

The widespread impacts of the COVID-19 pandemic encompass many areas of postsecondary education and training, including enrollment, pedagogy, finance, and more. In response to the pandemic, Oregon Governor Kate Brown prohibited in-person instruction at all postsecondary institutions for the spring 2020 term (Executive Orders 20-09 and 20-17). Institutions moved rapidly and dramatically to shift virtually all instruction to online and remote forms of delivery. Nevertheless, concern has arisen that enrollment would decline in the spring 2020 term, given its importance for student momentum and success. Particular questions arose about the equity impacts of shifting to online instruction and about fields of study that are less easily transferred to remote learning, such as career and technical education (CTE). Beyond the impacts on students, enrollment declines also affect institutions through lost tuition and fee revenue. This issue brief summarizes preliminary data on enrollment in Oregon’s public universities and community colleges for spring 2020. We note that all data in this brief are preliminary and subject to change, as enrollment data are not final until after the end of the term.

We focus on three measures of enrollment: headcount, full-time equivalents (FTE), and winter-to-spring retention. Combined, these measures suggest what effects, if any, the pandemic may have had on spring 2020 enrollment. For community colleges, the data reflect students enrolled for credit and exclude those enrolled in accelerated learning courses (high school students earning college credit). For public universities, the data reflect admitted students and exclude those enrolled in accelerated learning or other courses not part of an admitted program of study.

## Community Colleges

Overall, **enrollment at community colleges trended downward in spring 2020**. Both headcount and FTE enrollment were substantially lower in spring 2020 compared to spring 2019, each decreasing by 18 %. In comparison, the average year-to-year change in community college enrollment was a 4% decline in the post-recession period (between academic years 2010-11 and 2018-19).

**Community college spring term enrollment, by institution, 2019 and 2020**

	Headcount of For-Credit Students (excl. dual credit)				FTE of For-Credit Students (excl. dual credit)			
	2019	2020 (estimate)	Percent Change	Trend	2019	2020 (estimate)	Percent Change	Trend
<b>Community Colleges</b>	<b>98,329</b>	<b>80,754</b>	<b>-18%</b>	<b>steep decline</b>	<b>19,496</b>	<b>16,025</b>	<b>-18%</b>	<b>steep decline</b>
Blue Mountain	2,023	1,581	-22%	steep decline	391	310	-21%	steep decline
Central Oregon	5,673	4,901	-14%	steep decline	1,170	1,011	-14%	steep decline
Chemeketa	13,854	11,819	-15%	steep decline	2,307	1,940	-16%	steep decline
Clackamas	8,300	6,135	-26%	steep decline	1,418	1,085	-23%	steep decline
Clatsop	1,395	1,000	-28%	steep decline	204	178	-13%	steep decline
Columbia Gorge	1,010	1,012	0%	similar change	189	178	-6%	above average decline
Klamath	1,753	1,813	3%	similar change	299	295	-1%	similar change
Lane	10,386	8,599	-17%	steep decline	1,943	1,706	-12%	steep decline
LinnBenton	7,589	6,029	-21%	steep decline	1,280	1,091	-15%	steep decline
Mount Hood	7,223	5,731	-21%	steep decline	1,560	1,249	-20%	steep decline
Oregon Coast	634	515	-19%	steep decline	117	102	-13%	steep decline
Portland	23,665	19,689	-17%	steep decline	6,153	4,799	-22%	steep decline
Rogue	6,592	5,366	-19%	steep decline	1,090	925	-15%	steep decline
Southwestern Oregon	1,909	1,679	-12%	steep decline	410	364	-11%	steep decline
Tillamook Bay	836	592	-29%	steep decline	80	59	-27%	steep decline
Treasure Valley	3,126	2,092	-33%	steep decline	473	370	-22%	steep decline
Umpqua	2,361	2,201	-7%	above average decline	411	364	-11%	steep decline

Note: Changes recorded as "similar change" indicate changes of 0% up to 4%, "above average decline" indicate changes between 4 % and 8%, and "steep decline" indicate changes of greater than twice the average rate, or 8%.

