



# National and Connecticut Landscape

Presented to the Higher Education Financial  
Sustainability Advisory Board

September 9, 2024



## About NCHEMS



The National Center for Higher Education Management Systems (NCHEMS) is a postsecondary education research and advising organization that unlocks data and evidence to help states, systems, and institutions design policies and practices to meet their goals.

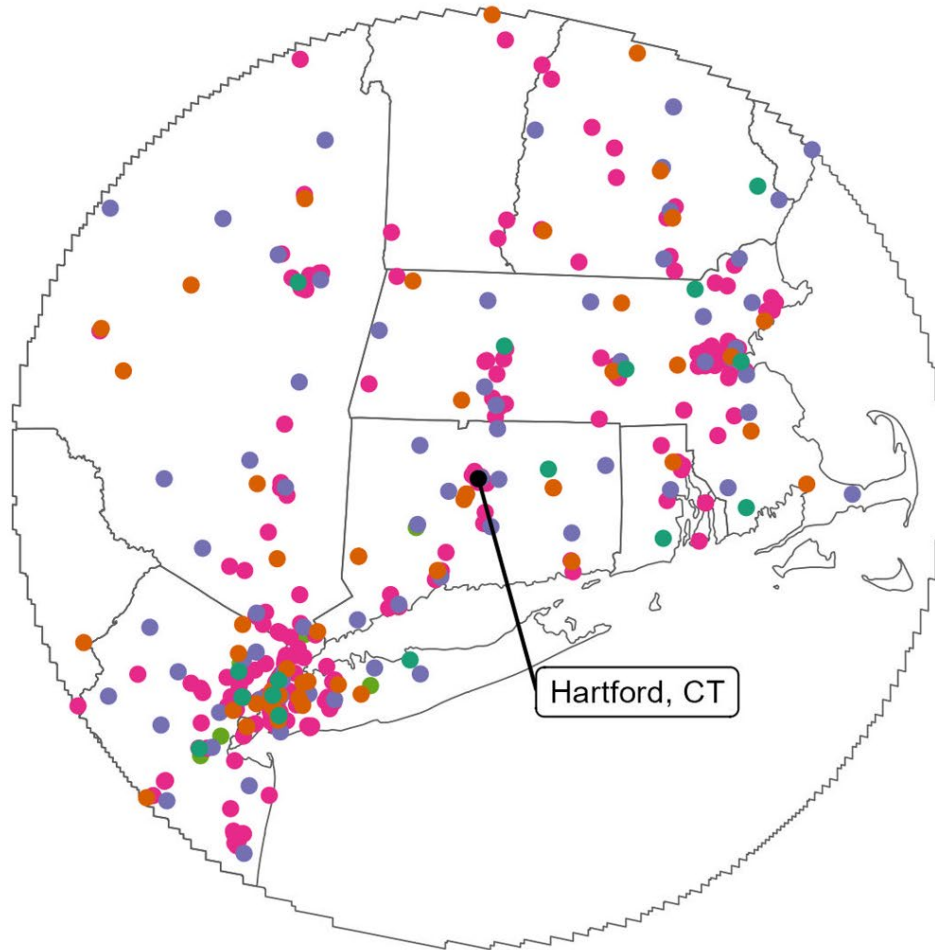


Since 1969, we've been engaging higher education leaders and state and system-level policy makers, providing the insights and intelligence they need to create and sustain successful higher education institutions and systems.

## Our Study

- Backdrop
  - Declining enrollment in the CSCUs
  - Prolonged unfavorable demographic conditions ahead
  - Charged budgetary discussions
- NCHEMS' assignment
  - Examine organizational structure
  - Draw appropriate comparisons with peer systems and institutions
  - Make recommendations and plans aimed at improving CSCU's financial sustainability while boosting student outcomes and addressing workforce needs

## Title IV, Degree-Granting Institutions Within 150 Miles of Hartford



- Public Research
- Public Masters, Bachelor's, and Other 4-Year
- Public Associates and Other 2-Year
- Private, Not-For-Profit
- Private, For-Profit

Notes: Private institutions that grant fewer than 25% of their awards at the baccalaureate or above levels are excluded.

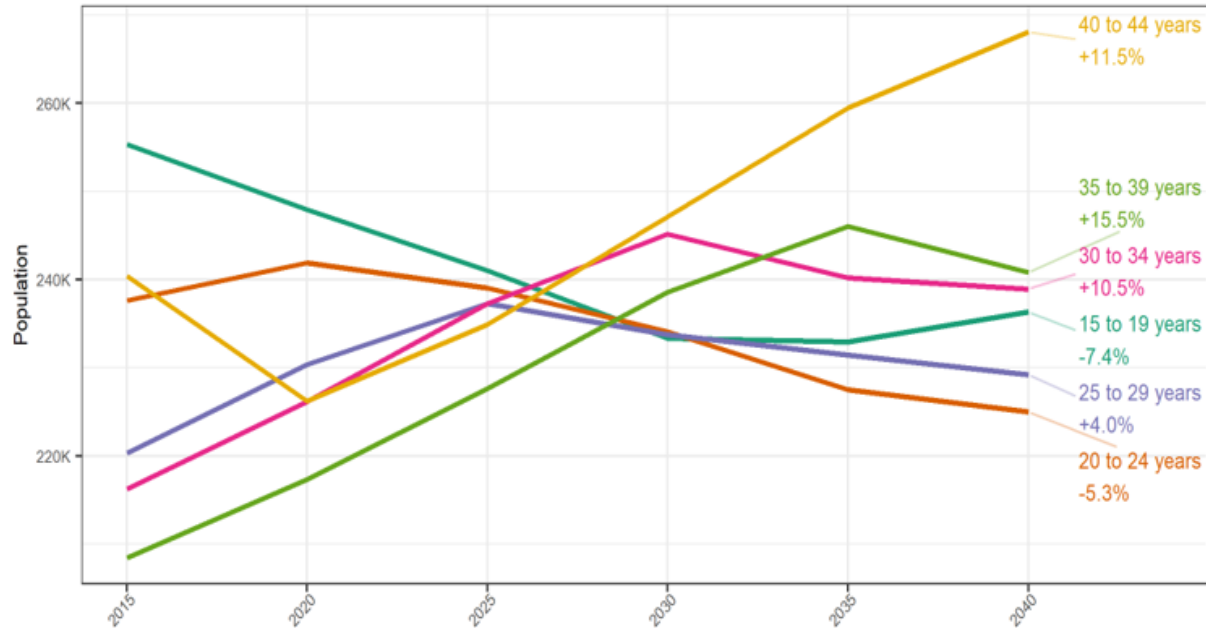
All main campuses of CT State are depicted.

