



COMMUNITY COLLEGE
system of New Hampshire

New Hampshire is Our Mission

Background for the Governor's Task Force
21 December 2023

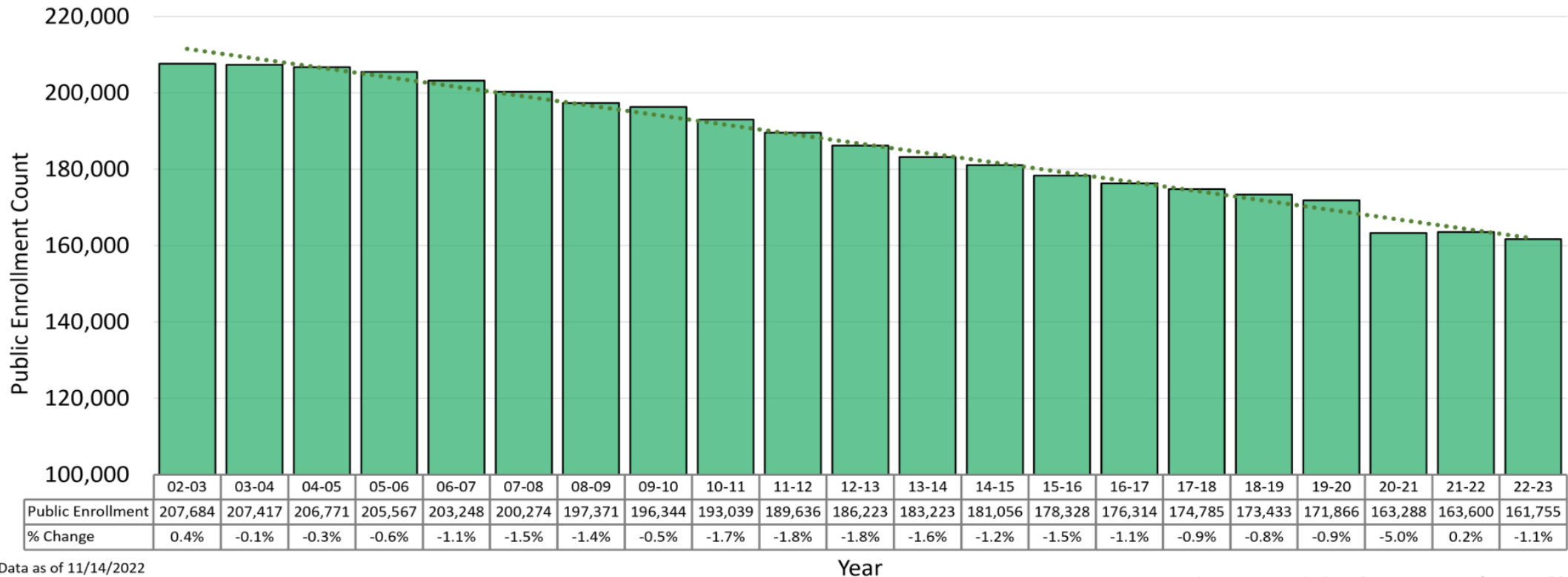


Key considerations about the future of postsecondary education

Relevant trends visible in New Hampshire's K-12 schools

NH's Public School Enrollments, AY2003 to AY2023

Enrollment Counts Per Year



Data as of 11/14/2022

Enrollment counts include Public Districts, Public Academies, and Joint Maintenance Agreements

Regression Line has an average decline of 2,483.6 per year (98.82% of fit)

The [Annie E. Casey Kids Count Data Center](#) reporting of race and ethnicity indicates that the NH population under 18 are more diverse than the state overall. The Kids Count Data Center provides age specific estimates, which show that children under 18 range from 16-18% BIPOC and/or Hispanic (using US Census Bureau estimates from 2016-2020).

Enrollments by Race/Ethnicity In New Hampshire Public Schools

As of October 1, 2023

	American Indian or Alaskan Native		Asian or Pacific Islander		Hispanic		Black Non-Hispanic		White Non-Hispanic		Multi-Race		Total
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	
State Total	306	0.19%	5,117	3.1%	14,242	8.63%	3,400	2.06%	135,913	82.37%	6,034	3.66%	165,012

Free & Reduced Lunch Eligibility, 2020-2021 (NH Department of Education)

ADM-A				Free & Reduced Eligible				% Eligible
Pre-School	Kinder-garten	Grades 1-12	ADM-A Total	Pre-School	Kinder-garten	Grades 1-12	ADM-A Total	All Grades %
964.11	10,482.15	135,618.85	147,065.12	296.39	2,724.50	32,296.27	35,317.16	24.01%

Relevant national trends influencing demand for postsecondary education



Questioning the value of college

Public Trust in Higher Ed Has Plummeted. Yes, Again.

By Zachary Schermele | JULY 11, 2023

Most Companies Say College Isn't Worth It for Their Employees

Nov 24, 2023 at 12:05 PM EST

Is College Worth It?

The new economics of higher education make going to college a risky bet.



From ECMC's "Question the Quo" Report

GEN Z'S BELIEF IN EDUCATION AFTER HIGH SCHOOL HAS INCREASED...

After a two-year dip in teens who see education as part of their future, the percentage has rebounded above pre-pandemic numbers. More than ever, students believe education after high school is necessary: 84% plan on attending postsecondary education at some point, with 57% coming from families where a parent or guardian does not have a bachelor's degree.

...BUT FOUR-YEAR COLLEGE IS NOT THE ONLY PATH

While belief in postsecondary education has increased, the types of education teens are considering have shifted since before the pandemic. High schoolers are moving away from the four-year path—consideration of four-year college has decreased 14 percentage points since before COVID-19 and nearly 20 percentage points since the early days of the pandemic. At the same time, interest in other credential-bearing and non-degree options has increased.



PERCENT OF HIGH SCHOOL STUDENTS WHO BELIEVE EDUCATION AFTER HIGH SCHOOL IS NECESSARY

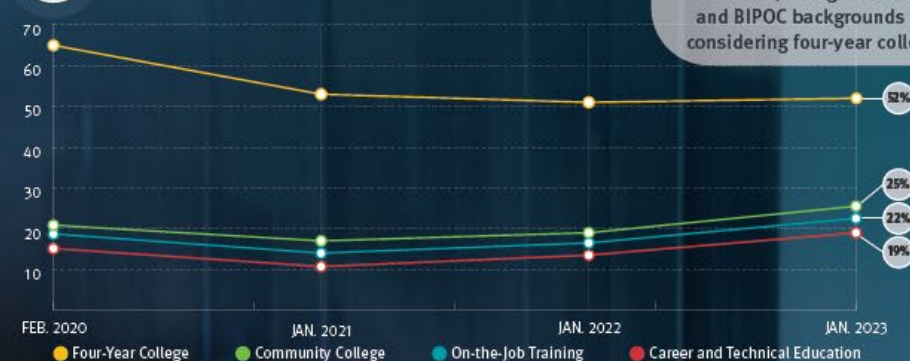


The pressure teens feel to pursue four-year degrees remains but is decreasing. The percentage decreased by 10 points between 2022 and 2023. While it lessened, more than half still feel self-directed pressure.

And while 75% of teens feel pressure to pursue a four-year degree, 63% are open to other options.



WHAT POST-HIGH SCHOOL PATHS ARE YOU CONSIDERING TODAY?



63% are open to options other than four-year college (up 7 percentage points since pre-COVID-19)

59% agree that they can be successful without a four-year degree (up 5 percentage points since pre-COVID-19)

38% say that because of the pandemic, they feel more comfortable following a path other than four-year college



ECMC—what matters to students?

COST OF EDUCATION REMAINS A TOP CONCERN FOR GEN Z TEENS

High schoolers from all demographics are looking at external sources to help cover the cost of college through scholarships, grants and student loans. Six in 10 teens say they are worried about how they will pay for college—a number that has remained consistent since before the pandemic. Despite financial concerns, 65% of students would prefer a career they are passionate about over a career that pays more money.

STUDENTS ARE MAKING PLANS ON HOW THEY'LL PAY FOR POSTSECONDARY EDUCATION.

● Total students surveyed ● Low-income, first-generation and BIPOC students

Plan to apply for scholarships



Plan to apply for grants (i.e., Pell, Federal Supplemental Educational Opportunity, etc.)



