STATE BOARD OF COMMUNITY COLLEGES
2022-26 System Strategic Plan Update

Background:

The following report provides updates on System Enrollment trends.

Plan 01: System Enrollment: Multi-Year Trends & Alignment with Propel NC Funding Needs
Goal 2 of the 2022-26 System Strategic Plan focuses on increasing access and enrollment at North Carolina community colleges to meet the state's educational attainment goal and expand postsecondary opportunities. The goal was developed amidst the COVID-19 pandemic, which caused a sharp decline of –17% in enrollment in late 2020 and early 2021. Since that time, North Carolina's community colleges have not only recovered from the pandemic but have surpassed pre-pandemic enrollment levels, growing by +23% in the last five years. Enrollment growth occurred across large and small, urban and rural colleges alike—demonstrating that the System's statewide geographic model is successfully reaching North Carolinians in every county. Today, more than one-third of students are enrolled in high-demand workforce sectors, reflecting the collective efforts of colleges to align education and training with employer needs. However, the data confirm that labor market demand outpaces current enrollment and completion levels for Propel NC workforce sectors. This validates the NCCCS legislative agenda focused on increasing enrollment capacity in high-demand workforce sectors to better serve the state's economy.

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System Enrollment

Multiyear Trends & Alignment with Propel NC Funding Needs

Report on Goal 2: Enrollment of 2022-26 System Strategic Plan

March 2026

NC COMMUNITY COLLEGES
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01
Context

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GOAL TWO
Enrollment

Increase access and enrollment at North Carolina community colleges to meet the state's educational attainment goal and expand postsecondary opportunities.

NC Community College System
Strategic Plan 2022-2026

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Data Timeframe Rationale

Goal 2 of the 2022-26 System Strategic Plan was developed amid the COVID pandemic, so progress with the goal is measured pre- and post-pandemic.

Our pre-pandemic baseline measures are:
- 2018-19: The last full academic year not impacted by the COVID pandemic
- Fall 2019: Part of 2019-20 academic year; the last full academic semester not impacted by the COVID pandemic

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NC CC Key Terminology

"FTE (Full-Time Equivalent)"

- Measure of the amount of instruction received by students
- 512 hours of all instruction received by a student equates to an FTE
  (16 Hours X 16 Weeks X 2 Semesters)
- Primary basis for which colleges are funded
- This includes Curriculum, Workforce Continuing Education, and Basic Skills

"Student Count"

- Unduplicated count of students receiving instruction during a specified timeframe regardless of hours

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02
How have we rebounded from the COVID pandemic?

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What the data tell us:
- The COVID-19 Pandemic caused a sharp decline of -17% in enrollment in 2020.
- Since then, both FTE and Student Count have seen a steady and sustained growth of +23%.
- *Current enrollment surpasses where we were before the pandemic.*

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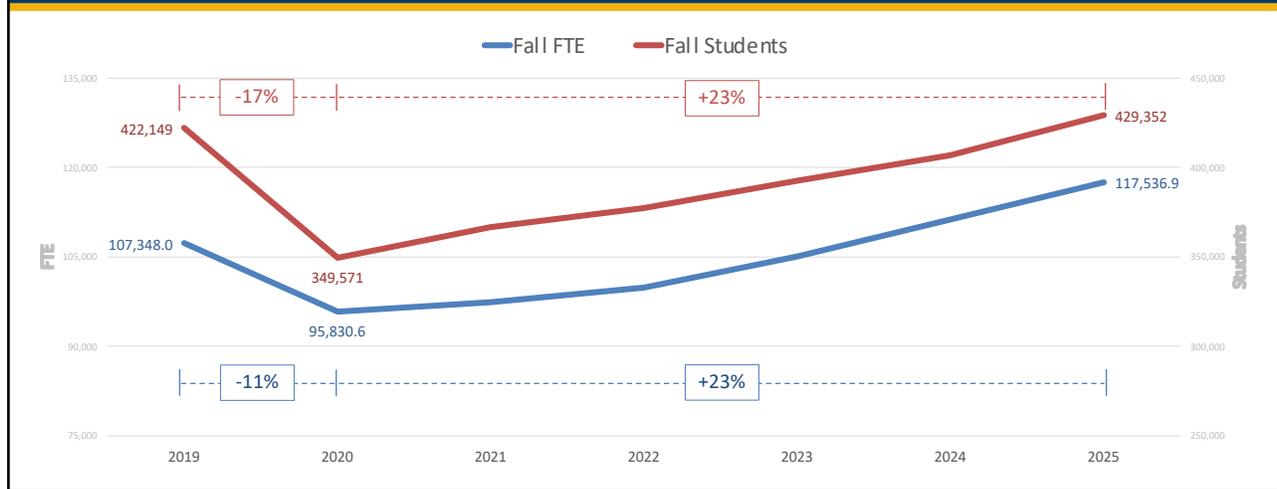
What the data tell us:
- Historically, when unemployment increases, community college enrollment increases.
- Our current growth defies that trend: *Community college enrollment continues to increase despite a decline in unemployment.*

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03

How has student enrollment changed?

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What the data tell us:

- *FTE mix* remains the same, with Curriculum representing the vast majority.

