

The 2020 Summer Surge and Fall Fallout: Enrollment Survey Report #2 (v 1.0)

6/15/20

Introduction

This report summarizes the results from a pair of surveys of California community colleges. The results of the surveys are intended to provide a basis for a high-level understanding how the coronavirus pandemic is affecting enrollments and scheduling in the California community college system. The coronavirus pandemic has had a strong impact on the economy, the nation, and the world. Higher education has certainly been among those areas that has been strongly affected. As colleges plan schedules and recruit and enroll students for fall 2020, how are students reacting to the prevalence of online classes and to concerns about health? Are they, to some extent, voting with their feet? How are colleges' efforts to adapt and enable students to enroll and pursue a higher education faring? These surveys represent a grassroots effort to share student enrollment behavior and community college scheduling behavior around the state so we may answer these and other pressing questions.

Amid reports that summer enrollments are surging (cf. <https://bit.ly/summer20-surge>), this week's report includes more information about summer enrollment. We will investigate how widespread the reported summer surge phenomenon is and how it relates to fall enrollments. To help promote understanding of these issues, the results section is organized around the following four questions:

1. *Are summer 2020 and fall 2020 enrollments up, down, or flat relative to 2019?*
2. *Are higher summer enrollments associated with higher fall enrollments?*
3. *Are colleges changing the number of sections they offer in response to the pandemic?*
4. *To what extent are colleges shifting classes online in summer & fall 2020?*

Method

Respondents from 56 California community colleges provided enrollment and/or FTES projection data via either survey #1—which ran from June 2nd, 2020 until June 6th, 2020—or survey #2—which ran from June 8th through June 13th—or both. Invitations to participate in survey #1 were distributed on a listerv serving institutional research professionals in the California community college system on June 2nd with reminders on June 4th and June 5th. Invitations to participate in survey #2 were distributed on the same listerv on June 8th with reminders on June 11th and June 12th. A link to survey #2 was also shared during a statewide webinar on June 10th. The surveys were hosted on Bakersfield College's Qualtrics account.

When colleges entered data more than once either during a survey's run (n = 5 repeat entries on survey #2) or across surveys (n=18 colleges entered data in survey #1 and survey #2), the latest available data were used. Where possible, data from both survey #1 and survey #2 are included in the analysis to increase the number of colleges and data points in the dataset.

Results

Research Question 1: Are summer 2020 and fall 2020 enrollments up, down, or flat relative to 2019?

Of the 56 colleges represented in the survey data, 45 provided comparative data on their summer 2020 enrollments relative to summer 2019 and 43 provided information on their fall 2020 enrollments relative to fall 2019. These colleges characterized their summer 2020 and fall 2020 enrollments as “up”, “down”, or “flat”. A large majority of colleges (71%) indicated that summer 2020 enrollments were up whereas only a small group of colleges (21%) reported that fall 2020 enrollments were up.

As shown in Table 1 below, summer enrollments are generally up across most of the state with some possible areas of lower enrollment being found in the North/Far North and the San Diego/Imperial County regions. Fall 2020 enrollments by contrast, are generally lower for seven out of ten colleges. South Central Coast & Los Angeles/Orange County regions, however, have an above average number of colleges showing enrollment growth in fall 2020, though the number of respondents in each of these regions is relatively small (n = 4 and n = 5, respectively).

Table 1. Most Colleges Seeing Higher Summer Enrollments but Lower Fall Enrollments

	Summer is "Up" (n = 45)	Respondents by Region	Fall is "Up" (n = 43)	Respondents by Region
Bay Area	64%	11	7%	14
Central/Mother Lode	83%	6	0%	7
Inland Empire/Desert	75%	4	33%	3
Los Angeles/Orange County	100%	8	50%	4
North/Far North	50%	8	25%	8
San Diego/Imperial Counties	50%	4	0%	2
South Central Coast	75%	4	60%	5
Overall	71%	45	21%	43

Thirteen of the fifty-six colleges (23%) that provided data on fall 2020 were not able to provide a comparison with fall 2019. Eleven out of the fifty-five colleges (20%) that otherwise responded to questions about fall 2020 indicated they had not yet begun registration for fall 2020 while another two colleges indicated that there had been anomalies in the registration process and that these anomalies made comparisons with fall 2019 unreliable at this point in their registration cycles.