Plan to get student loans



Believe their family will pay from their own accounts



Have savings to pay for education



NOTE: Students from low-income, first-generation and BIPOC backgrounds differ from their peers in terms of how they plan to pay for education, with significantly fewer planning to pursue scholarships, loans and grants.¹

DESPITE HAVING PLANS FOR HOW THEY WILL PAY FOR COLLEGE, STUDENTS HAVE ADDITIONAL QUESTIONS ABOUT:

Scholarships available



Lifetime earnings depending on the path they take after high school



Average costs outside of tuition



Length of time to pay back student loans



Grants available



Jobs/gigs to help make payments while attending school

● Total students surveyed ● Low-income, first-generation and BIPOC students

¹ ECMC Group/VICE Media Question The Quo Education Pulse Survey October 2022: Insights from Underserved Populations



Relevant data on New Hampshire's labor market projections through 2030

NH Economic & Labor Market Information Bureau

New Hampshire Employment Projections by Industry and Occupation

base year 2020 to projected year 2030

2020 Estimated	2030 Projected	Numeric Change	Percent Change
675,594	726,549	50,955	7.5%

New Hampshire Employment Projections by Industry and Occupation

base year 2020 to projected year 2030

H	I	J
Average Annual Openings		
Exits¹	Transfers²	Total
30,024	45,926	81,045

What will matter in the coming decade(s)

- Opportunity—who will we serve?
 - Pre-K-12+
 - Working adults
 - Career transitions
 - Expanding the workforce
- Outcomes—what will we need to deliver for NH’s 21st century workforce?
 - Degrees
 - Certificates
 - Industry-recognized credentials
 - Just-in-time training
- **Accountability**
 - Quality
 - Access (with success)
 - Value (cost relative to quality with a measurable return on investment)



How CCSNH is positioned for the future

Supporting New Hampshire's communities and workforce

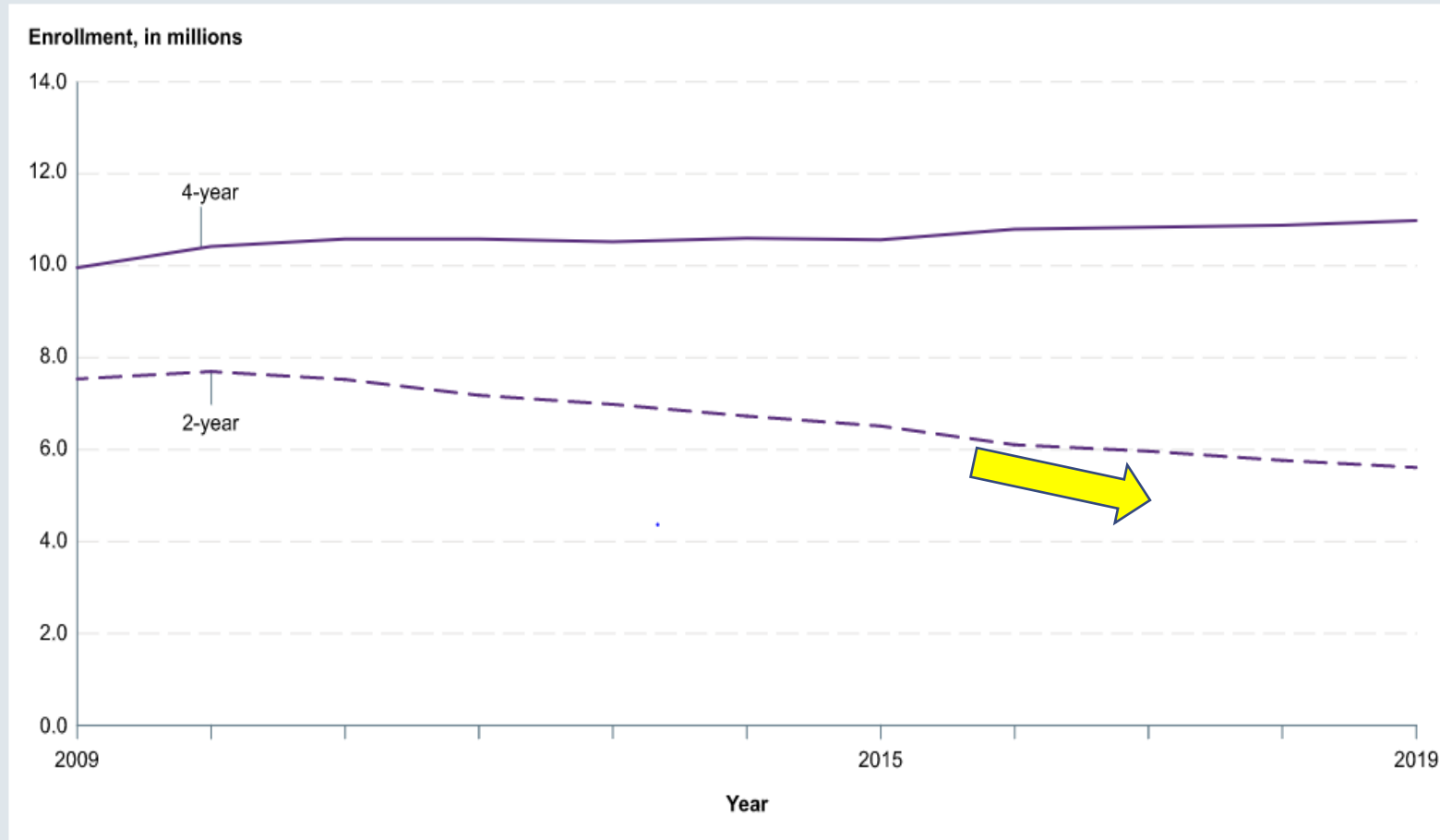
- Campuses throughout New Hampshire to serve communities and support local employers and industries
- Serving more than 22,000 students each year, across the life cycle of learners
 - Associate degree and certificate programs
 - High demand career and technical programs
 - Transfer-focused programs aligned with USNH
 - Business training programs
 - Industry-recognized skills-based training
 - Customized training with employer partners
 - Accelerated and affordable dual enrollment pathways for high school students
- 93% of our students are NH residents and the vast majority remain in our communities and in our workforce



Let's start with national trends in
community college enrollment...



Figure 5. Undergraduate enrollment in degree-granting postsecondary institutions, by level of institution: Fall 2009 through fall 2019



NOTE: Data are for the 50 states and the District of Columbia. Degree-granting institutions grant associate's or higher degrees and participate in Title IV federal financial aid programs. Some data have been revised from previously published figures.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), Spring 2010 through Spring 2020, Fall Enrollment component. See *Digest of Education Statistics 2020*, table 303.70.

Enrollment
in Public
Two-Year
Colleges
2009-2019

And then COVID's impact on the lives of community college students....

Enrollment dropped precipitously during the pandemic – the total number of enrolled students fell by 11 percent from fall 2019 to fall 2020 and by another 7 percent from fall 2020 to fall 2021.



EdWorkingPapers

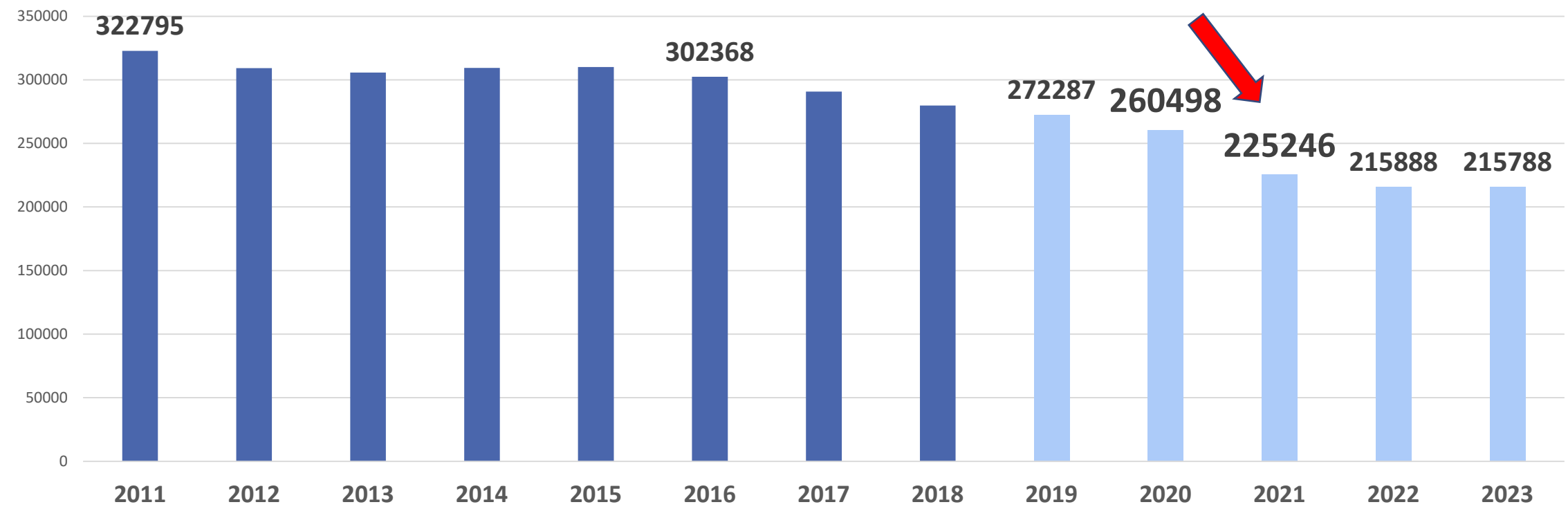
<https://www.edworkingpapers.com> › default › files ⋮

The Impact of COVID-19 on Community College Enrollment ...