Source: IPEDS

# Population Trends

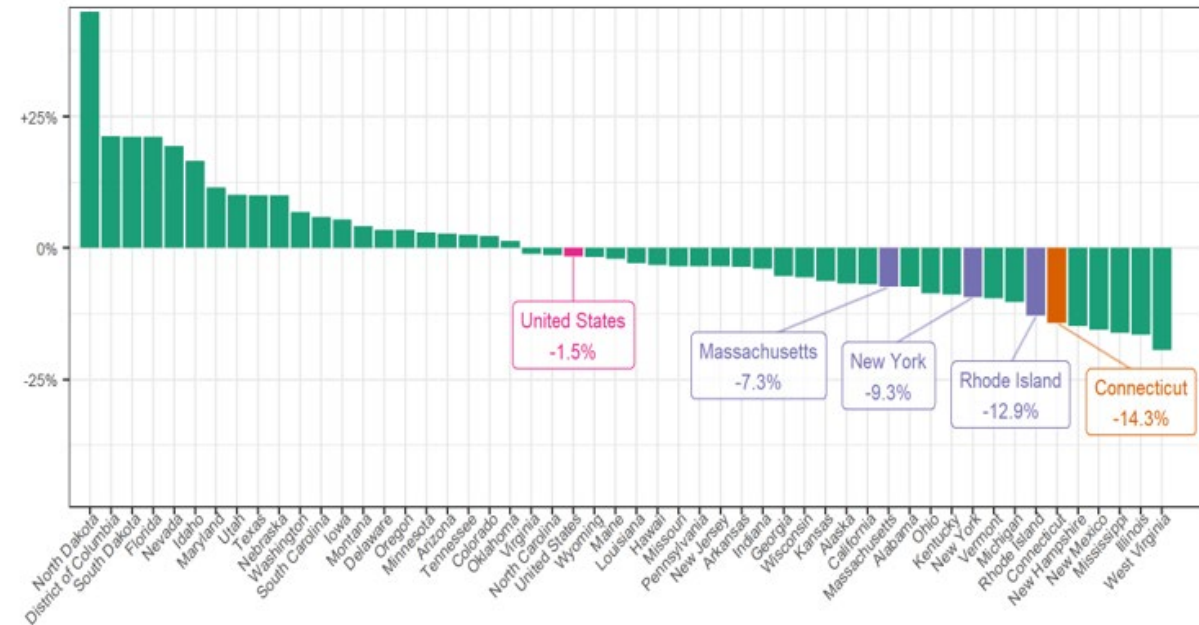
Connecticut is facing years of sharp declines in the traditional college-aged population

Projected 2015-2040 Change in Connecticut Population, Selected Age Groups



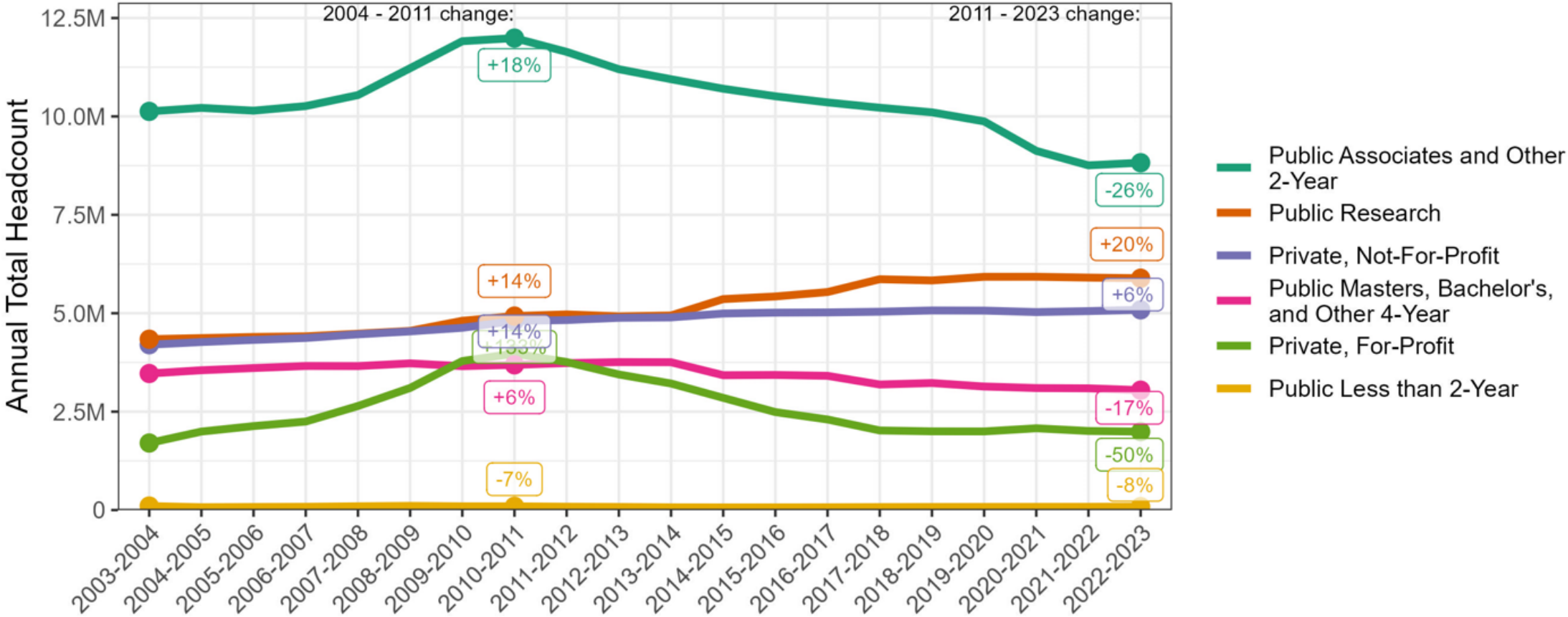
Source: Connecticut State Data Center.