Fall 2019 to Fall 2025: FTE by Instructional Area

- Curriculum
- Workforce Continuing Education
- Basic Skills
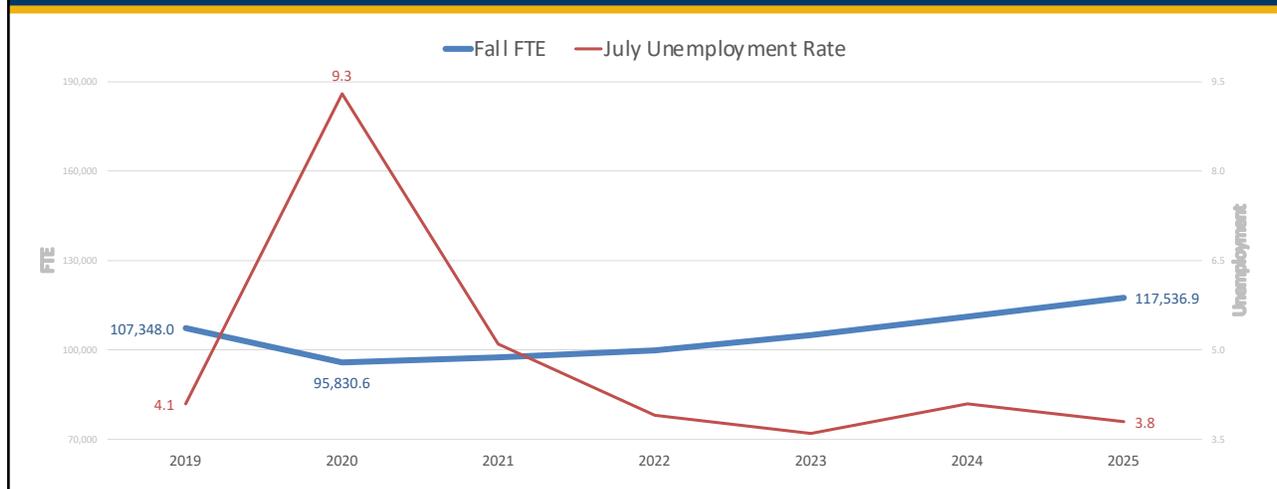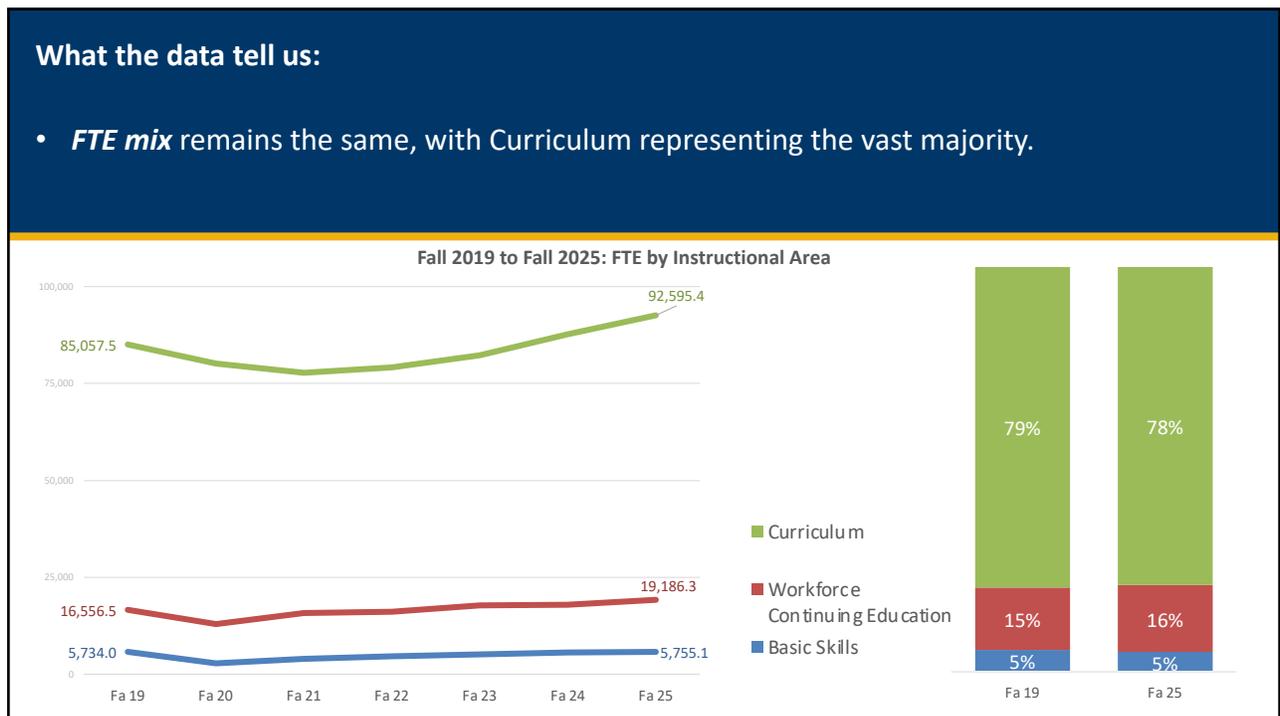
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What the data tell us:

- Student Count mix remains the same, with Curriculum representing the majority.

Fall 2019 to Fall 2025: Student Count by Instructional Program Area
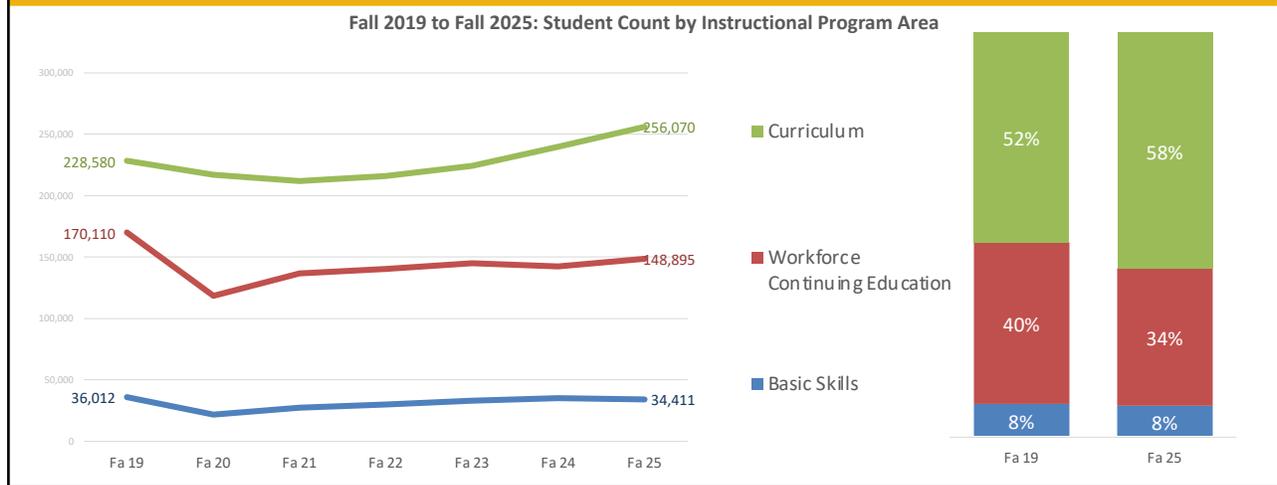
11

What the data tell us:

- Workforce Continuing Ed serves the largest number of students overall and was most sharply impacted by COVID.
- Transfer and Gen Ed continue to serve the largest number of students in Curriculum, reflecting strong demand for the community college as a gateway to the Bachelor degree.
- Career & Technical Education (CTE) enrollment has grown along with labor market demand for skilled workforce with an Associate degree.

