

Higher Education Enrollments and Degree Trends and Implications for Planning within the State University System

Discussion Paper

January 20, 2015

Introduction and Background

With a headcount of around 350,000 undergraduate and 75,000 graduate students, Florida's public university system is one of the largest in the country, as befits the third largest state in the U.S. which now boasts 20 million residents. When higher education was building capacity in the United States during the 1950s and 1960s, its growth was fueled by legislation such as the GI Bill, the first Higher Education Act, and other important policy pieces that promoted access to public colleges and universities in every state. Many of the mid-20th century planners made sure no residents would need to drive more than 40 or 50 miles to attend a college or university in their home state. This model of public higher education was built upon a foundational belief that access to higher education was a public good.

Access to higher education is available today in ways that earlier planners did not envision. In Florida, students can now access 77 baccalaureate and 248 master's degree programs offered fully or primarily online by the State University System (SUS)—and that doesn't include online programs offered via private providers or other out-of-state public providers. It is possible to earn a degree without students needing to drive to a campus, center or site. In addition, the Florida College System (FCS) also offers 196 baccalaureate degree programs—some of them online—targeted to local workforce demand, providing additional access to higher education for Florida's residents.

This report provides trend data for instructional activity by various campus locations. Only campuses that have been approved as Type 1 (over 2,000 FTE), Type 2 (between 1,000 and 2,000 FTE), or Type 3 (less than 1,000 but at least 300 FTE) are addressed in this report. Terms used in this report to differentiate campuses are listed below:

- **Main campus** is the primary site of university educational, research, and administrative activities.
- **Regional, stand-alone campus** is a university owned campus that provides a fairly broad range of degree programs, research activity, and student services (e.g. FIU Biscayne Bay).
- **Regional, hosted/joint-use campus** is an SUS campus that operates in facilities shared with, but owned by, a Florida College partner on the partner's campus (includes joint-use facilities and college center space) (e.g., UCF Cocoa).
- **Special focus campus** is a unit of a university, apart from the main campus, that provides certain special, clearly defined programs (e.g., FAMU Law School).

In order to monitor growth throughout the System, Board of Governors staff, in close collaboration SUS colleagues, has developed an Educational Sites Inventory to track where campuses and sites are located and to cross-walk data with other Board office databases. As a result, for the first time, the Board of Governors has a system-level planning tool that provides important information about the extent of instructional activity that takes place away from the main campuses of its 12 universities.

This report provides a first look at Florida's State University System using data from the new Educational Sites Inventory. Setting guidelines for growth—and monitoring that growth—are important responsibilities of coordinating and governing boards. The Board of Governors sets guidelines for growth in Regulation 8.009 (Educational Sites), which defines campuses according to enrollment numbers and range of instruction, research activity, and extent of student services. The regulation also defines more permanent special purpose centers as well as temporary instructional and special purpose sites apart from the main campus.

It is expected that this report will raise additional questions critical to system-level planning as the Board engages in discussions about the extent to which the State University System is on track to achieve the baccalaureate and graduate degree production goals established in the *2025 System Strategic Plan* and most recently reaffirmed in the Board's 2014 review of those goals.

Guiding Questions

At the November 2015 Board meeting, the Chair of the Board's Strategic Planning Committee, Dean Colson, and several other Board members requested that Board staff return with additional information regarding trends throughout all sectors of Florida higher education that could impact the Board's 2025 Strategic Plan goals for baccalaureate and graduate degree production. Information was presented at the November Board meeting showing that the State University System is projected to miss its goals for degree production—by 6,000 annually for bachelor's degrees and by about 1,800 annually for graduate degrees. Other information was also presented which suggested that, at the baccalaureate level, the Florida College System offerings have increased, currently producing about 5,800 bachelor's degrees annually. Questions were raised by Board members about enrollment and degree production by the Independent Colleges and Universities of Florida (ICUF), the Commission on Independent Education (CIE) and other higher education providers.

In order to respond to the Board's questions, the following considerations guided this study:

- What are the enrollment and degree trends at the SUS main and regional campuses, as well as ICUF, CIE and Florida College System institutions?
- What factors might be influencing the trends?

- Does it appear that the trends will impact the Board’s 2025 goals for baccalaureate degree production (90,000 annually) and graduate degree production (35,000 annually)?

This report presents highlights on baccalaureate and master’s degree trends and instructional activity for the entire higher education system in Florida, as well as data that is specific to just the SUS. For the SUS, trends in instructional activity are presented by four distinct campus types (main campus; stand-alone regional campus that offers a multiple program array; regional joint-use campus; and special focus campus that offers special, clearly defined programs or services).¹

