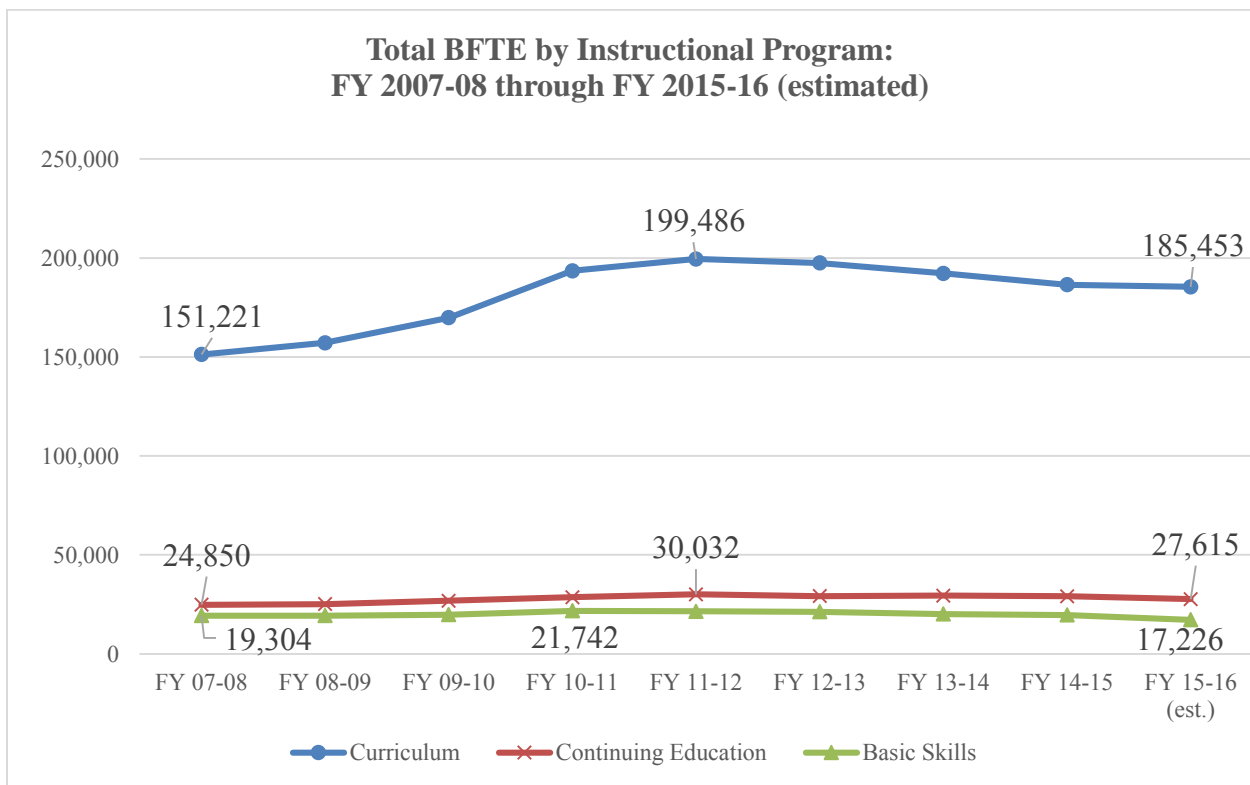


**STATE BOARD OF COMMUNITY COLLEGES
Enrollment Update**

Colleges submitted final Fall 2014 enrollment data in late January. Based on this data, the Finance and Operations Division has updated colleges' estimated budget FTE for FY 2015-16. Budget FTE is calculated based on the higher of the prior year's FTE enrollment or the average of the prior two years. Overall, FY 2015-16 BFTE is estimated to be 2.1% lower than FY 2014-15 BFTE. Despite enrollment declines that have occurred since BFTE enrollment peaked in FY 2011-12, systemwide BFTE for FY 2015-16 is estimated to still be 18% higher than pre-recession levels. Enrollment trends, however, have not been uniform among instructional programs or colleges.



Curriculum

Curriculum BFTE increased 32% between FY 2007-08 and FY 2011-12. Since that time, curriculum BFTE has declined by 7%, but remains 23% above pre-recession levels systemwide. Curriculum enrollment at our large institutions has driven the growth that has been sustained since the recession. Also, effective Summer 2014, colleges were authorized to earn BFTE during the summer term for technical/STEM (Tier 1A and 1B), developmental math, and developmental English/reading courses. Colleges earned a total of 8,721 FTE in these areas last summer. While curriculum FTE enrollment for the 2014-15 traditional academic year is estimated to be 4.0% below academic year 2013-14 enrollment, the additional FTE earned in the summer will net

