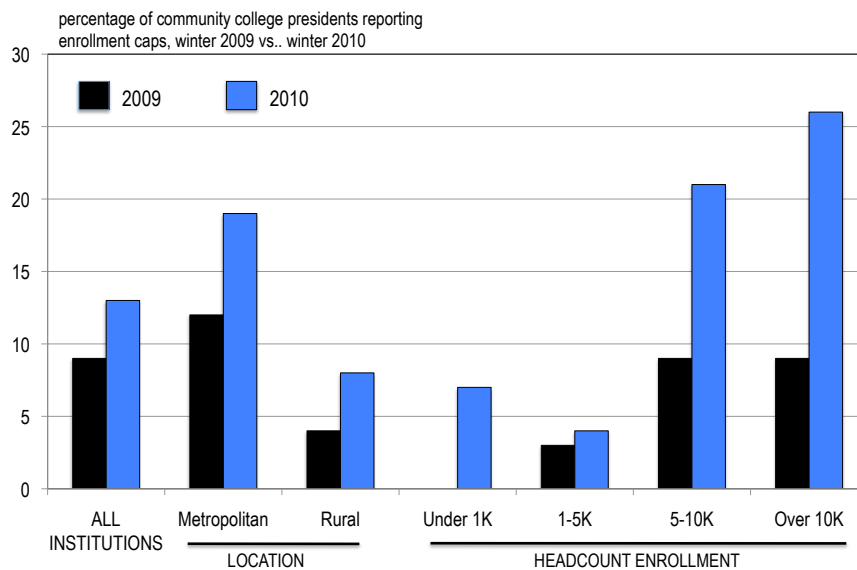
Enrollment Gains in Health Care Program, 2010