Fall 2019 to Fall 2025: Student Count by Instructional Program Area
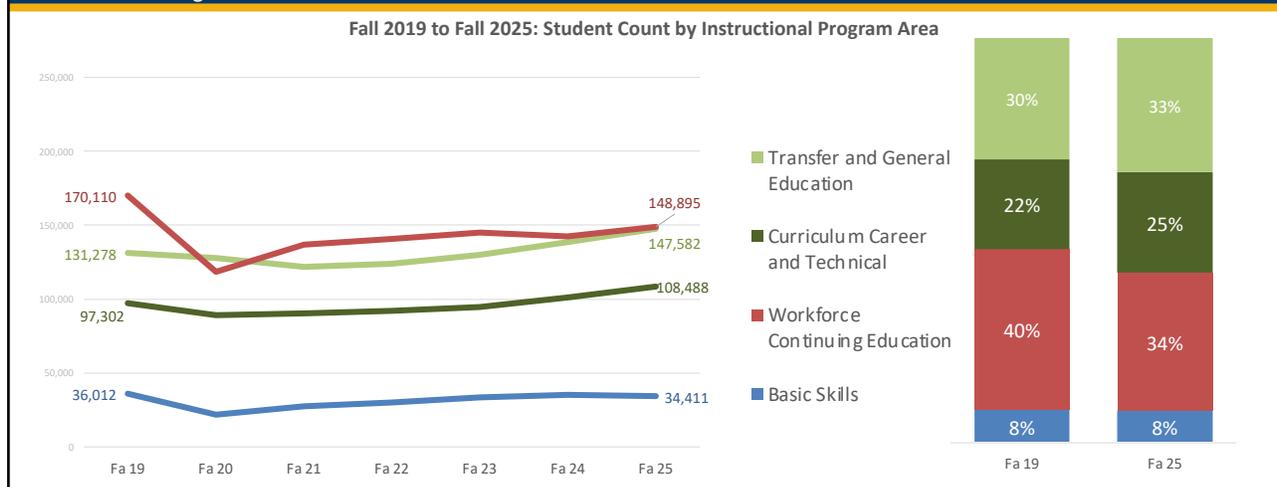
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What the data tell us:

- Transfer degree enrollment remains a core part of the enrollment portfolio and indicator of quality.
- *About 7 in 10 community college transfer graduates enroll at a 4-Year college or university within 1 year.*
- *NCCCS transfer students outperform other North Carolina transfer and native students by GPA.*
- This reflects the strong academic preparation offered via community colleges.

GPA During First Year at North Carolina Public University: Junior Status
(Fall 2024 Entering Term)
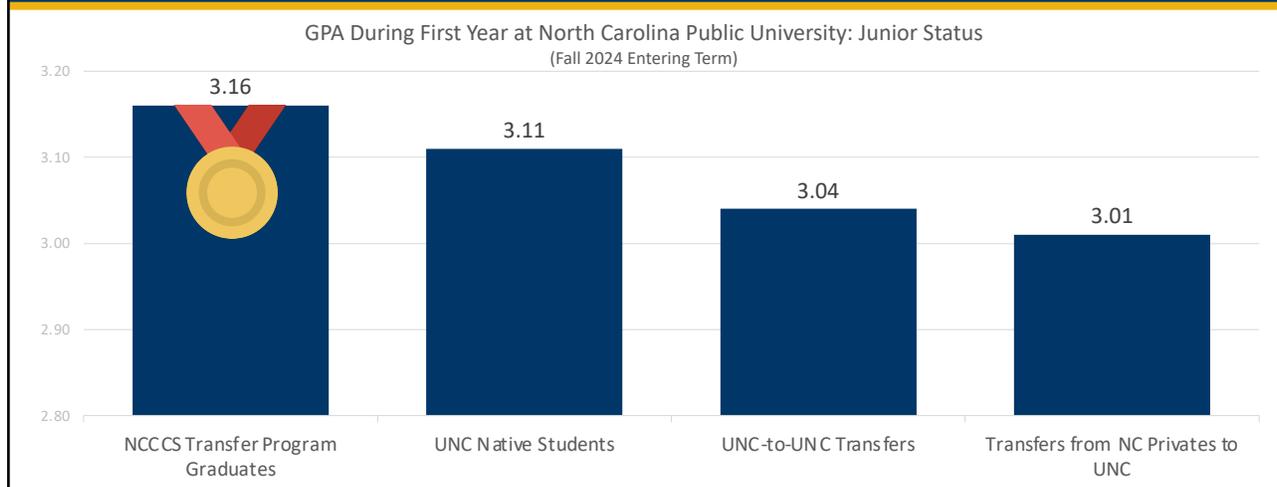
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What the data tell us:

- *COVID sparked a permanent shift to offering more online and hybrid classes.*
- Online and hybrid classes are consistently cited by students as important to overcome transportation barriers, work scheduling conflicts, and other logistical challenges of bringing instructors and students together.
- This trend is consistent across urban, suburban, and rural areas.

