



HLC MEMBERSHIP BY THE NUMBERS

2021 Institutional Update Data

INTRODUCTION

As higher education faces shrinking enrollments, the COVID-19 pandemic has upended the traditional operational models and forced all of us to face up to new realities. Embodying the human ingenuity and strong foundation of higher education in the United States, HLC member institutions have continued to persevere and ensure quality of teaching and learning during the pandemic. The following analysis of student enrollment, program completion, workforce, and financial resources, drawn from the 2021 Institutional Update data, viewed in historical trends, and placed within the national context, demonstrates the strength and resilience of HLC member institutions in times of crisis and disruptive challenges.

MEMBER INSTITUTIONS

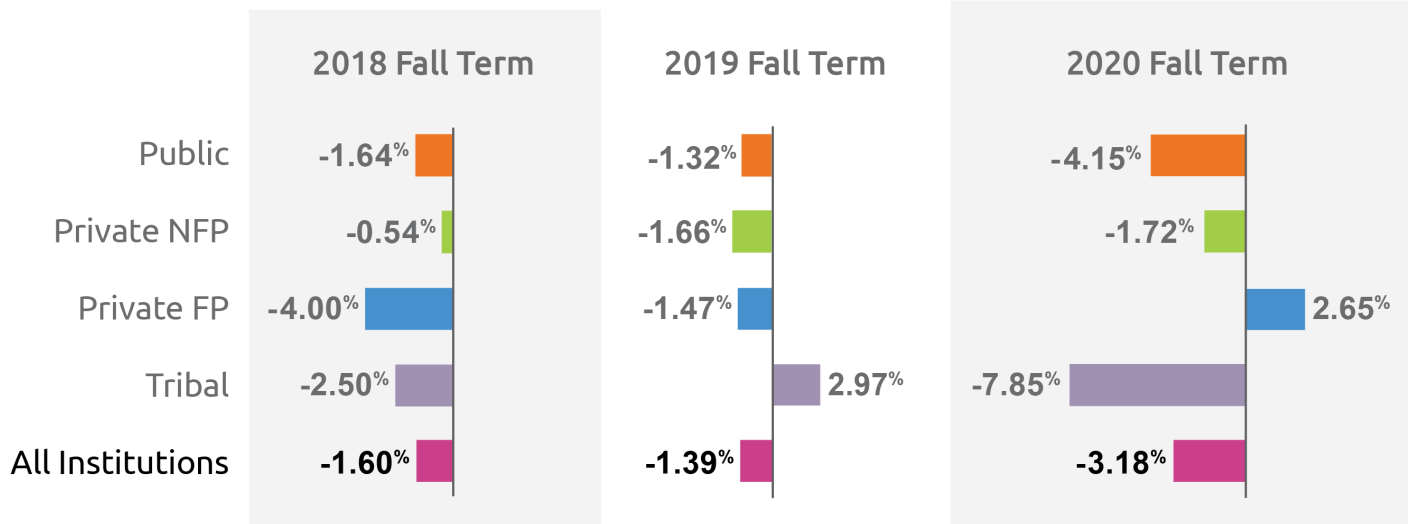
In April 2021, HLC membership consisted of 971 institutions serving students in the United States and around the world. During the past year, as the higher education industry continued to consolidate, HLC membership shrunk by six institutions, which were either permanently closed, merged with other entities, or consolidated with existing HLC member institutions.

ENROLLMENT HEADCOUNT

HLC member institutions enrolled nearly five million undergraduate and graduate students in fall 2020, accounting for approximately 25% of the total fall enrollment in degree-granting U.S. colleges and universities (NCES). The overall fall 2020 enrollment in HLC member institutions was down by 3.18% compared with the fall 2019 level. The enrollment decline was slightly higher than the nationwide enrollment change (2.5%) that was estimated by the National Student Clearinghouse (NSC Current Term Enrollment Estimate). This drop reflects the multitude of challenges brought on by the pandemic for institutions and students alike.