Projected Change in High School Graduates by State, 2019-2034



Source: Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2020.  
<https://knocking.wiche.edu/data/knocking-10th-data/>

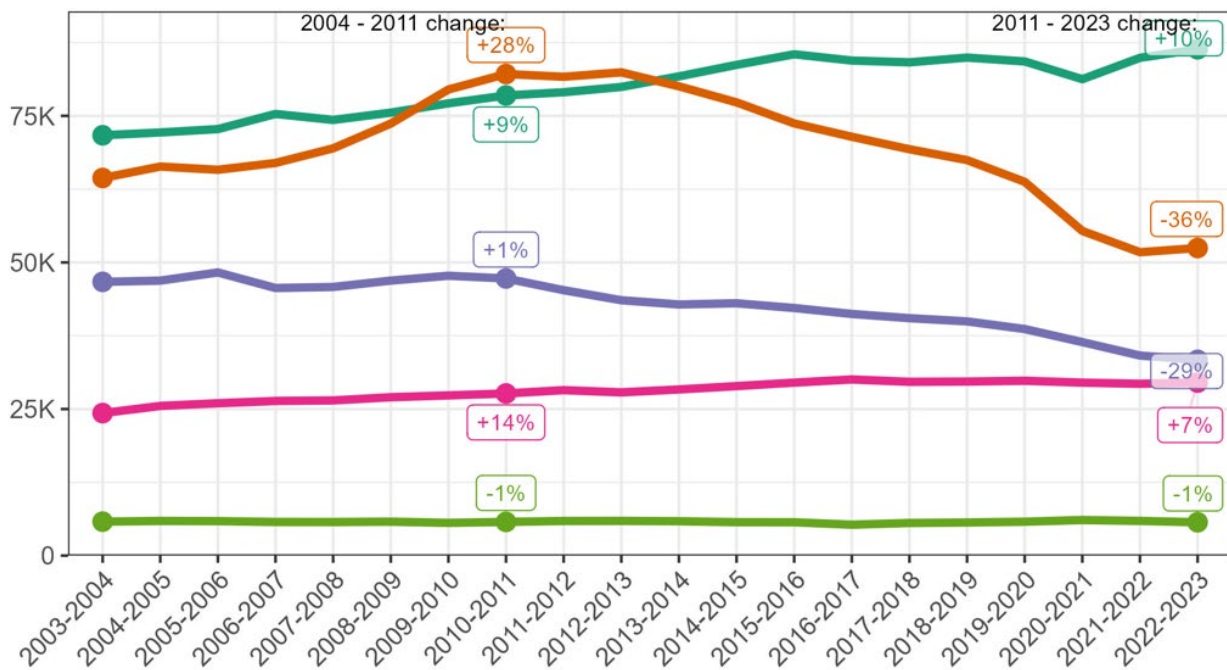
# Annual Headcount by Sector, U.S. Total



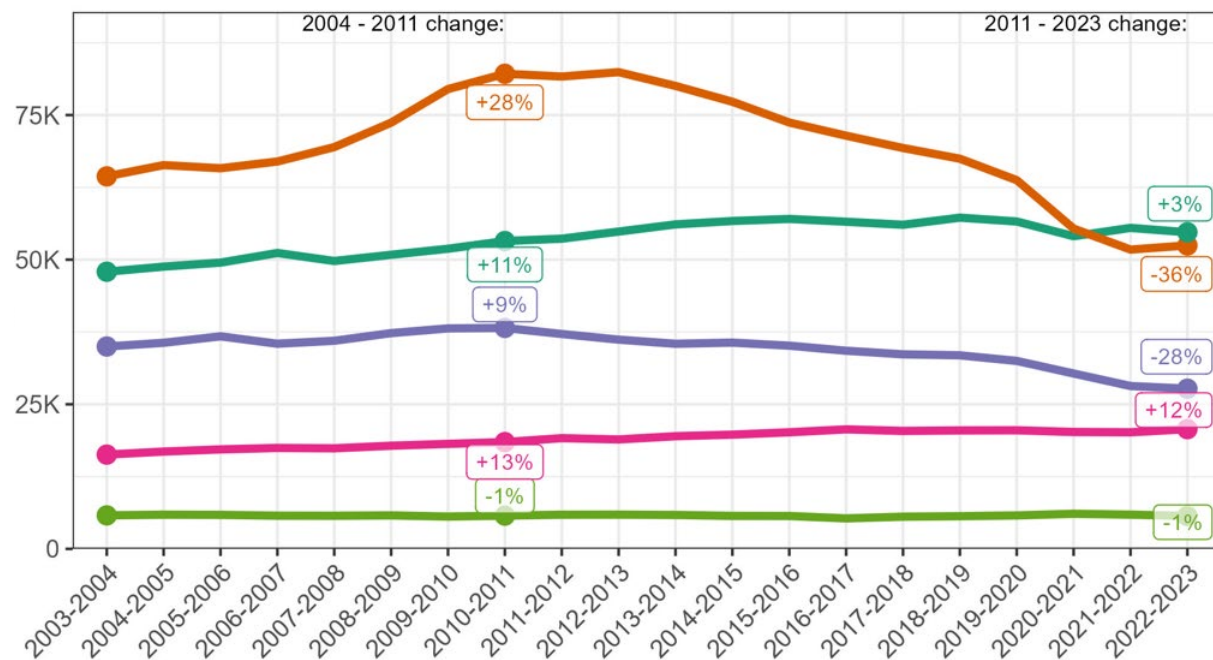
Source: NCES IPEDS 12-Month Enrollment Survey, effyYYYY files 2013-2022 final release; 2023 provisional release.