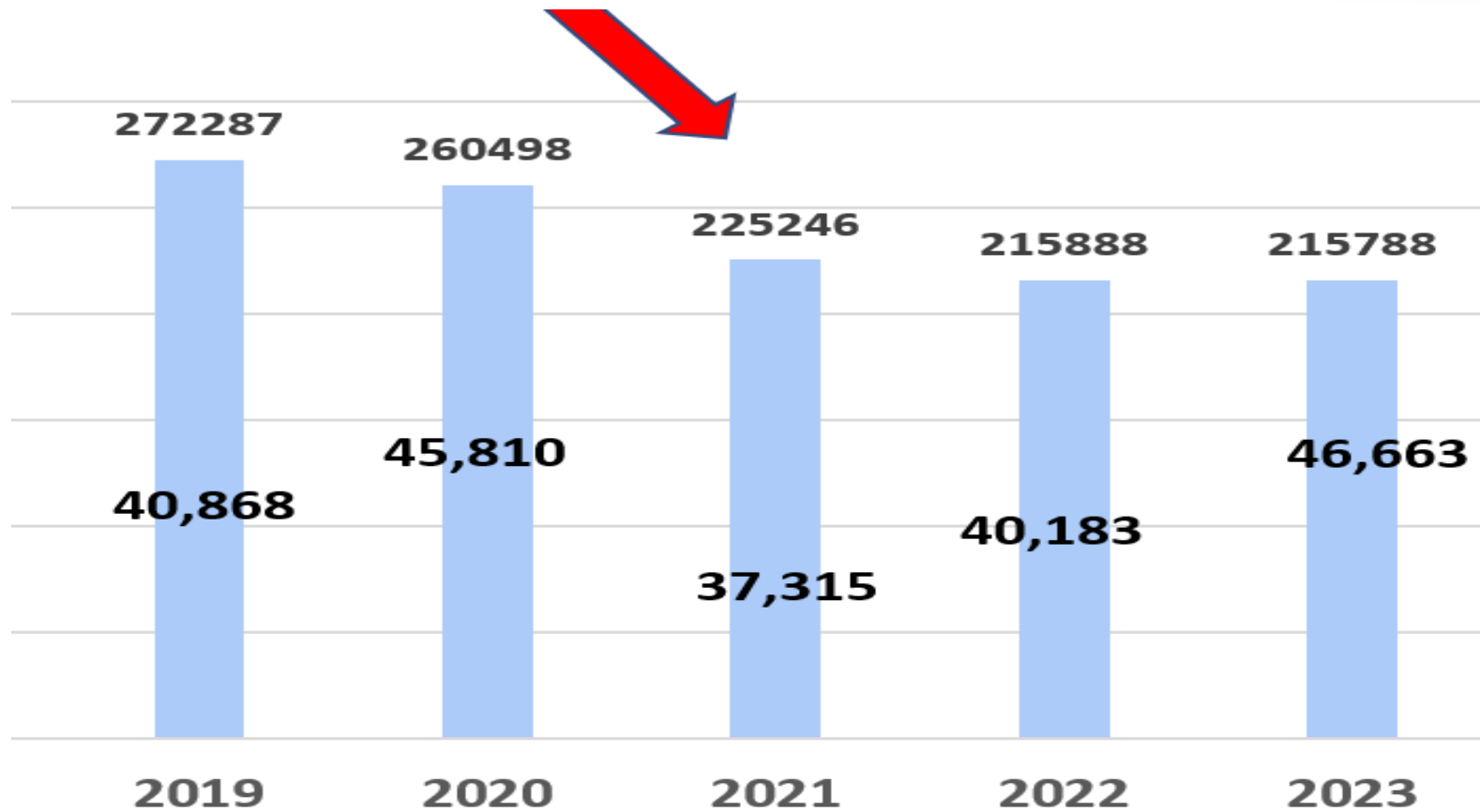


The New Hampshire context

CCSNH Enrollment by Credit Activity AY2011-AY2023

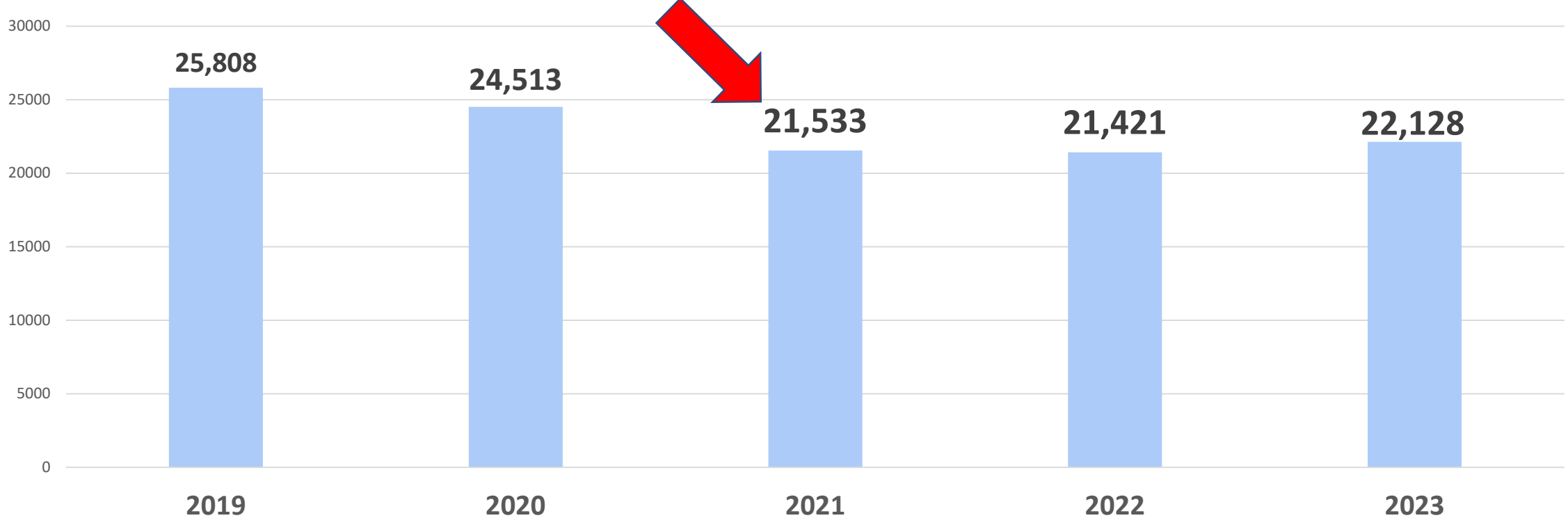


Dual Enrollment Credit Activity

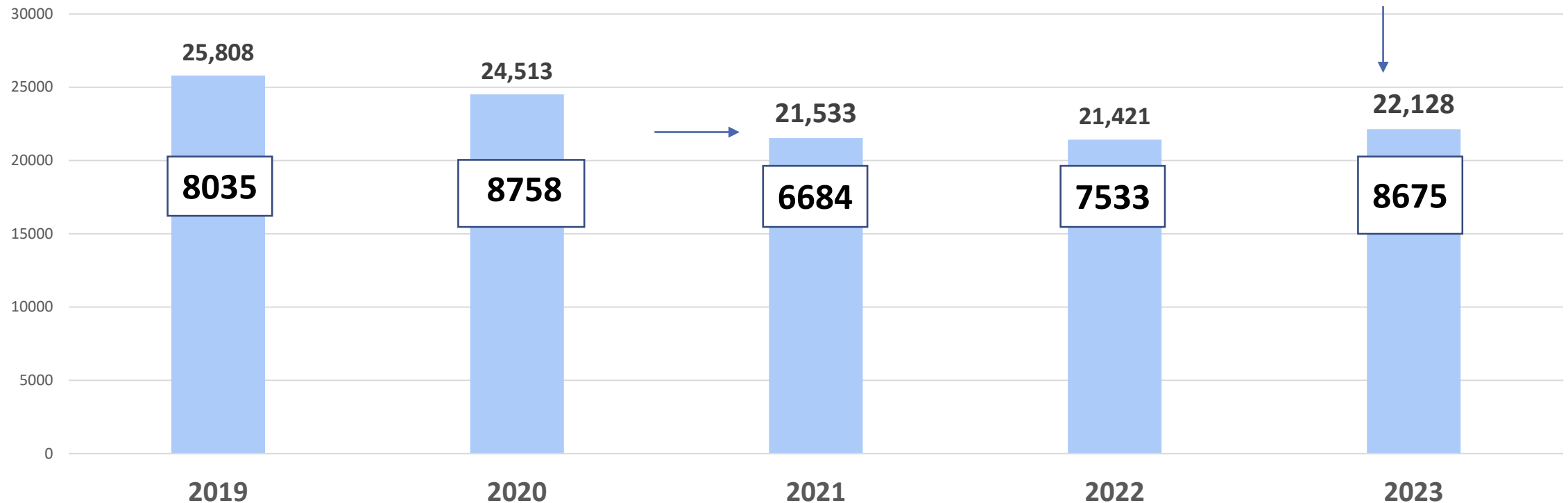


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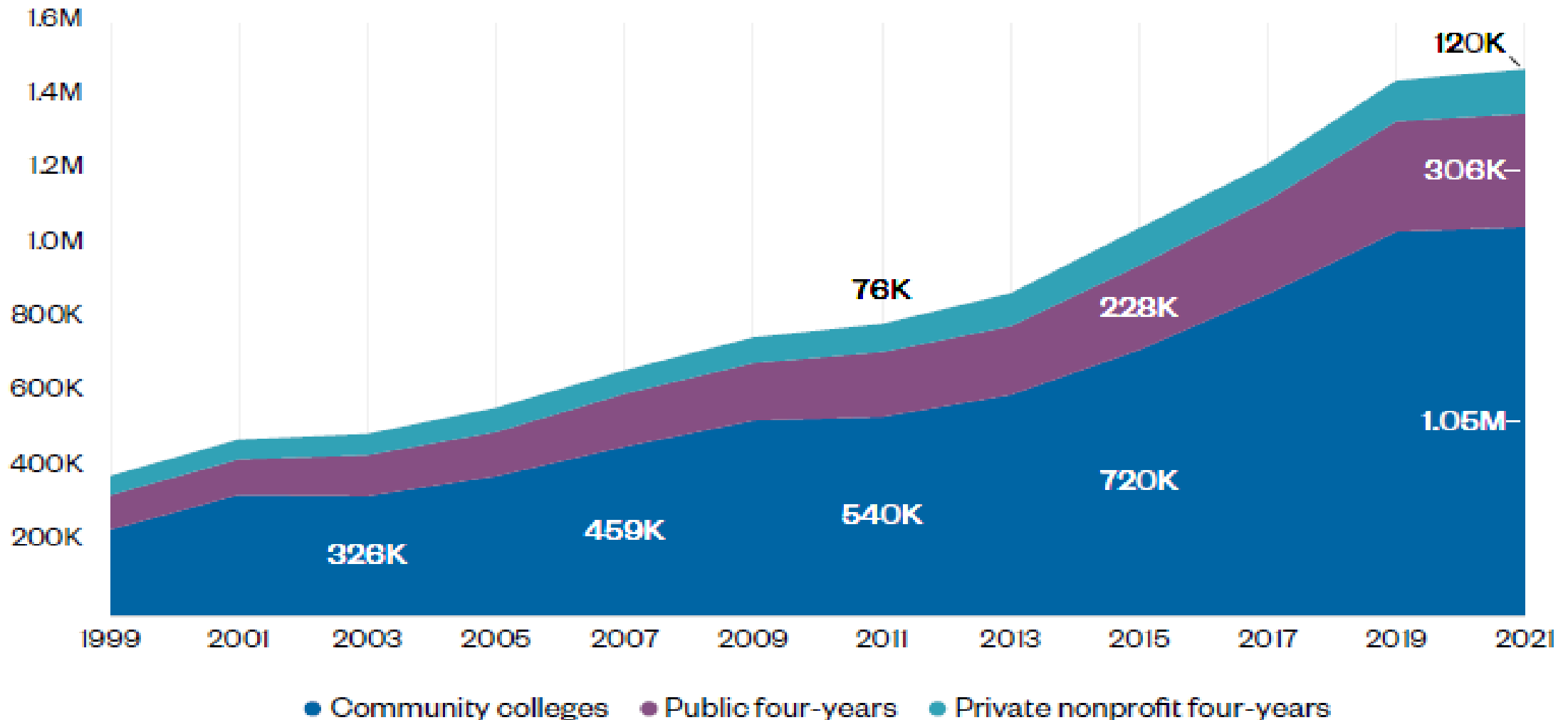
CCSNH Enrollment by Students Served, AY2019--AY2023