Fall 2019 to Fall 2025 Curriculum FTE: Instructional Method
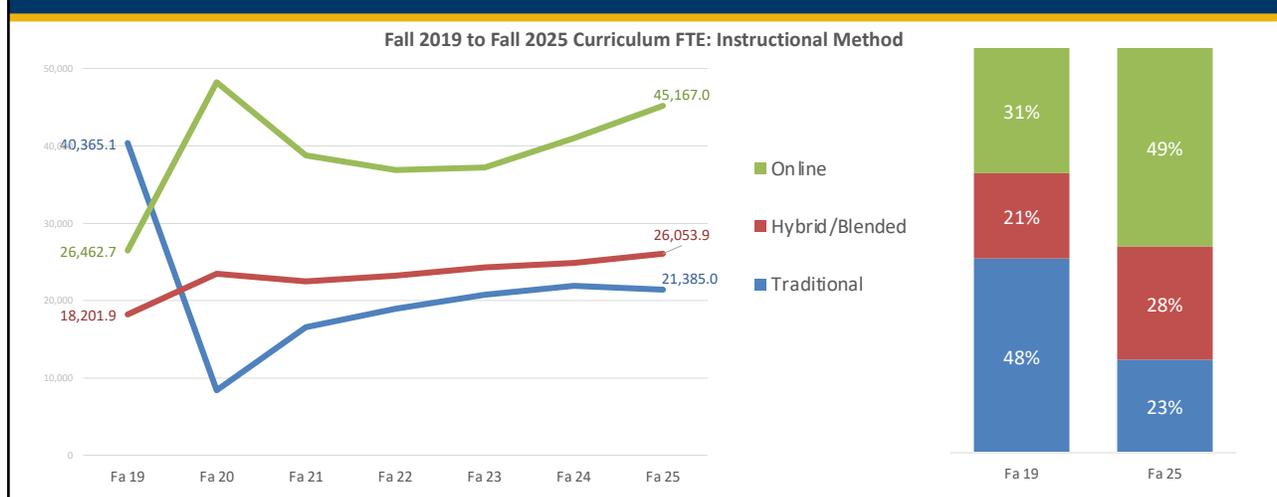
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What the data tell us:
- *Dual enrollment has served as both a source of stability and growth in enrollment.*
- *Since 2019, our total dual enrolled student population has grown by 37%.*
- *That is 5-6% average annual growth in dual enrollment.*
- *As a percentage of total enrollment dual enrollment's share grew by 5%.*

Fall 2019 to Fall 2025 Curriculum Student Count: Dual Enrollment

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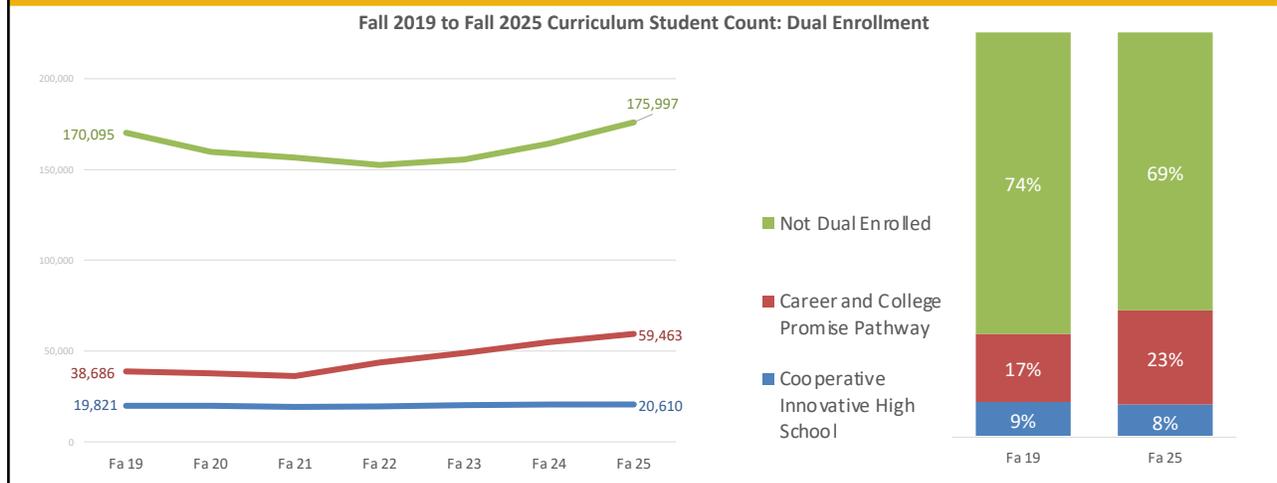
What the data tell us:
- *Where students come from varies across colleges, and influences how colleges adapt to serve them.*
- **Border colleges have a higher proportion of out-of-state students.**
- **Colleges adjacent to prisons have a higher proportion of prison-based students.**
- **Certain rural colleges have a higher proportion of high school students.**

Prison Instruction Share of Total FTE (Fall 25)		High School Students Share of All Students (Fall 25)		Age 18-24 Students Share of All Students (Fall 25)		Out of State Students Share of All Students (Fall 25)	
College	% Share	College	% Share	College	% Share	College	% Share
Pamlico CC	36.5%	Martin CC	34.9%	Pitt CC	39.8%	Tri-County CC	10.0%
Southeastern CC	15.9%	Mitchell CC	31.7%	Central Piedmont CC	39.7%	Stanly CC	8.0%
Mayland CC	14.1%	South Piedmont CC	31.1%	Johnston CC	39.4%	Piedmont CC	5.5%
Richmond CC	12.9%	College of The Albemarle	28.8%	Cape Fear CC	39.4%	Cleveland CC	4.7%
South Piedmont CC	7.4%	Mayland CC	26.7%	Wake TCC	39.1%	Wake TCC	4.4%
		Central Carolina CC	26.7%			Mayland CC	4.4%
System	**2.3%** 1,549 FTE	**System**	**18.6%** 80,073 Students	**System**	**32.7%** 140,362 Students	**System**	**2.2%** 9,460 Students

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How has enrollment varied by college?

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2018-19 to 2024-25 FTE Change by College

College	% Change
James Sprunt CC	83%
South Piedmont CC	45%
Brunswick CC	39%
Robeson CC	37%
Beaufort County CC	34%
Mitchell CC	34%
McDowell TCC	33%
Johnston CC	28%
Cape Fear CC	25%
Cleveland CC	24%
Davidson-Davie CC	22%
Gaston College	19%
Catawba Valley CC	18%
Central Piedmont CC	18%
College of The Albemarle	18%
Guilford TCC	17%
Tri-County CC	16%
Forsyth TCC	15%
Wake TCC	15%
Piedmont CC	14%
Wilson CC	14%
Montgomery CC	14%
Durham TCC	13%
Alamance CC	12%
Craven CC	12%
Caldwell CC and TI	9%
Sampson CC	9%
Blue Ridge CC	9%
Pamlico CC	9%
Carteret CC	8%
Rowan-Cabarrus CC	7%
Isothermal CC	7%
Central Carolina CC	6%
Martin CC	6%
Wilkes CC	6%
Randolph CC	4%
Rockingham CC	3%
Sandhills CC	3%
Wayne CC	-1%
Southwestern CC	-1%
Bladen CC	-1%
Vance-Granville CC	-2%
Roanoke Chowan CC	-3%
Pitt CC	-3%
Richmond CC	-4%
Halifax CC	-5%
Coastal Carolina CC	-6%
Southeastern CC	-6%
Surry CC	-7%
Fayetteville TCC	-7%
Nash CC	-7%
Western Piedmont CC	-8%
Stanly CC	-9%
Asheville-Buncombe TCC	-14%
Edgecombe CC	-14%
Lenoir CC	-15%
Haywood CC	-17%
Mayland CC	-27%