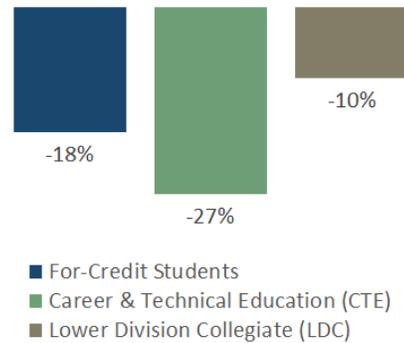
# Impact of COVID-19 – Continued

Changes in enrollment vary by institution. Columbia Gorge and Klamath Community Colleges reported headcount enrollment that was relatively steady (changes that varied from an increase in enrollment to a decline of 4% or less) from 2019 to 2020. However, these institutions had experienced growth earlier in the year, which slowed in spring, and Klamath’s FTE enrollment declined slightly. In contrast, the remaining 15 colleges reported large declines in enrollment, most of 12% or more. Five institutions reported declines in both headcount and FTE of greater than 20%: Blue Mountain, Clackamas, Mt. Hood, Tillamook Bay, and Treasure Valley Community Colleges.

Declines in enrollment also varied notably by area of instruction: enrollment in CTE courses fell much more than enrollment in lower division collegiate (LDC) courses. Colleges reported a 27% decline in FTE enrollment for CTE courses between spring 2019 and spring 2020, compared to a decline of 10% in FTE enrollment for LDC courses.

Qualitative reports suggest that some CTE fields of study are less adaptable to the remote instruction that the pandemic necessitated. We do not know whether students in CTE programs were less able to enroll this spring than students in LDC programs.

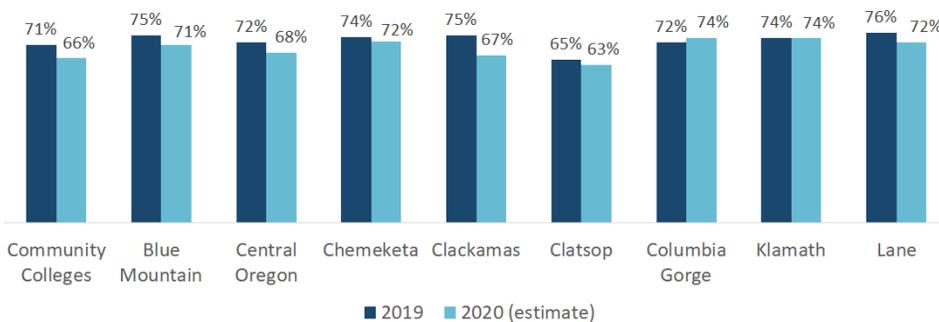
Percent Change in Community College Spring FTE Enrollment, 2019 to 2020



Source: Community college reports.

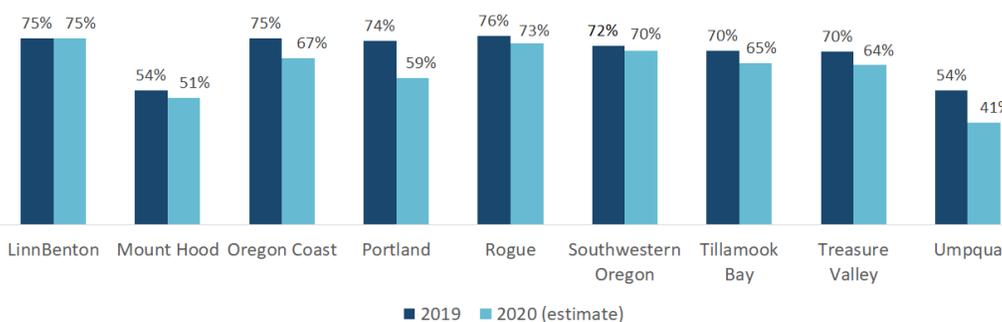
A more precise indication of pandemic effects on enrollment is the percentage of students from winter term who return in the spring term (among those enrolled for credit). This rate tends to change less from year to year than headcount and FTE enrollment, and declines in it are especially indicative of an external shock. Between 2019 and 2020, **the**

Percent Community College For-Credit Students Continuing Winter to Spring (excl. dual credit)



**winter-to-spring term continuation rate declined 5%.** Thirteen of the 17 community colleges show a decrease in the percentage of students returning in spring 2020.

