



Results from the Survey on the Impact of the
Economic Recession on Fall 2009 Enrollment, Financial Aid and
Budgeting at Independent Colleges and Universities

ACCU

Introduction

A recent survey conducted by the National Association of Independent Colleges and Universities (NAICU) found that undergraduate enrollment for fall 2009 is projected to increase slightly—by an average of 0.2 percent—over fall 2008. Overall student enrollment (undergraduate and graduate students) at these institutions is projected to increase by 0.1 percent over last year. Increased funding for Pell Grants and other federal student aid programs was widely credited for helping to maintain student educational choice, while more generous institutional student aid policies, lower-than-usual tuition increases, salary freezes, and more flexible admissions practices were commonly cited campus responses to the economic downturn.

The NAICU survey began collecting data on Monday, May 18, 2009, and closed on Friday, June 19, 2009. Questions were designed to be answered by campus executives in charge of enrollment, financial aid and institutional budgets. The following findings are the final results as of June 19, 2009.

NAICU received 284 completed surveys, a 30 percent response rate. Most of the responding institutions would be characterized as small, baccalaureate colleges (i.e., a student body of less than 5,000). For additional description of the types of responding institutions, please see the Appendix at the end of this report.

Key findings from the national survey:

- Undergraduate enrollment at private, nonprofit colleges and universities for fall 2009 is projected to increase slightly—by an average of 0.2 percent—over fall 2008.
- Majorities reported an increase or no change in paid deposits for the fall term, projected new students, projected returning students, and projected transfer students.
- A majority of respondents accepted a higher number of regular applicants versus last year. More than one-third accepted late applications or extended the recruiting cycle
- More than half of responding institutions report they increased tuition at less than the historical average. Nearly 30 percent said they increased tuition at lower-than-expected rates. Five percent froze tuition at the previous year's rate.
- Eight in 10 of responding institutions reported an increase in fall 2009 student aid applications versus fall 2008.
- A majority of institutions reported they responded more positively to more student aid appeals, and increased the size of institutional aid awards. More than three-quarters of respondents reported they increased institutional aid awards over last year.

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The following aggregated results are the responses from 73 ACCU private, not-for-profit institutions. For each survey question, the answer with the highest number of responses for ACCU are highlighted in red ink and the national responses are highlighted in blue. Many of the survey questions also asked respondents to write additional comments, which are provided in this report. The following results are presented in the same sequential order of the survey, starting with question number six.

II. Paid Deposits

Question 6/7: Comparison of full-time undergraduate paid deposits received as of May 15, 2009 for fall 2009 versus full-time undergraduate paid deposits received as of May 15, 2008 for fall 2008.

Fall 2009 vs. Fall 2008 Paid Deposits	ACCU		National	
	Number	Percent	Number	Percent
Increased	32	47.1	142	55.0
No change	1	1.5	3	1.2
Decreased	35	51.5	113	43.8
Total	68	100.0	258	100.0

III. Enrollment

Question 8/9: Comparison of average projected institutional undergraduate enrollment for fall 2009 versus actual institutional undergraduate enrollment for fall 2008..

Undergraduate Institutional Enrollment	ACCU			National		
	Projected Fall 2009	Fall 2008	Percent Change	Projected Fall 2009	Fall 2008	Percent Change
Average Student Enrollment	2813	2822	-0.3	2424	2418	0.2%

Comparison of average projected institutional enrollment (Undergraduate, Graduate/First Professional) for fall 2009 versus actual institutional enrollment (Undergraduate, Graduate/First Professional) for fall 2008.

Total Institutional Enrollment (All Levels)	ACCU			National		
	Projected Fall 2009	Fall 2008	Percent Change	Projected Fall 2009	Fall 2008	Percent Change
Average Student Enrollment	3866	3840	0.7	3193	3189	0.1%

Question 10: How is the economic recession affecting your institution's fall 2009 undergraduate student enrollment as compared to your fall 2008 undergraduate student enrollment?

