



Who's at the College Door?

Projections of High School Graduates

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A Central Question

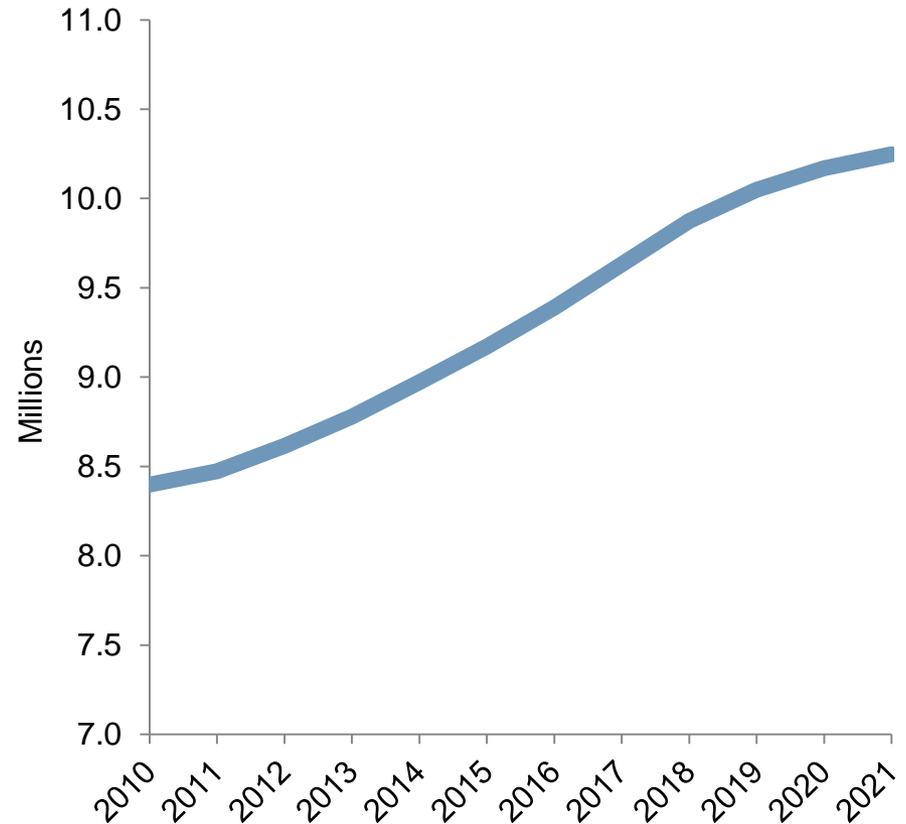
How can colleges and universities be renewed and reinforced in their efforts to serve as engines of economic opportunity and mobility and to meet society's growing needs for an educated workforce and citizenry, amidst changing demographic conditions and under deep fiscal constraints?

The Need to Serve New Populations

- A **decline in the enrollment demand** from “traditional” students turns a seller’s market into a buyer’s market
- A rising need to serve students from underrepresented backgrounds who will be **less well prepared academically** and have **fewer financial resources** at their command

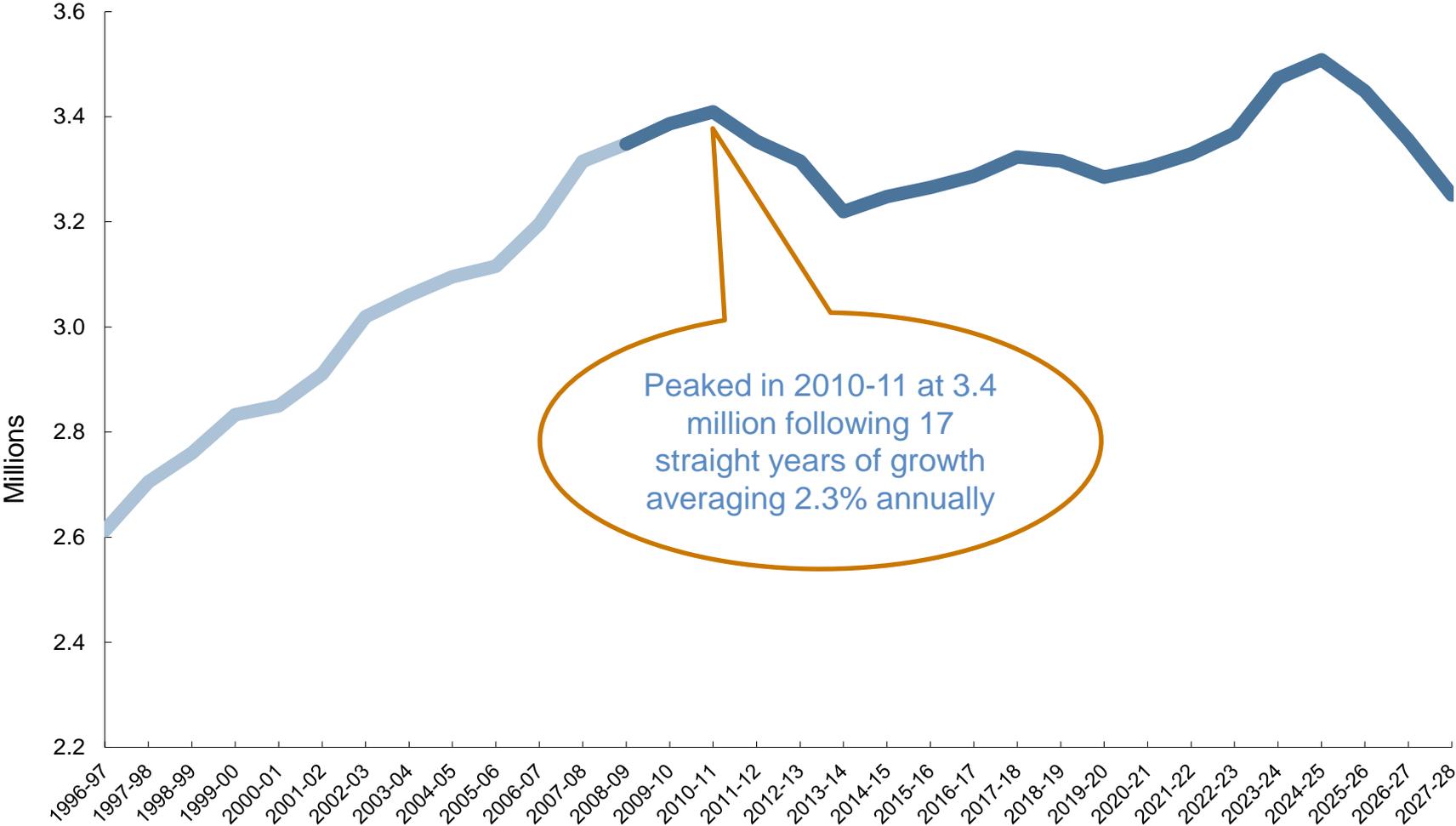
Projections of Postsecondary Enrollment of Adults 25 and Older

- Adult enrollment is projected to grow by 22 percent between Fall 2010 and Fall 2021.