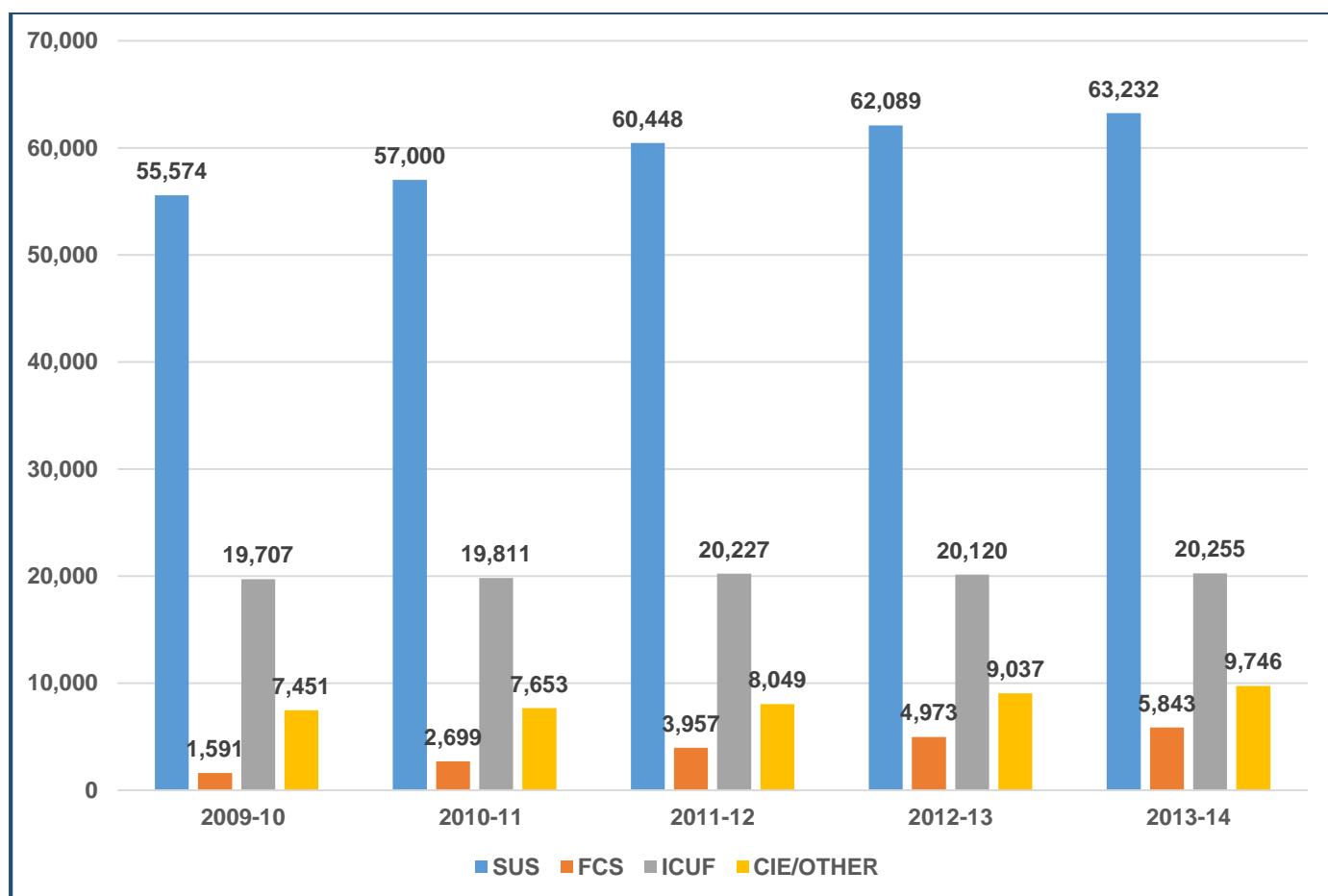
This is the first report using the data from the Board’s new Educational Sites Inventory, which is expected to become more accurate and robust as data definitions become more standardized. Further analysis will be conducted in subsequent reports that will examine trends by major field of study and other important factors.

¹ Data on special purpose centers, temporary instructional sites, or community outreach-oriented special purpose sites are not included in this report.

State-wide Data Highlights

- A five-year trend in baccalaureate degrees granted in Florida shows growth by all sectors that award these degrees (SUS, ICUF, FCS and those CIE institutions that report Florida data).²
- Although the baccalaureate degrees awarded by the Florida College System (FCS) is still the smallest actual number (5,843 degrees in 2013-14) awarded among all four sectors of higher education, the FCS shows the fastest growth rate, at 267%.

Chart 1: Five-Year Trend in Bachelor's Degrees Awarded by Sector, 2009-10 to 2013-14