College	FTE Change
Wake TCC	3361
Central Piedmont CC	3144
Cape Fear CC	2029
Guilford TCC	1853
Forsyth TCC	1218
South Piedmont CC	1214
Johnston CC	1178
James Sprunt CC	1037
Robeson CC	960
Gaston College	936
Mitchell CC	930
Catawba Valley CC	850
Davidson-Davie CC	824
Brunswick CC	753
Cleveland CC	746
Durham TCC	671
Beaufort County CC	586
Alamance CC	526
Rowan-Cabarrus CC	511
College of The Albemarle	456
McDowell TCC	407
Craven CC	372
Caldwell CC and TI	346
Central Carolina CC	329
Wilson CC	263
Piedmont CC	231
Blue Ridge CC	216
Sampson CC	197
Tri-County CC	179
Wilkes CC	176
Isothermal CC	148
Montgomery CC	145
Carteret CC	144
Sandhills CC	110
Randolph CC	107
Rockingham CC	61
Martin CC	54
Pamlico CC	48
Bladen CC	-20
Wayne CC	-23
Southwestern CC	-23
Roanoke Chowan CC	-28
Vance-Granville CC	-57
Halifax CC	-57
Southeastern CC	-128
Richmond CC	-131
Western Piedmont CC	-163
Surry CC	-224
Nash CC	-239
Coastal Carolina CC	-251
Pitt CC	-269
Stanly CC	-269
Haywood CC	-294
Edgecombe CC	-311
Mayland CC	-414
Lenoir CC	-722
Asheville-Buncombe TCC	-929
Fayetteville TCC	-1015

What the data tell us:

- **Enrollment growth is not concentrated – it is distributed across the System.**
- Growth occurred across the spectrum of colleges – large to small, urban to rural.
- While large colleges added the most FTE in absolute terms, many of the highest percentage growth rates occurred among small and mid-sized rural colleges.
- This demonstrates:
  - Growth capacity is not size-dependent.
  - Smaller institutions are not structurally limited in their ability to rebound and expand.
  - The system's geographic model is functioning as intended.

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What the data tell us:

- *In the last year, enrollment grew by 16,422 FTE*
- *That growth translated to $102,176,661 dollars.*
- *This aligns with our enrollment growth funding request.*

Budget FTE Growth

+6.3% 197,387 → 209,803

+12,416 FTE
$78,871,414

— Curriculum
— Workforce CE
— Basic Skills

Total +16,422 FTE
$102,176,661

+8.2% 42,695 → 46,499

+3,534 FTE
$21,189,544

+3.5% 13,675 → 14,147

+472 FTE
$2,115,703

2025-26 Allotted   2026-27 Budget

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2024-25 FTE by College

What the data tell us:

- *Larger colleges drive volume.*

- Large urban colleges generate the largest raw enrollment totals.

- The top six colleges have enrollment equivalent to the smallest 38 colleges.

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What the data tell us:
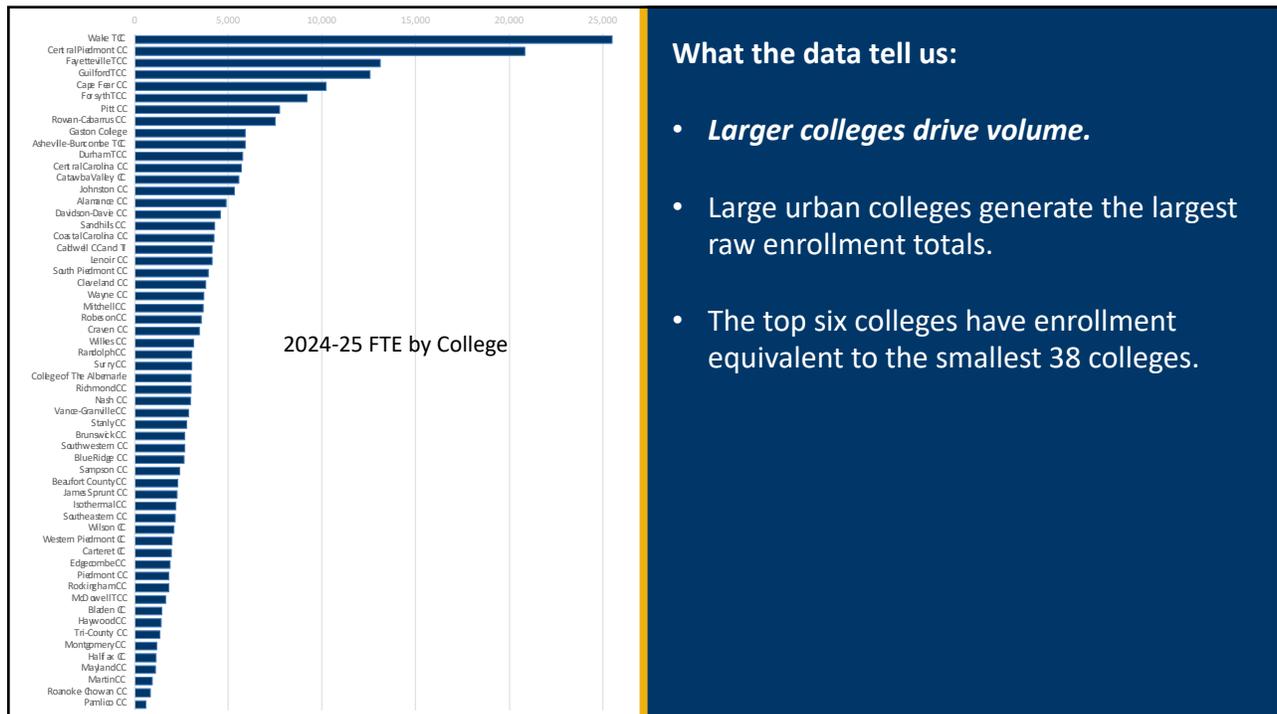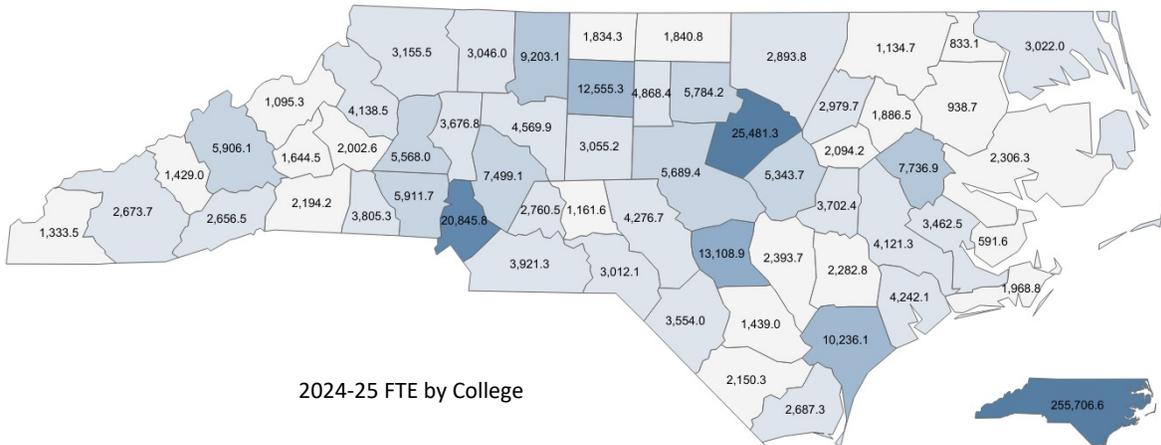- *Larger colleges drive volume.*
- Large urban colleges generate the largest raw enrollment totals.
- The top six colleges have enrollment equivalent to the smallest 38 colleges.

