VIEW FROM THE TOP

Managing Enrollment during the "Unprecedented"

By Tara Sprehe

As widespread restrictions to in-person instruction continue to impact higher education, community colleges in particular are seeing significant enrollment declines. Implications to budgeting, the success of students, and the uncertainty of current and future recessions are challenging enrollment managers across the United States. This article discusses community college enrollment and recession impacts and identifies key strategies/questions to consider for the future.

Unprecedented. Chaotic. Tumultuous. Uncertainty. These words and others have been used to describe 2020. At most higher education institutions in the United States, the global pandemic, a stressful election season, social unrest, and economic uncertainty have meant enrollment managers are scrambling to meet their current enrollment and retention goals. At community colleges, the challenge has been even greater. For a week in September 2020, in which wildfires forced our college to delay starting school for a week, I longed for "just" a pandemic. Indeed, community colleges lost about 400,000 students in the fall of 2020, nearly double the decline seen in 2019 (Amour 2020).

As many colleges and universities face continued restrictions to in-person instruction, and "normal" economic impacts are anything but, key questions for enrollment managers are emerging:

- How do we predict enrollment in an environment that we haven't experienced before?
- Is there a recession within the current recession?
- Will there be a different recession when the current global crisis "ends"?
- What should we consider to influence enrollment and retention efforts at our institutions?

Community College Enrollment (2000–2020)

While Strategic Enrollment Management (SEM) concepts and strategies have been around for more than 30 years at universities, community colleges, as open access institutions, were largely immune from internal and external factors influencing enrollment (Bontrager and Clemetsen 2009). Likened to "accidental" enrollment, community college enrollment patterns largely remained consistent through the 1990s, which meant many community colleges let enrollment occur without planning strategically.