Students Served by CCSNH Dual Enrollment, AY 2019-AY 2023



US Dual Enrollment, 1999-2021

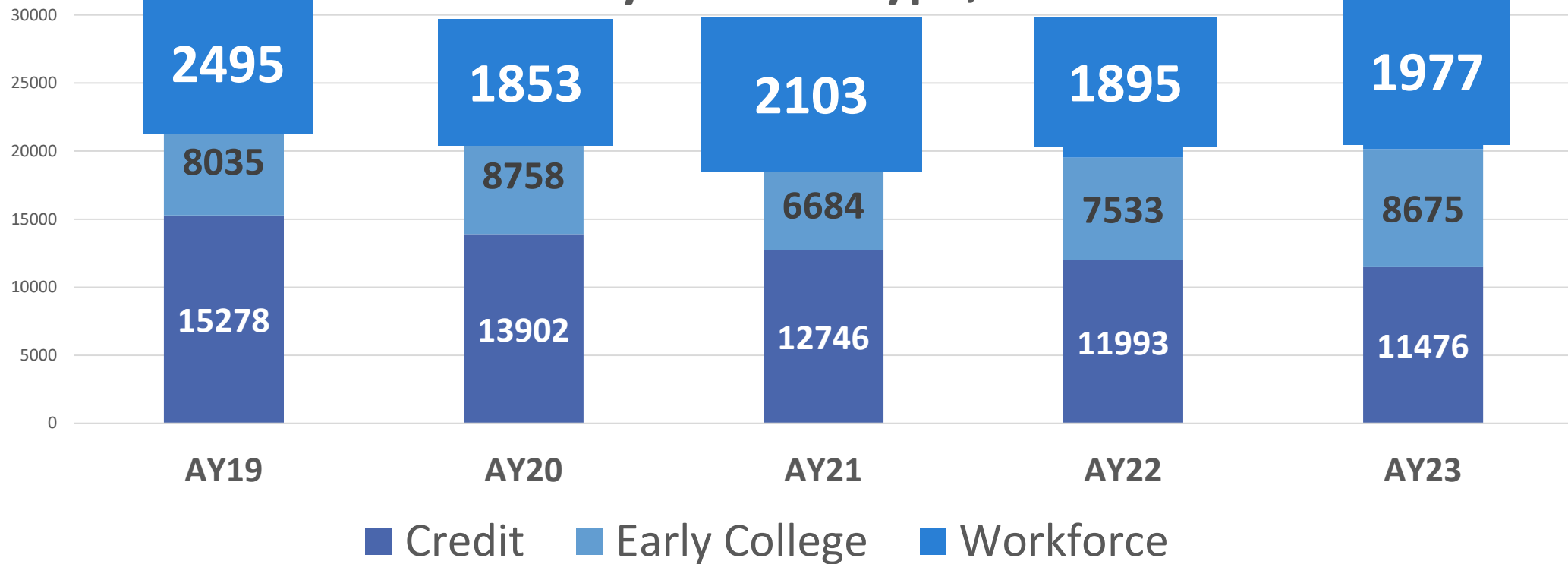


Source: Fink (2023).



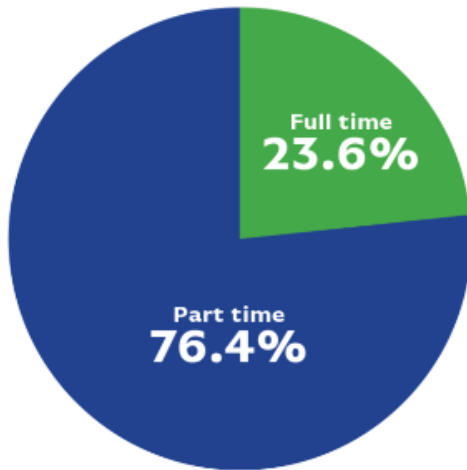
New Hampshire perspective

CCSNH Enrollment by Student Type, AY2019--AY2023



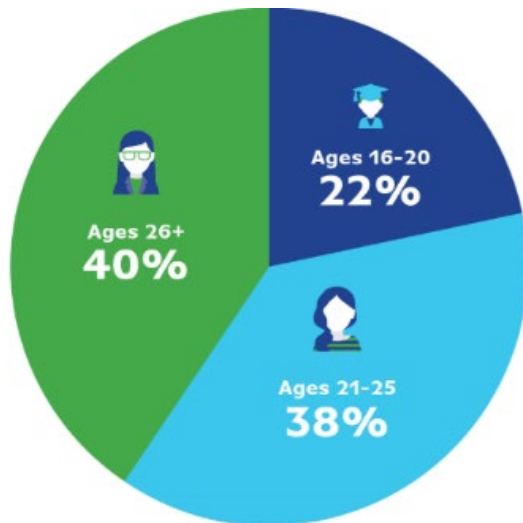


Full time vs. part time



CCSNH Students by Age Range

Ages listed for the current academic year: Summer '20, Fall '20 and Spring '21. Does not include Running Start, Early College, eStart, non-credit or potential students from late start classes.



Who our students are and what they seek:

- ✓ Programs that are compatible with their lives
 - ✓ Respect for place and time
 - ✓ Accessible and flexible
 - ✓ Aligned with local opportunities
- ✓ Economic and social mobility
 - ✓ Exploration and on-ramps
 - ✓ Academic and personal support
 - ✓ Life-changing career pathways
- ✓ Affordable on a family budget

Free & Reduced Lunch Eligibility, 2020-2021 (NH Department of Education)

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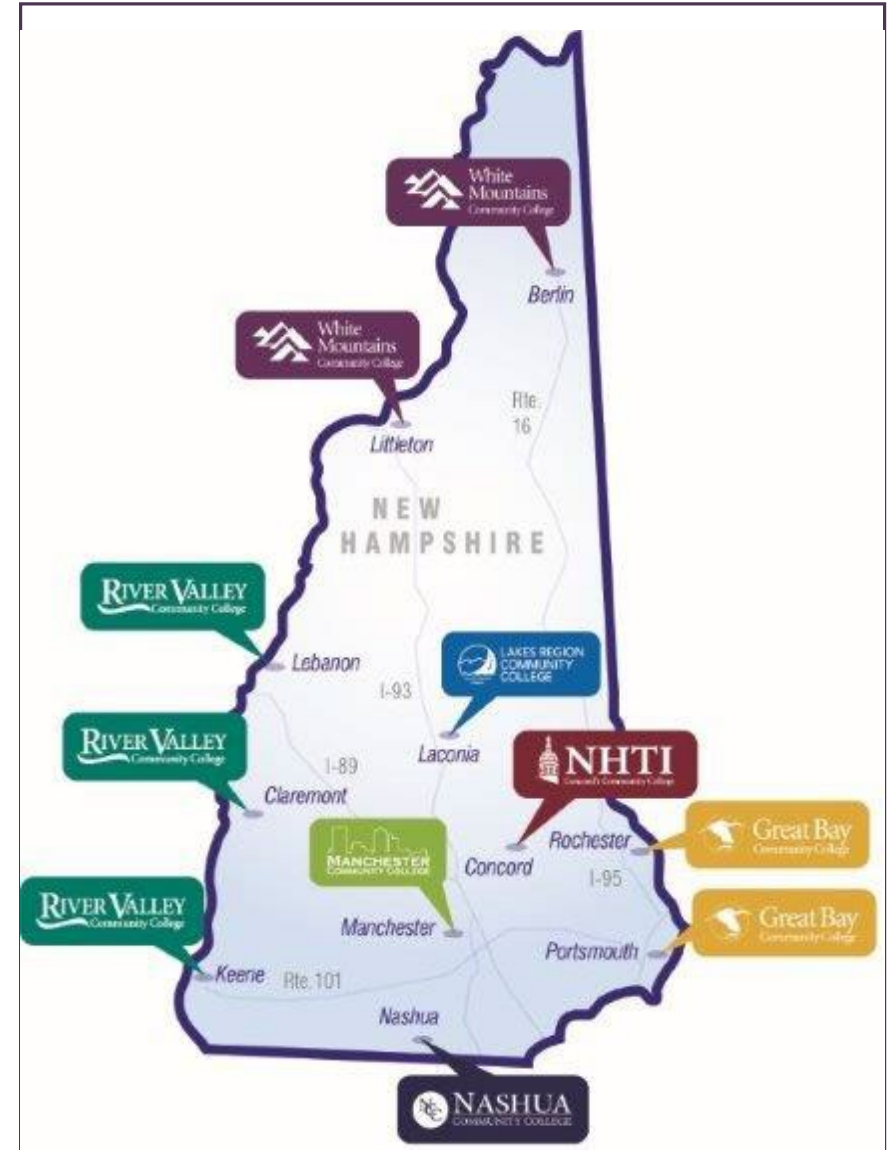