2024-25 FTE by College

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College Service Area Participation Ratio
2024-25 Ratio of College NC Student Headcount Ages 15-44 to Service Area Population Ages 15-44

What the data tell us:

- *Small colleges drive market penetration, as a ratio of students to local community.*

- Smaller, rural colleges reach the highest percentage of their local population.

- This demonstrates that the original vision of having a community college within 30 minutes of every North Carolinian translates into measurable geographic reach and local impact.

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College Service Area Participation Ratio
2024-25 Ratio of College NC Student Headcount Ages
15-44 to Service Area Population Ages 15-44

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05

How is enrollment aligned with Propel NC workforce sectors?

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2024-25 Student Enrollment Comparing Propel NC Categories
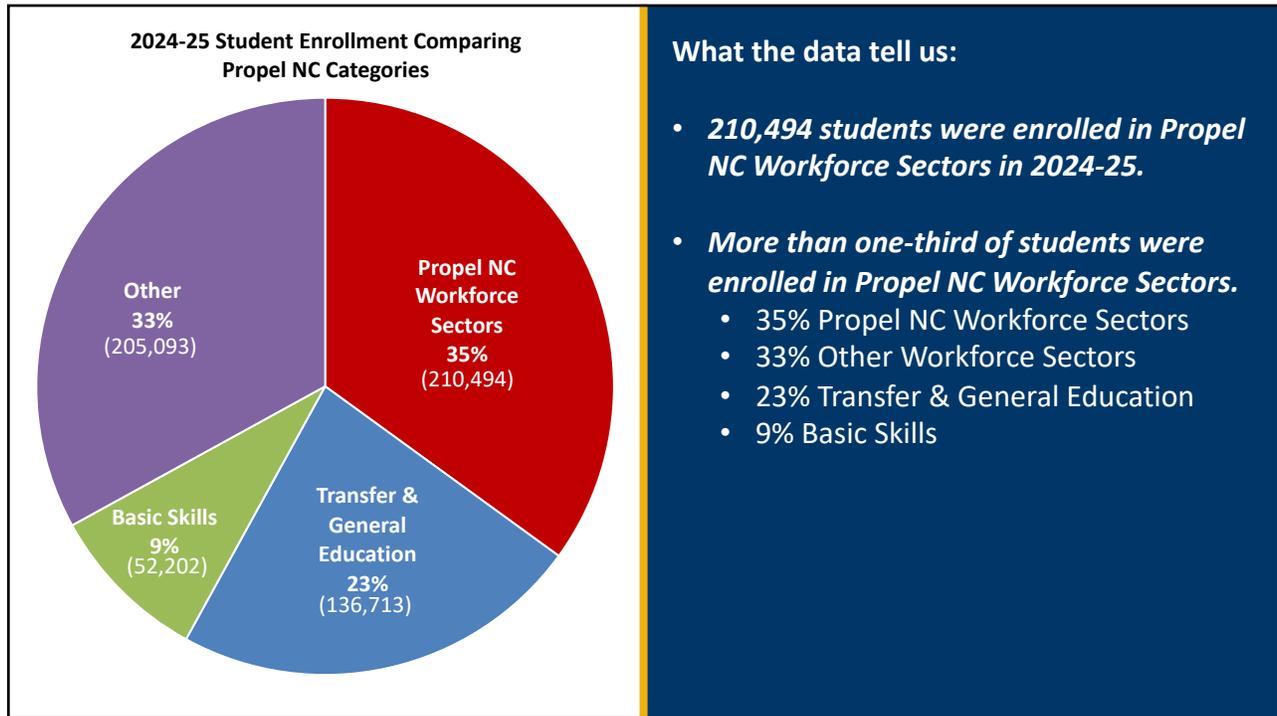
Pie chart:
- Propel NC Workforce Sectors 35% (210,494)
- Transfer & General Education 23% (136,713)
- Basic Skills 9% (52,202)
- Other 33% (205,093)

What the data tell us:

- *210,494 students were enrolled in Propel NC Workforce Sectors in 2024-25.*

- *More than one-third of students were enrolled in Propel NC Workforce Sectors.*
  - 35% Propel NC Workforce Sectors
  - 33% Other Workforce Sectors
  - 23% Transfer & General Education
  - 9% Basic Skills