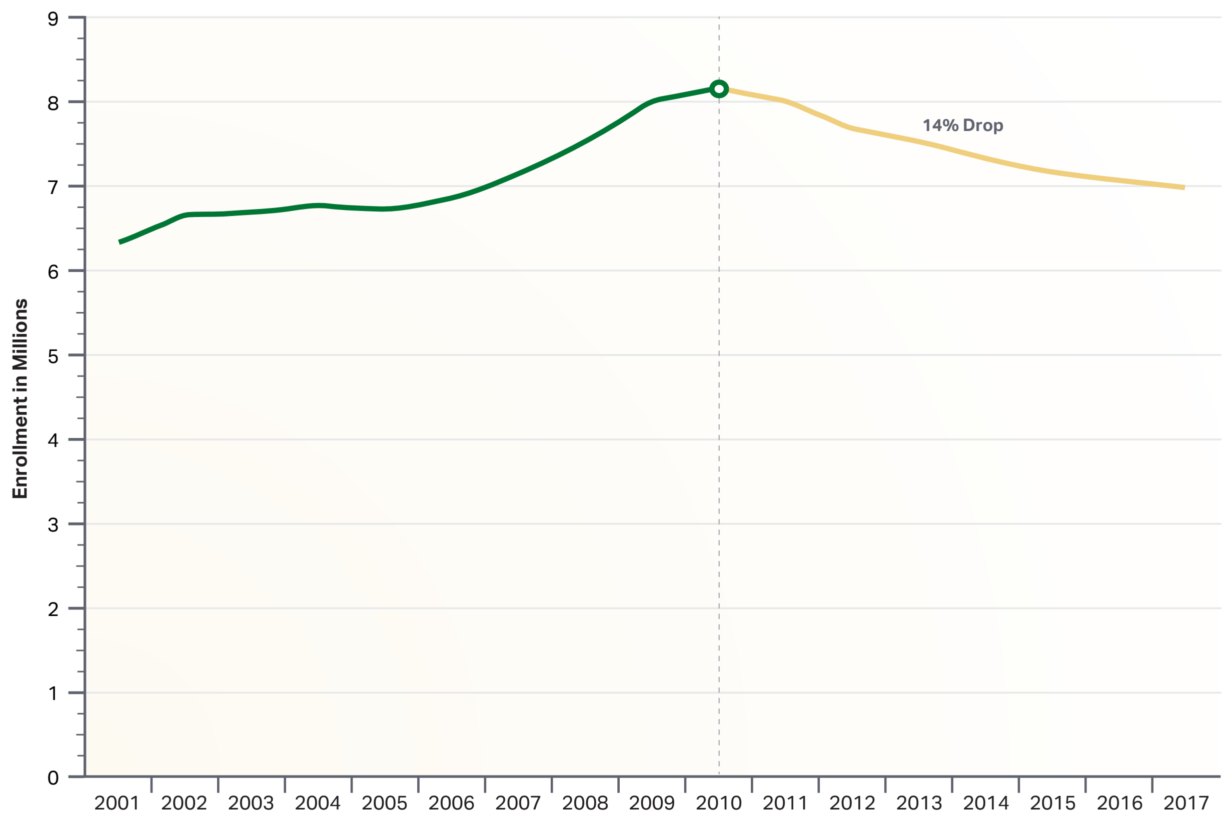

FIGURE 1 ➤ Community College Enrollment, 2001 to 2017

Source: AACC 2019, 2

In analyzing Integrated Postsecondary Educational Data System (IPEDS) data, the American Association of Community Colleges (AACC 2019) noted that growth in community colleges began in earnest at the beginning of the 21st century with 5 percent growth in 2001–02 and 1 percent growth until 2006 when a recessionary period began.

During a typical recession, enrollment at community colleges increases. In the "great recession" years of 2006–2010, community colleges saw an explosion of enrollment as thousands of individuals found themselves unemployed or underemployed and sought the opportunity to skill up, complete a certificate or degree, or change career fields. Enrollment grew by 20 percent over a four-year period (5 percent annually). Figure 1 shows the enrollment patterns at community colleges from 2001–2017. Enrollment managers suddenly found themselves with a new set of problems: not enough instructors and course sections to meet demand, or not enough staff to help new students navigate systems. At the same time, budgets were slashed, compounding an already difficult situation. Community colleges started asking the same questions universities had been asking themselves for years. What is the right size of our institution? How do we plan for the ebb and flow of economic booms and busts? "Accidental" enrollment gave way to the rise of an emerging group of strategic enrollment managers at community colleges. The timing proved fortuitous as the next decade brought new challenges.

During robust economic times, enrollment typically declines as prospective community college students choose employment over education. Due to the strong economy in recent years, coupled with declining numbers of high school graduates, enrollment at community colleges has steadily declined since 2010. Between 2010 and 2017, enrollment decreased by 14 percent nationally. The Midwest and Northeast were particularly hard-hit areas of the country. And the trend continues with enrollment declines reported for 2018 and 2019, including a 3.4 percent drop in the spring of 2019 compared to 2018 (Fain 2019). Fall reporting (Sedmak 2020) demonstrates that 2020 will be no different.

As 2020 began and the Seattle area became ground zero for the early stages of the pandemic, colleges and universities shuttered their doors, converted face-to-face instruction to online learning, and saw significant declines in enrollment. By the summer of 2020, colleges and universities grappled with uncertainty as to whether they would be open or online only. The public questioned paying "full price" for an online education at a prestigious four-year institution when classes could be completed at a much-reduced rate at community colleges (Kerr 2020). Enrollment managers at community colleges anticipated picking up much needed enrollment when university bound students decided to enroll at community colleges instead of packing up and heading to universities. As summer turned into fall, it became clear that this did not happen to the extent anticipated. Many universities opened their residence halls but kept courses online. Some institutions returned to limited face-to-face instruction. Many students originally intending to attend four-year institutions did so, and many community college students didn't attend at all. As of October 22, with 76 percent of institutions reporting their enrollment, community colleges saw the deepest decline in students attending their institutions. While enrollment was down across all sectors except graduate students, community college enrollment was down 9.5 percent compared to 2019, and for first-year students, the decline was 19 percent (Sedmak 2020). Community colleges faced two challenges: addressing an immediate (current academic year) enrollment crisis and predicting what will happen once a vaccine is widely available and colleges can return to "normal" (the post-pandemic environment remains unclear).

It should be noted that the pandemic has impacted some systemically non-dominant undergraduate populations greater than white students (down 6.6 percent in fall 2020). Notably, Native American (down 9.6 percent) and Black (down 7.5 percent) students were not attending colleges and universities in 2020 at the same rate as in 2019. Hispanic (down 5.4 percent) and Asian (down 3.1 percent) students also were not enrolling at the same rate as other populations.

What's Next?

As the data presented previously indicate, when the economy struggles and unemployment is higher, individuals take the opportunity to gain a new skill, complete that long-ago started associate degree, or change careers. When students are presented with opportunities for increased wages in a strong economy, they will often choose jobs over postsecondary education. Skilled community college enrollment managers build their enrollment management plans in reaction to, and preparation for, the ebbs and flows of the economy.