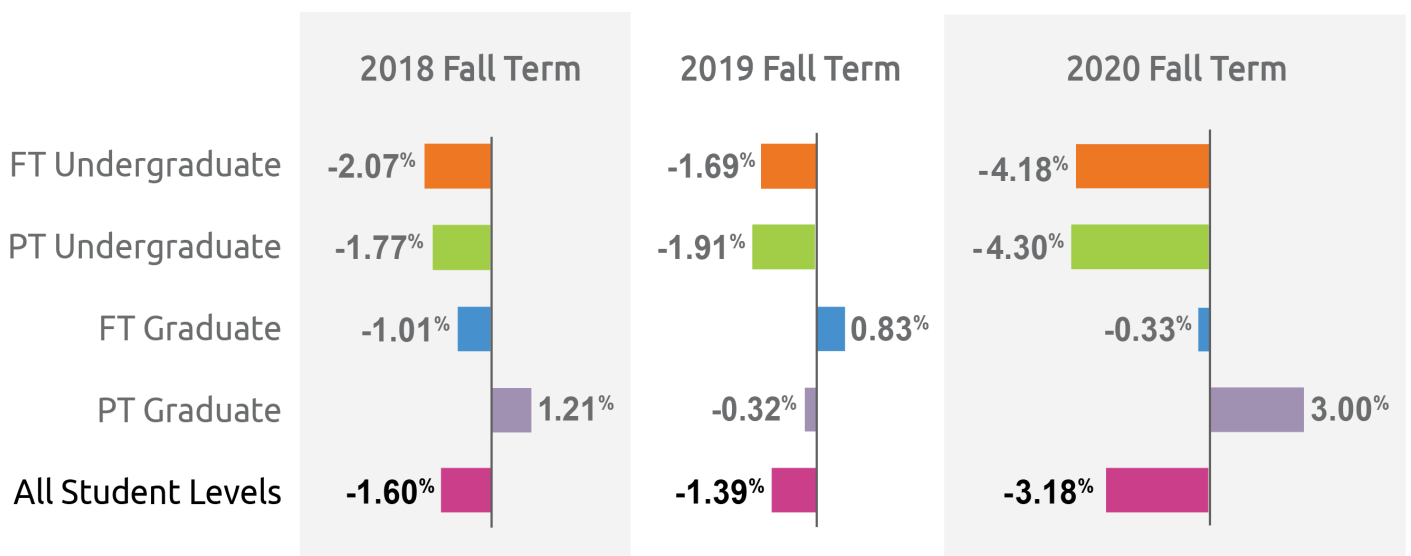
The year-over-year percent change in enrollment varied across institution types. Of the downward trend, tribal colleges experienced the highest drop in total student enrollment (7.85%), which reversed the gains (2.97%) made in the prior year. The enrollment decline among public institutions (4.15%) was in line with the nationwide rate (4%) as reported by the National Student Clearinghouse, while the decline among private not-for-profit (NFP) institutions (1.72%) may be indicative of the continuing consolidation trend in this group. On the upward side, enrollment in private for-profit (FP) institutions improved 2.65% over the last year.

Percentage Change in Postsecondary Enrollment by Institutional Control: Fall 2018 to Fall 2020