# Headcount Enrollment at Connecticut Institutions, FY2004-2023

## Total Enrollment



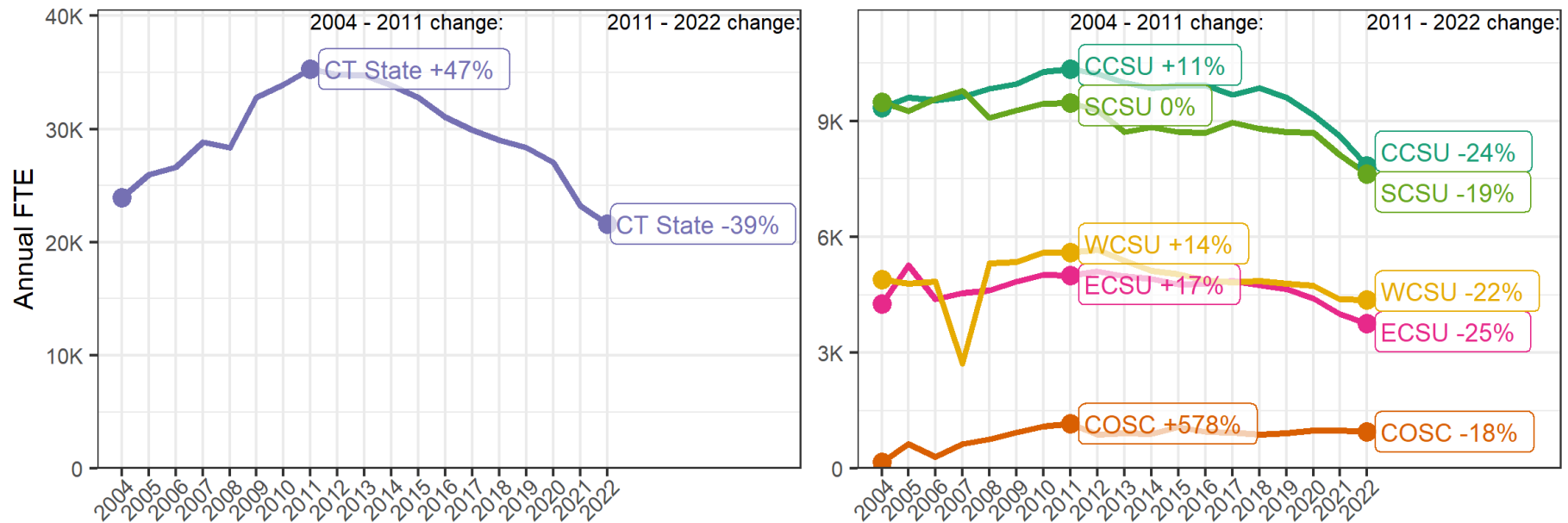
## Undergraduate Enrollment



Source: NCES IPEDS 12-Month Enrollment Survey, effyYYYY files 2013-2022 final release; 2023 provisional release.



# FTE Enrollment at CSCU Institutions, FY2004-2022

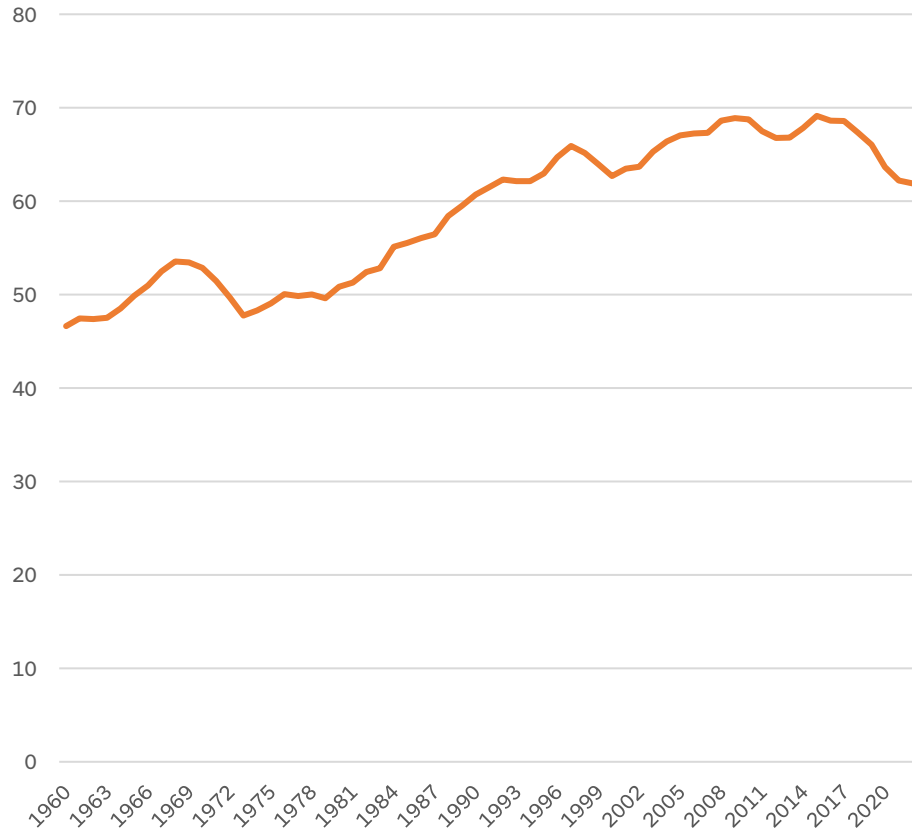


Source: NCES IPEDS 12-Month Enrollment Survey, files efiayyyy. Notes: The two graphs are on separate y-axis scales. Percentage changes represent change from previous dot.