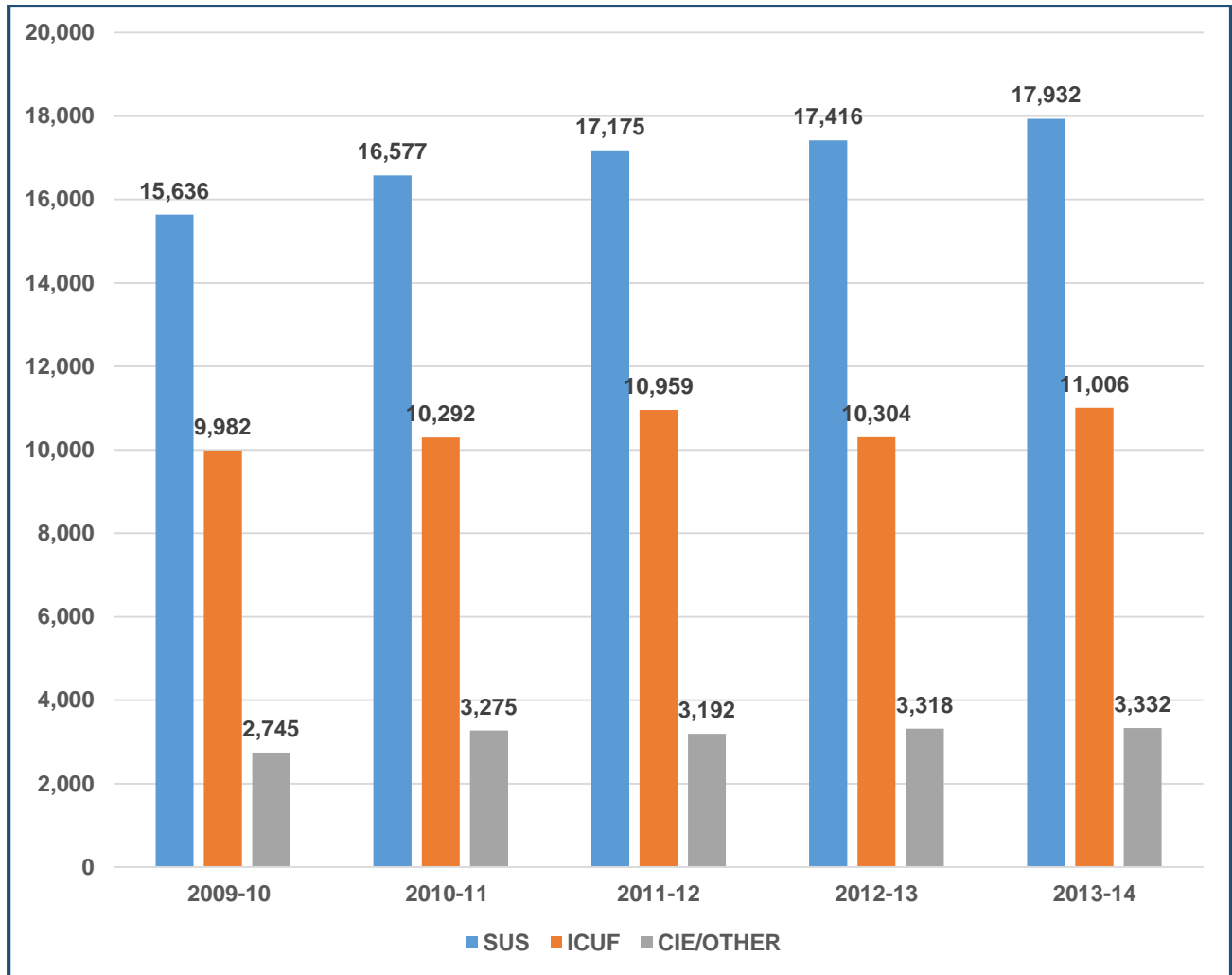


Source: Board staff analysis of U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics. Integrated Postsecondary Education Data System Completions data (2009-2014).

² Some CIE institutions that provide higher education programs in Florida are not captured in Florida data because their headquarters are located in other states. Therefore, the CIE data that is available for Florida most likely underrepresents activity in the state.

- At the Master's degree level, the five-year trend also shows about the same amount of growth in the number of degrees awarded among all three sectors (SUS, ICUF, and CIE) that award Master's degrees. Of note, however, is that the growth rate for the SUS has slowed within the last few years.

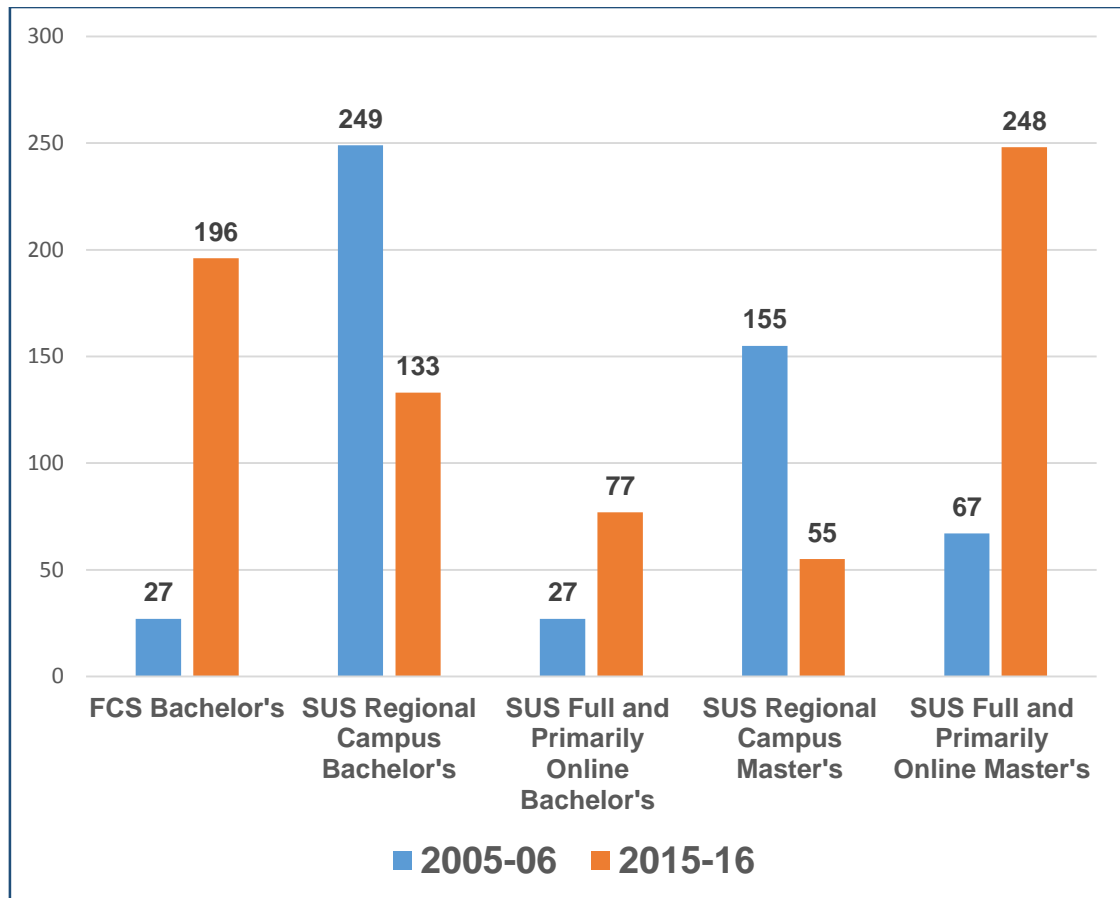
Chart 2: Five-Year Trend in Master's Degrees Awarded by Sector, 2009-10 to 2013-14



Source: Board staff analysis of U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics. Integrated Postsecondary Education Data System Completions data (2009-2014).

