



The Commission on
INDEPENDENT
Colleges & Universities
in New York

**Report: Fall 2017 Enrollment and Workforce
Trends at New York's Private, Not-For-Profit
Colleges and Universities**

Prepared by the Commission on Independent Colleges and Universities | Fall 2017

Executive Summary

In August and September 2017, the Commission on Independent Colleges and Universities (CICU) surveyed its membership regarding changes in enrollment and workforce levels between fall 2016 and fall 2017. This report aggregates responses from 80 colleges and universities with varying missions, academic program offerings and approaches to enrolling new students. Responding institutions represent 75 percent of CICU's total membership. Participation in the survey was voluntary, and most of the colleges and universities not included in these results focus exclusively on two-year or graduate degrees.

The survey is part of ongoing research as CICU monitors enrollment and employment trends at New York's private, not-for-profit colleges and universities to gauge the impact of recent changes in financial aid policies at the state level. These studies are designed to inform policymakers as they make decisions that impact the balance in New York's higher education ecosystem with regard to affordability, student success and jobs.

Analysis of the findings suggest that the most significant changes in enrollment occurred at 48 colleges and universities with student bodies comprised primarily of New York State residents (65% or more), a group this report calls "majority New Yorker-serving institutions."

Those 48 majority New Yorker-serving institutions shed six percent of their workforce, or 1,535 jobs, between fall 2016 and fall 2017. Based on CICU's most recent economic impact study, direct employment reductions plus indirect and induced effects point to nearly 3,200 jobs lost.

Within that group of majority New Yorker-serving institutions, 30 institutions reported enrollment declines in fall 2017. That group of 30 represents institutions in every region of New York with varied missions and sizes. Enrollment at those institutions is as small as a few hundred students and as large as several thousand; in total, they educate 60,300 undergraduate students.

The 30 majority New Yorker-serving institutions that had lower enrollment in fall 2017, reported an aggregate eight percent decline in first-time enrollment of New York residents in fall 2017. At these 30 campuses, year-over-year enrollment declines surpassed recent trends.¹ Also, the enrollment decline was sharper among state residents than out-of-state students.

For most majority New Yorker-serving institutions, it was more difficult in 2017 than it was in 2016 to attract new students and transfer students. Of those majority New Yorker-serving institutions, 60 percent reported fewer students transferring into their institutions in 2017.

The enrollment declines at the 30 majority New Yorker-serving institutions are in line with the forecasting model used in a report produced by CICU in March 2017. That report, an extrapolation of data from a Georgetown University study of a proposed national free college tuition plan, suggested that public policy providing significant subsidies to students in the public sector would result in enrollment declines of seven to 15 percent at private, not-for-profit institutions. The CICU report produced in March also forecasted that this trend would be felt most acutely at majority New Yorker-serving institutions.

¹ Recent trends for this group of institutions show slight year-over-year fluctuations in first-time undergraduate enrollment of New York State students. Between 2006 and 2016, enrollment of first-time undergraduates from New York State at these institutions increased by 2 percent.

Detailed Findings

Survey results are reported in the aggregate for two subsets of New York’s private, not-for-profit colleges and universities. The first group (n=48) comprises institutions where New York State residents make up at least 65 percent of undergraduate enrollment. The second group (n=30) is the subset of those majority New Yorker-serving institutions that reported lower undergraduate enrollment in fall 2017.

Workforce and Enrollment Changes for Majority New Yorker-Serving Institutions (n=48)

Of the 48 majority New Yorker-serving institutions:

- Total workforce is lower by 3,200, including 1,500 direct jobs and 1,700 indirect and induced jobs; this represents a six percent reduction in direct jobs alone
- 30 report lower undergraduate enrollment in fall 2017
- Overall undergraduate enrollment is down by two percent
- Enrollment of first-time freshmen is down by five percent
- First-time enrollment of New York State residents is down by six percent
- Fifty percent report lower incoming transfer enrollment in fall 2017

Majority New Yorker-serving institutions (at least 65 percent of undergraduates are New York residents)	Enrollment Change Fall '16 to Fall '17: Total Undergrad	Enrollment Change Fall '16 to Fall '17: All First-Time Freshmen	Enrollment Change Fall '16 to Fall '17: Only NY Resident First-Time Freshmen	Employment Change Fall '16 to Fall '17	Institutions with Fewer Incoming Transfers in Fall '17
% Change	-2%	-5%	-6%	-6% (-1,535 direct jobs; -3,200 direct, indirect and induced jobs)	50%

Majority New Yorker-Serving Institutions (65 Percent or More of Undergraduates are New York State Residents) that Report Fewer Undergraduates in Fall 2017 (n=30)

Of the 30 majority New Yorker-serving institutions that report enrollment declines in fall 2017:

- Overall undergraduate enrollment is down by five percent; first-time freshmen enrollment is down by seven percent
- First-time freshmen enrollment of New York State residents is down by eight percent
- Sixty percent report lower incoming transfer enrollment in fall 2017

Majority New Yorker-serving institutions that reported enrollment declines in Fall '17	Enrollment Change Fall '16 to Fall '17: Total Undergrad	Enrollment Change Fall '16 to Fall '17: All First-Time Freshmen	Enrollment Change Fall '16 to Fall '17: Only NY Resident First-Time Freshmen	Institutions with Fewer Incoming Transfers in Fall '17
% Change	-5%	-7%	-8%	60%