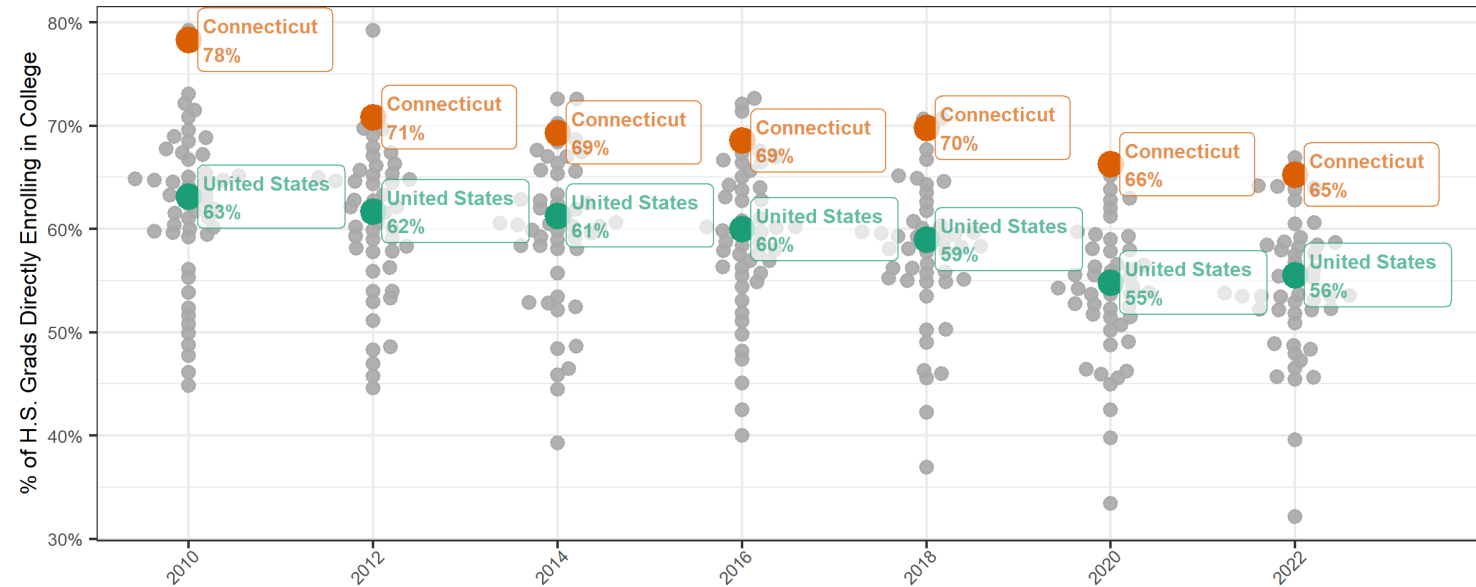


# Percent of Recent High School Graduates Enrolled in College

U.S., 1960-2022



State College-Going Rates, 2010-2022

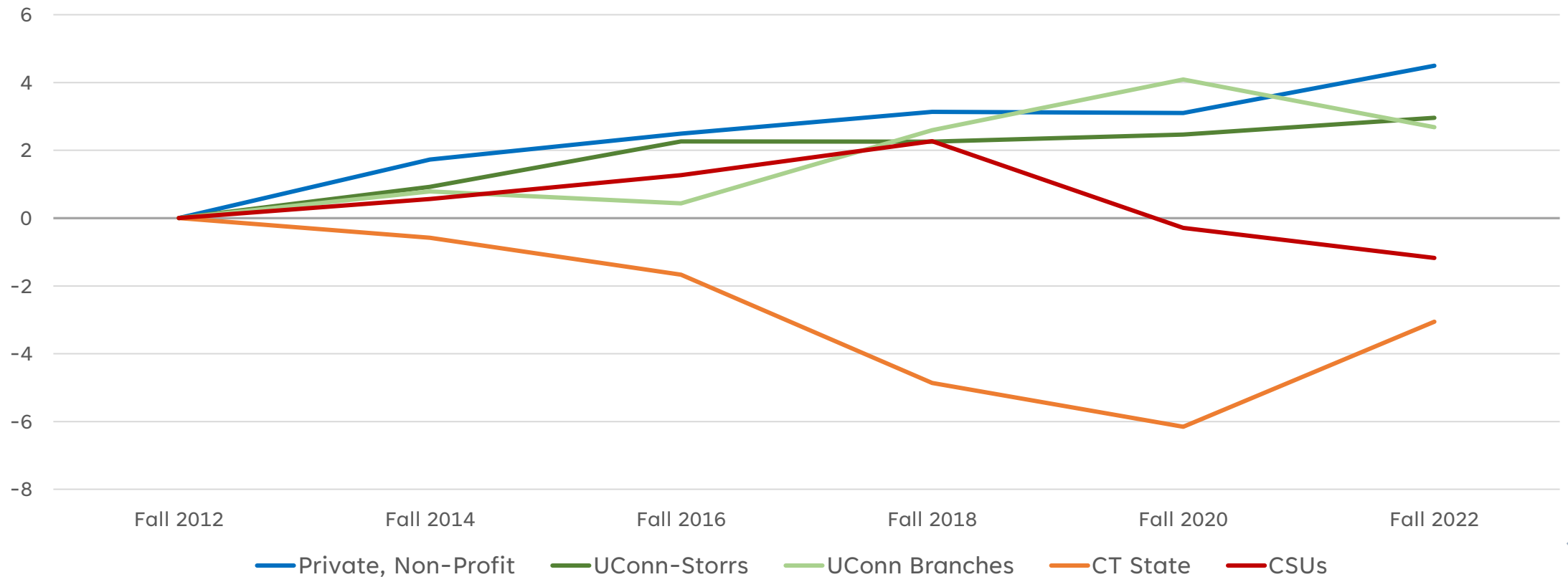


Sources: WICHE Knocking at the College Door: Projections of High School Graduates; NCES IPEDS Fall Residency and Migration Files eYYYYc. Note: Each dot represents one state.

# Causes of the Decline in College-Going Rates

1. Demographic conditions
2. A strong economy increases the opportunity cost of college
3. Questions about the value of a degree
4. Lingering effects of the pandemic
  - Dissatisfaction with the experience during the pandemic
  - Institutions continue to make adjustments in how instruction and student supports as they struggle to figure out what's permanent and balance good pedagogy, student demand, and faculty preferences
5. Campuses as sites for partisan clashes
  - Values conflicts for families
  - Safety concerns