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What the data tell us:
- *37,254 students completed credentials in Propel NC workforce sectors in 2024-25, representing a major share of the state's workforce pipeline.*

2024-25 Completers by Propel NC Workforce Sectors

Bar chart:
- Healthcare I: 5,476
- Engineering and Advanced Manufacturing: 2,039
- Trades and Transportation: 9,331
- Information Technology: 3,297
- Public Safety and First Responders: 9,225
- Healthcare II: 7,886

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Slide 27

What the data tell us:

- *Propel NC workforce sectors represent the core of North Carolina's high-demand, high-earning industries.*
- Median wages across these sectors ranges from $53,000-$64,000, representing middle-class career pathways.
- The majority of completers in these sectors come directly from community college programs, representing the most critical talent pipeline for employers in North Carolina.
- *Demand significantly exceeds supply, which is why we need to increase capacity in these sectors.*

Connecting Enrollment to Workforce Demand and Wages

(Approximate Completer Median Annual Earnings)

Legend:
- Healthcare I ($64,000)
- Engineering and Advanced Manufacturing ($60,000)
- Trades and Transportation ($53,000)
- Information Technology ($54,000)
- Public Safety and First Responders ($54,000)
- Healthcare II ($38,000)

	2024-25 Enrollment	2024-25 CC Completers	Average Annual CC Aligned Openings
Healthcare I	18,618	5,476	14,633
Engineering and Advanced Manufacturing	8,314	2,039	2,998
Trades and Transportation	48,937	9,331	71,477
Information Technology	16,618	3,297	5,377
Public Safety and First Responders	92,527	9,225	7,755
Healthcare II	25,480	7,886	30,526

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Slide 28

What the data tell us:

- According to the National Student Clearinghouse, community college curriculum undergraduate enrollment has increased 3% since 2019 nationally. During the same timeframe, North Carolina community college enrollment increased 12%.
- National four-year undergraduate enrollment has decreased 1% as North Carolina increased 8%.
- 49% of North Carolina curriculum undergraduates are enrolled at a community college compared to 37% nationally.