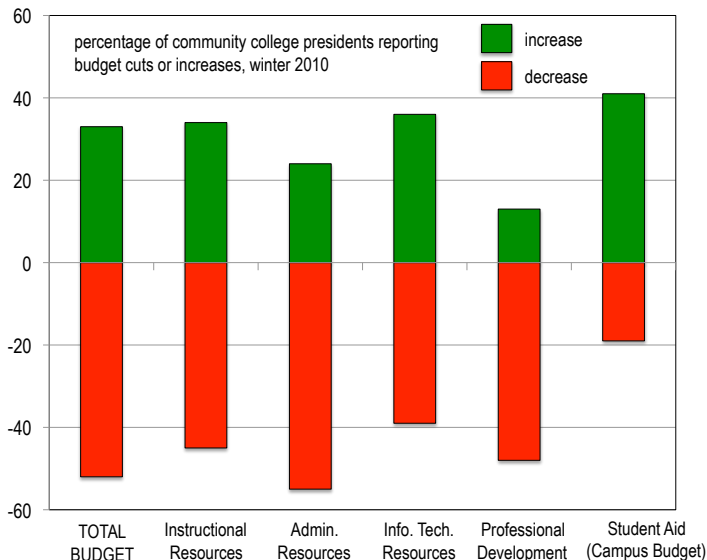
Online Courses Enrollment Gains, 2010



Enrollment Caps, 2009 vs. 2010

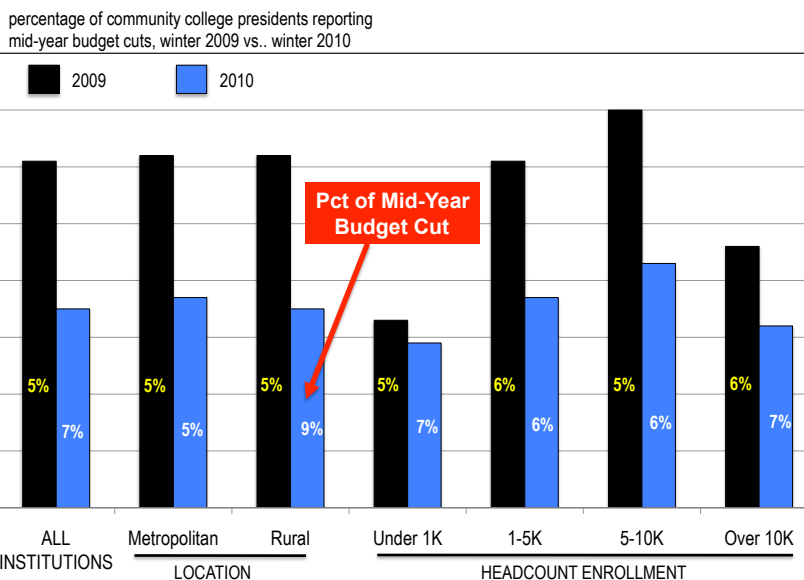


Budgets, 2010



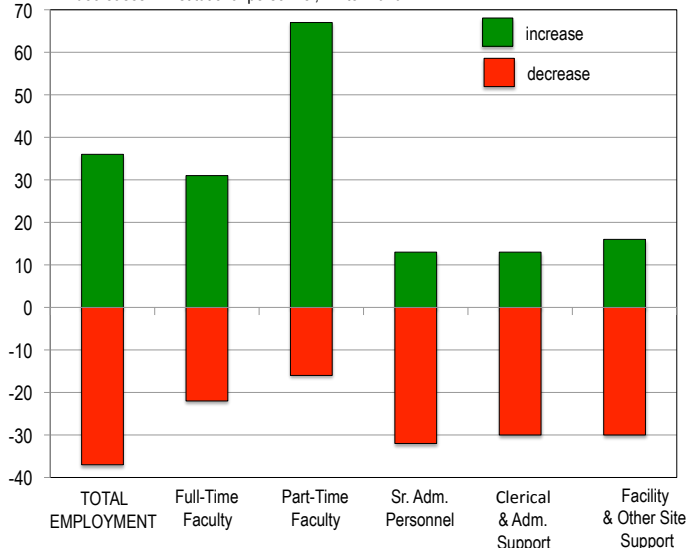
- 42 pct of presidents report operating budget cuts of 5 pct or more, compared to 38 pct in 2009.
- More campuses report larger cuts across operating areas than in 2009.

Mid-year Budget Cuts, 2009 vs. 2010



Employment Trends, 2010

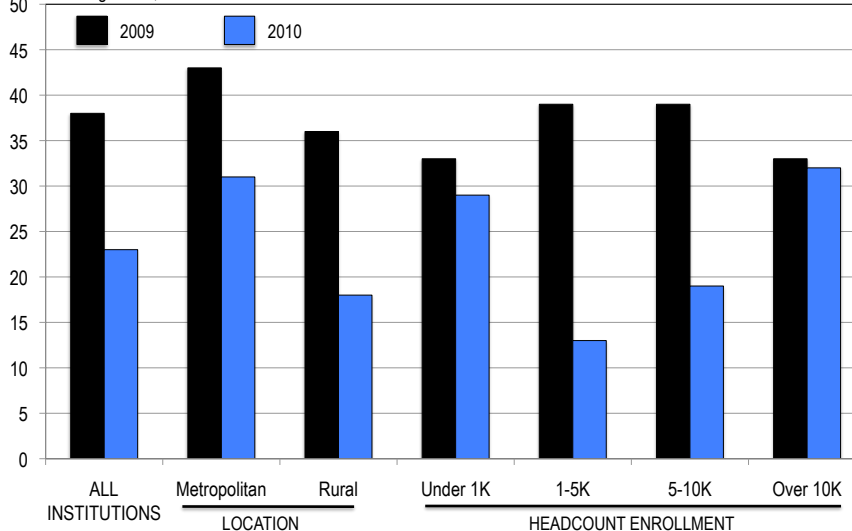
Percentages of campuses reporting increases or decreases in institutional personnel, winter 2010



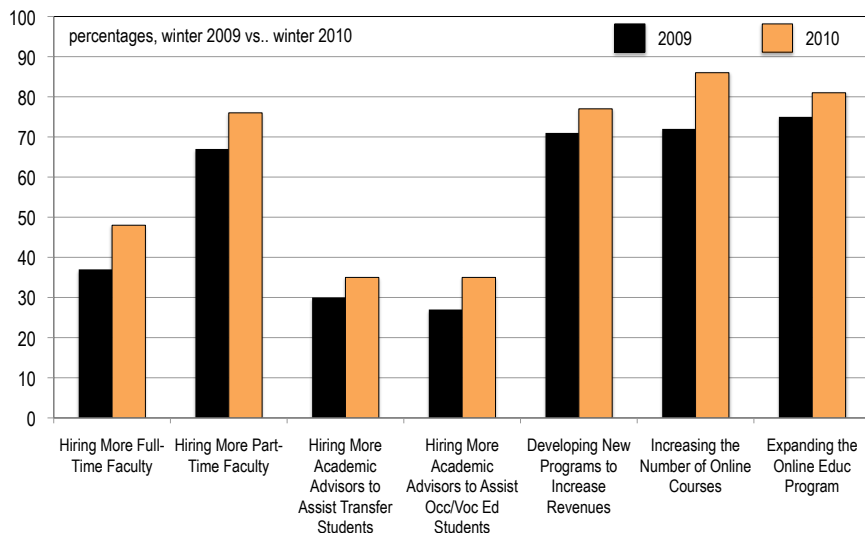
- Except for part-time faculty, generally smaller increases & bigger decreases in 2010 vs.. 2009.
- *No Surprise!* More part-time faculty: 64 pct gain in 2010 vs.. 54 pct in 2009.