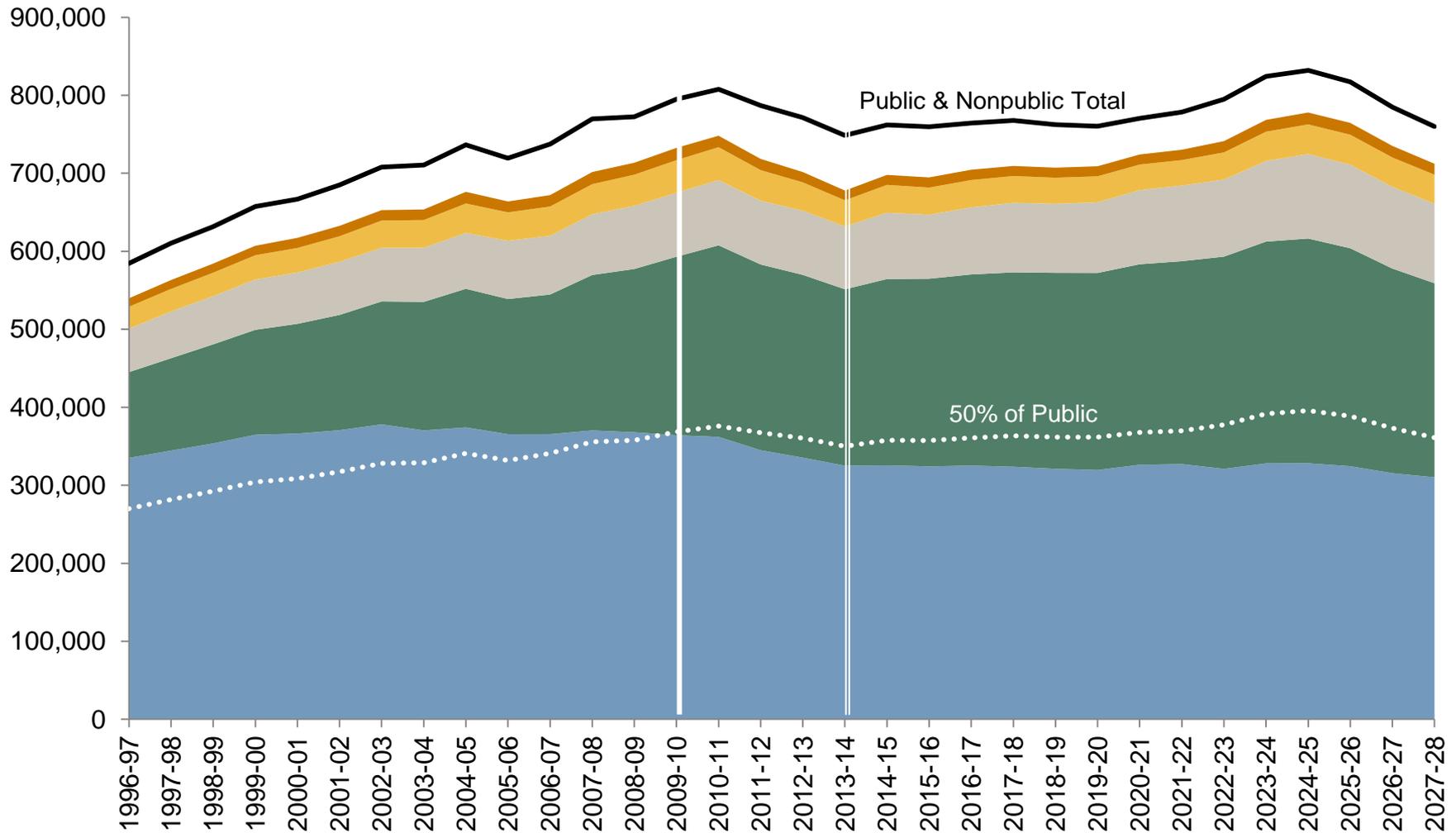


Source: National Center for Education Statistics, *Projections of Education Statistics to 2021*, Table 21.

U.S. Public and Nonpublic High School Graduates, 1996-97 to 2027-28

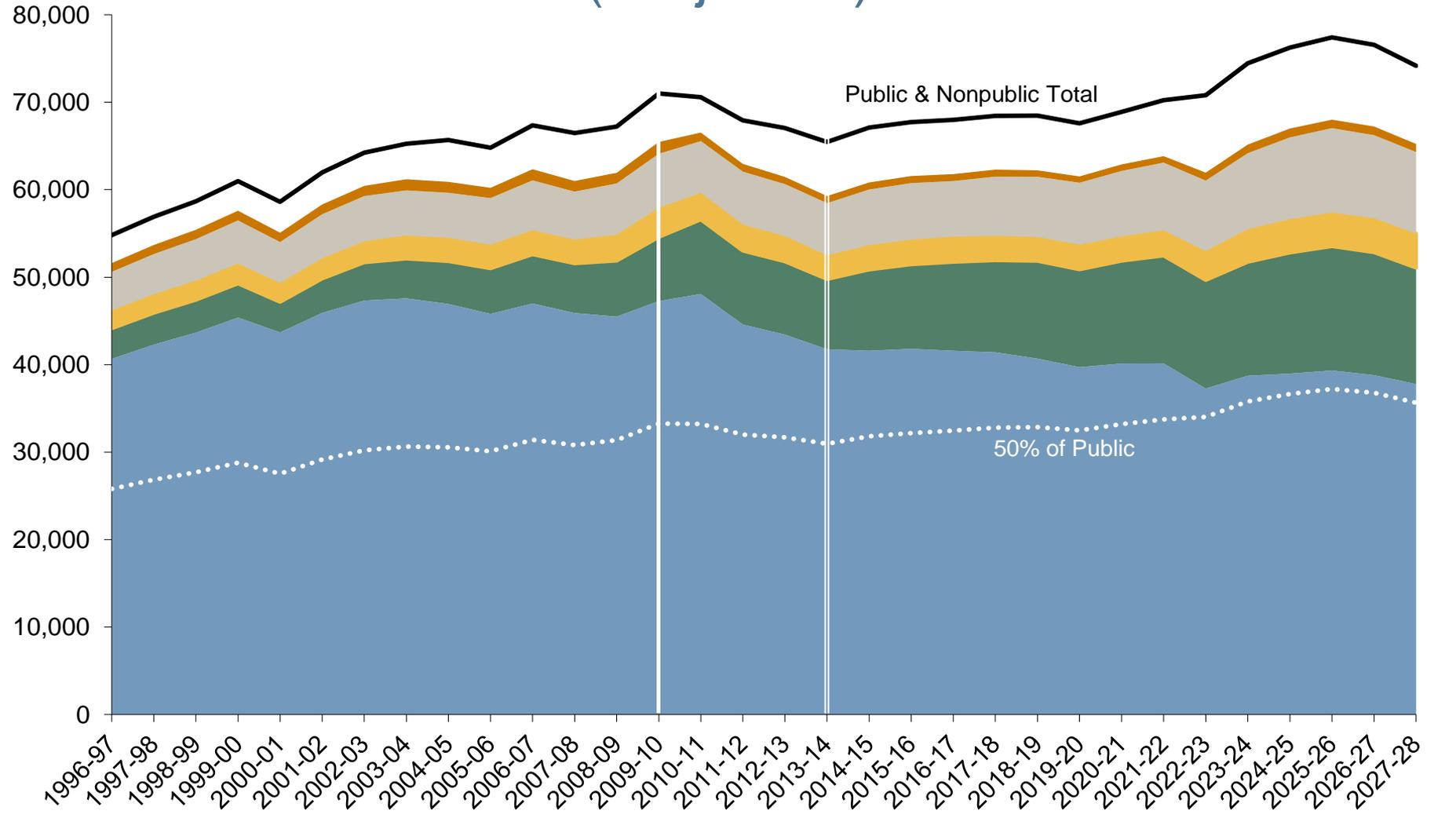


High School Graduates in the West by Race/Ethnicity, 1996-97 to 2008-09 (Actual); 2009-10 to 2027-28 (Projected)