Free & Reduced by District AY23-24 (statewide rate 24.09%)

• Berlin	48.50%	• Manchester	47.35%
• Claremont	40.31%	• Nashua	40.93%
• Concord	34.99%	• Newport	56.45%
• Conway	35.22%	• Portsmouth	12.10%
• Franklin	53.95%	• Rochester	38.25%
• Laconia	49.83%		
• Littleton	53.74%		

Aligned with areas of need

Supporting
New Hampshire's
communities and
New Hampshire's
families

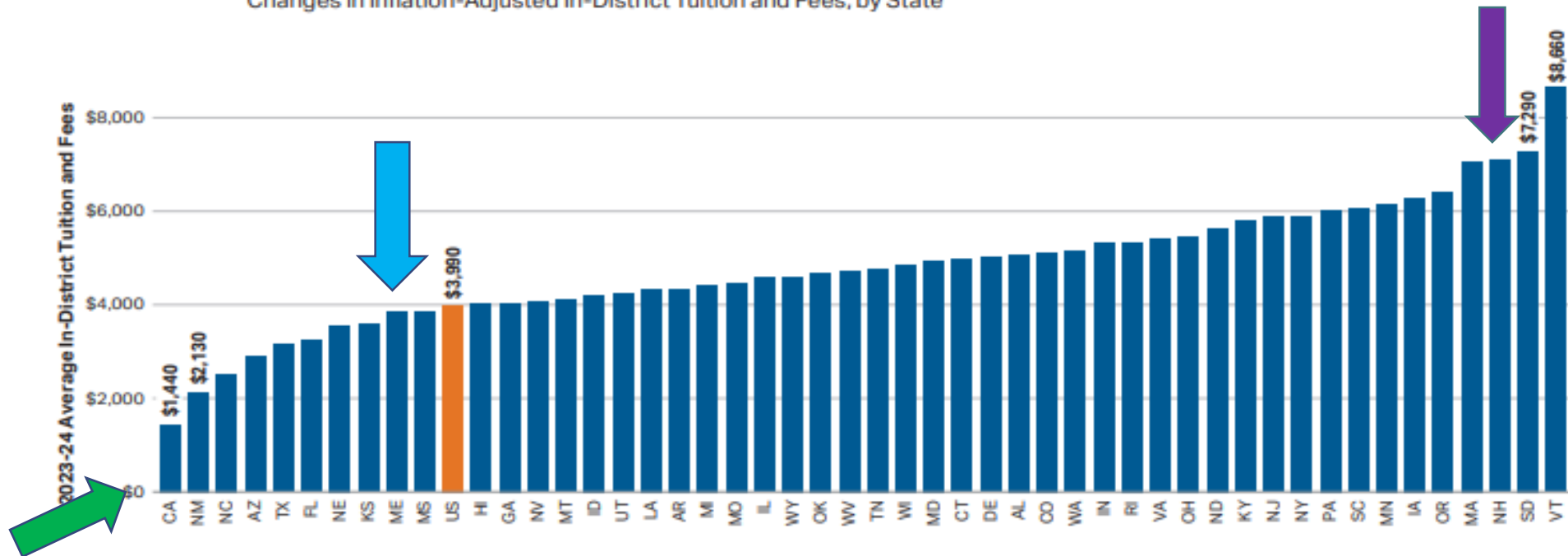


College Board's Trends in College Pricing (2023)

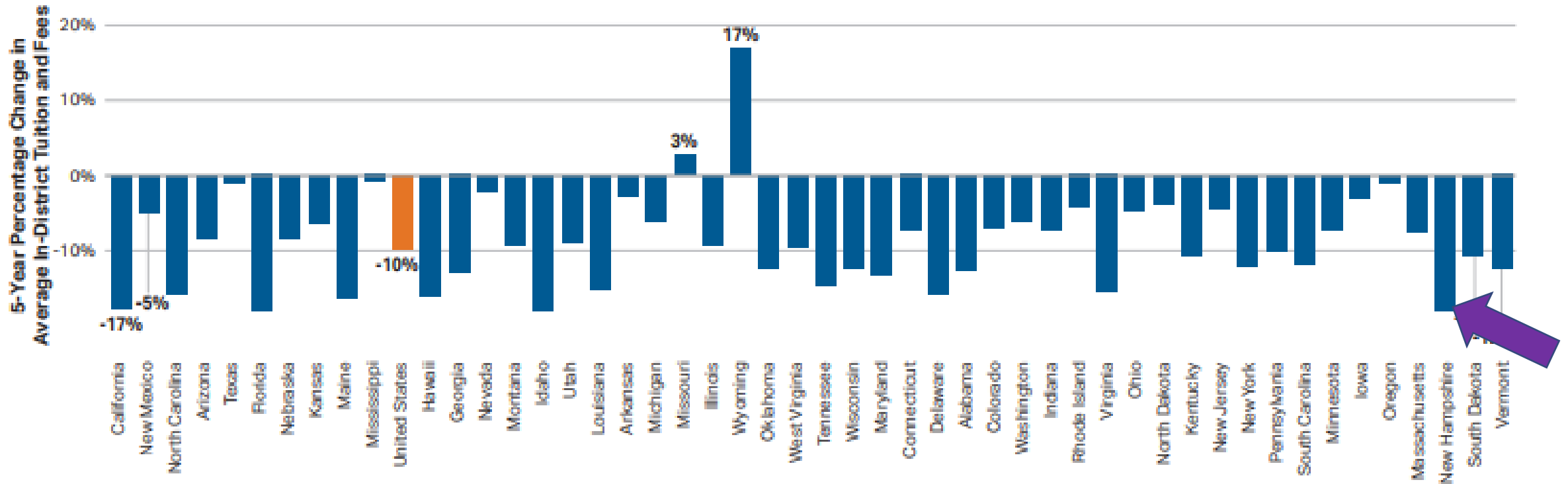
Tuition and Fees by State: Public Two-Year

In 2023-24, average published tuition and fees for full-time in-district students at public two-year colleges range from \$1,440 in California and \$2,130 in New Mexico to \$8,660 in Vermont.

FIGURE CP-5 Average 2023-24 In-District Tuition and Fees at Public Two-Year Institutions and 2018-19 to 2023-24 Five-Year Percentage Changes in Inflation-Adjusted In-District Tuition and Fees, by State



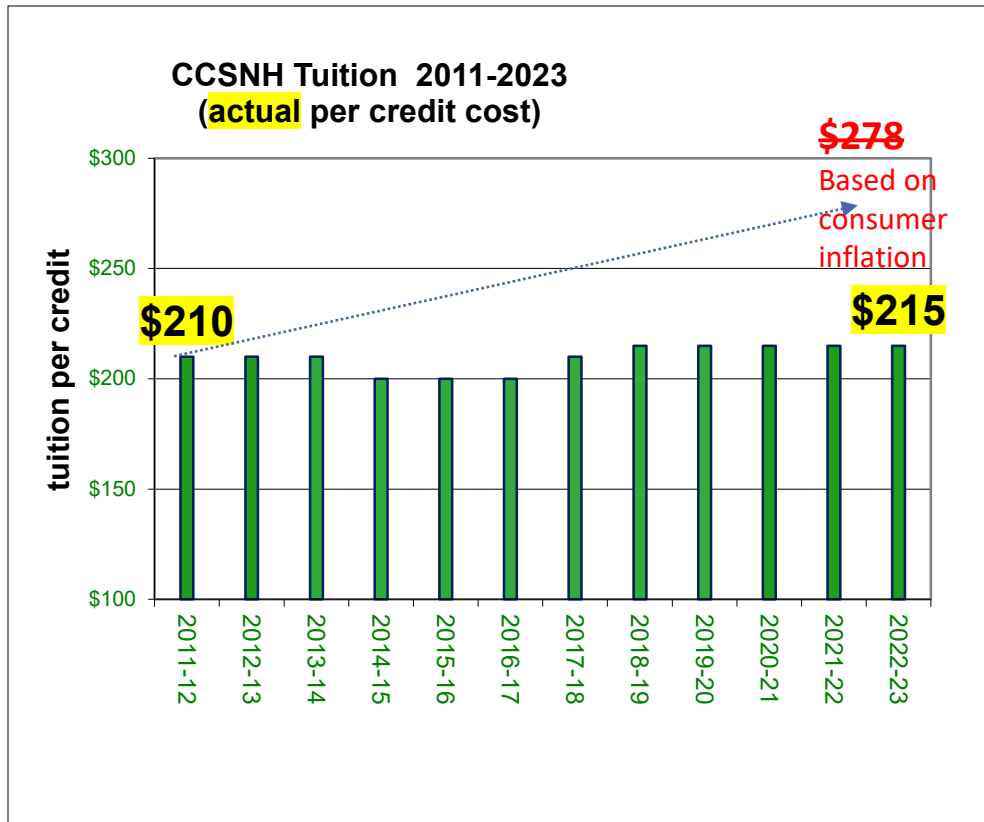
5-Year Inflation-Adjusted Change in Average Tuition & Fees— “2-Year Public”



SOURCE: College Board, Annual Survey of Colleges; NCES, IPEDS Fall Enrollment data.