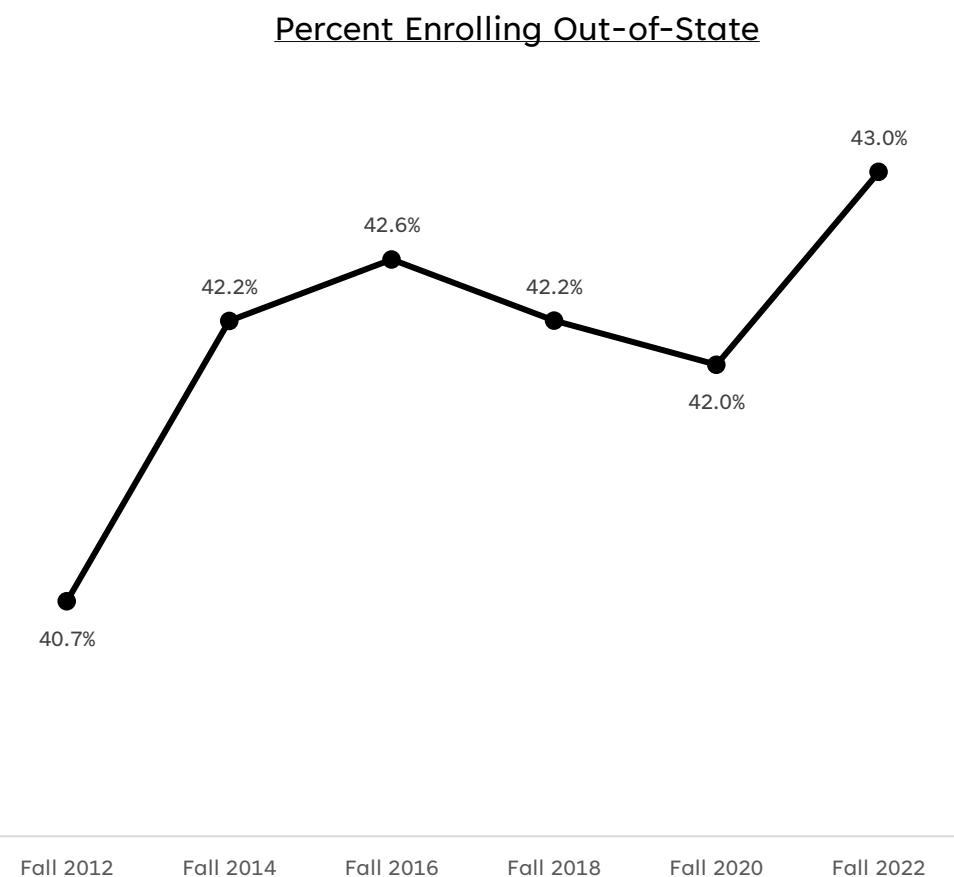
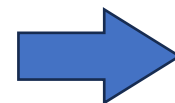
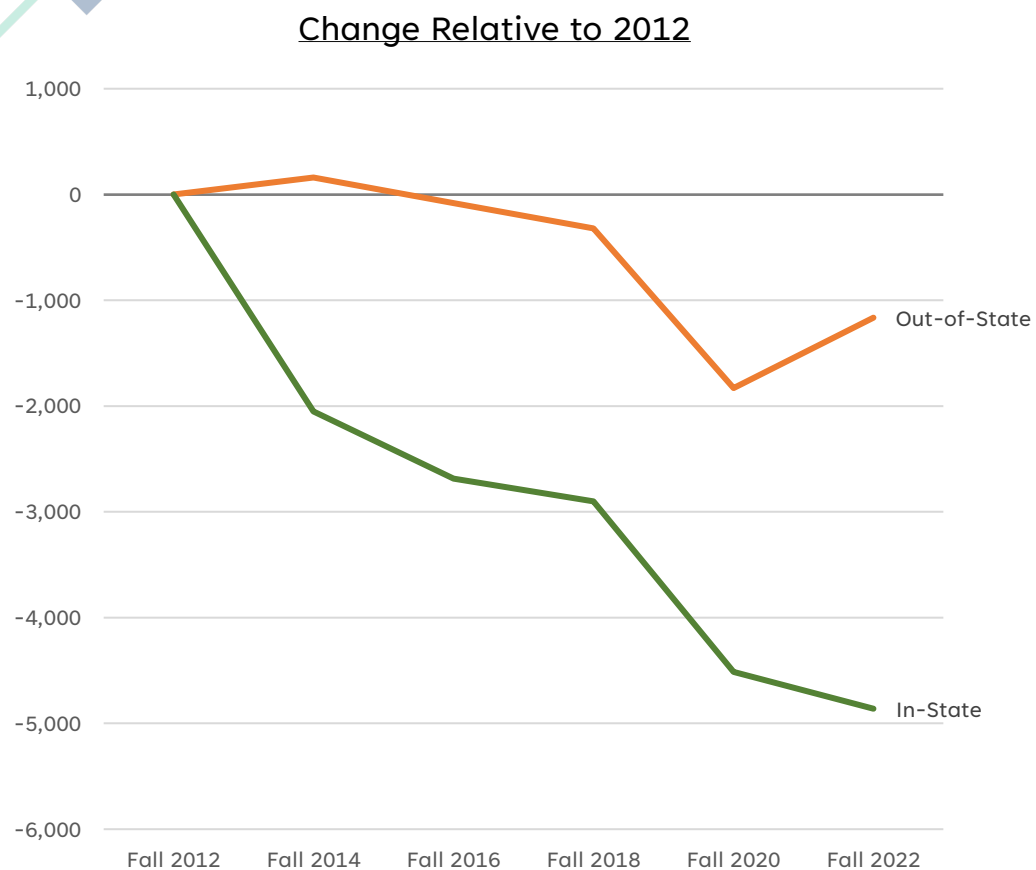
## Change (in Percentage Points) in Shares of First-Time In-State Students



Note: Data are based on the headcount of all Connecticut residents enrolling for the first time at an institution located in Connecticut. The change in proprietary institutions' shares is not shown.

Source: NCES IPEDS.