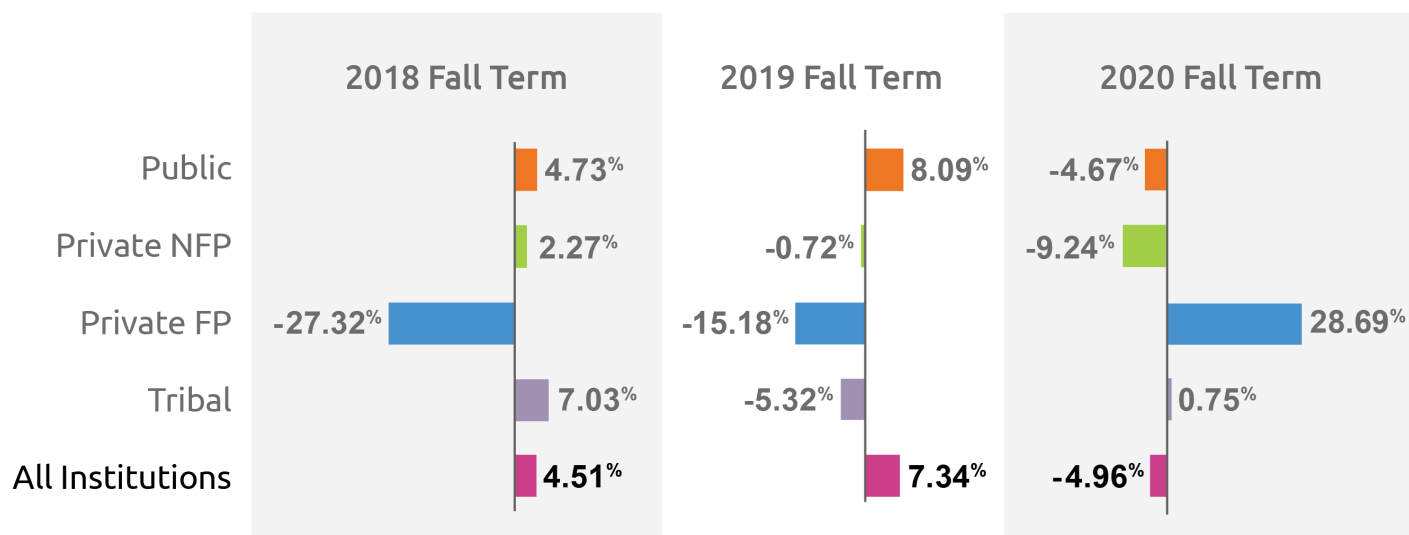
Undergraduate student enrollment in fall 2020 was down by 4.22% in comparison to the prior year level, with a nearly identical percent change among full-time and part-time students. Full-time (FT) graduate enrollment decreased by a small amount (.33%), while part-time (PT) graduate enrollment went up 3%.

Percentage Change in Postsecondary Enrollment by Student Level: Fall 2018 to Fall 2020



The number of high school students taking college courses in fall 2020 was down by 4.96% from the fall 2019 level. The downturn in dual enrollment in fall 2020 was the first time in recent history for HLC public institutions where most of the dual credit students are enrolled (93% of the total). The decline in enrollment can be attributed to the disruptive impacts of the pandemic on the operations of school systems and on student learning. It is also notable that the percent decrease in fall 2020 dual enrollment was about twice as high at private not-for-profit institutions (9.24%) as at public institutions (4.67%). On the upside, dual enrollment at tribal colleges in fall 2020 slightly increased compared to the fall 2019 level (.75%), while enrollment at private for-profit institutions strengthened (28.69%) reversing the decreasing trend in the last few years.

Percentage Change in Dual Enrollment by Institutional Control: Fall 2018 to Fall 2020