Recessions are defined as "a significant decline in economic activity spread across the economy, normally visible in production, employment, and other indicators." (NBER 2020). In 2019, a majority of economists were predicting a recession in 2020 (Sherman 2019). Some community colleges began anticipating increased enrollment in reaction to a looming recession. And then, in June 2020, the National Bureau of Economic Research (NBER 2020) officially declared what most consumers already knew; the United States was officially in a recession. There was double-digit unemployment, and thousands of businesses shuttered, including the hard-hit services sector, construction, and real estate.

But enrollment managers were left wondering, is the declared recession of June 2020 what economists had predicted? Or a direct result of the pandemic? Or possibly a combination of the two, in which an emerging recession was accelerated due to the global health crisis? And most importantly to enrollment managers, will the current recession sustain into 2021 and 2022? Will the pandemic-related economy rebound but the recessionary period predicted in 2019 linger? How will we know what prospective students will do with their choice between employment (if there are jobs) and attending school (if there aren't jobs)?

Some economists are stating that we are actually experiencing "a recession within a recession" (Rabouin 2020). This would mean the looming recession that economists were predicting prior to the pandemic is happening, and the pandemic-related job losses, lack of product output, and less spending by consumers is a temporary recession happening inside what would be considered a "normal" recessionary period. Some economists are warning that we will feel the second component of the economy when the pandemic "ends." This means that the global health crisis created a severe but likely short-lived economic downturn that will end when a vaccine is widely available. But underneath the short-lived challenges of the pandemic, are increasing permanent job losses, failed businesses, and consumers saving money instead of spending it. To help enrollment managers anticipate what could happen, here are some potential scenarios. Each assumes those institutions not already offering in-person instruction will be able to do so by fall 2021; at the same time, most, if not all, restrictions established by local and state governments will have eased significantly if not entirely.

Scenario One: The Roaring Twenties (Part II)

Between 1920 and 1929, the United States saw significant economic growth mostly attributed to consumer spending. Admittedly, there were many new things to spend money on that previously didn't exist (*e.g.* cars). And technology was advancing at an unprecedented rate. Women began entering the workforce in greater numbers. One hundred years later (2020–2029), we will likely see continued technological advances. But perhaps more importantly, U.S. consumers are saving money. A record 33 percent of Americans have income left at the end of each month after taxes and spending (the definition of savings) during the pandemic.

This is all to say, some economists anticipate that we will be able to quickly regain lost ground as the economy picks up post-pandemic recession. Consumers who can spend will do so. If the government provides additional bailouts, failed or failing business will get back on their feet again resulting in hiring employees. The result for community college enrollment? A likely return to pre-pandemic trends of declining enrollment.

Scenario Two: The Economy Craters

Take a moment to think about your own pandemic environment. For many of us, our local economies were destroyed in March and April of 2020. Restaurants, retail, construction, and real estate, all halted. Travel? Shuttered. But in fall 2020, all reports (Thopson-DeVeaux 2020) indicated that the retail sector was back (albeit mostly online). Restaurants, though decimated, shifted to take-out and delivery in ways they never dreamed possible. Construction workers and real estate agents figured out how to build and sell real estate (at least residential). What becomes of the travel industry remains to be seen.

Much of the workforce figured out how to work remotely. Prior to the pandemic, "roughly 5 percent of full-time employees with office jobs worked from home, a figure likely to settle at 20–30 percent in the new normal" (Levanon 2020). Again, imagine your own pandemic environment, but think about the commercial district—your local strip malls, brick-and-mortar retail shops, and high density commercial real estate in thriving cities. Do we really need all that occupied space if we are working remotely? And if we are working remotely, and got used to ordering our food, clothing, and other essentials online, do we need to visit those places again? It is worth considering that major sectors of business, including higher education, figured out how to be more efficient, automate more, and, generally, rely on fewer people during the pandemic. Will those jobs return? Maybe not. But we could see more Amazon drivers and warehouse workers. Technological advances will continue to thrive. The wage gap is expected to continue growing. But it could take several years for the economy to recover from the pre-pandemic, almost recession, and the pandemic-related recession.