- As shown in Chart 3 below, there has been an overall sharp decline over the past 10 years among the SUS regional campuses in the number of degree programs offered. This decline seems to correspond with a sharp increase in offerings via distance learning and baccalaureate degrees by the Florida College System.

Chart 3: Ten-Year Comparison of Degree Offerings, 2005-06 and 2015-16



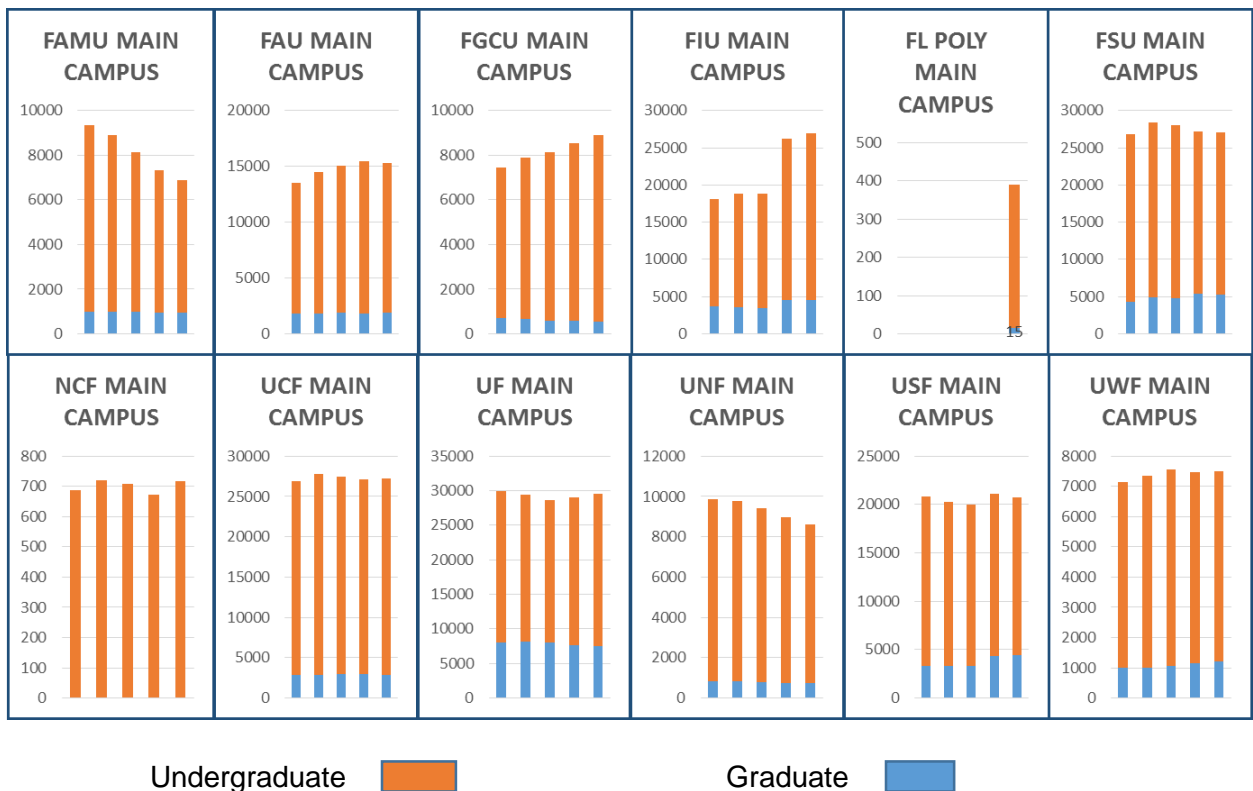
- Sources: (1) Board staff analysis for 2005-06 SUS data: 2006 Branch Campus Survey.
 (2) Board staff analysis of SUS websites, December 2015.
 (3) Florida Department of Education. Division of Colleges. <http://www.fldoe.org/schools/higher-ed/fl-college-system/baccalaureate-degree-proposal-process.stml>.
 (4) Board of Governors 2015 Survey of Academic Programs Offered via Distance Learning.

- Baccalaureate enrollments at Florida College System institutions in various regions of Florida, particularly in the southeast, central east coast, northeast, and center of Florida regions, show rapid growth. More moderate growth is occurring in the southwest and northwest regions. Further analysis regarding enrollment trends in FCS baccalaureate programs is planned.

SUS Data Highlights³

- Data show that there is some variability in undergraduate and graduate instructional activity on the main campuses reported by the 12 State University System institutions. As shown in the chart below, six institutions show relatively stable instructional activity over the past 5 years, with three showing increases and two showing declines. Florida Polytechnic, as a newly established institution, has data for just one year.

Chart 4: Five-Year Trends in Instructional Activity at SUS Main Campuses, 2010-11 to 2014-15



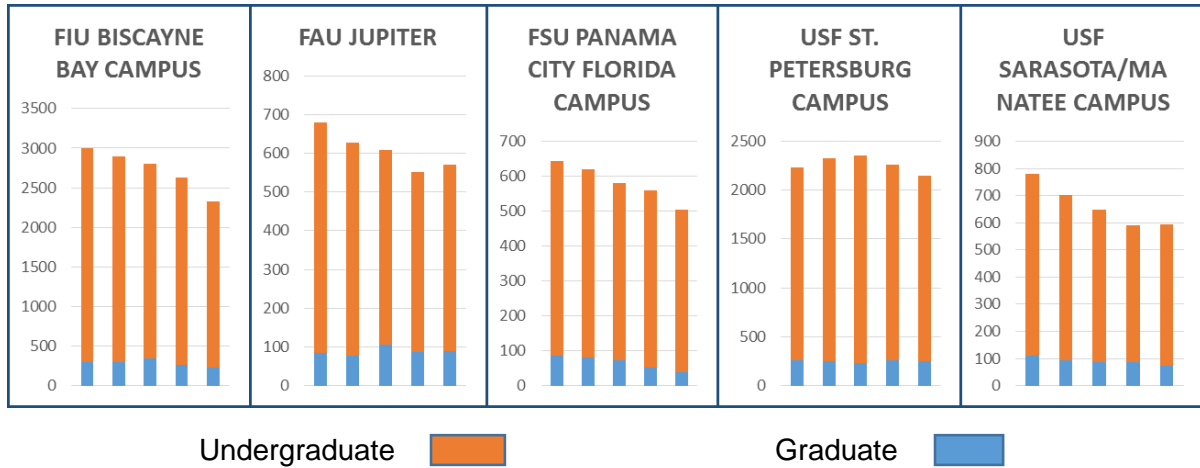
Source: Board of Governors staff analysis. State University Data System (SUDS) and Educational Sites Inventory. (December 2015.)