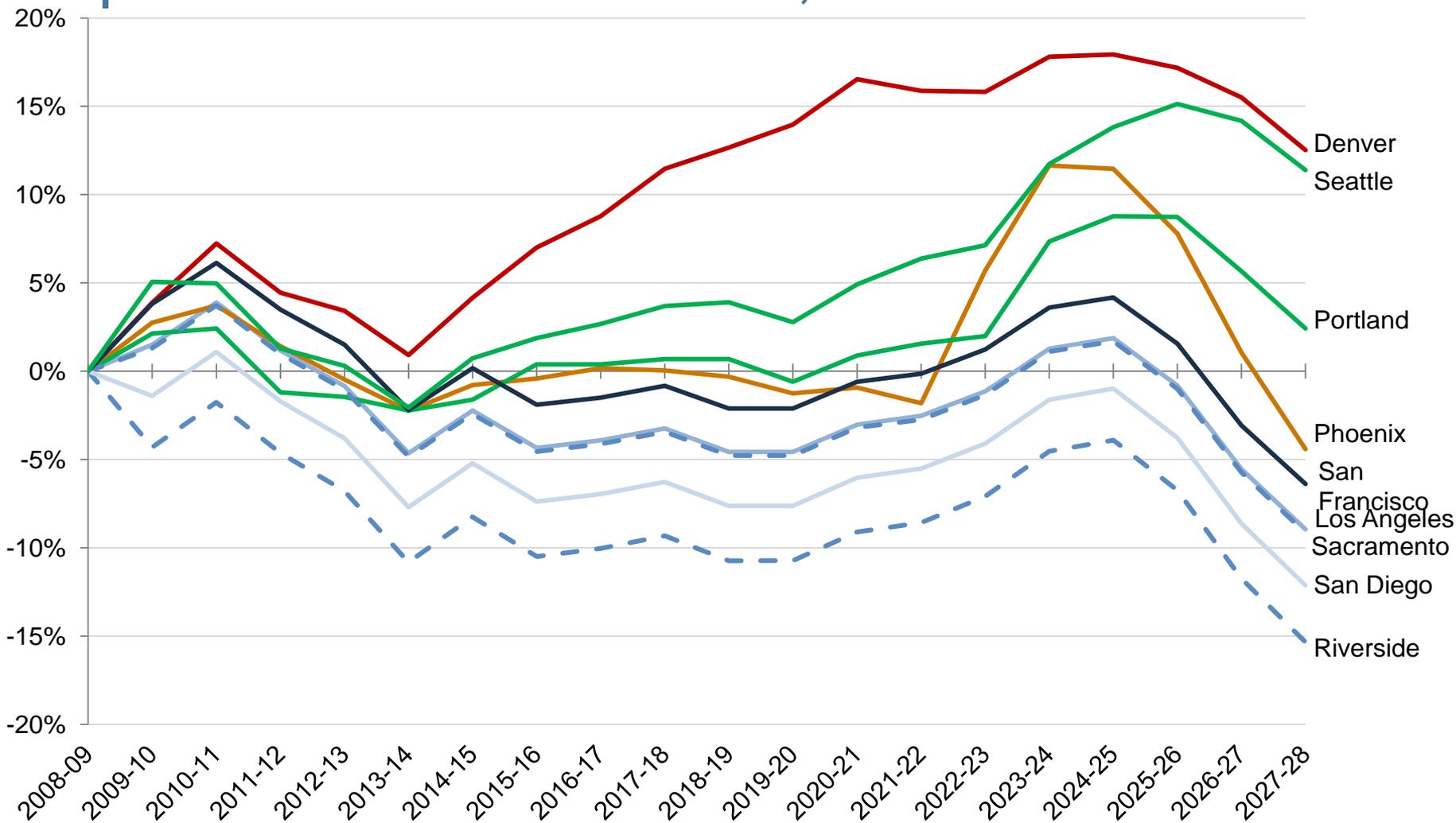
■ White non-Hispanic
 ■ Asian/Pacific Islander
 ■ Hispanic
 ■ Black non-Hispanic
 ■ American Indian/Alaska Native

High School Graduates in Washington by Race/Ethnicity, 1996-97 to 2008-09 (Actual); 2009-10 to 2027-28 (Projected)

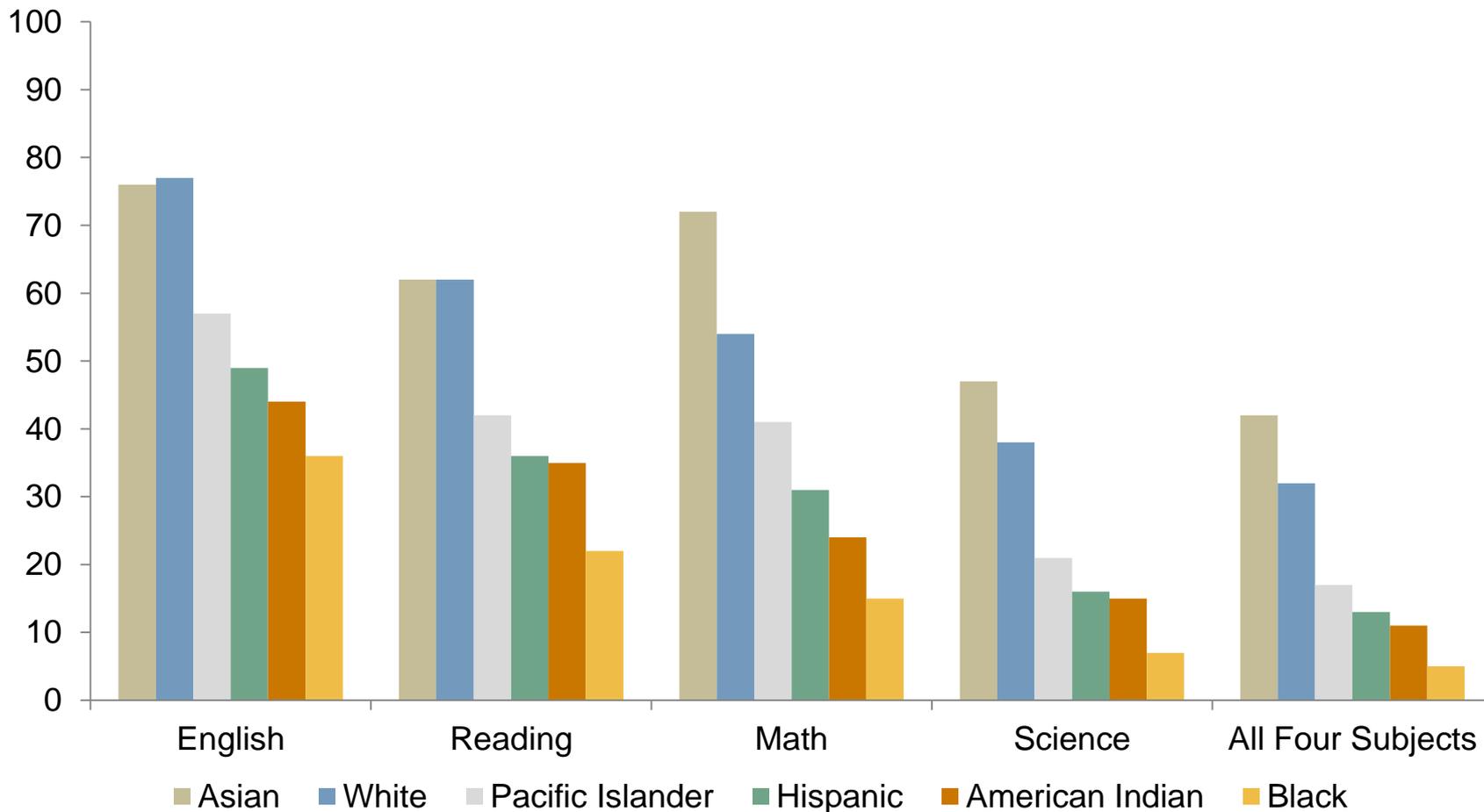


■ White non-Hispanic ■ Asian/Pacific Islander ■ Hispanic ■ Black non-Hispanic ■ American Indian/Alaska Native