Percent Community College For-Credit Students Continuing Winter to Spring (excl. dual credit)



Together, these findings indicate that **the COVID-19 pandemic likely led to a substantial enrollment decline at Oregon community colleges.** Nearly all colleges experienced a decrease in both headcount and FTE and most colleges experienced a decrease in the percentage of students returning to campus in the spring. Further, enrollment declines were larger for CTE courses than for LDC courses.

Note: The statewide community college retention rate is the average of the institutions’ retention rates, weighted by the 2020 headcount of each institution. Source: Community college reports.

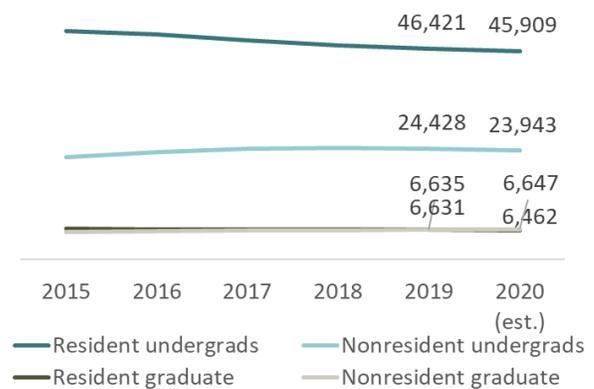
# Impact of COVID-19 – Continued

## Public Universities

In contrast to community colleges, enrollment at Oregon public universities remained relatively steady in spring 2020 compared to previous years, at least among admitted students. The number of Oregon resident admitted undergraduates fell 1.1% between spring 2019 and spring 2020.<sup>1</sup> This is a similar decline as previous years of the post-recession period, when year-to-year declines in headcount have averaged 2.0%. Enrollment changes varied across the institutions, from a 5.1% decline to a 2.6% increase, but the differences are consistent with longer term trends at the individual universities. Enrollment appears similarly steady for nonresident undergraduates and for graduate students.

This pattern is also evident in winter-to-spring continuation rates. Comparing 2020 to 2019, the percentage of students from winter term who returned in the spring was steady. For Oregon resident undergraduates, 90.5% of students returned in spring 2020, compared to 90.7% in spring 2019. Winter-to-spring continuation rates were also steady for nonresident undergraduates and for graduate students.

Public University Spring Term Enrollment, 2015 to 2020



Source: HECC analysis of student records.

Percent of Public University Students Continuing Winter to Spring, 2015 to 2020



Source: HECC analysis of student records.

Because of the additional burden of remote instruction, there is particular concern about impacts on historically underrepresented students. These preliminary data indicate that both headcount enrollment and winter-to-spring continuation rates are steady across racial/ethnic groups: Asian American, Black/African American, Hispanic/Latinx, Native American/Alaska Native, Native Hawaiian/Pacific Islander, and white, and multi-racial. This holds for undergraduate and graduate students alike.

These findings indicate that **students enrolled in a degree-seeking program at the public universities enrolled and stayed enrolled at similar rates in spring 2020 as in previous years** and that this holds for students in different racial/ethnic groups.

## Future Questions

While spring term enrollment changes convey an important, immediate impact of the COVID-19 pandemic, postsecondary students and institutions have also experienced impacts that extend beyond the few dimensions shown here. In the coming months, HECC reports will examine enrollment questions more fully, including by other student characteristics, as well as investigate impacts of the pandemic on completion rates, on fall 2020 enrollment, on transfer rates between community colleges and public universities, and on institutional finances.

<sup>1</sup> We focus on headcount enrollment at the universities, where headcount and FTE enrollment are more similar than at the colleges.