# Enrollment of First-Time Connecticut Residents, by Location of Institution



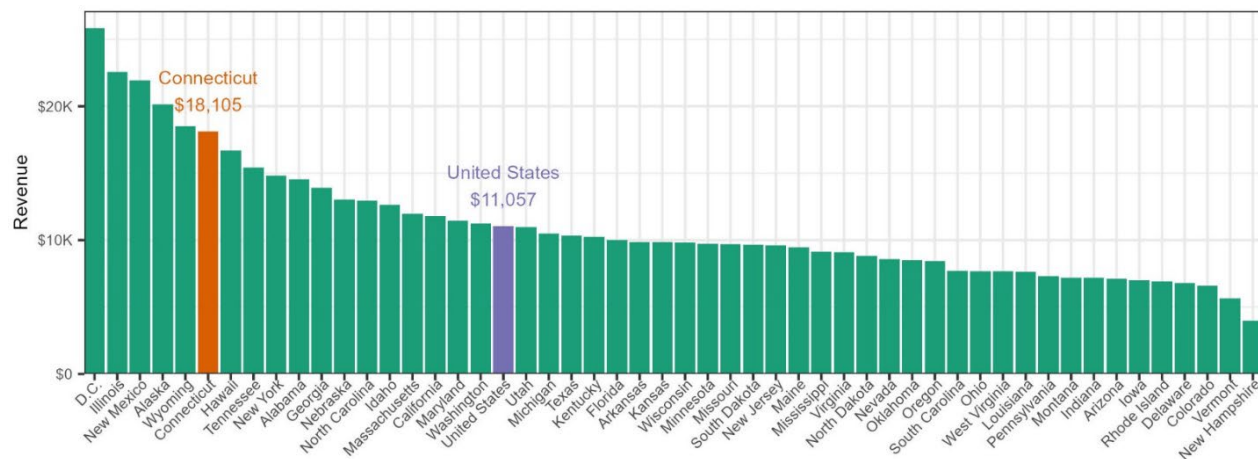
Source: NCES IPEDS.

## Summary

- Demographic trends are increasingly unfavorable, and the competition for students among institutions is growing more stiff.
- College-going rates are trending downward in Connecticut and nationally.
- Enrollment nationally is down significantly, especially in the public two-year sector.
- CSCU institutions' recent enrollment losses come on the heels of an historic peak.
- CSCU has lost market share among in-state students to other Connecticut institutions.
- Connecticut residents are more likely to enroll out-of-state, who are being attracted to other states' public research universities.

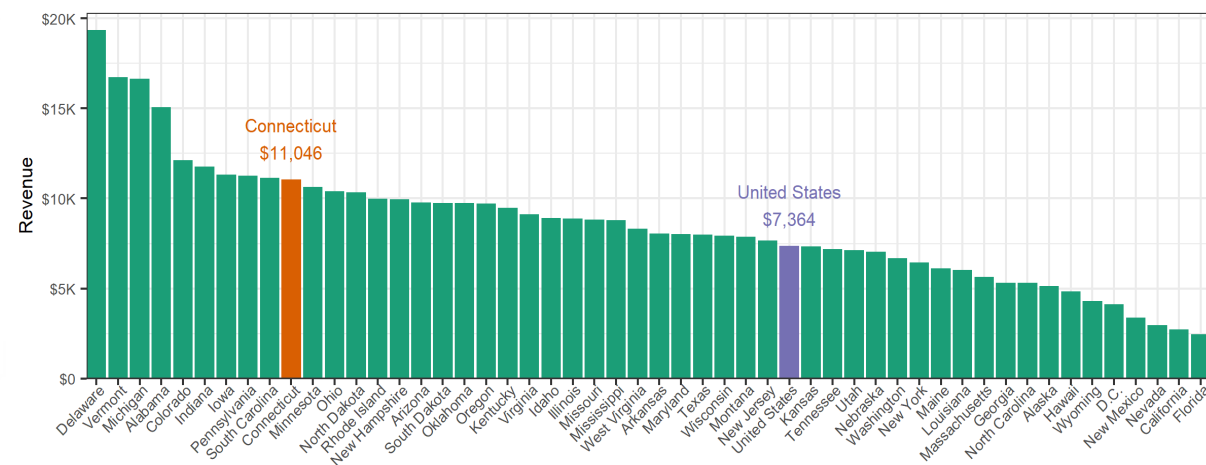
# Educational Appropriations and Public Net Tuition Revenue per FTE, FY2023

## Educational Appropriations



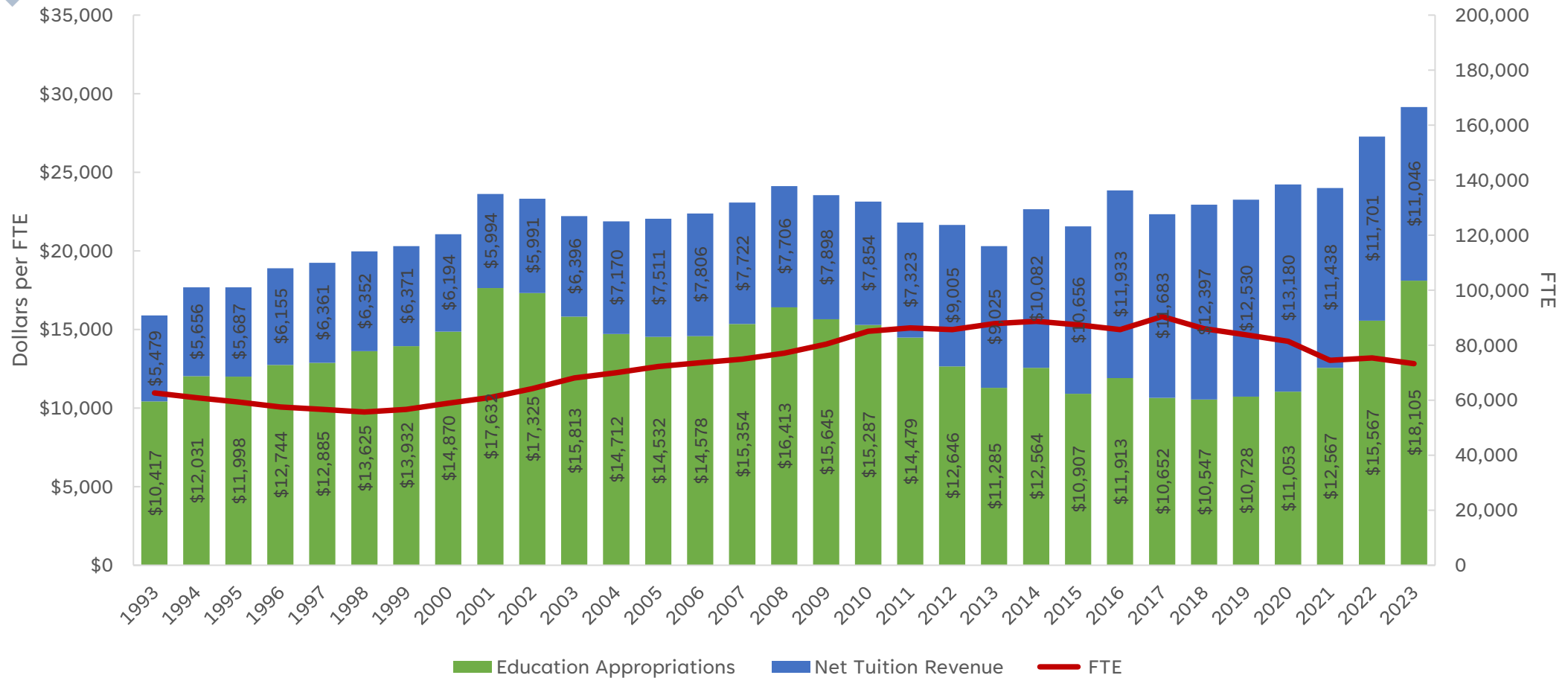
Source: State Higher Education Executive Officers Association. (2023)  
State Higher Education Finance: FY 2022. Note: Values adjusted for cost of living (COLI), inflation (HECA) and enrollment mix (EMI).