Cumulative Percent Change Among Public High School Graduates (Projected), Most Populated Western MSAs, 2008-09 to 2027-28



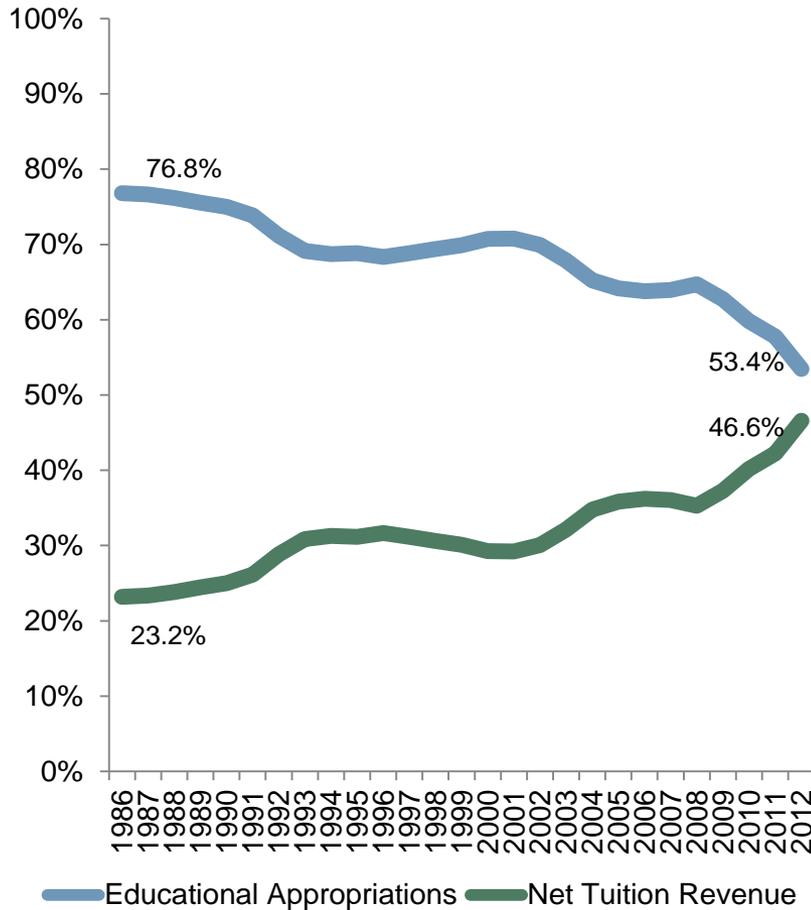
Percent Meeting ACT College Readiness Benchmarks by Race/Ethnicity, 2012



Source: ACT, *The Condition of College & Career Readiness 2012*

Growing Dependence on Net Tuition Revenue

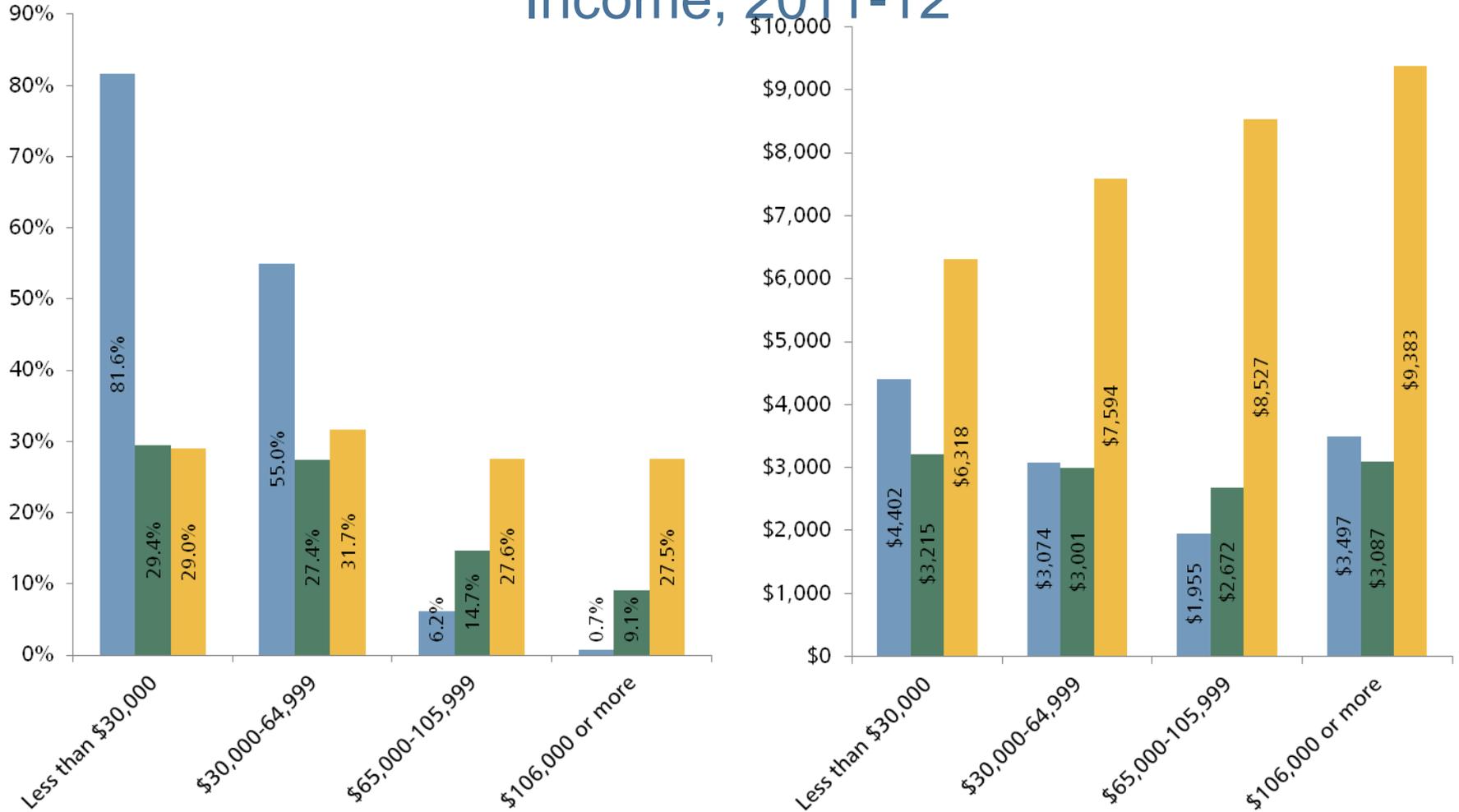
Share of Institutions' Discretionary Revenue