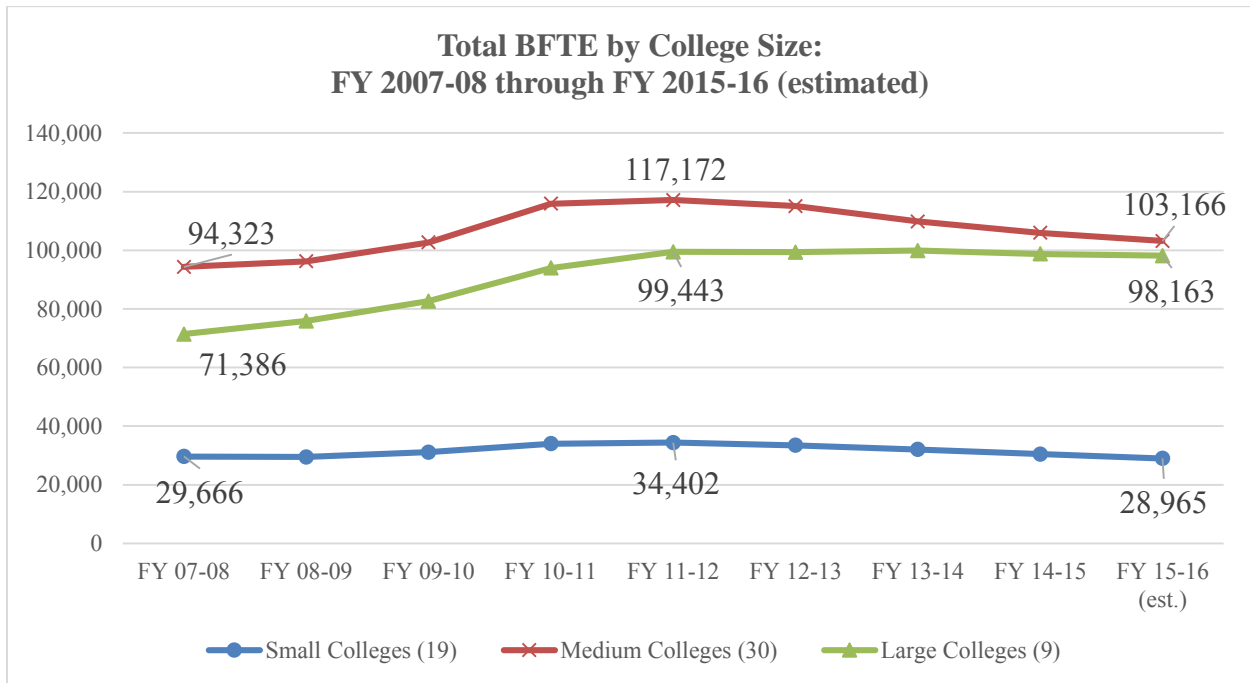
against the decline in enrollment that colleges are experiencing during the traditional academic year. Consequently, we expect curriculum BFTE to decrease about 0.6% in FY 2015-16.

Continuing Education

Continuing education BFTE increased by 21% between FY 2007-08 and FY 2011-12. Since that peak, continuing education BFTE has decreased by 8%, eliminating approximately half of the growth experienced during the recession. As a group, our smallest colleges have largely sustained the growth experienced in continuing education during the recession, while medium and large colleges have generally seen continuing education BFTE declines since the peak.