Forbes (Marr 2020) recently identified eight skills that will be needed in the post-pandemic workforce:

- Adaptability and flexibility
- Tech savviness
- Creativity and innovation

TABLE 1 ➤ Unemployment Rates, 2000 to 2023[a]

	2000	2010	2018	2020 (April)	2020 (Sept.)	2021	2022	2023
Unemployment Rate (U-3) (%)	3.9	9.5	3.7	14.7	7.9	5.5[b]	4.6[b]	4.0[b]
Real Unemployment Rate (U-6) (%)	7.0	16.9	7.5	22.8	12.8	—	—	—

[a] Except where noted, percentages reflect September of each year provided.
[b] Estimated percentages.

- Data literacy
- Critical thinking
- Digital coding skills
- Leadership
- Emotional intelligence

For community colleges that are not already layering these learning outcomes into programs for all students (not just transfer students), now is the time to build them into all programs, including career and technical education programs. In an increasingly automated world, businesses will be looking for these skills in addition to a specific tool of the trade. The result for community college enrollment? A likely slight increase in enrollment as industries change how they work and a new labor force is needed.

Scenario Three: Economy Returns to Normal

According to a survey of economists (Thomson-DeVeaux 2020) conducted in the fall of 2020, 66 percent predicted that the economy will not truly be back to normal until 2022 or later. The double-digit unemployment rate in April 2020 of 14.7 percent was down to 7.9 percent by September 2020. Still, lingering doubts about future stimulus packages have economists concerned that the rebound will not be as quick as originally hoped.

The U.S. Bureau of Labor Statistics (n.d.) include widely reported unemployment rates. They also provide what is called the "real unemployment rate," which includes the underemployed (those who do not have enough paid work or are not doing work that makes full use of their skills, abilities, and experience); marginally-attached workers (those who are able and willing to work and have either held a job or searched for employment within the last year but are not actively seeking employment now); and the discouraged worker (those who prefer to work but are no longer actively seeking employment due to inability to find work). These numbers are often significantly higher than the unemployment rate.

By looking at unemployment rates over the past decade and comparing them to your own enrollment trends at the same time, you can begin to anticipate what enrollment might do at your institution in the next couple of years. The result for community college enrollment? Community colleges are likely to see an initial increase in enrollment when pandemic restrictions are eased or ended. Additionally, slight increases in 2022 and 2023 may occur as the economy struggles to get out of the recession.

Moving Forward

Understanding the current landscape of enrollment, including the impact of a global health crisis, gets enrollment managers only so far. In a "typical" economic environment, when asked by your college president for an enrollment update, enrollment practitioners use established tools and processes for meeting that request. However, we are in uncharted territory, and some may be wondering what to do in the face of the unprecedented. For those of us with existing SEM plans (including established Key Performance Indicators or KPIs) (Bontrager and Clemetsen 2009), there are a couple of options to address goals and targets:

- Choose to evaluate and update your KPIs based on what you are seeing currently in the pandemic enrollment data. At our institution, we ultimately decided not to do this. Our current set of KPIs and goals are set for 2024–25. Resetting them interrupts the activities underway to influence the targets and ultimately would make measuring the impact of our activities difficult.

- Assuming you have KPIs established and are reporting on them annually, you can asterisk the data for 2020–21 to reflect the global health crisis. Didn't make progress toward your yield target? Asterisk and explain that the number of applicants who did not enroll was a result of the decline in enrollment for first-time college students in almost all sectors of higher education.

But if your college president asks you to predict the enrollment for the next several years, what should you do? The best way to predict the future is to look to the patterns of the past. You see predictive analytics in the real world every day, maybe no more so than when you shop using Amazon. Based on your purchasing behavior, Amazon will predict what it thinks you will buy next. Harnessing the data of customer patterns is what the private sector has used for decades to anticipate what consumers will do next.

Higher education is no different. Collecting and analyzing data are essential tools for any successful enrollment manager. According to *Strategic Enrollment Management: Transforming Higher Education* (Bontrager, Ingersoll, and Ingersoll 2012), many of us fall into the trap of merely collecting data and reporting it. We design brochures for prospective students laden with facts about the student profile. We create reports to share with the college community and our boards of education. And we routinely report our data to national, state, and local entities as required or requested. We look for behaviors of students to help inform our decision-making in setting enrollment and retention goals. For example, we look to high school GPAs to predict student success in college. But many school districts moved their spring 2020 semester grades under pass/no pass policies. We also look to a student's Estimated Family Contribution (EFC) for financial aid purposes to help us determine aid eligibility. But many parents may have lost jobs during the pandemic or had to make difficult decisions about staying home to support their family instead of working.