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Credit hours include both fundable and non-fundable sources.

³ Please note that the scale of the individual sections of Charts 4 through 10 of this document can change.

- Chart 5 shows a decline in instructional activity at the SUS stand-alone regional campuses that offer a multiple program array.

Chart 5: Five-Year Trend in Instructional Activity at SUS Regional Stand-Alone Campuses, 2010-11 to 2014-15

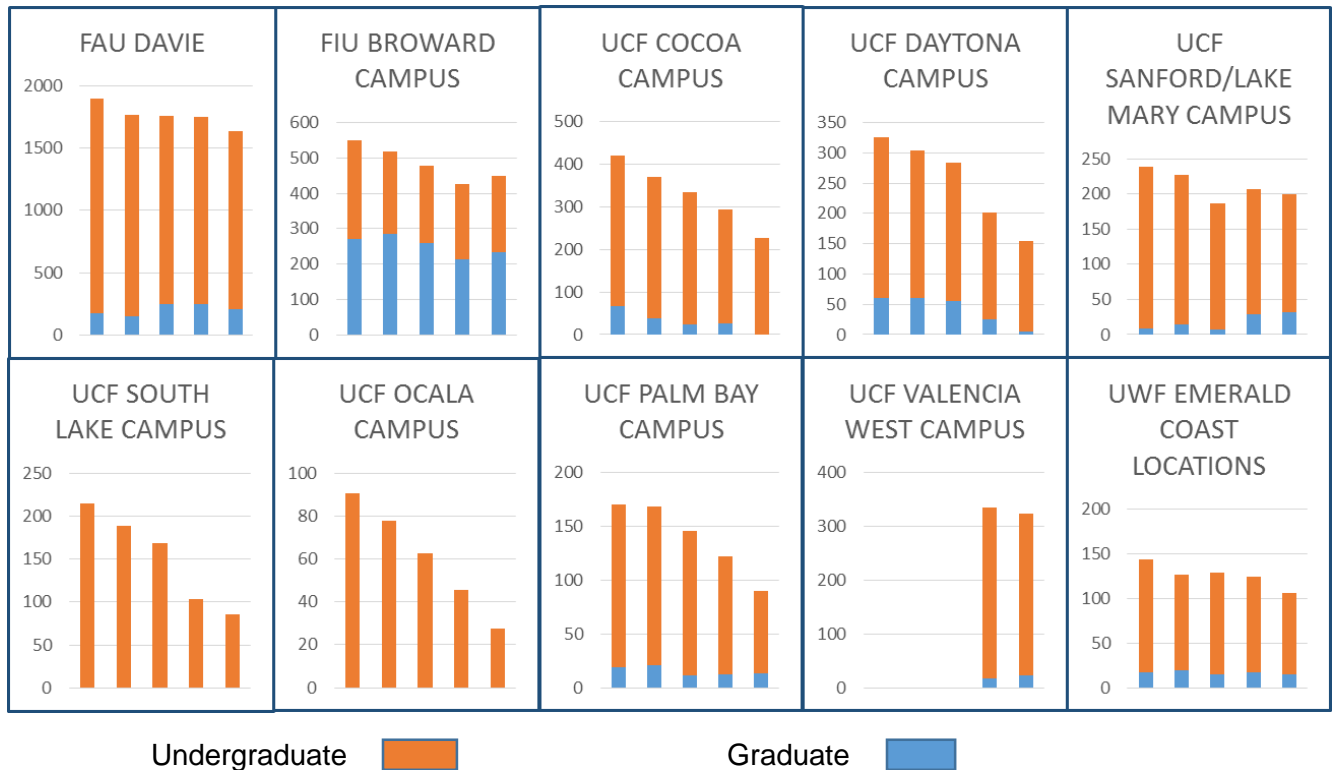


Source: Board of Governors staff analysis. State University Database System (SUDS) and Educational Sites Inventory. (December 2015.)

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Credit hours include both fundable and non-fundable sources.

- Chart 6 below shows that, over the past five years, there has also been an across-the-system decline in instructional activity at the hosted/joint-use regional campuses with the Florida College System.