Fall 2019 to Fall 2025: Curriculum Undergraduate Student Count

Legend: NCCC, NC 4-Year, Nationwide CC, Nationwide 4-Year

Source: National Student Clearinghouse

Community College Share of Curriculum Undergraduates

Nationwide: Fa 19 — 64%/36%; Fa 25 — 63%/37%
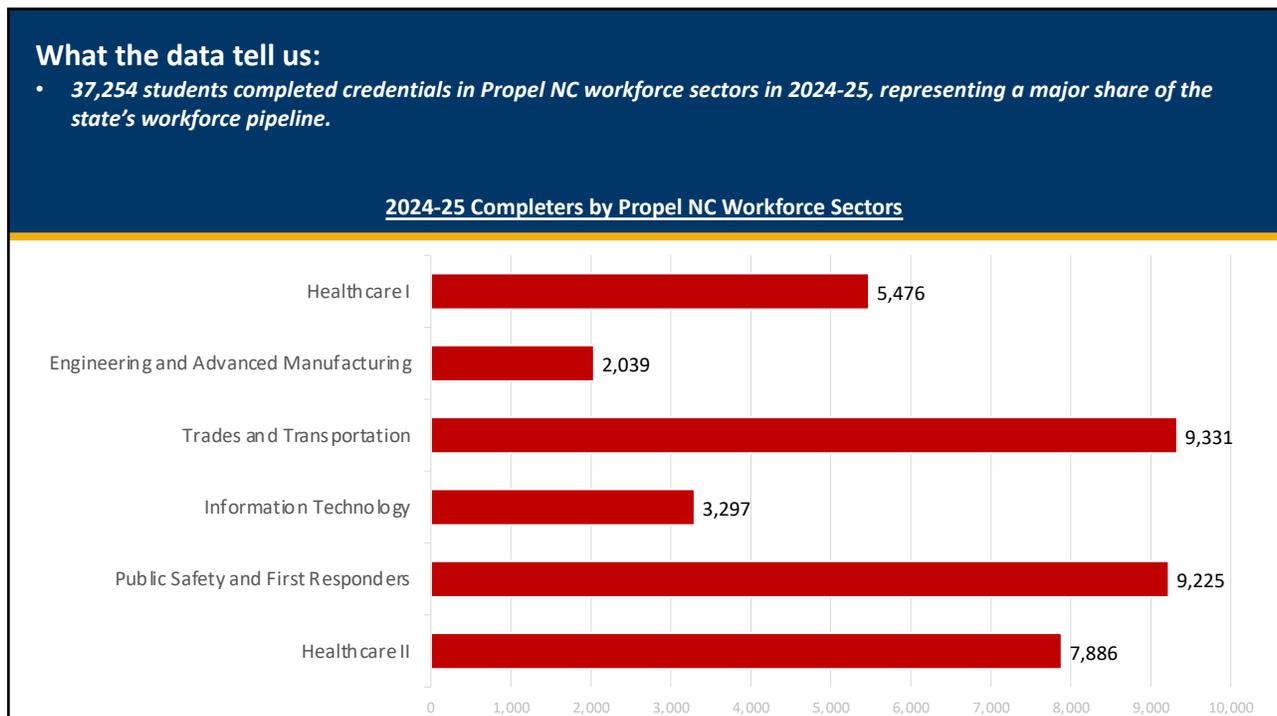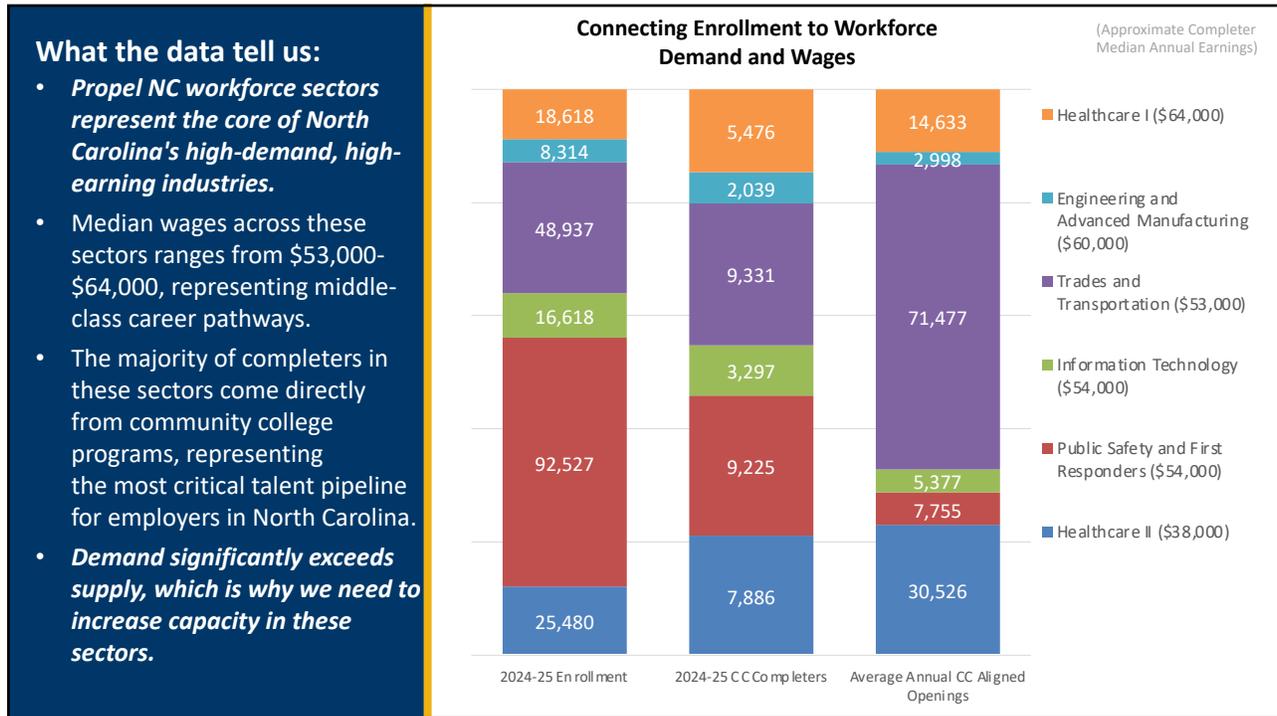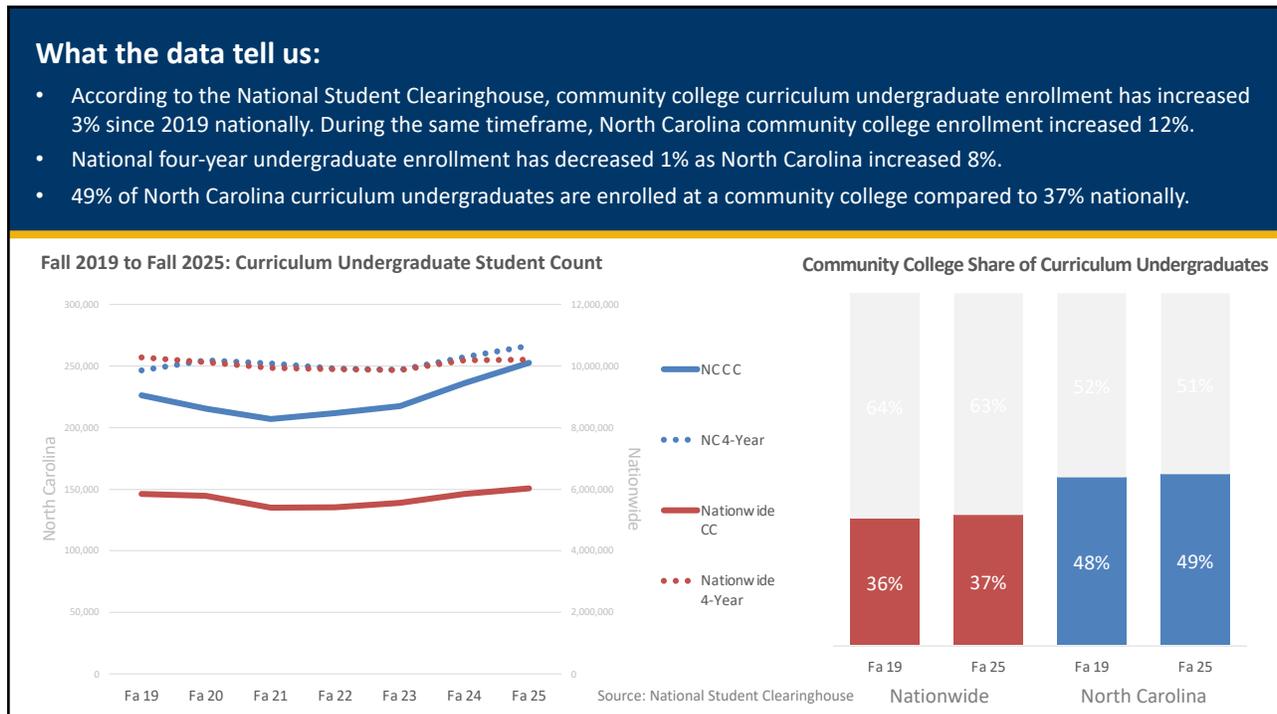North Carolina: Fa 19 — 52%/48%; Fa 25 — 51%/49%

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Opportunities to better serve with expanded capacity:

- Over 220,000 individuals 25-44 without a High School Diploma or Equivalent we are not serving.
- Over 840,000 individuals 25-44 with a High School Diploma or Equivalent we are not serving.

	North Carolinians 25-44 Years of Age	
	Without a High School Diploma or Equivalent	With High School Diploma or Equivalent but no Postsecondary Credential
Statewide (2024)	241,383	970,551
Served by North Carolina community colleges (2024-25)	19,423	126,423
Potential Students	**221,960**	**844,128**

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NC CC Closing: Why Does This Matter?

- Enrollment has fully rebounded and surpassed pre-pandemic levels.
- Growth is statewide – across large and small, urban and rural – suggesting the geographic model of NCCCS is functioning as intended to reach North Carolinians in every county.
- North Carolina is #1 in Workforce Development nationally and outpaces the nation in enrollment growth – the results of efforts being made across our colleges.
- More than one-third of students are enrolled in high-demand workforce sectors.
- Labor demand currently outpaces enrollment and completion for Propel NC sectors.
- Without funding for additional enrollment capacity, workforce shortages will persist.
- The NCCCS funding request aligns appropriations with demonstrated student demand and documented workforce need.

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