Affordability – CCSNH/State partnership



At \$215/credit, CCSNH has the lowest college tuition in NH...

- Tuition in last decade has increased by only 2%.
- Annual full-time tuition (in-state, based on 30 credits/year): \$6,450

...but still well above the national average

State support for affordability has been critical

- State funding is approximately half of CCSNH operating budget
- Affordability creates economic and societal benefits

Our enrollment is increasingly concentrated in programs that serve high-demand sectors but that are costly to offer and we—CCSNH and the SONH—have absorbed those costs to develop and sustain a skilled workforce and engaged citizens

- Fields like nursing, radiation therapy, dental, welding, engineering technology & trades are costly to deliver but critical to NH’s workforce

We offer other forms of essential help for students

- No-cost/Low-cost textbook program
- Food pantries, career closets, emergency assistance

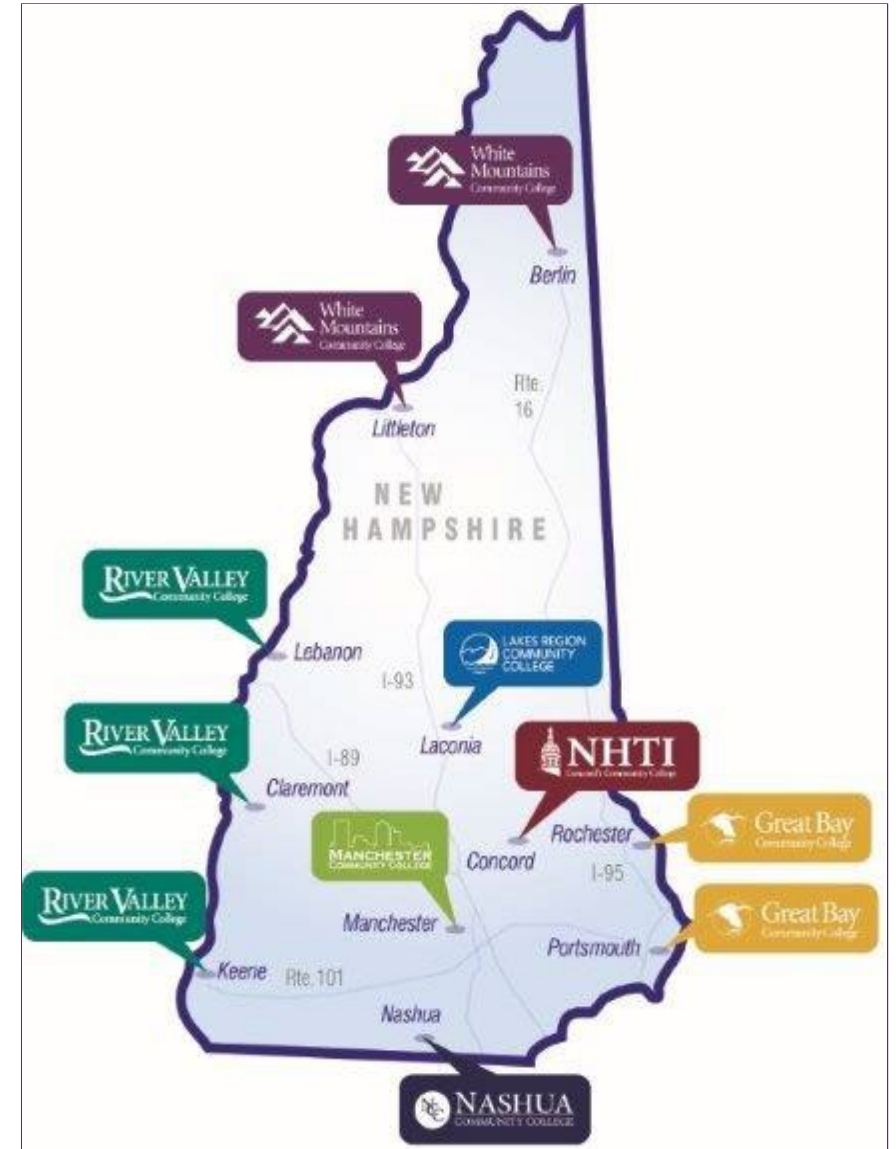


What does that all mean for New Hampshire?

- New Hampshire can't afford to waste talent
- Education will be a lifelong pursuit
 - Fostering and enabling literacy, numeracy, and capacity to learn (and a love for learning) will be essential
- Access (in all of its forms) will matter
- Affordability, value, and cost are complex and interrelated issues that will require solutions

Supporting New Hampshire's communities and workforce

- 93% of our students are NH residents and the vast majority remain in our communities and workforce
- Campuses throughout New Hampshire to serve communities and support local employers and industries
- 22,000 students annually, from high school through career advancement and lifelong learning programs that include:
 - Accelerated and affordable dual enrollment pathways
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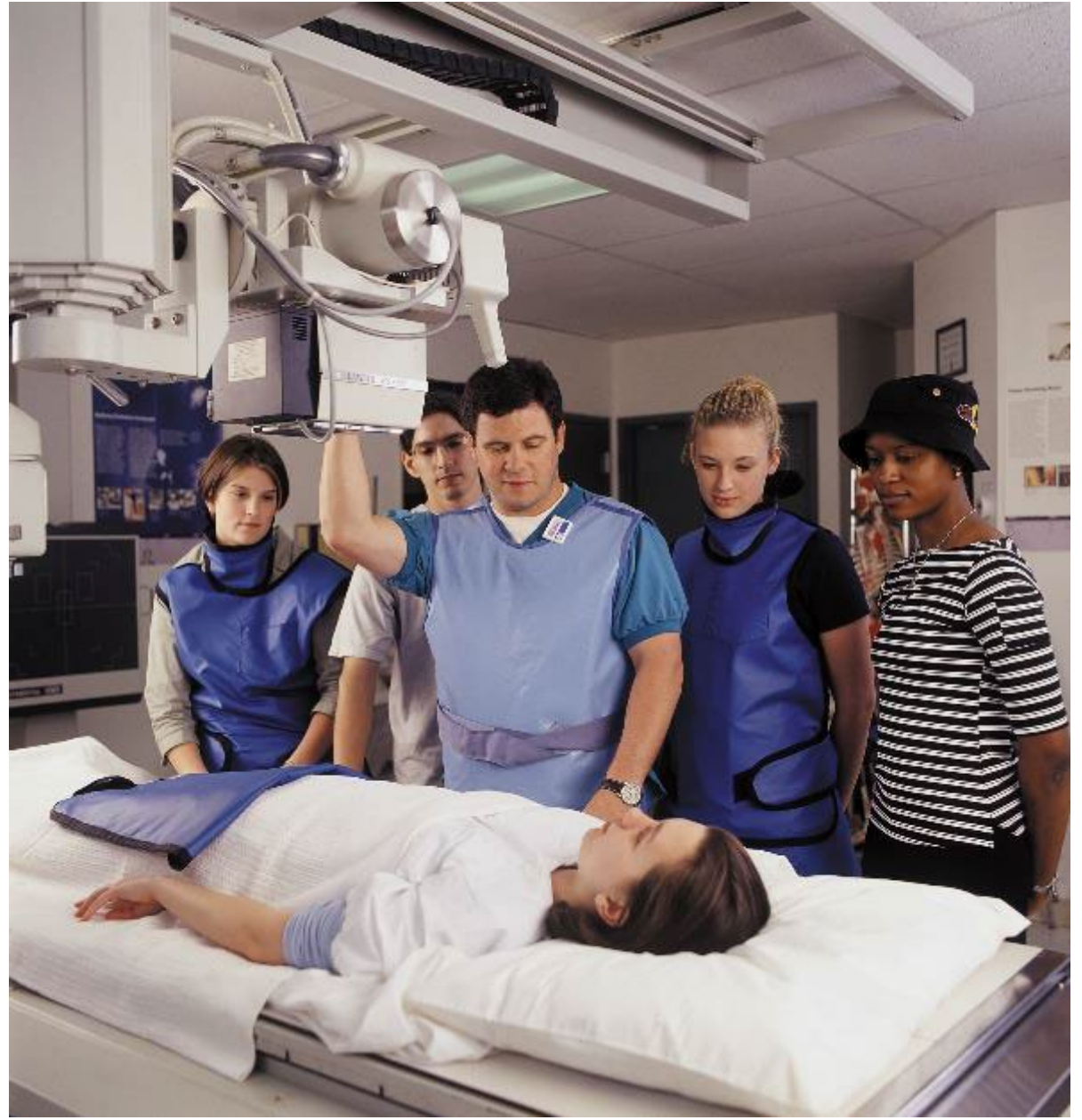
Supporting New Hampshire's communities and workforce