State	Net Tuition Revenue Share, FY2012	Change in % Points Since 1986
New Hampshire	84.5%	27.2
Colorado	70.8%	30.7
Pennsylvania	69.9%	31.6
Virginia	64.3%	34.9
Ohio	62.3%	26.6
New Jersey	54.6%	33.8
Kentucky	46.0%	20.4
Washington	41.7%	20.1
Florida	37.5%	19.0
Texas	37.4%	17.5
Georgia	36.7%	16.1
New York	36.4%	17.9
Illinois	33.5%	14.1
North Carolina	28.5%	15.5
California	25.6%	14.8
Wyoming	13.8%	4.4

Source: SHEEO SHEF

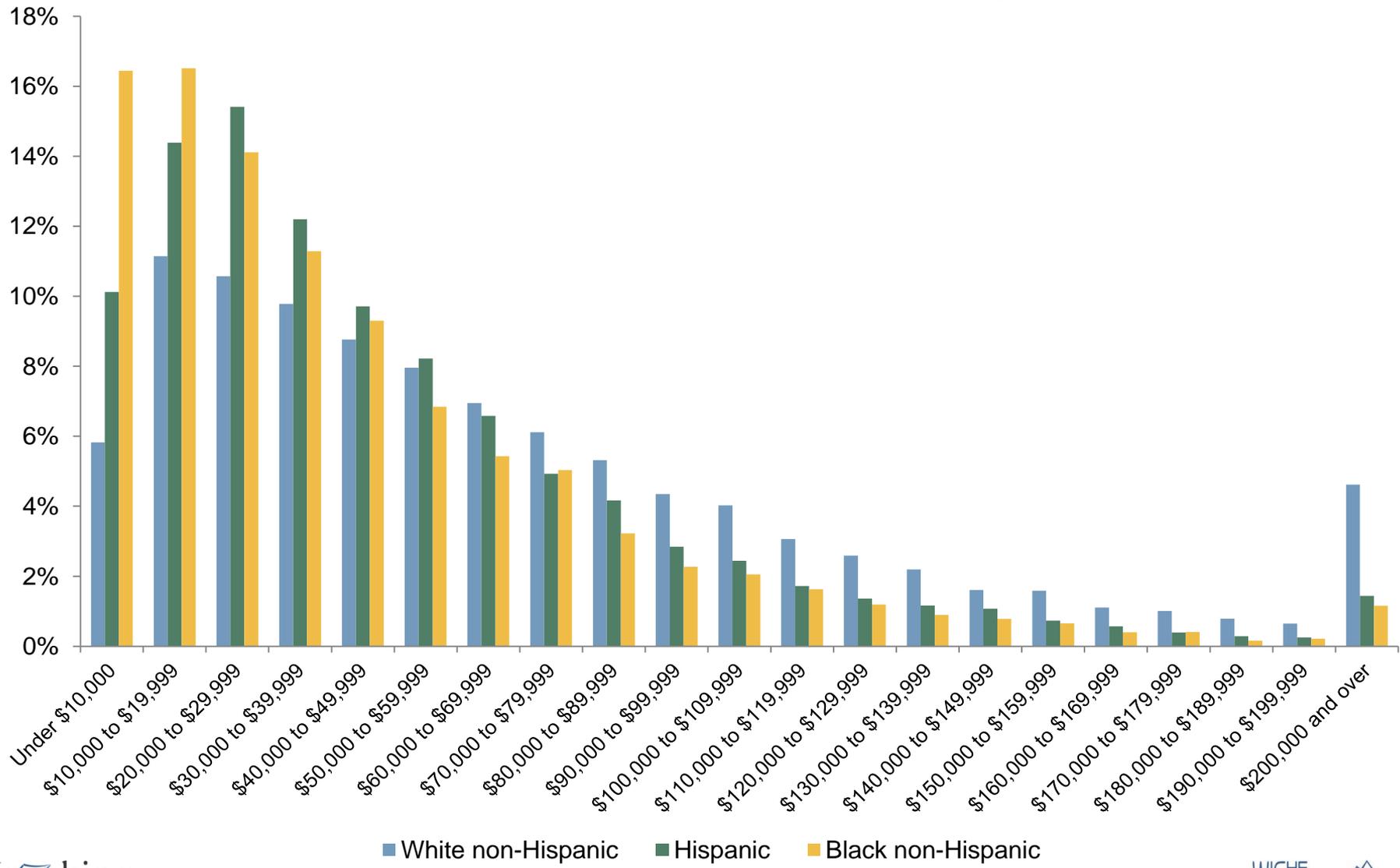
Percent of Dependent Students Receiving Grants and Average Amount Received by Source of Grant and Income, 2011-12