Hiring Freeze, 2009 vs. 2010

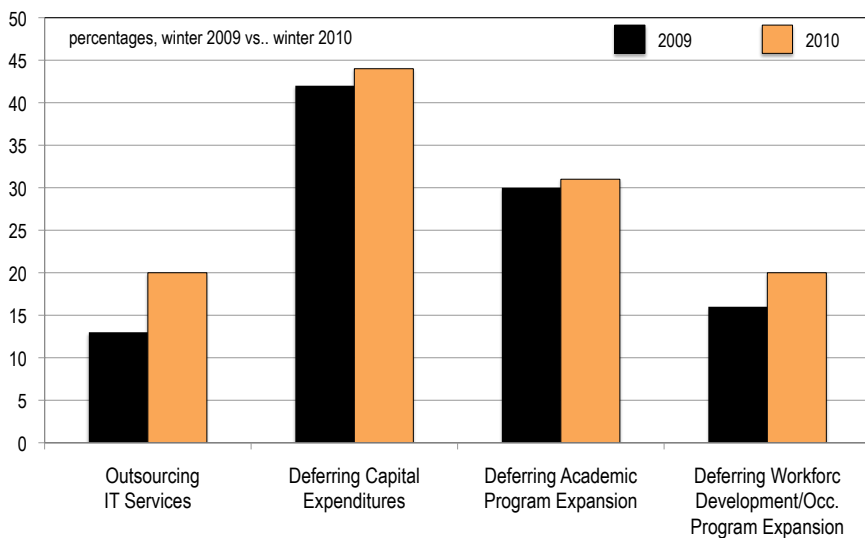
percentage of community college presidents reporting a hiring freeze, winter 2009 vs.. winter 2010



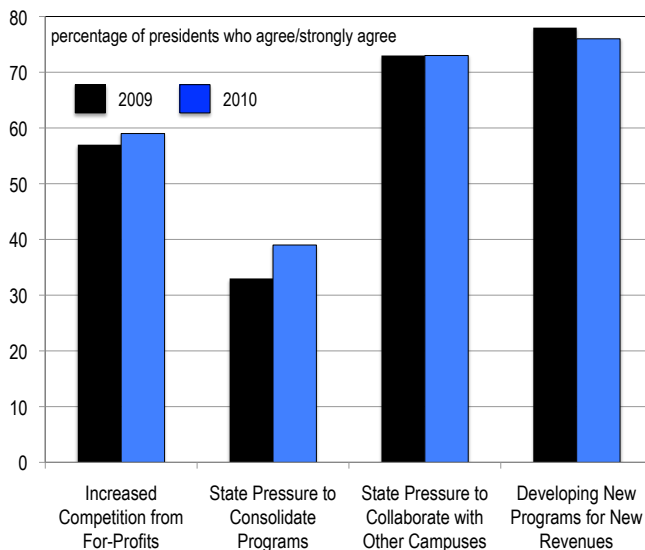
Strategies for Coping with the Changing Environment