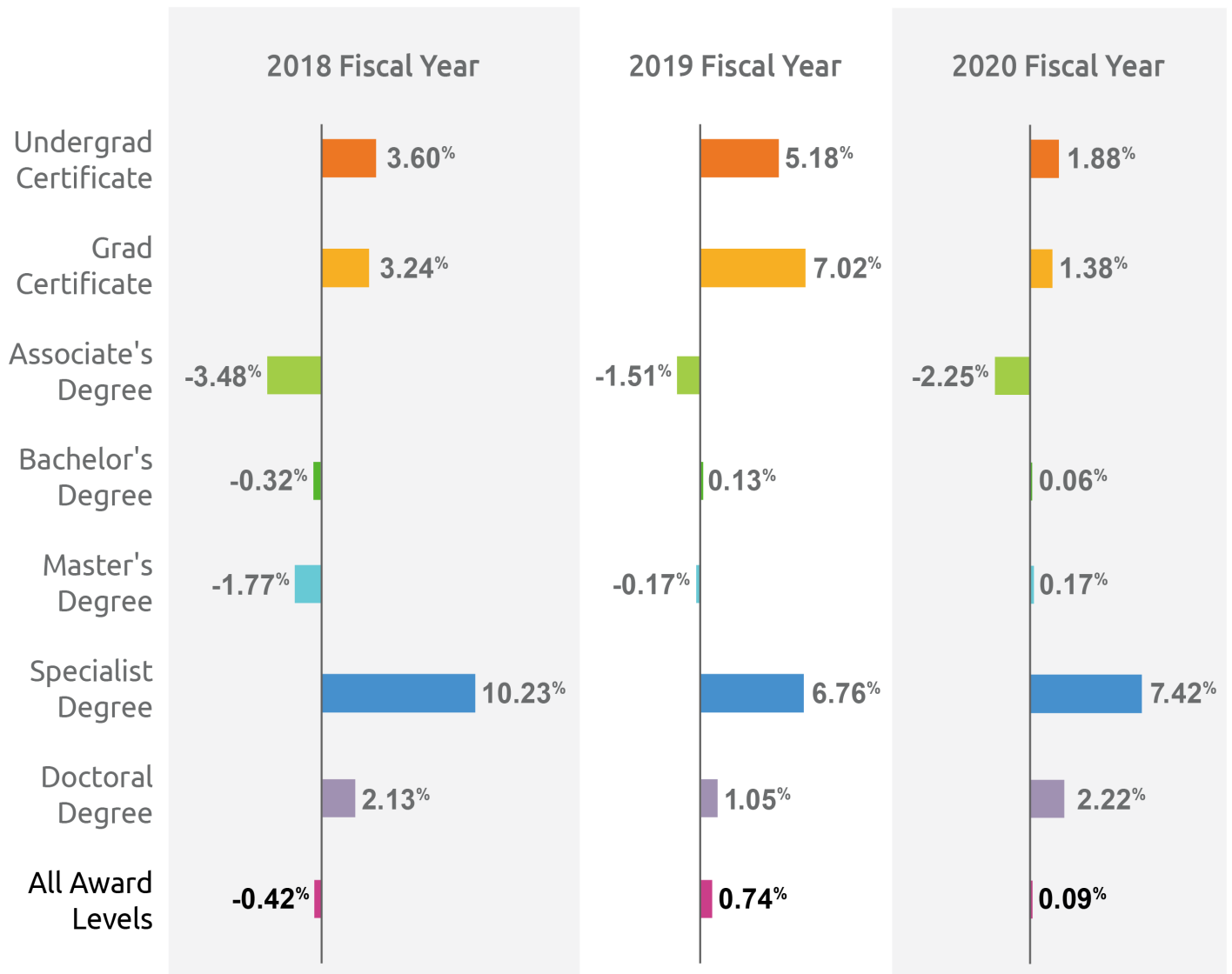


PROGRAM COMPLETION

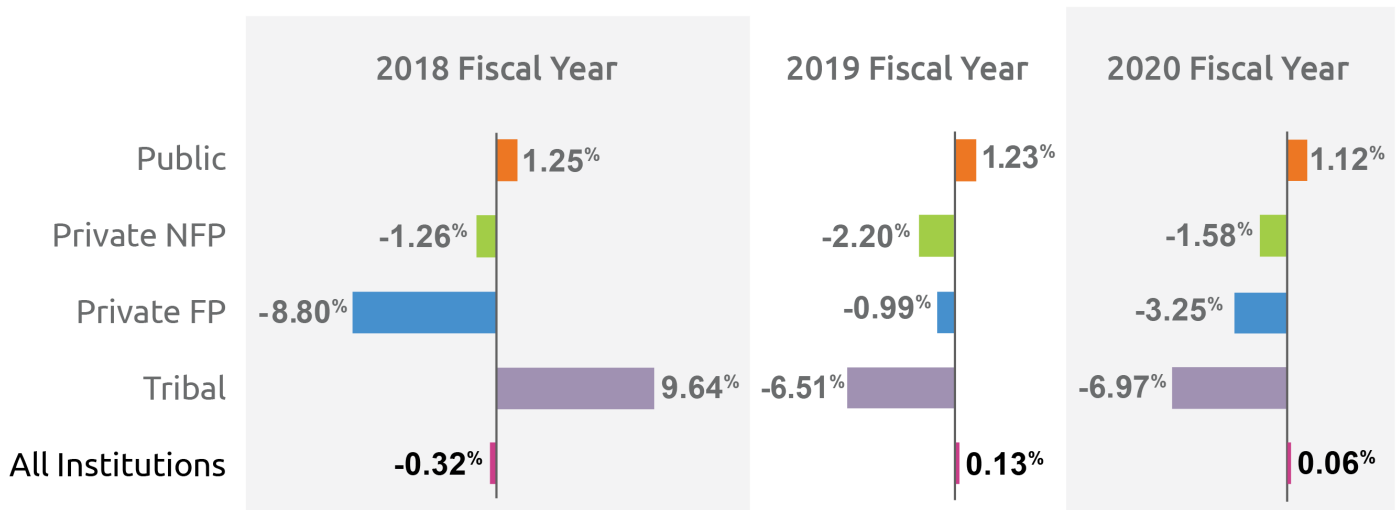
HLC member institutions awarded more than 1.44 million degrees and certificates in fiscal year 2019-20. Compared to the prior year, associate’s degree awards were down by 2.25%, while degree completion increased 0.06% at the bachelor’s level, 0.17% at the master’s level, 7.42% at the specialist level, and 2.22% at the doctoral level. The number of awarded certificates also increased 2.13% over the last year.

Two-thirds of all bachelor’s degrees were conferred by public institutions. While bachelor’s degree completion continues to strengthen among public institutions, the numbers were down among private not-for-profit, private for-profit and tribal institutions, by 1.58%, 3.25% and 6.97%, respectively. The decreases in bachelor’s degree completion in private for-profit institutions appear to approximate the national trend in the last few years (NCES). Among private not-for-profit institutions, bachelor’s degree completion has continued to improve among doctoral-level institutions while declining in non-doctoral, smaller institutions. Lastly, while the number of bachelor’s degree conferrals was found stable in most tribal colleges, a small number of colleges reported relatively large decreases over the last two years.