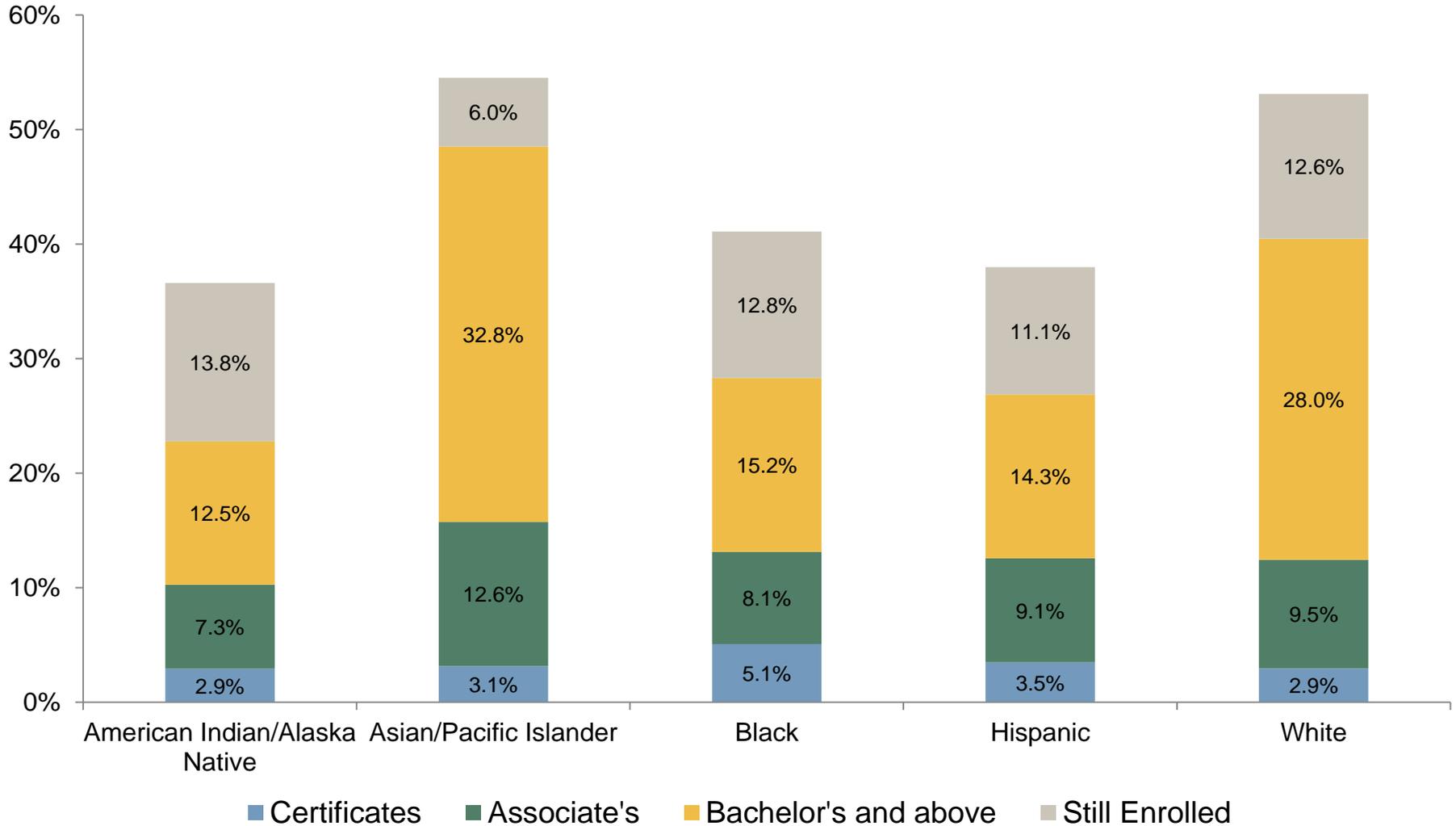
Source: NPSAS

■ Federal ■ State ■ Institution

Percent Distribution of Household Income by Race/Ethnicity, 2010



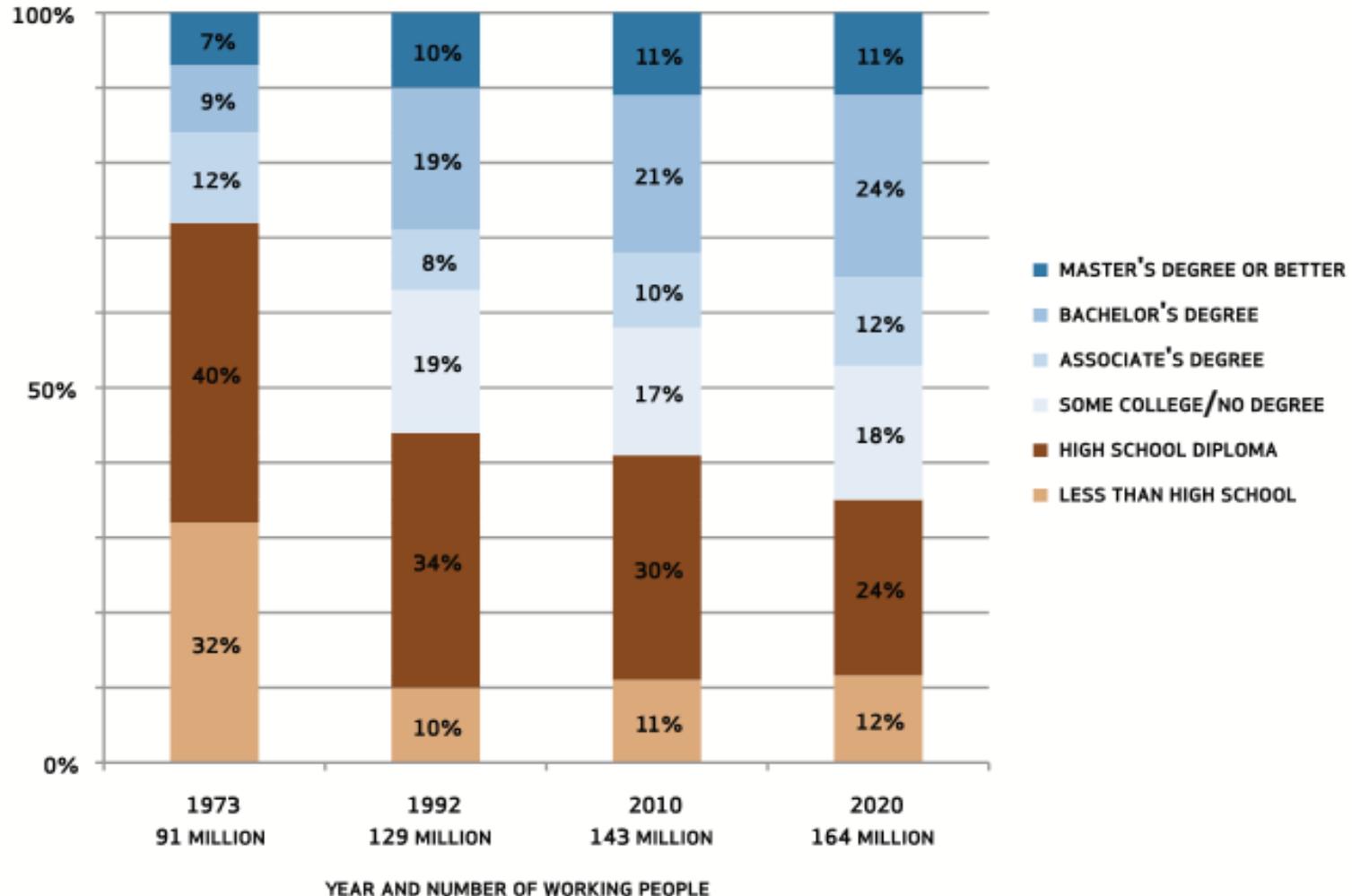
Completion by Race/Ethnicity



Source: WICHE Multistate Data Exchange

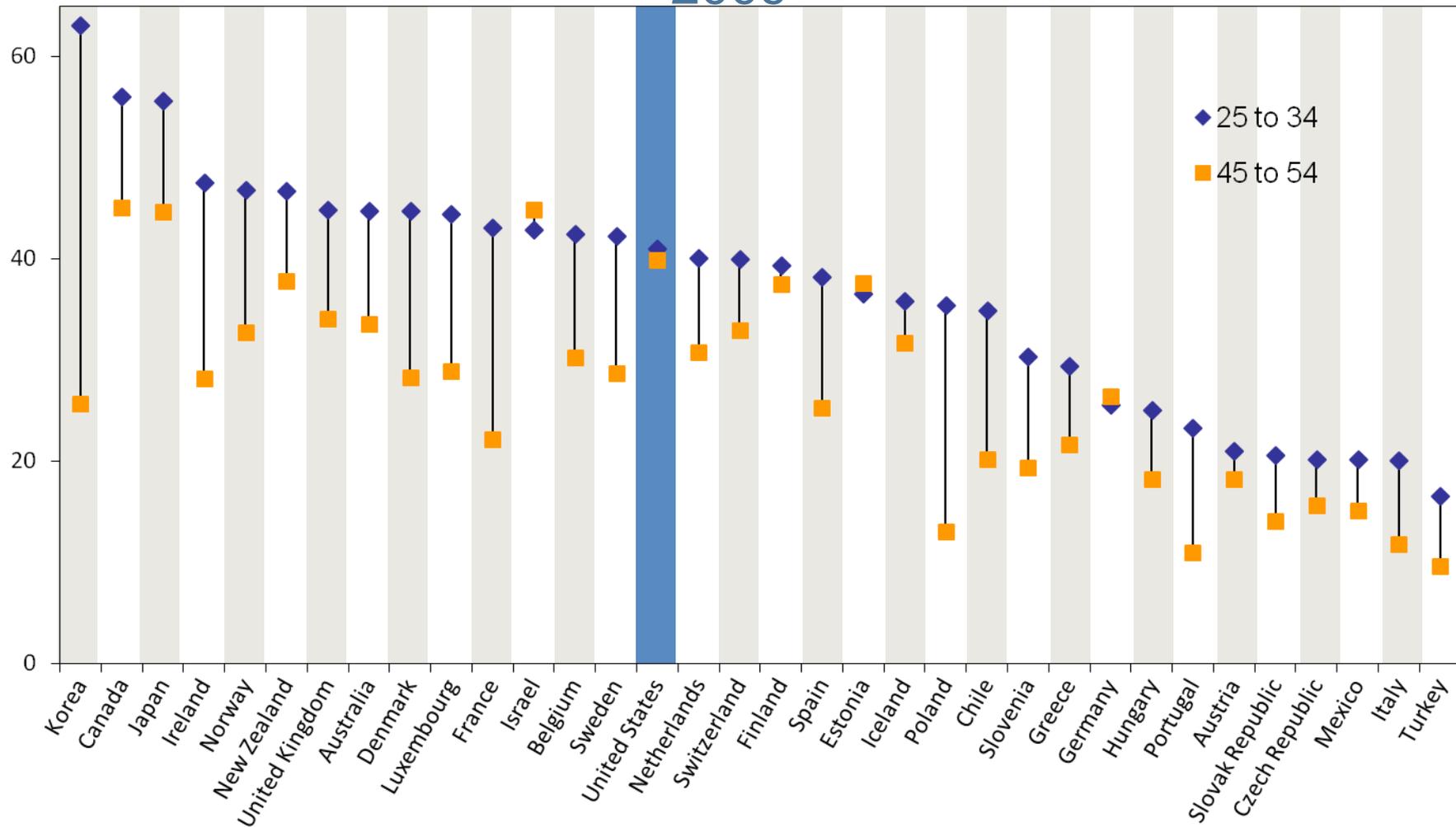
Notes: Data apply to public high school graduates from the class of 2005 in HI, ID, OR, or WA who had a subsequent postsecondary enrollment record, and first-time public postsecondary students in 2005-06 in any of those states. Data count awards achieved through end of AY2010-11. "Still Enrolled" means those without an award who had an enrollment in the final term AY2010-11