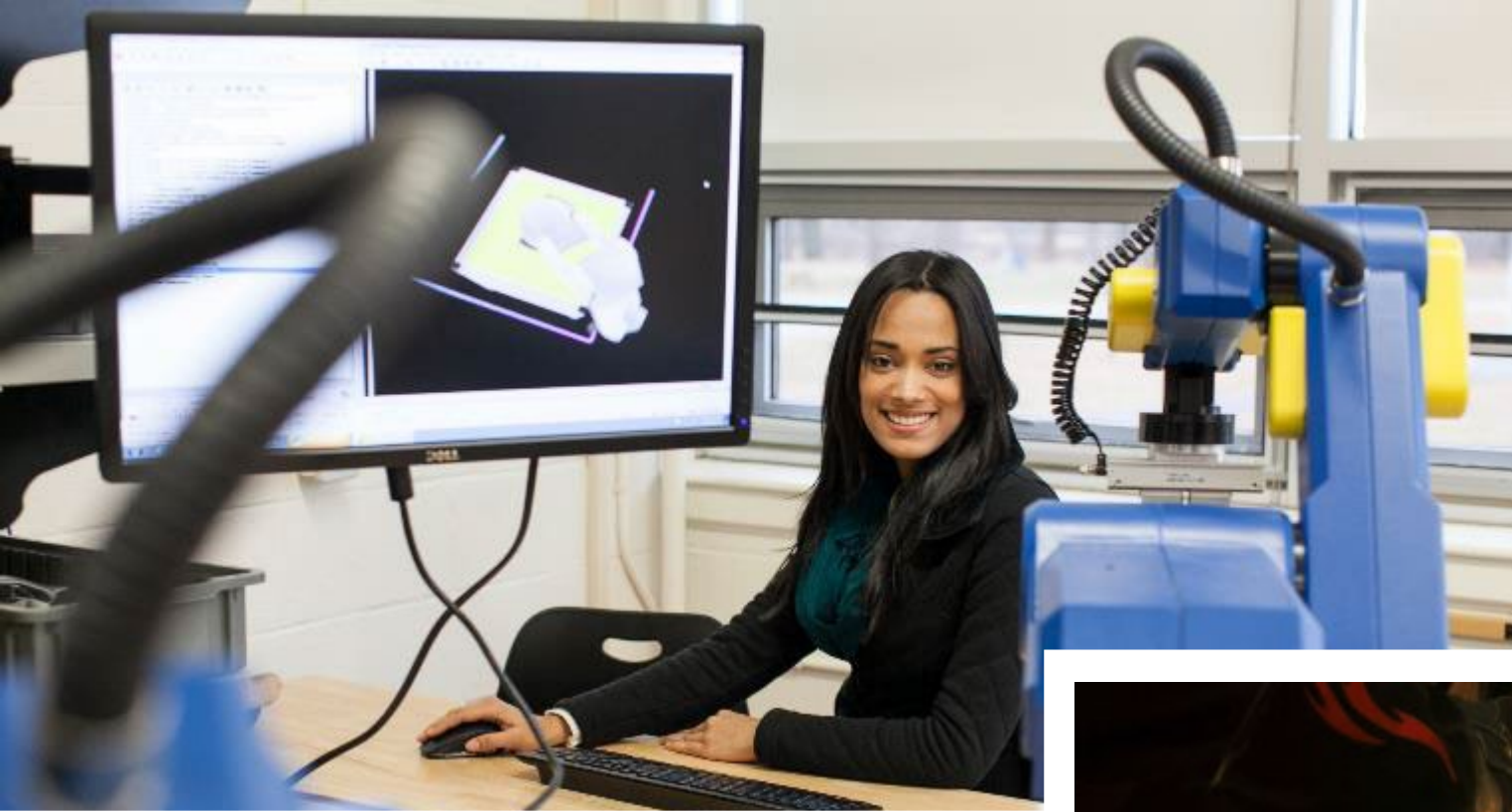
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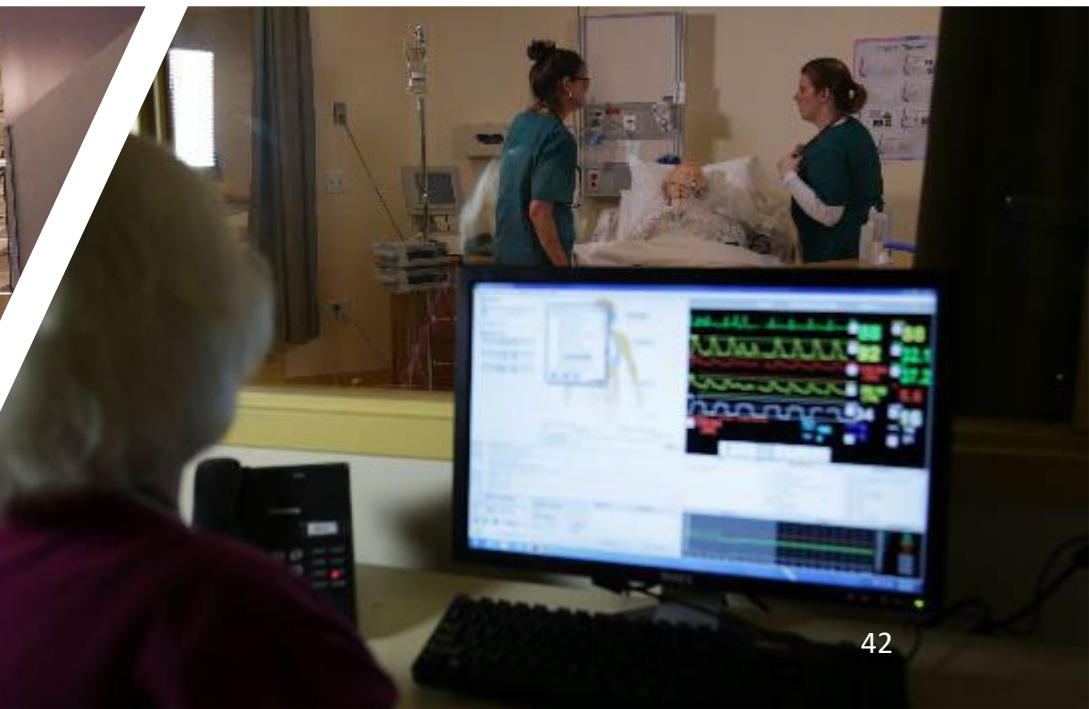












CCSNH's work is aligned with the top priorities in NH's Economic Recovery and Expansion Strategy



Goal #1: Retain and recruit a modern workforce

Specific strategies in the report include:

- Leverage existing programs
- Explore all talent pools
- Build educational partnerships
- Upskill labor

CCSNH programs prepare NH residents for all of the sectors noted in the report, with particular strength in healthcare, technicians across multiple industries, hospitality, IT, business professions, skilled trades such as HVAC, welding, electrical systems technology, electrical line workers and more

CCSNH Statement of Net Position



A summarized Statement of Net Position is as follows:

	June 30,		
	2023	2022 Restated	2021 Restated
Assets			
Current	\$ 56,957,331	\$ 62,173,383	\$ 54,300,709
Capital assets, net	2,776,015	3,232,555	104,568,144
Other noncurrent assets	<u>142,547,103</u>	<u>134,512,301</u>	<u>37,650,668</u>
Total assets	<u>202,280,449</u>	<u>199,918,239</u>	<u>196,519,521</u>
Deferred outflows of resources	<u>24,172,568</u>	<u>28,098,327</u>	<u>34,485,617</u>
Liabilities			
Current	16,054,434	17,304,984	13,543,614
Noncurrent	<u>133,916,661</u>	<u>140,809,877</u>	<u>199,820,892</u>
Total liabilities	<u>149,971,095</u>	<u>158,114,861</u>	<u>213,364,506</u>
Deferred inflows of resources	<u>25,933,475</u>	<u>33,651,873</u>	<u>35,079,042</u>
Net position (deficit)			
Invested in capital assets, net of related debt	96,237,727	89,117,701	92,606,092
Restricted nonexpendable	21,616,929	20,937,783	18,722,735
Restricted expendable	7,057,947	5,138,716	10,652,266
Unrestricted	<u>(74,364,156)</u>	<u>(78,944,368)</u>	<u>(139,419,503)</u>
Total net position (deficit)	<u>\$ 50,548,447</u>	<u>\$ 36,249,832</u>	<u>\$ (17,438,410)</u>

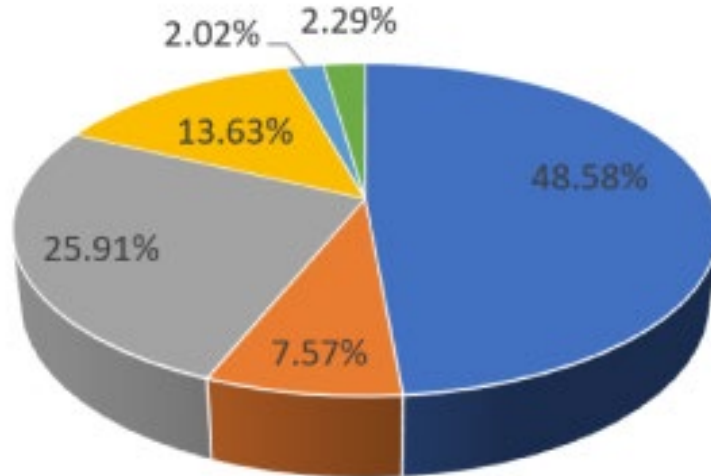
CCSNH Summary of Revenue, Expenses, and Changes in Net Position