Basic Skills

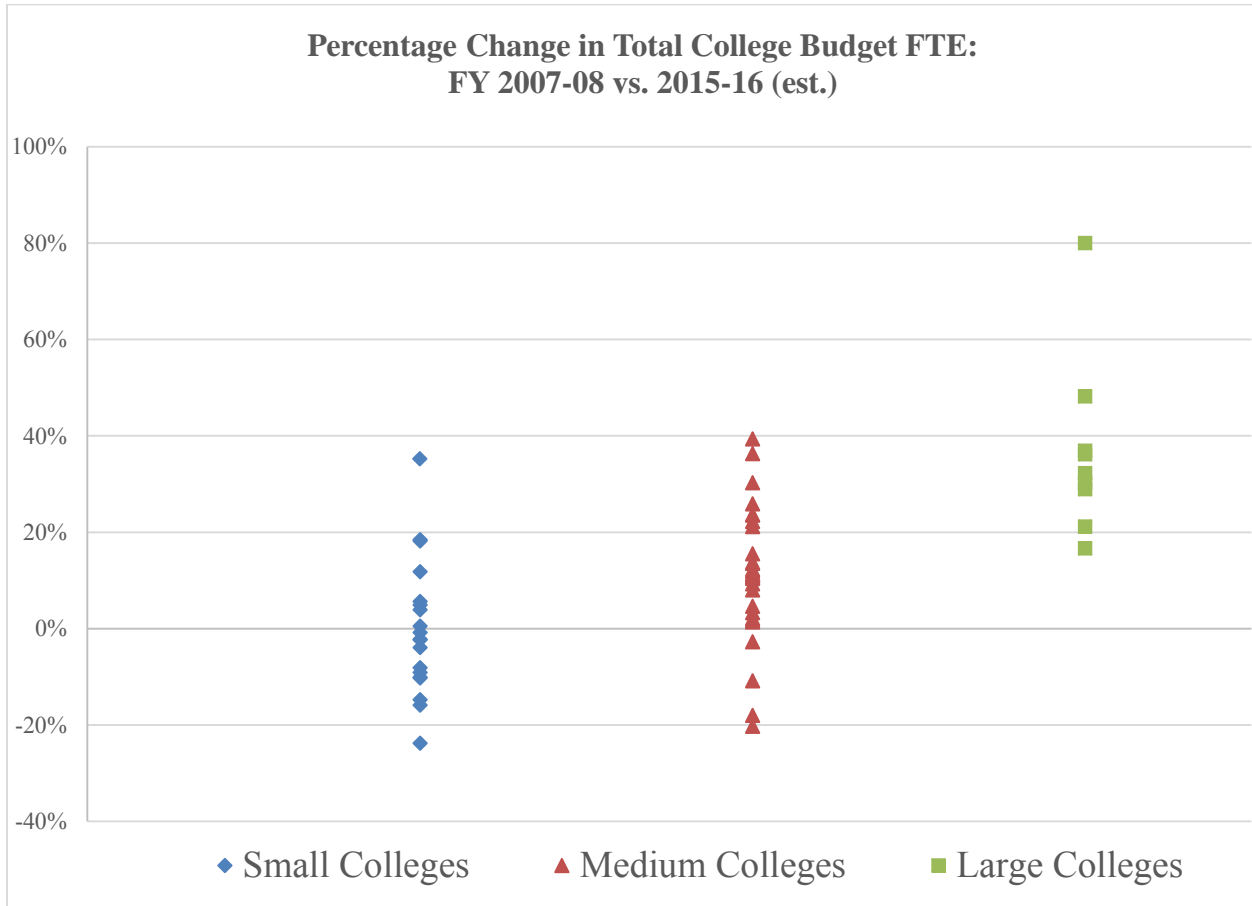
Basic skills BFTE reached its peak in FY 2010-11, increasing 11% between FY 2007-08 and FY 2010-11. Unfortunately, basic skills BFTE has declined 20% since that peak; indeed, FY 2015-16 basic skills BFTE will be 11% below pre-recession enrollment levels. This enrollment decline greatly accelerated this past year; systemwide basic skills FTE enrollment in calendar year 2014 declined by 20% as compared to calendar year 2013. Since BFTE is calculated based on the higher of the prior year’s enrollment or the average of the prior two year’s enrollment, the impact of this significant decline will be spread across the next two fiscal years, providing colleges a limited time period to adjust.



Enrollment trends among colleges differ when grouped into general size categories: small (< 2500 FTE), medium (2500-6499 FTE), and large (6500+ FTE). As a group, small colleges experienced a much smaller spike in enrollment during the recession and now have total BFTE enrollment that is slightly below pre-recession enrollment levels. Medium colleges experienced a 24% increase in total BFTE between FY 2007-08 and FY 2011-12 and have sustained about 40%

of that growth. Large colleges experienced the biggest spike in enrollment during the recession (39%) and has largely sustained the vast majority of that growth since FY 2011-12.

These trends by general size category, however, should be interpreted with caution. There is **significant** variation in the change in BFTE enrollment between FY 2007-08 and FY 2015-16 (estimated) among colleges within each category. The following chart shows the percentage change in total BFTE over the past seven years. As shown below, the “spread” between the college with the largest BFTE decline and the college with the largest increase in all three size categories exceeds 60 percentage points.



Change from Prior Year in Fall Enrollment at Public 2-Year Institutions

	National		NCCCS***	
	IPEDS*	NSC**		
Total Enrollment				
Fall 2012	-3.9%	-3.6%	-2.1%	
Fall 2013	-2.4%	-3.3%	-0.2%	
Fall 2014*	pending	-3.5%	-3.6%	

	National		NCCCS	
	Men	Women	Men	Women
Enrollment by Gender				
Fall 2012	-2.9%	-4.1%	-1.4%	-2.5%
Fall 2013	-2.0%	-4.2%	1.4%	-1.3%
Fall 2014	-3.7%	-3.3%	-3.4%	-3.7%

	National		NCCCS	
	24 and Under	> 24	24 and Under	> 24
Enrollment by Age				
Fall 2012	-2.1%	-5.7%	-1.4%	-2.8%
Fall 2013	-1.3%	-6.2%	2.9%	-3.3%
Fall 2014	-1.5%	-6.7%	0.9%	-8.5%

	National		NCCCS	
	Part-Time	Full-Time	Part-Time	Full-Time
Enrollment by Enrollment Intensity				
Fall 2012	-1.7%	-6.2%	0.9%	-5.1%
Fall 2013	-3.4%	-3.1%	3.4%	-3.7%
Fall 2014	-2.7%	-4.8%	not available	

	National		NCCCS		
			Full-Time	Part-Time	Unemployed
Enrollment by Employment Status					
Fall 2012			-4.4%	-3.2%	-0.7%
Fall 2013	Not available		-4.3%	1.0%	0.4%
Fall 2014			-5.4%	-1.9%	-4.0%

*Integrated Post-Secondary Education Data System

**National Student Clearinghouse

***NCCCS enrollment data reflects unduplicated curriculum headcount enrollment