Figure 1 and figure 2 show the distribution of the percentage changes in FTES and enrollments for summer 2020 and fall 2020, relative to 2019. Summer 2020 enrollments were up an average of 9.9% with a minimum change of -51% and a maximum change of +48% across 39 colleges that reported these figures. FTES was up even more, on average, standing at 13.4% higher for summer 2020 than at the same point in summer 2019, on average. The greatest decrease in summer FTES was -52% and the largest increase was +80% among the 34 colleges that provided FTES information for summer.

Fall 2020 enrollments, on the other hand, were down an average of -10.5% with a minimum change of -58% and a maximum change of +40% across 41 colleges that reported enrollment change values. FTES

was also down, -9.1% lower on average for fall 2020 than at the same point in fall 2019. The minimum and maximum change in fall FTES were -65% and +41%, respectively. There is a great deal of volatility and variation in enrollment and FTES across the calendar years as well as among colleges in the state.

Figure 2. Most colleges indicated higher enrollments and FTES for summer 2020 relative to summer 2019

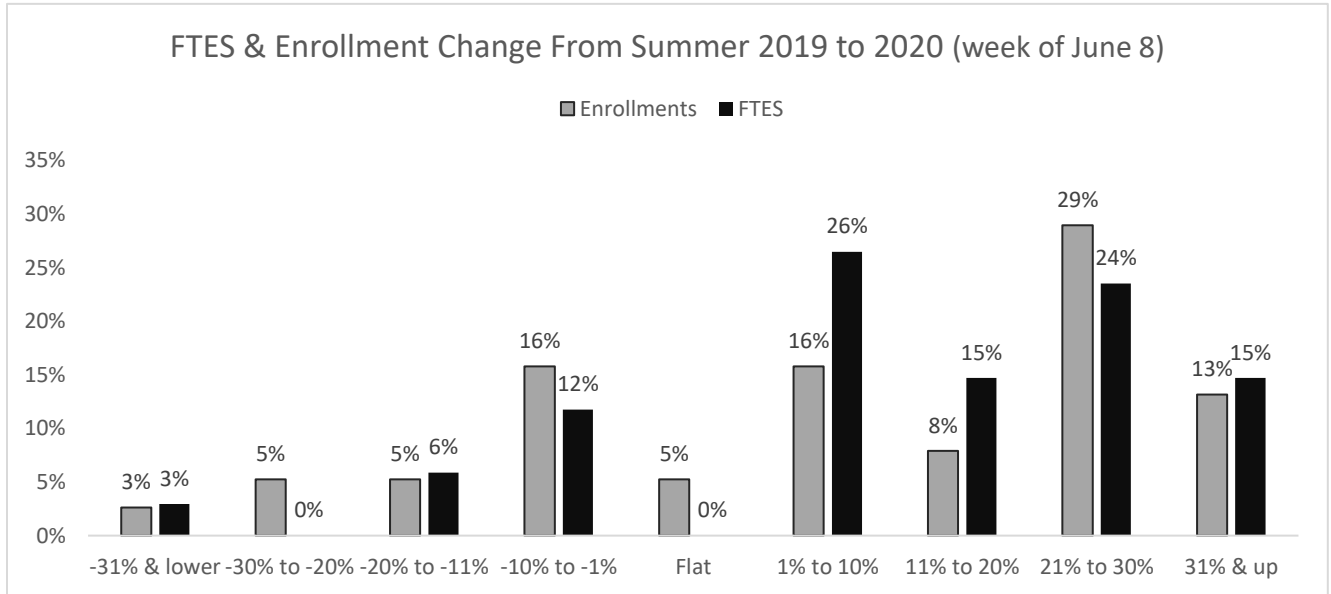
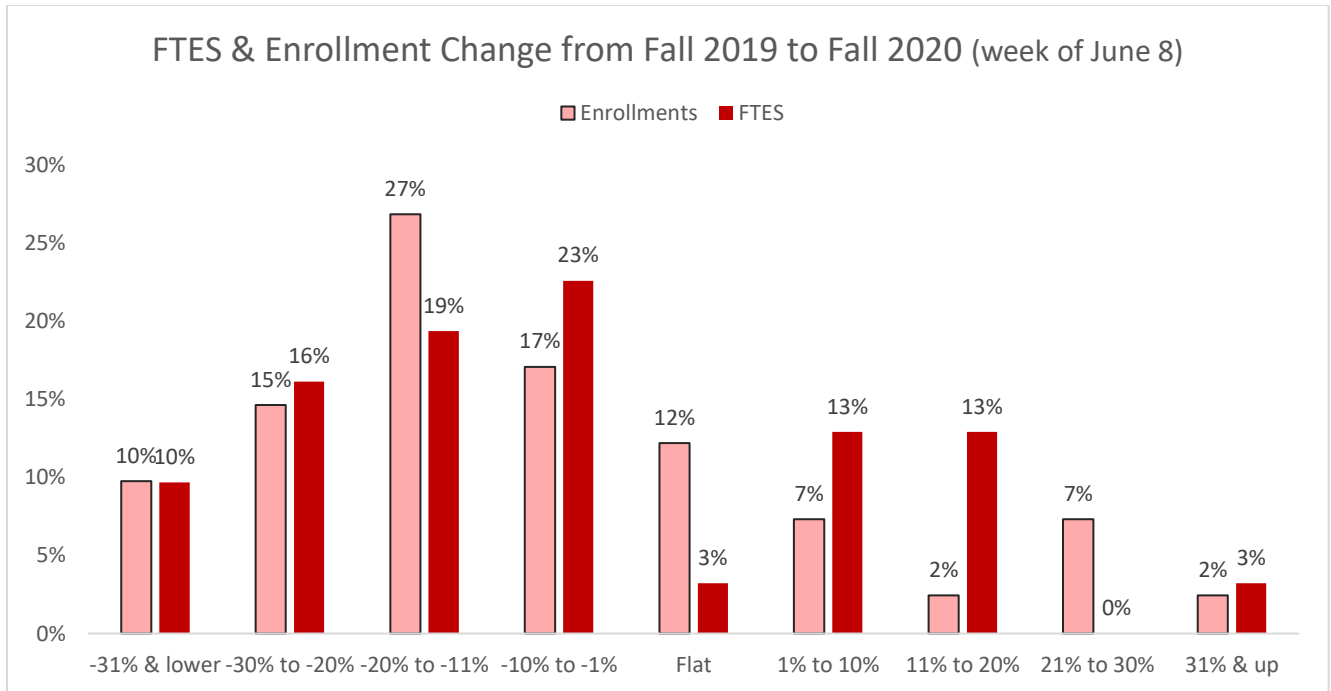


Figure 2. Majority of colleges indicated lower enrollments and FTES for fall 2020 relative to fall 2019



Research question 2: Are higher summer enrollments associated with higher fall enrollments?

At this point in the fall registration cycle, there is little relationship between summer enrollments and fall enrollments. The correlation coefficient for the change in summer enrollments and the change in fall enrollments is 0.082 while the correlation coefficient for change in summer FTES and the change in fall FTES is 0.111; both values indicate a very low degree of association, much closer to zero than to one. In other words, simply because a college is currently experiencing a summer surge does not mean that they are also experiencing a fall surge.

Research Question 3: Are colleges changing the number of sections they offer in response to the pandemic?

Scheduling for summer was more likely to involve an increased number of sections than was scheduling for fall: 29% of colleges reported increasing the number of sections for summer 2020 relative to summer 2019, while only 14% of colleges reported increasing the number of sections they scheduled for fall 2020 relative to fall 2019.

While an increased number of sections offered in the summer is fairly strongly correlated with whether a college reports enrollments as up, flat or down ($r = .55$), the same is not true for fall 2020 sections and enrollments ($r = -.07$), perhaps because both scheduling and enrollments for fall 2020 are still developing.