Chart 6: Five-Year Trend in Instructional Activity at SUS Regional Hosted/Joint-Use Campuses with Florida College System, 2010-11 to 2014-15

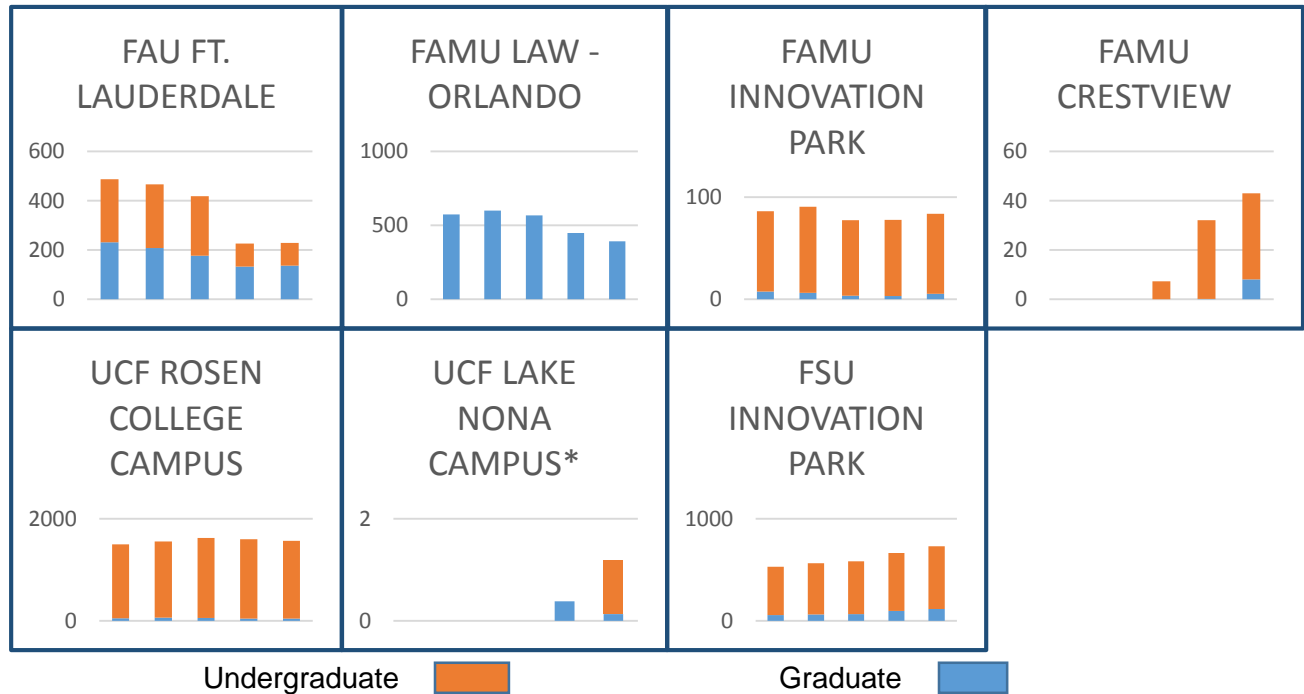


Source: Board of Governors staff analysis. State University Database System (SUDS) and Educational Sites Inventory. (December 2015.)

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Credit hours include both fundable and non-fundable sources.

- As seen in Chart 7 below, however, special focus campuses show mixed results and there does not appear to be any real system trend for these campuses.

Chart 7: Five-Year Trend in Instructional Activity at SUS Special Focus Campuses, 2010-11 to 2014-15



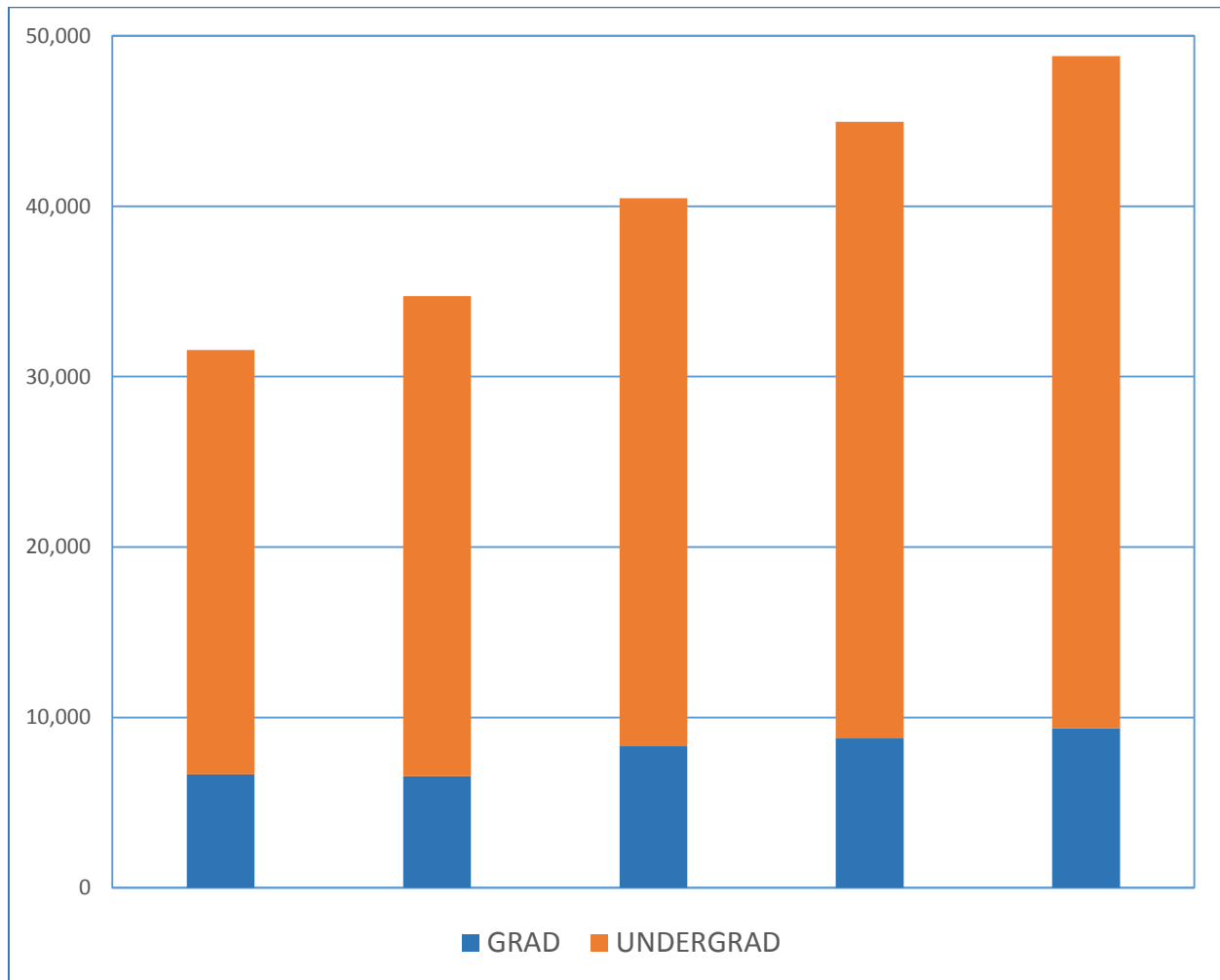
Source: Board of Governors staff analysis. State University Database System (SUDS) and Educational Sites Inventory. (December 2015.)