	Years Ended June 30,		
	2023	2022 Restated	2021 Restated
Operating revenues			
Net tuition and fees	\$ 33,693,835	\$ 21,179,583	\$ 28,691,160
Other operating revenues	<u>23,321,069</u>	<u>23,032,891</u>	<u>20,316,717</u>
Total operating revenues	<u>57,014,904</u>	<u>44,212,474</u>	<u>49,007,877</u>
Operating expenses			
Employee compensation and benefits	78,893,326	52,596,999	86,503,583
Other operating expenses	<u>36,853,522</u>	<u>35,811,272</u>	<u>35,554,760</u>
Total operating expenses	<u>115,746,848</u>	<u>88,408,271</u>	<u>122,058,343</u>
Operating loss	<u>(58,731,944)</u>	<u>(44,195,797)</u>	<u>(73,050,466)</u>
Nonoperating revenues (expenses) and other changes			
State appropriations - operating	56,000,000	56,000,000	55,360,000
State appropriations - capital	8,431,950	2,290,942	1,940,544
Capital grants and contracts	744,617	524,093	885,666
Lease revenue	129,761	145,488	38,225
COVID funding	1,922,533	23,102,359	24,256,194
(Loss) investment return used for operations	3,668,024	(1,014,369)	824,199
(Loss) investment return net of amount used for operations	1,919,231	(5,513,550)	6,364,366
Nonexpendable contributions	671,562	2,208,985	653,374
Interest expense on subscriptions	(40,289)	(4,221)	-
Interest expense on leases	(127,780)	(125,284)	(103,325)
Interest expense on capital debt	<u>(289,050)</u>	<u>(451,735)</u>	<u>(514,614)</u>
Nonoperating revenues and other changes, net	<u>73,030,559</u>	<u>77,162,708</u>	<u>89,704,629</u>
Increase in net position	<u>14,298,615</u>	<u>32,966,911</u>	<u>16,654,163</u>
Net position (deficit), beginning of year, as previously stated	36,249,832	(17,438,410)	(34,092,573)
Cumulative effect of correction of an error	<u>-</u>	<u>20,721,331</u>	<u>-</u>
Net position (deficit), beginning of year, restated	<u>36,249,832</u>	<u>3,282,921</u>	<u>(34,092,573)</u>
Net position (deficit), end of year	<u>\$ 50,548,447</u>	<u>\$ 36,249,832</u>	<u>\$ (17,438,410)</u>

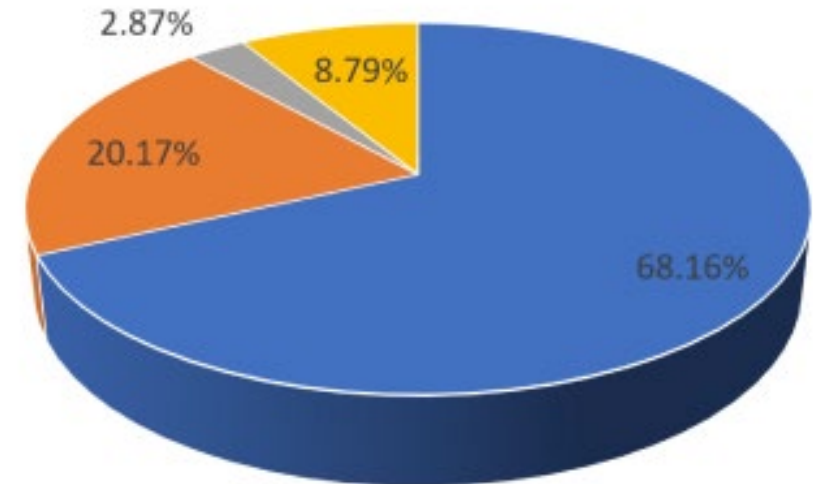
CCSNH Revenue and Expense FY23

2023 Revenue by source



- Non-operating, net
- Net Tuition and fees
- Other revenue
- Other changes in net position
- Grants and contracts
- Auxiliary revenue

2023 Expenditures by type

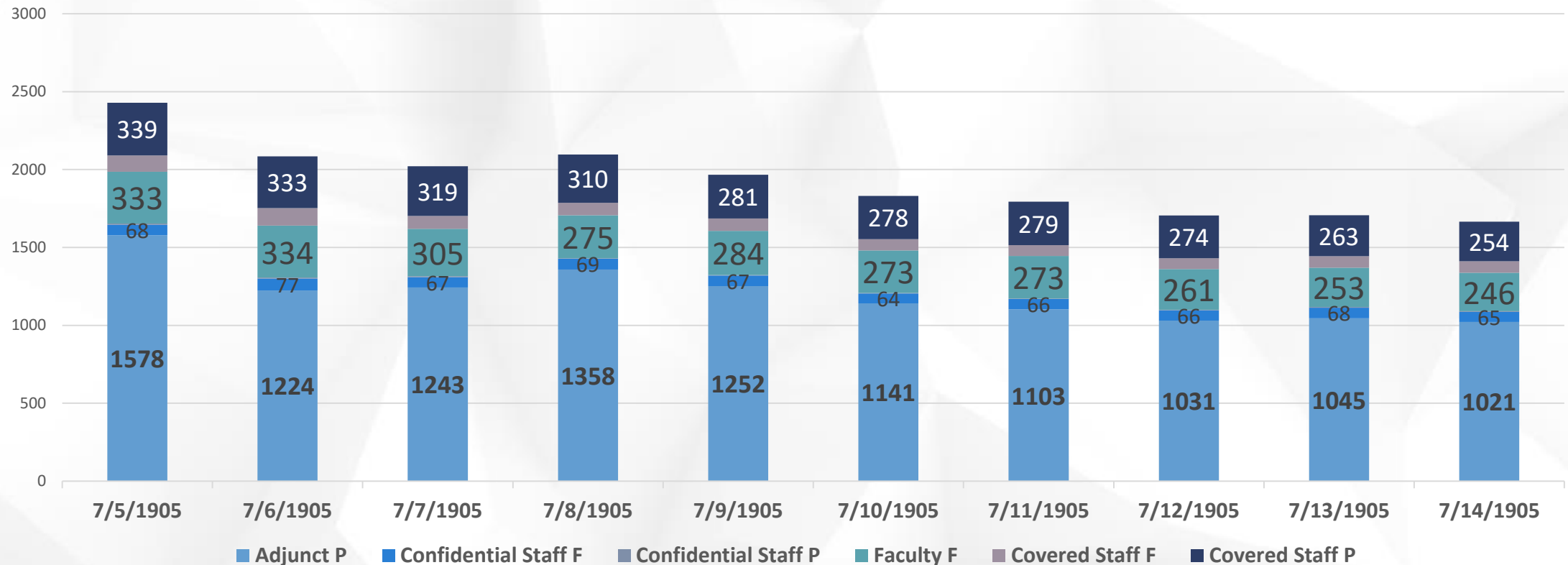


- Employee wages and benefits
- Utilities
- Other operating expenses
- Depreciation and Amortization

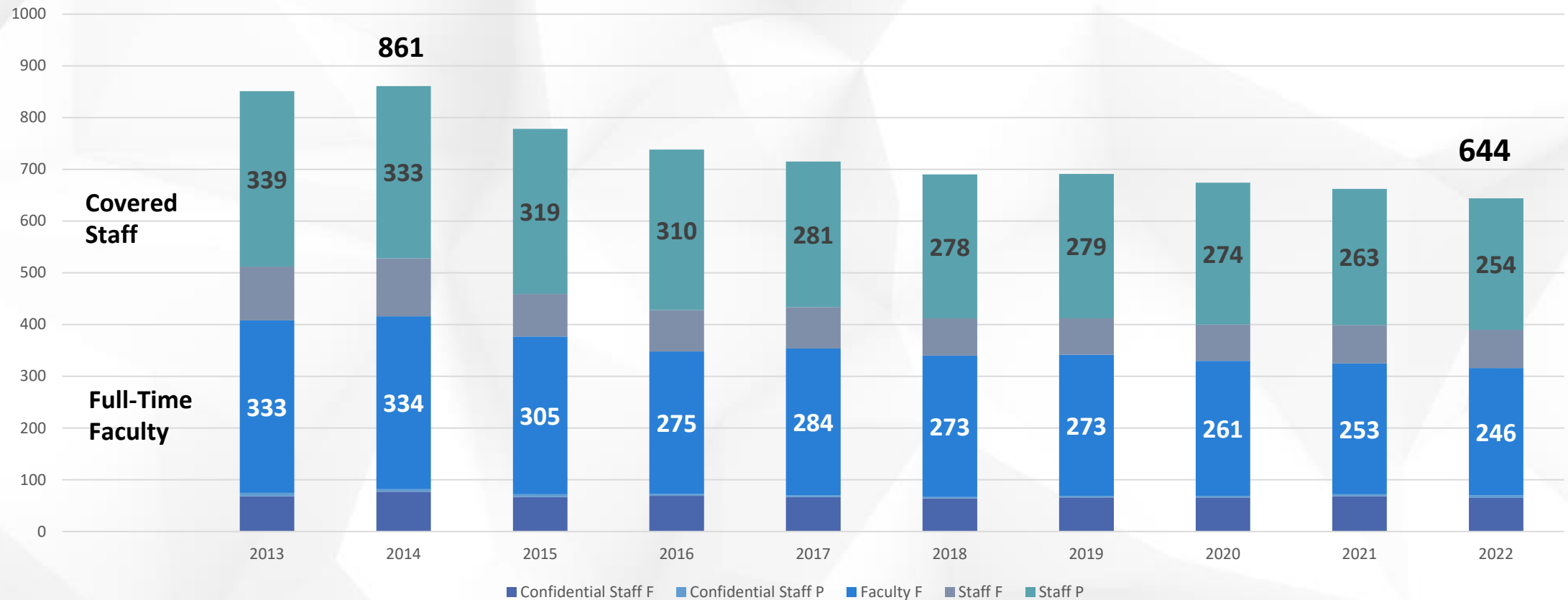
CCSNH Employee Headcount 2013-2022 (including Adjunct Faculty)



CCSNH Employee Headcount
2013-2022



CCSNH Employee Headcount 2013-2022 (without Adjunct Faculty)



Student Success that Supports the State's Success Because New Hampshire is our mission



COMMUNITY COLLEGE
system of New Hampshire

CHOOSE COMMUNITY