Table 2. Percent Reporting Increased Enrollment by Level of Change in Sections from 2019 to 2020

Change in Sections	Summer (n = 41)		Fall (n = 31)	
	No.	% Enrollment Up	No.	% Enrollment Up
11%+ more	5	100%	0	--
6% to 10% more	6	100%	1	0%
1% to 5% more	1	100%	3	0%
Same	9	89%	9	33%
-1% to -5% fewer	7	57%	6	17%
-6% to -10% fewer	4	50%	7	14%
-11%+ fewer	9	33%	5	20%

Research Question 4: To what extent are colleges shifting classes online in summer & fall 2020?

The colleges in the sample have made a clear shift toward online instruction in both their summer 2020 and fall 2020 schedules. Additionally, 90% of respondents (38 out of 42) indicated that they are mostly or completely online for summer 2020 while 83% of respondents indicated that they would be mostly or completely online for fall 2020 (30 out of 36). Three colleges indicated that they would have a much higher prevalence of online class sections, but they did not characterize their fall 2020 as mostly or completely online. Additionally, two colleges had not yet finalized decisions as to the degree of their online presence in fall 2020.

Table 3. Shift toward online sections in 2020 relative to 2019

Change in Online Sections	Summer (n = 42)		Fall (n = 36)	
	No.	%	No.	%
Much higher	38	90%	33	92%
Somewhat higher	3	7%	1	3%
About the same	1	2%	0	0%
No final decision	0	0%	2	6%

Caveats

The data in the survey is derived from a sample of voluntary participants from 56 out of 115 California community colleges and may not represent all of the colleges in the system equally well. Additionally, fall 2020 enrollment data is still quite early in the cycle and there may be a great deal of variability in early enrollment numbers. A considerable percentage of colleges in the sample had not yet opened fall registration, so with additional time and more participation these early trends could very well change substantially. Finally, one of the impacts of the pandemic may be to delay action and enrollment either by directly affecting the systems and processes that students use to enroll or by causing uncertainty among students and potential students. The end result of these disruptions may be to cause different patterns of enrollment or delayed patterns of enrollments which may result in misleading comparisons across semesters as the typical comparative assumption of all other things being equal is certainly not being met in this instance.