Strategies for Coping with the Changing Environment

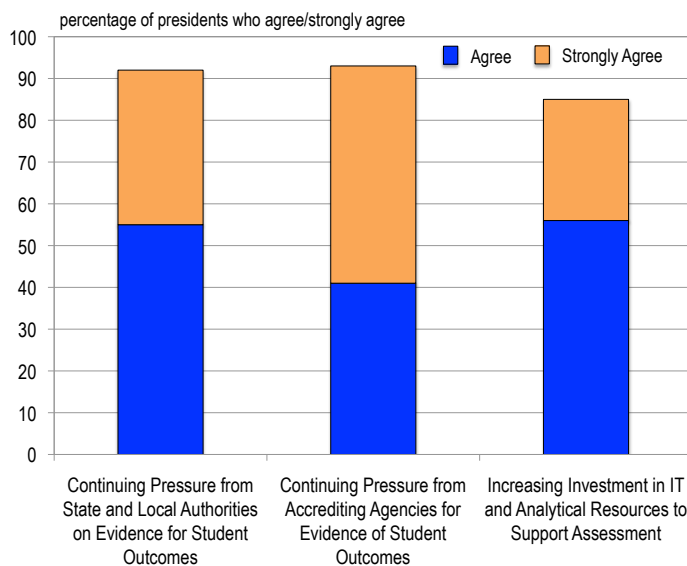


Presidential Perspectives, 2009 vs. 2010
The Competitive Environment



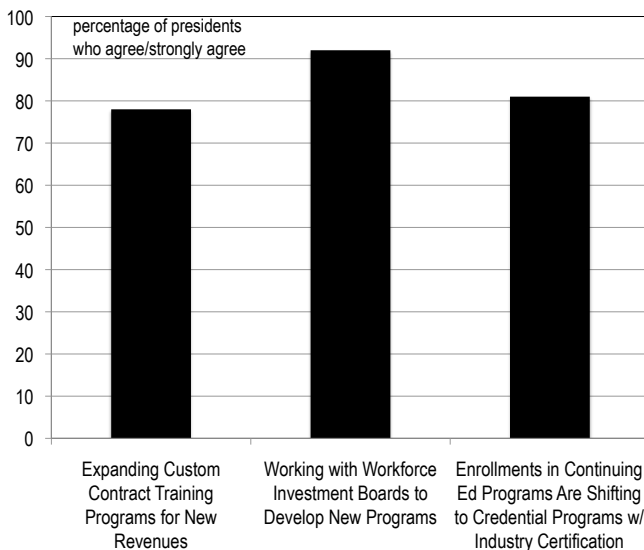
- Continuing pressures from for-profits, plus state pressure to consolidate and collaborate
- Presidents searching for new sources of revenue

Presidential Perspectives, 2009 vs. 2010
The Pressures for Assessment



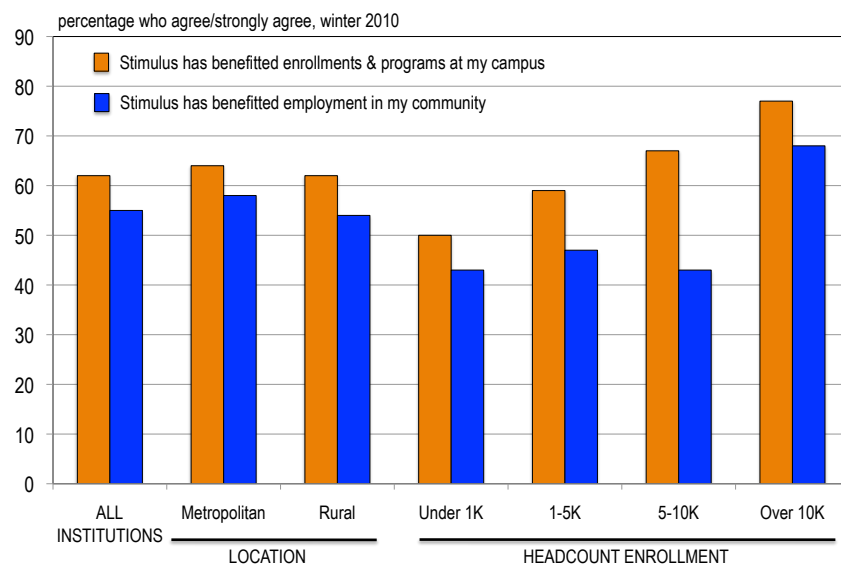
- Continuing pressures for assessment and outcomes despite budget cuts.
- IT investments play an increasingly important role in assessment.