## Public Net Tuition Revenue



Source: State Higher Education Executive Officers Association. (2024)  
State Higher Education Finance: FY 2023. Note: Values adjusted for cost of living (COLI) and enrollment mix (EMI).

# Public FTE Enrollment, Education Appropriations per FTE, and Net Tuition Revenue per FTE, Connecticut, FY 1998-2023 (Constant Adjusted Dollars)



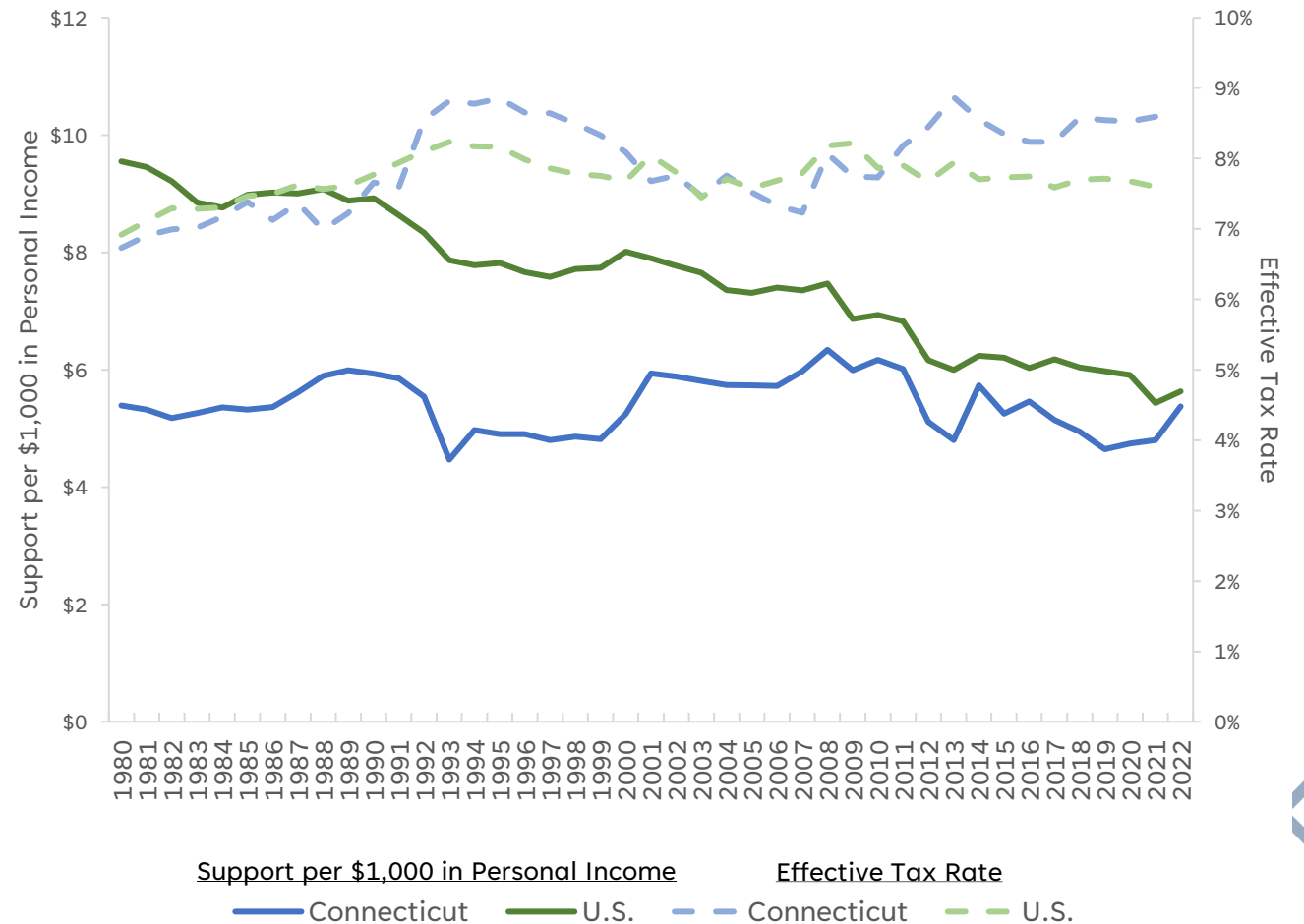
Notes: Education appropriations include federal stimulus funding, but exclude state funding for research, hospitals, and medical education.

Source: SHEEO SHEF



# State Tax Effort

- Connecticut taxes itself to pay for higher education at a rate slightly higher, but historically similar to, the nation.
- It has been significantly less generous to higher education than the nation as a whole when measured against the state's personal income.
- That gap had all but disappeared by 2022, which was due to worsening levels of support across the nation rather than improvement in Connecticut (in fact, Connecticut has generally grown less generous since 2010).



Source: SHEEO SHEF

# Questions?