*UCF does not report its medical student instructional activity via credit hours.

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Credit hours include both fundable and non-fundable sources.

- The chart below shows a sharp increase in the number of distance learning offerings reported by 10 universities. Florida Polytechnic and New College do not report any instruction occurring via Distance Learning.

Chart 8: Five-Year Trend in SUS Instructional Activity from Distance Learning, 2010-11 to 2014-15

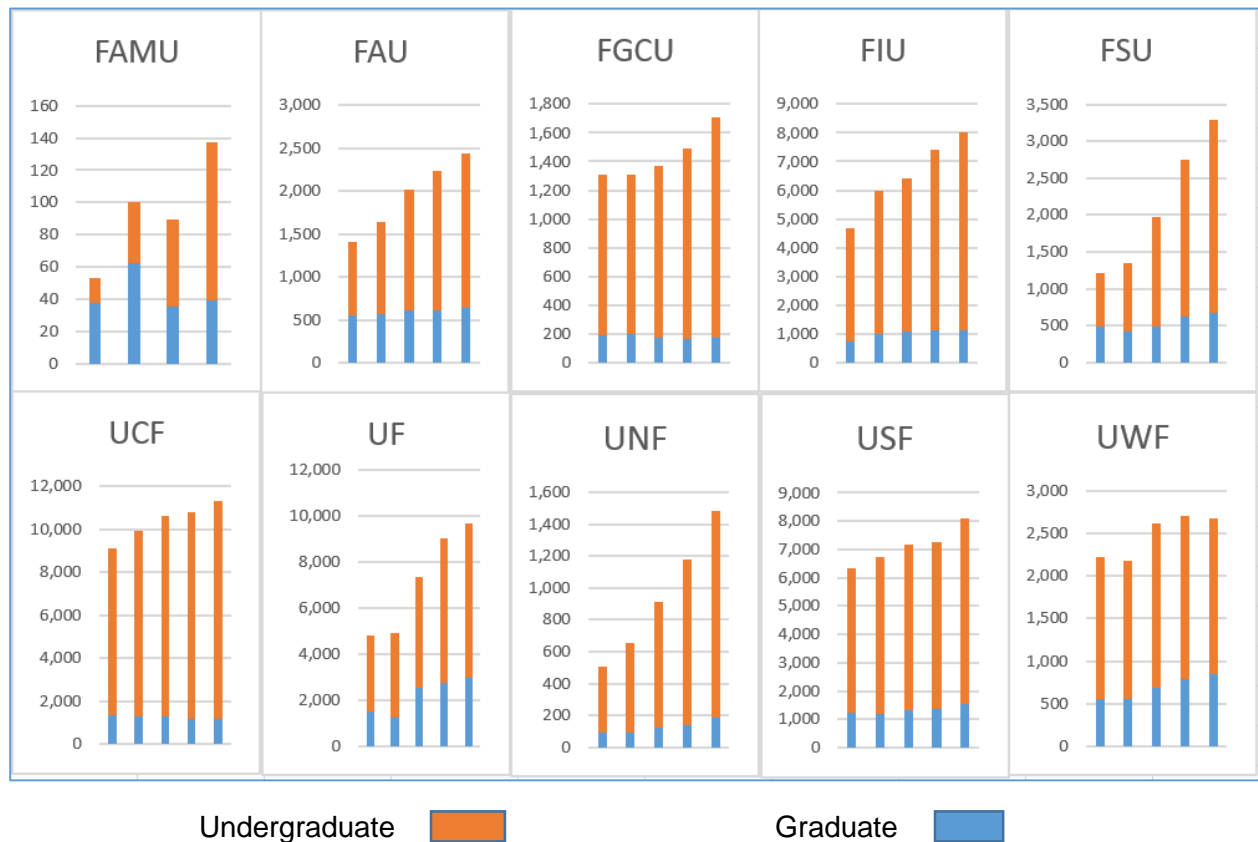


Source: Board staff analysis of the State University Database System (SUDS).

Note: Distance Learning is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.).

- The five-year trend showing an increase in distance learning offerings holds true for institutions across the SUS. Florida Polytechnic and New College do not report any instruction occurring via Distance Learning.