Percentage Change in Degrees and Certificates Awarded: Fiscal Years 2018 to 2020



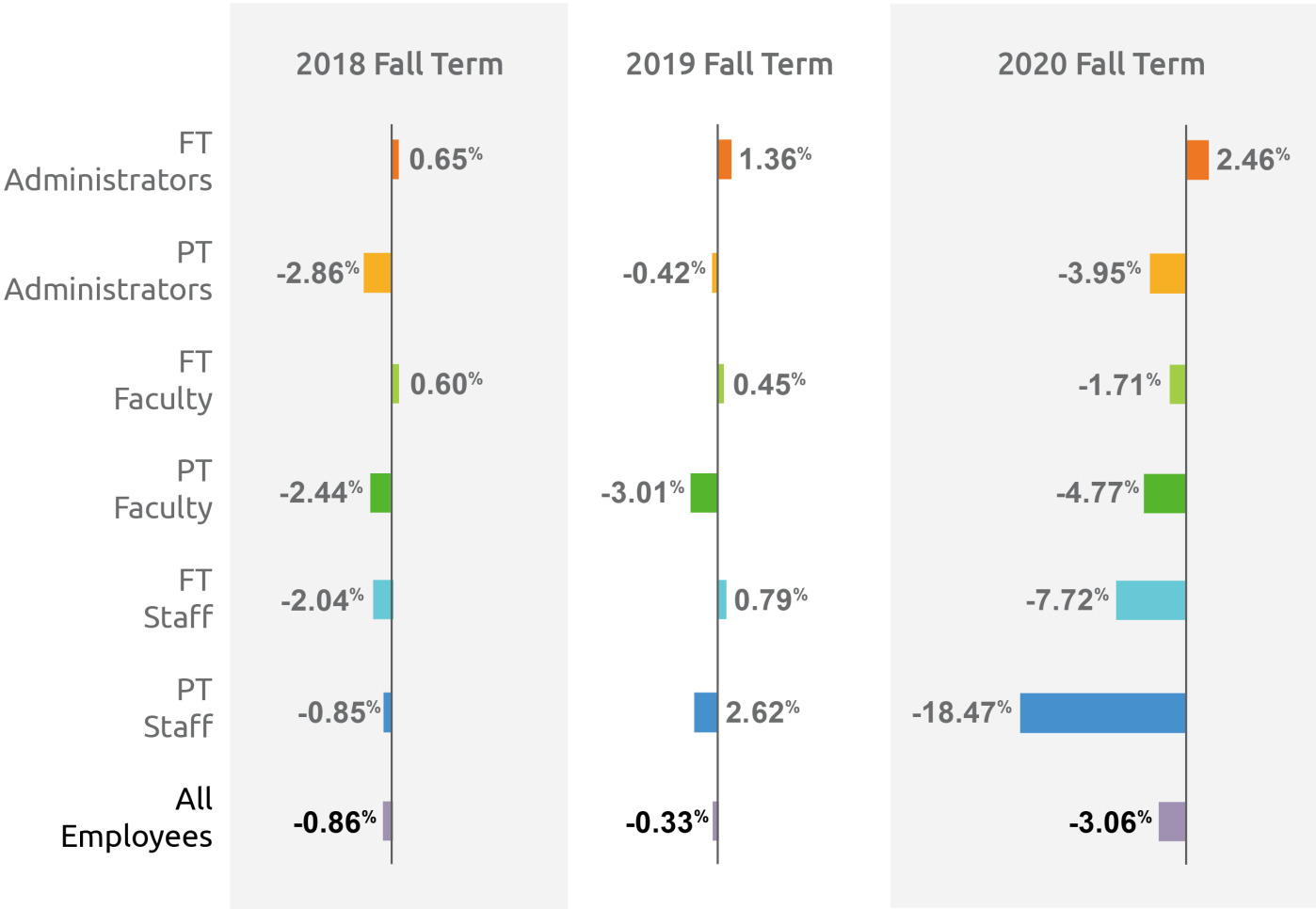
Percentage Change in Bachelor's Degrees Conferred by Institutional Control: Fiscal Years 2018 to 2020



INSTITUTIONAL WORKFORCE

HLC member institutions employed a workforce of nearly 1.1 million people in fall 2020, down by 3.06% from the previous year's level. Among instructional staff, the number of full-time faculty was down by 1.71% and the number of part-time faculty declined 4.77% from the previous year. Among administrator positions, full-time administrators gained 2.46%, continuing the upward trend in the last few years, while the number of part-time administrators decreased by 3.95%. Lastly, the number of full-time and part-time staff positions declined by 7.72% and 18.47%, respectively, compared with the prior year's levels. The significant reduction in the number of non-instructional staff, especially among part-time staff positions, can be attributed to the shift to remote work and the cost-control mechanisms that institutions had deployed in response to the pandemic conditions.

Percentage Change in Institutional Workforce Headcount: Fall 2018 to Fall 2020



COMPOSITE FINANCIAL INDEX

For most member institutions the composite financial index (CFI) was calculated based on financial data from fiscal year 2019–20. The average composite financial index (CFI) was 5.02 among tribal colleges, 3.79 among public institutions, 2.38 among private not-for-profit, and 2.25 among private for-profit institutions. While the average CFIs were almost identical to the prior year’s levels for public, private not-for-profit and tribal institutions, the average CFI level among private for-profit increased by .25, or 12.5%, indicating strengthened financial positions in this group.

Composite Financial Index (CFI) by Year