Education Requirements for Workforce Participation



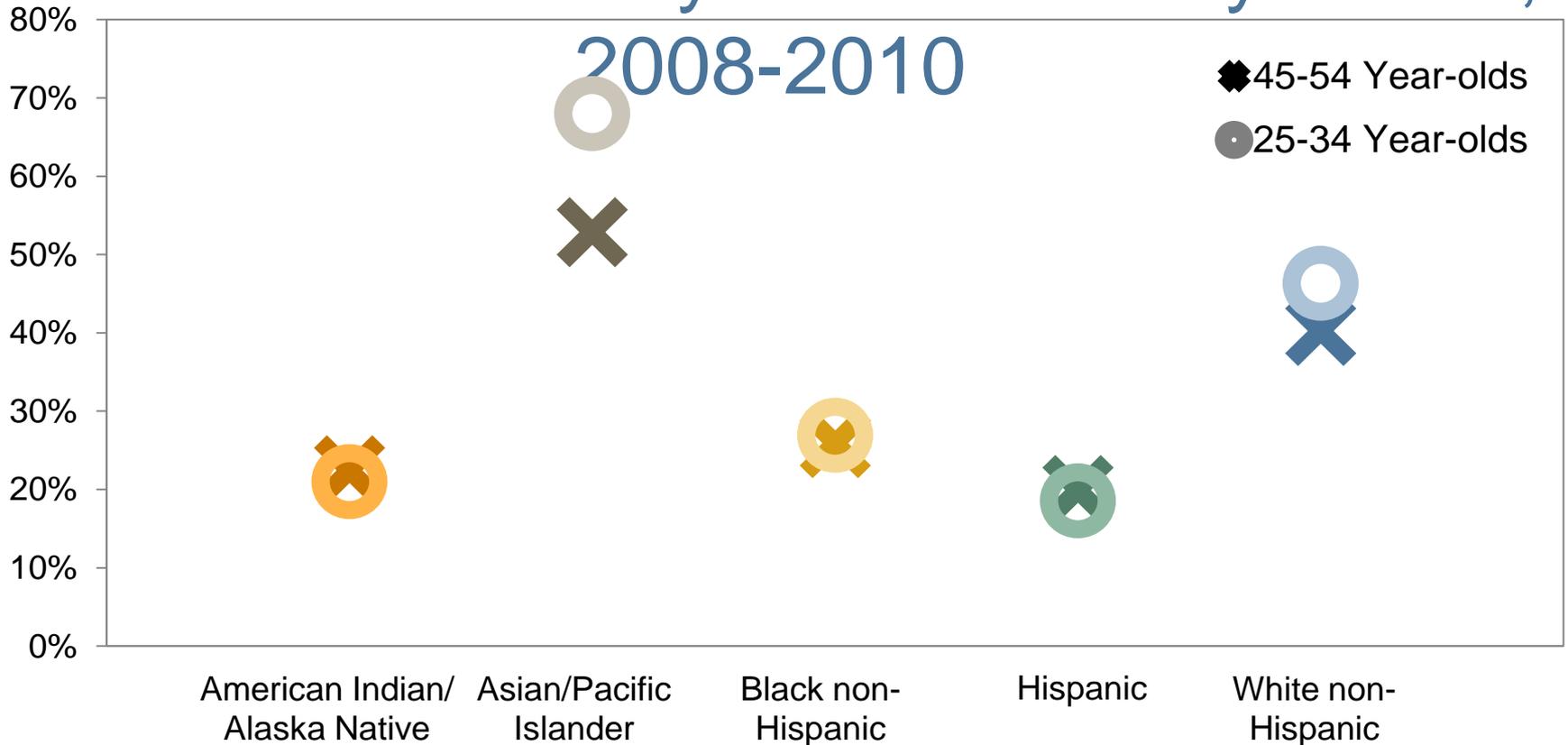
Note: In 1973, some college and associate degrees were in the same category.
 Source: Georgetown University Center on Education and the Workforce.

Differences in College Attainment (Associate & Higher) Between Younger and Older Adults – U. S. & OECD Countries, 2009



Source: Organisation for Economic Co-operation and Development (OECD), *Education at a Glance 2011* (via NCHEMS)