10a: Returning undergraduate student enrollment	ACCU		National	
	Number	Percent	Number	Percent
More than a 5% increase	3	4.4	18	6.9
1%-5% increase	16	23.5	71	27.2
No Change	34	50.0	105	40.2
1%-5% decrease	13	19.1	62	23.8
More than a 5% decrease	2	2.9	5	1.9
Total	68	100.0	261	100.0

10b: New undergraduate student enrollment	ACCU		National	
	Number	Percent	Number	Percent
More than a 5% increase	11	15.7	45	17.0
1%-5% increase	12	17.1	74	27.9
No Change	17	24.3	61	23.0
1%-5% decrease	17	24.3	49	18.5
More than a 5% decrease	13	18.6	36	13.6
Total	70	100.0	265	100.0

10c: Transfer undergraduate student enrollment	ACCU		National	
	Number	Percent	Number	Percent
More than a 5% increase	8	11.6	28	10.6
1%-5% increase	17	24.6	59	22.3
No Change	25	36.2	115	43.6
1%-5% decrease	13	18.8	37	14.0
More than a 5% decrease	6	8.7	25	9.5
Total	69	100.0	264	100.0

Question 11: *What steps has your institution taken to achieve its fall 2009 undergraduate enrollment goals in light of the economic recession? (check all that apply)*

Steps taken to achieve fall enrollment goals	ACCU		National	
	Number	Percent	Number	Percent
Responded positively to more student aid appeals	56	76.7	165	58.1
Increased the size of institutional aid awards	46	63.0	157	55.3
Accepted a higher number of regular decision applicants vs last year	30	41.1	148	52.1
Increased the number of students receiving institutional aid	35	47.9	123	43.3
Accepted late applications/extended the recruiting cycle	26	35.6	92	32.4
Accepted more students on the waiting list versus last year	13	17.8	37	13.0
Created a longer waiting list versus last year	10	13.7	34	12.0
Accepted a higher number of early decision applicants versus last year	5	6.8	28	9.9

IV. Financial Aid

Question 12: *Due to the economic recession, applications for student aid for fall 2009 versus fall 2008 have:*

Fall 2009 student aid applications versus fall 2008	ACCU		National	
	Number	Percent	Number	Percent
Substantially increased (more than 15% increase)	10	14.3	40	15.1
Moderately increased (6%-15% increase)	21	30.0	90	34.0
Slightly increased (1%-5% increase)	25	35.7	89	33.6
No change	11	15.7	36	13.6
Slightly decreased (1%-5% decrease)	1	1.4	7	2.6
Moderately decreased (6%-15% decrease)	2	2.9	3	1.1
Substantially decreased (more than 15% increase)	0	0.0	0	0.0
Total	70	100.0	265	100.0

Question 13: How did your student aid packages for fall 2009 change from fall 2008?

Fall 2009 vs. Fall 2008 Paid Deposits	ACCU						National					
	Increase		Decrease		No Change		Increase		Decrease		No Change	
	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.
Institutional aid awards (including loans)	53	76.8	5	7.2	11	15.9	203	76.6	13	4.9	49	18.5
Federal grant aid	53	76.8	2	2.9	14	20.3	200	75.8	4	1.5	60	22.7
Federal work study	24	34.3	1	1.4	45	64.3	95	36.3	7	2.7	160	61.1
Federal loans	30	42.9	3	4.3	37	52.9	144	54.5	11	4.2	109	41.3
State aid	4	5.9	23	33.8	41	60.3	49	19.1	83	32.3	125	48.6
Private loans	21	32.8	7	10.9	36	56.3	78	31.5	46	18.5	124	50.0
Family contribution	13	19.1	32	47.1	23	33.8	50	19.2	121	46.5	89	34.2

Question 14: To what extent have the following federal programs been useful for fall 2009?