Chart 9: Five-Year Trend in Distance Learning Instructional Activity by SUS Institutions, 2010-11 to 2014-15

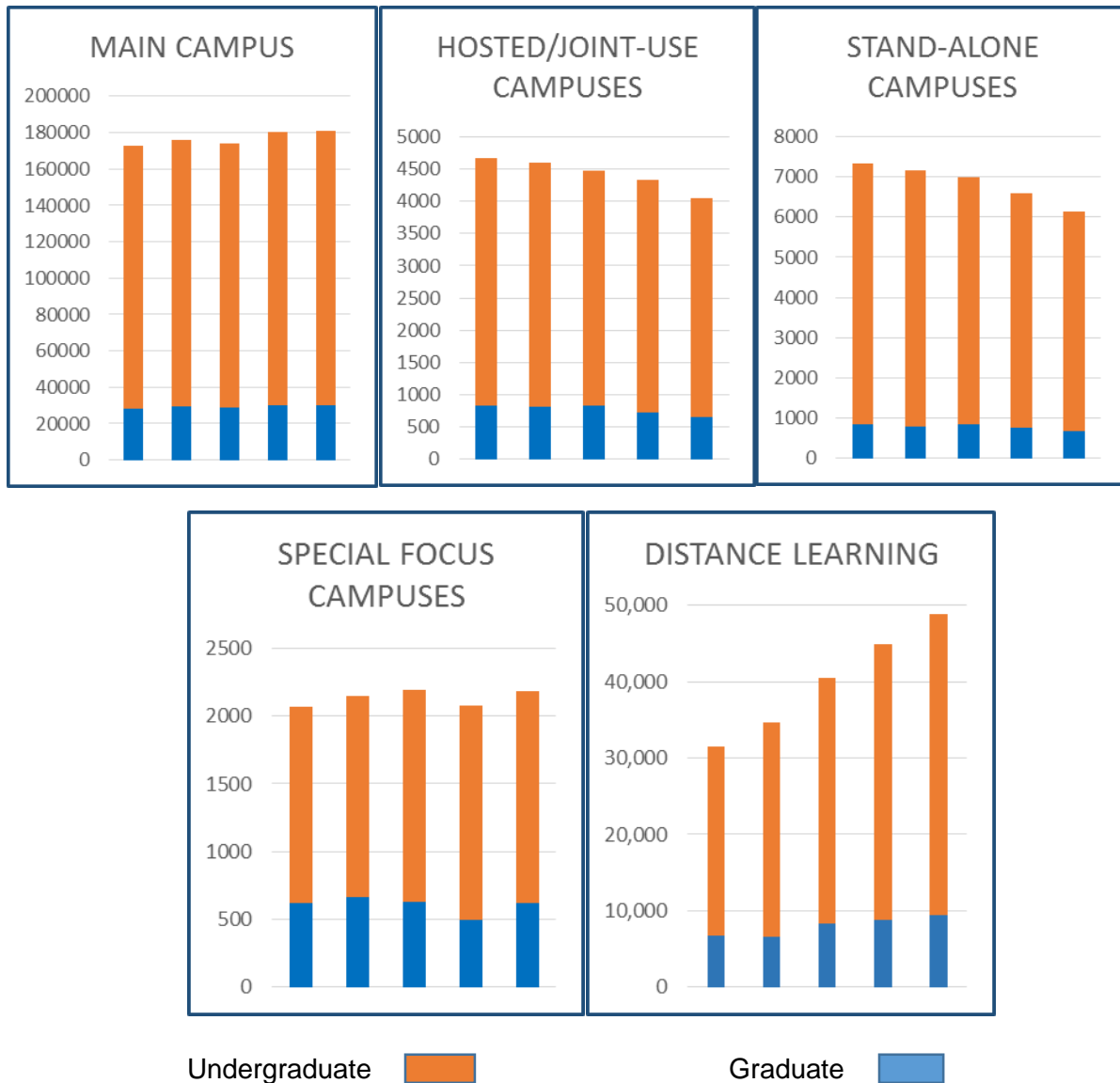


Source: Board staff analysis of the State University Database System (SUDS).

Note: Distance Learning is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). Credit hours include both fundable and non-fundable sources.

- A summary look at trends just for the SUS main campuses, regional campuses, and special focus campuses suggests that there is a high level of System-level stability on the main campuses, that regional campuses of all types tend to show declining instructional activity, that there are mixed results regarding instructional activity at special focus campuses, and that distance learning offerings show strong increases.

Chart 10: Summary of Trends in Instructional Activity by the SUS Campus Types and Distance Learning, 2010-11 to 2014-15



Implications for System Planning

Overall, from our review of trends in degree production and instructional activity among Florida's higher education sectors and within the State University System itself, several trends seem to suggest themselves from the data and may warrant further examination:

- At the baccalaureate level, all higher education sectors in Florida have seen growth over the past 5 years in the number of degrees awarded, but the growth in Florida College System degrees far outpaces that of the other sectors.
- All three sectors (SUS, ICUF and CIE)⁴ that offer graduate degrees have experienced about the same percentage of growth in the number of degrees awarded.
- Within the SUS, there is variability in instructional activity on the main campuses. Excluding newly established Florida Polytechnic, 6 of the 11 SUS institutions show stable instructional activity over the past five years. Three institutions show increases and two institutions show declines in growth.
- A shift in where baccalaureate programs are offered is occurring, with a decrease in regional campus offerings and a strong increase in online offerings and Florida College System baccalaureates.
- The data show that the joint-use regional campuses also appeared to be experiencing decline in instructional activity over the past five years.
- The stand-alone SUS regional campuses that offer a varied program array are showing a decline across the system.

For a number of years, we have been hearing about a “paradigm shift” caused by technology in the way we deliver higher education. Some of the data suggests that we are indeed now seeing the effect of online courses and programs in how students earn their credits and their degrees.

Further analyses by broad program discipline areas and comparisons of headcount enrollments are planned. The potential effect of the trends that we are seeing in enrollments, instructional activity and degree production upon the Board's goals needs further examination. It is important to understand whether certain areas of the curriculum are being affected in the trends reported in this *Discussion Paper*. Answers to these additional questions should facilitate system-wide planning to increase degree production in areas of strategic emphasis, in alignment with Board of Governors' *2025 System Strategic Plan*.

⁴ Several CIE campuses have closed this past year so there may be a sharp drop in CIE numbers for 2015-16.