In an ideal state, we are supposed to collect the data, think about the data, and look for patterns that over time help predict the future. If the current behaviors we use to predict the future have never happened before, what is the best way forward?

Grounding your work in already established SEM practices is key. Gather what data you can about what is happening during the pandemic and compare it to previously gathered data. Examples of important data include (Bontrager, Ingersoll and Ingersoll 2012, 158–159):

- Market share, market penetration, and [awareness] information (success relative to peers and competitors)
- Census and population projection information
- Competitor information
- State graduation and college-going rates
- Potential market analysis (such as per capita income)
- National/State financial information
- Institutional data (space availability, program, capacity, etc.)
- Other institutional key performance indicators

The above list is an excellent approach to get the big picture of enrollment data and to begin thinking about analytics and, ultimately, predicting the enrollment for your institution. Here are some specifics steps to gathering the data you will need to shape your projections:

Start with reviewing what you do know is happening currently and compare that to 2019:

- Applicants
    - → Yield—how many of your fall 2020 applicants ultimately enrolled?
    - → How many FAFSAs were received? How many of those students enrolled?
- Enrollment
    - → Do you have the same headcount but your FTE took a dive? The same number of students are taking fewer credits.
    - → Did both your headcount and FTE decrease?
    - → Which segments of your student population (transfer, career-technical, developmental edu-

cation, full-time, part-time, race, ethnicity) decreased the most?

- Retention
  - What is happening within the term? Are students enrolling and then dropping? Are you following up with them to learn why?
- External Factors
  - What are the enrollment trends of your competitors? What about institutions in your region that are similar in size and make up to your own college?
  - Use Bureau of Labor Market data to analyze employment patterns in your region. Have employment rates increased, held steady or decreased since the great recession, the three years leading up to the pandemic, April 2020, and fall 2020? Compare these numbers to your enrollment.
  - Talk with business industry leaders. What do they anticipate they will need for 2022 and 2023?
  - Talk with high school partners. What are their students saying about attending college in the fall of 2021?

If you have a robust SEM plan but haven't looked at it in some time, refresh your memory on the development of the plan. If you haven't created a SEM plan before, use the above steps to help respond to questions and concerns about enrollment. And know that you are now on your way to being a strategic enrollment manager.

Closing

By sharing national enrollment trends, ascertaining unemployment rates, discussing recessionary climates, and identifying key questions to ask while building a database that tells the story of the enrollment at your institution during the pandemic, this article was written to help community college enrollment managers feel more confident in finding a way forward when the health crisis ends. Managing enrollment is challenging enough without a pandemic. Predicting how many students will be on your campus when we simply don't know what the economy will do nor what prospective and current students will do as they face college choice decisions is even more challenging. For community colleges, at least eight years of consecutive enrollment declines were already wreaking havoc on budgets, and enrollment managers were being asked difficult questions about how to recruit and retain students. But predicting enrollment isn't impossible. Start small and ensure you have a snapshot of what is currently happening at your college, and determine where you can anticipate what enrollment might do in the next couple of years.

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Tara Sprehe serves as the Dean of Academic Foundations and Connections at Clackamas Community College in Oregon. This unique division blends all functional areas of student affairs (including athletics and counseling) and includes the academic areas of math, English, adult basic skills, and English for Speakers of Other Languages. Sprehe has 30 years of experience working in higher education with 20 of those years in the community college environment. Prior to her role as dean, Sprehe was the associate dean for enrollment and student services, which included the following functional areas: admissions and recruitment, academic advising, disability resources, financial aid, registration and records, and testing services. She served as the college registrar for nine years at Clackamas.

Prior to her work in community colleges, Sprehe worked in admissions, academic advising, residence life, and career services for several four-year public universities. She has a bachelor's degree in psychology from the University of Oregon and a master's degree in student affairs in higher education from Miami University (Ohio). Sprehe served as president of Oregon ACRAO (OrACRAO), the local arrangements committee chair for PACRAO 2013, was an editor for the 2016 edition of the AACRAO Academic Record and Transcript Guide, and a member of the AACRAO Disciplinary Notations on Transcripts Work Group. She regularly presents at the annual Strategic Enrollment Management Conference and feels incredibly lucky to do this challenging and rewarding work.