Presidential Perspectives, 2010
Workforce Development Initiatives

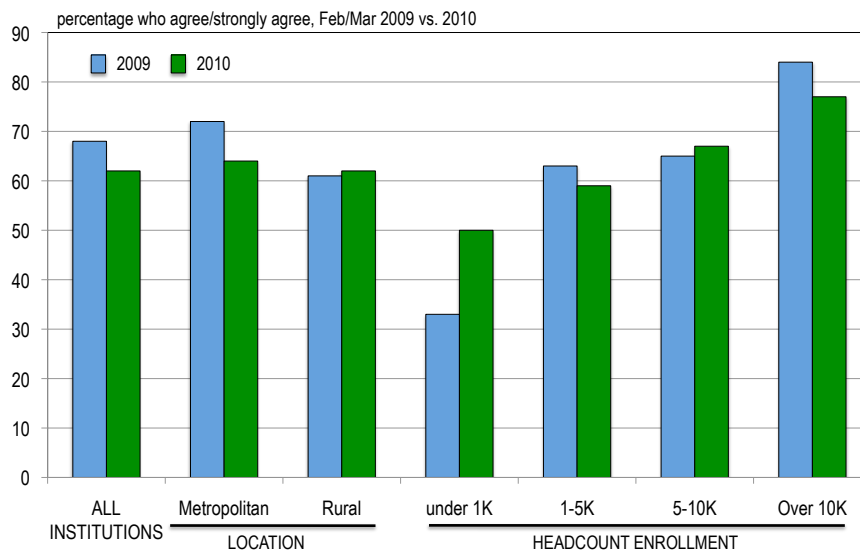


- Strong focus on local labor markets, employer needs, and training opportunities.

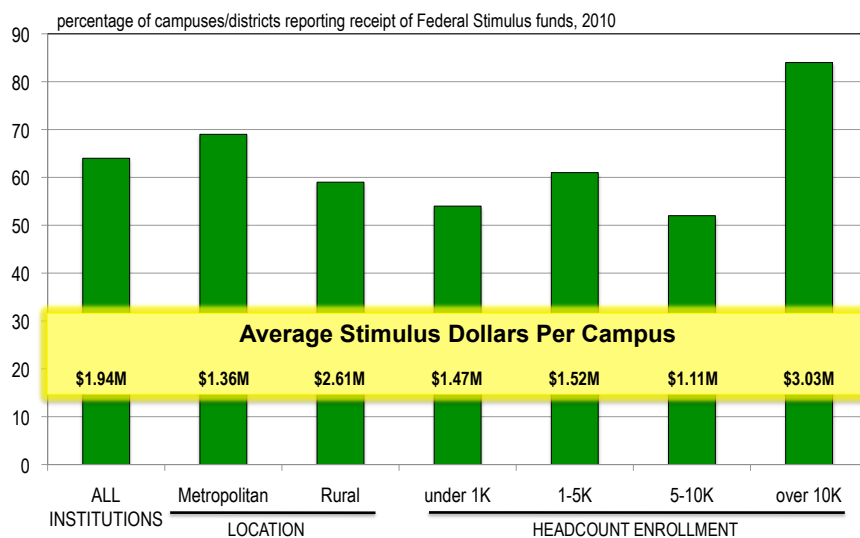
Impact of the Stimulus Funds



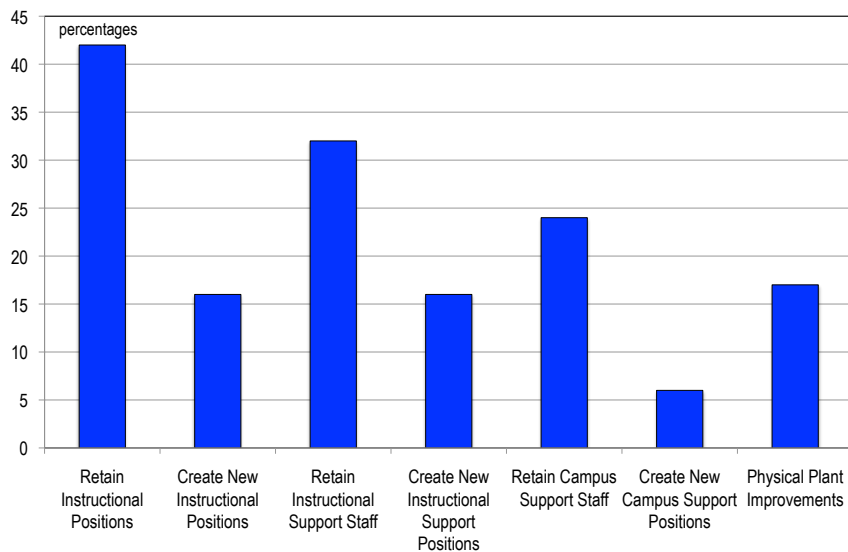
Stimulus Funds Will Benefit Enrollments at My Campus: Expectations (2009) vs. Impact (2010)



Who Got Stim Money – and How Much?



How Community Colleges Spent the Stimulus Money, 2010



Critical Issues

- Continuing to do much more with a lot less
- The critical importance of infrastructure
- 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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