Conclusion

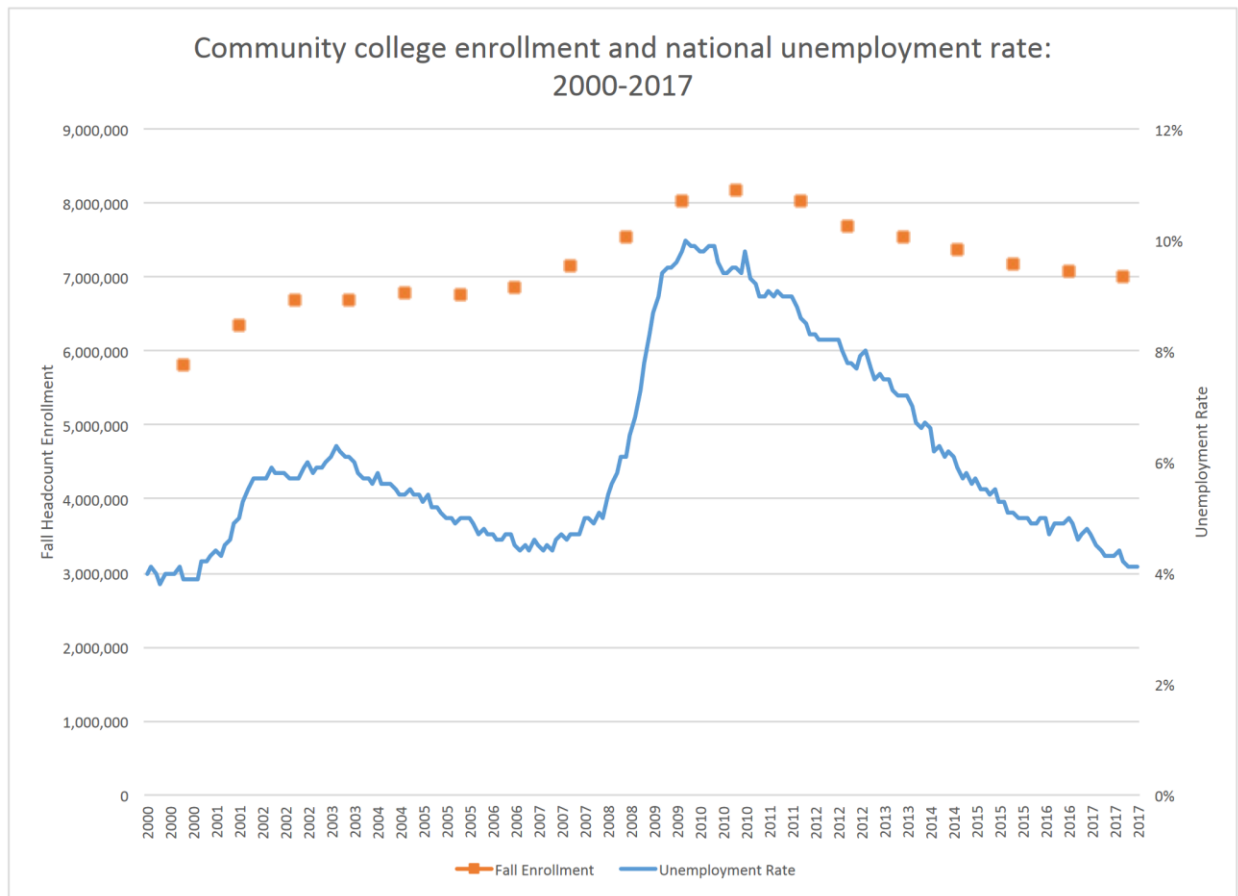
The trend toward lower enrollments and FTES for fall 2020 relative to fall 2019 was confirmed in this week’s survey and analysis. Seven out of ten community colleges in the sample, which represents a third of California community colleges, are reporting lower fall enrollments. At the same time, summer enrollments are higher—in many cases substantially higher—than in summer 2019. Even among colleges that reduced the number of sections in their summer 2020 schedule, it was fairly common to see higher enrollments and/or FTES. Why is the trend for summer enrollments so starkly different than for fall enrollments?

It is possible that the summer surge in enrollments is in part due to the disruption of spring 2020. Students who were unable to complete courses in spring 2020 may be taking advantage of the summer as a chance to complete courses that they had planned to complete in the spring. The relative drop in fall enrollments, on the other hand, may have more to do with the behavior of incoming, first-time college students. Recruitment of graduating seniors has likely been hampered by the inability of colleges to conduct face-to-face outreach and recruitment activities. At the same time, these prospective students may be more inclined to stay on the sidelines and watch as events unfold. They have many questions that are still largely unresolved, such as: will classes be available in person in the fall? In other survey work, students have clearly indicated that face-to-face instruction is more appealing to most than is online-only instruction. Some students may be contemplating a gap year, in which they delay college

enrollment. Others may simply be waiting for more clarity or guidance on the process and, as online processes and communication mature, we may see a later surge in enrollment

One group of prospective students that can be expected to make an impact on fall enrollments are those who are recently out-of-work due to the impact of the coronavirus pandemic on businesses. These prospective students may be in need of wayfinding assistance as they are not part of the established flow of graduating high school students. This large group may not yet have found their way to the doors and online portals of the community colleges, but when they do, their presence can be expected to be substantial. If the historical association between higher unemployment rates and higher community college is any indicator (see figure 3 below), community colleges may soon see a dramatic increase in the number of students seeking access to the limited resources of the community college system.

Figure 3. Historical increase in community college enrollment when unemployment increases



From page 16 of *Community College Enrollment Crisis? Historical Trends in Community College Enrollment*, American Association of Community Colleges (2017).

These survey results provide us with some preliminary intelligence about what is happening on the front lines of student enrollment and recovery from the coronavirus pandemic. The situation is dynamic, however, and bears careful monitoring.

Stay tuned.