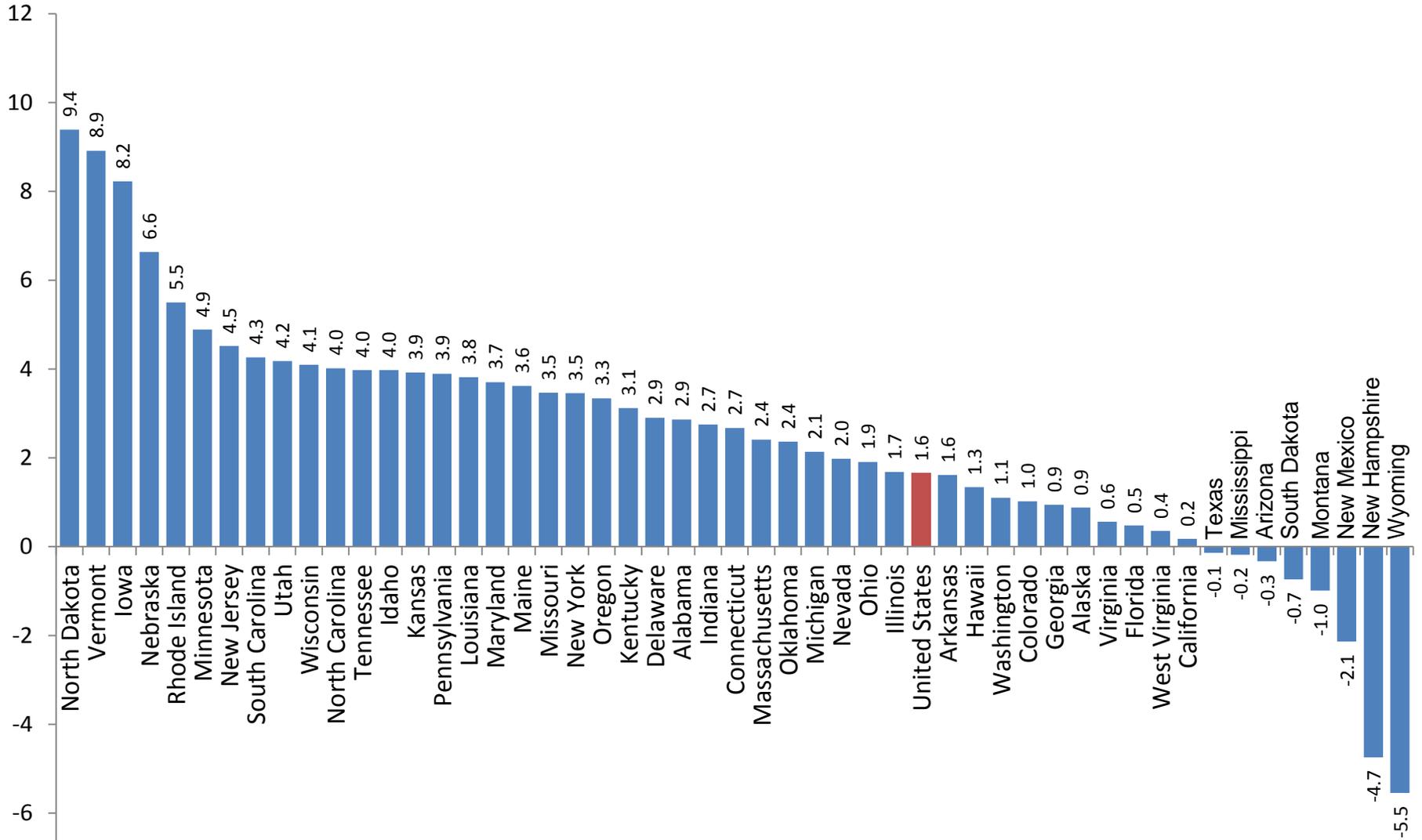
Differences in College Attainment (Associate & Higher) Between Younger and Older Adults by Race/Ethnicity – U.S.,



Note: All differences between age groups of the same racial/ethnic group and between racial/ethnic groups are statistically beyond the 90% margins of error except for American Indians/Alaska Natives. 90% margins of error range from +/- 1% for American Indians/Alaska Natives aged 25-34 to +/- 0.1% for White non-Hispanics aged 45-54.

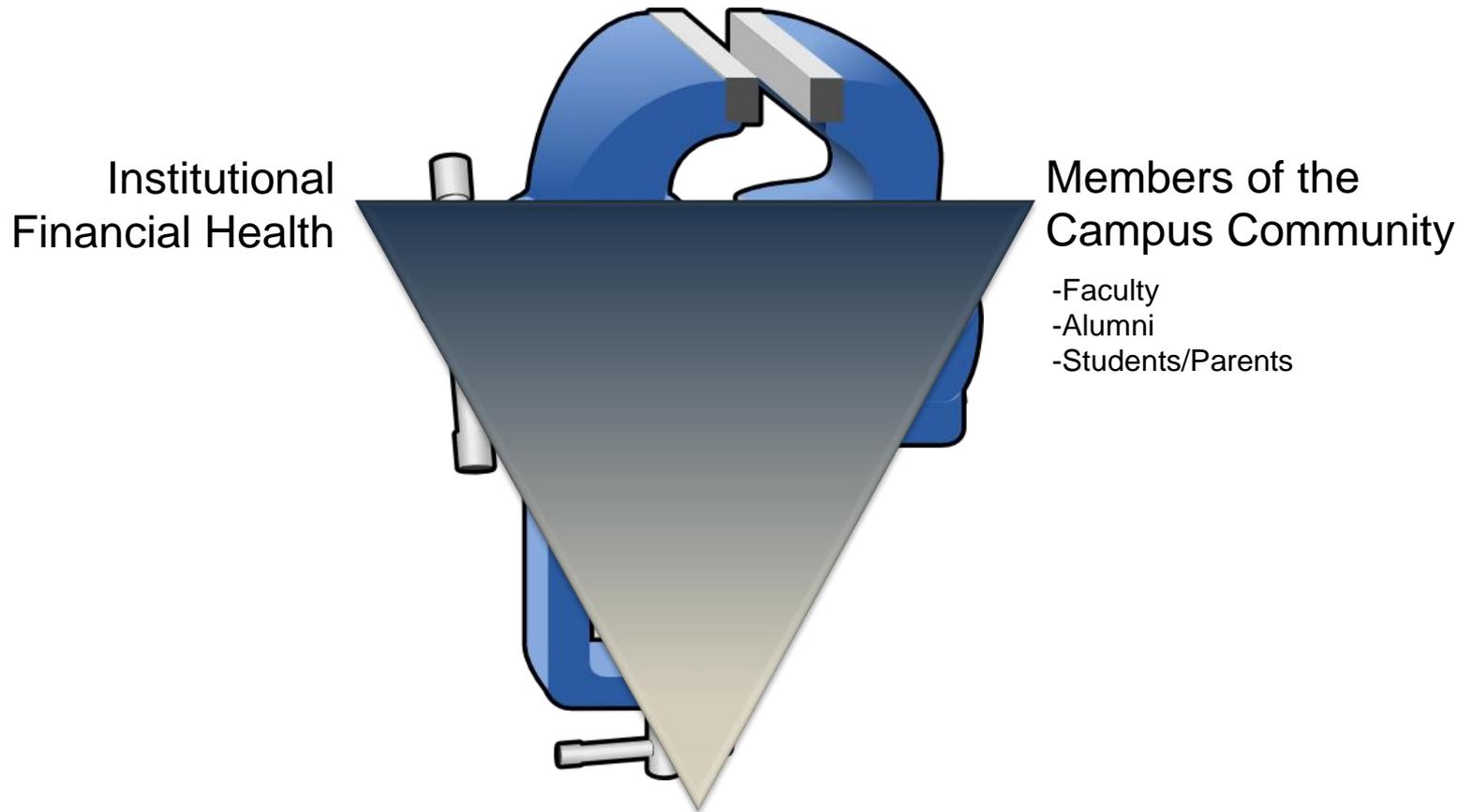
Source: U.S. Census Bureau, 2008-10 American Community Survey (ACS) Public Use Microdata Sample (PUMS). Via NCHEMS.

Change in Percentage Gap in College Attainment between Whites and Underserved Minorities from 2000 to 2009-11 – 25 to 34 Year



Source: NCHEMS analysis of U.S. Census Bureau, Decennial Census and American Community Survey data

The Tricky Business of Balancing Obligations



Institutional
Financial Health

Members of the
Campus Community

- Faculty
- Alumni
- Students/Parents

Advancing Public Educational Attainment Levels

Institutional Strategies in Response: What Will Work and With What Tradeoffs?

- Recruiting out-of-state, international students
- Attracting full-pay students
- Employing predictive analytics for leveraging institutional aid
- Transparency in pricing
- New markets: online and elsewhere
- Community colleges as feeders
- Diversifying programs, such as reaching out to veterans and adult learners
- Retention efforts

Discussion

- What do these projections mean for you and your institution?
- In what ways are you adjusting policy and practice?
- To what extent are you sensing tension between societal needs and institutional interests, and how do you navigate that?