Program	ACCU						National					
	Very Helpful		Helpful		No Difference		Very Helpful		Helpful		No Difference	
	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.	Num.	Pct.
\$500 increase in Pell Grant awards	42	59.2	26	36.6	3	4.2	154	57.9	93	35.0	19	7.1
\$2000 increase in Stafford loan limits	44	62.0	23	32.4	4	5.6	159	59.6	85	31.8	23	8.6
20% increase in federal work study	20	29.4	23	33.8	25	36.8	78	29.9	89	34.1	94	36.0

V. Institutional Aid

Question 17: If your institution provided additional institutional aid to students for fall 2009, where did the additional funding come from? (check all that apply)

Sources of fall 2009 additional institutional aid funding	ACCU		National	
	Number	Percent	Number	Percent
Increased tuition revenue	39	53.4	152	53.5
Made cuts in other institutional budget areas	41	56.2	140	49.3
Increased fund raising/gift revenue	8	11.0	39	13.7
Other	9	12.3	33	11.6
Drew down more funds from endowment	5	6.8	15	5.3

Question 18: Due to the economic recession, have your currently enrolled undergraduates taken any of the following steps for the 2008-2009 academic year or for fall 2009 term? (check all that apply)

Steps currently enrolled undergraduates have taken for the 2008-2009 academic year or for the fall 2009 term	ACCU		National	
	Number	Percent	Number	Percent
Work more hours	40	54.8	158	55.6
Participate in a tuition payment plan	38	52.1	148	52.1
Borrow more through private sources (credit cards, private loans, etc.)	43	58.9	146	51.4
Stop out of school	26	35.6	111	39.1
Switch to part-time status	26	35.6	74	26.1

VI. Balancing the Budget

Question 19: *Due to the economic recession, which of the following cost-cutting measures has your institution taken? (check all that apply)*

Cost-cutting measures taken	ACCU		National	
	Number	Percent	Number	Percent
Increased tuition at less than historical average	47	64.4	154	54.2
Froze salaries	36	49.3	152	53.5
Froze new hiring	34	46.6	133	46.8
Restricted travel	26	35.6	124	43.7
Slowed down current construction/renovation projects	28	38.4	107	37.7
Delayed maintenance	18	24.7	87	30.6
Gave smaller than usual salary increases	35	47.9	81	28.5
Increased tuition less than anticipated	25	34.2	78	27.5
Laid off staff (non-faculty)	6	8.2	54	19.0
Cut salaries/benefits	11	15.1	48	16.9
Canceled planned construction/renovation projects	13	17.8	44	15.5
Laid off faculty	1	1.4	20	7.0
Froze tuition levels	1	1.4	13	4.6
Cut student services	2	2.7	12	4.2
Cut academic programs	1	1.4	11	3.9

Question 20: *Due to the economic recession, which of the following revenue-increasing steps has your institution taken or is planning to take? (check all that apply)*

Revenue-increasing steps institutions have taken or are planning to take	ACCU		National	
	Number	Percent	Number	Percent
Increased/attempted to increase enrollment	43	58.9	186	65.5
Increased tuition	38	52.1	154	54.2
Increased room and board	33	45.2	122	43.0
Created new academic extension or continuing education programs	22	30.1	75	26.4
Borrowed funds	2	2.7	20	7.0
Sold assets	1	1.4	13	4.6

Appendix: Institutional Representation

Carnegie Classification (National)	Number	Percent
Doctoral/Research	25	8.8
Masters	100	35.2
Baccalaureate	122	43.0
Associates	3	1.1
Special Focus	31	10.9
Unclassified	3	1.1
Total	284	100.0

Institution Size (National)	Number	Percent
Under 1,000	58	20.4
1,000 - 4,999	181	63.7
5,000 - 9,999	27	9.5
10,000 - 19,999	15	5.3
20,000 and above	3	1.1
Total	284	100.0

Level (National)	Frequency	Percent
Four or more years	281	98.9
At least 2 but less than 4 years	3	1.1
Total	284	100.0

Geographic Region (National)	Frequency	Percent
New England CT ME MA NH RI VT	29	10.2
Mid East DE DC MD NJ NY PA	76	26.8
Great Lakes IL IN MI OH WI	45	15.8
Plains IA KS MN MO NE ND SD	21	7.4
Southeast AL AR FL GA KY LA MS NC SC TN VA WV	72	25.4
Southwest AZ NM OK TX	13	4.6
Rocky Mountains CO ID MT UT WY	3	1.1
Far West AK CA HI NV OR WA	25	8.8
Total	284	100.0