Instructional capacity in US higher education: Today and tomorrow

June 2026

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1 Executive summary

In 2020, the EY-Parthenon Education Practice published a report titled "*Quantifying the impact of excess capacity in higher education*" with support from Lumina Foundation that discussed the level and impact of instructional capacity in the US higher education system through FY19. This new report, "*Instructional capacity in US higher education: Today and tomorrow*," serves as an updated view of instructional capacity utilization through FY25[1] and provides a perspective on how overall utilization (and therefore available capacity) is expected to change over the next decade.

The findings in this report reflect current trends shaping US higher education. In recent years, total enrollments have declined due to a variety of factors, including shifting demographics, policy changes, and rising costs of attendance. Despite these trends in enrollment, institutions have continued to hire instructional staff and expand programming in a competitive effort to attract students. Together, these factors have contributed to a surplus of instructional capacity, which, if sustained over time, can exacerbate existing operational and financial challenges that many institutions in the US currently face.

This report is designed to contribute to ongoing state and national conversations regarding challenges and opportunities in higher education by providing a sector-wide, data-informed analytical framework for assessing instructional capacity and utilization. The potential action steps presented in this report are intended to catalyze informed dialogue, rather than prescribe solutions. Individual states and institutions are encouraged to adapt their actions taking into consideration distinct circumstances, data measurement practices and specific goals.

Findings

The EY-Parthenon Education Practice developed an instructional capacity utilization analysis that considers both full-time equivalent (FTE) enrollment and maximum instructional capacity. Our analysis estimates a persistent and widening gap between maximum instructional capacity and actual enrollment, assuming that historical trends in FTE enrollments and instructional hiring continue. Some key findings of the analysis include:

Enrollment declines of -3.2% were paired with an increase in the system maximum instructional capacity of 2.3% between FY15 and FY25

- This led to utilization decline, from 82% in FY15 to 78% in FY25

78% utilization implies available capacity of approximately 4.2 million seats

- EY-Parthenon estimates that FY25 instructional capacity (supply) was 18.9 million FTE enrollments versus actual enrollment (demand) of 14.8m FTE students

Total utilization could drop to 74% in FY35 if FTE enrollment and hiring trends continue

- Max instructional capacity is estimated to increase by 2.5 percentage points whereas student FTE enrollment is estimated to remain stagnant through FY35. As a result, utilization could fall from FY25 to FY35, implying an additional ~472,000 surplus FTE "seats" over the next decade

Instructional capacity utilization differs by institutional segment and geography; this variation highlights the need for tailored strategies at both institutional and state policy levels

- **Sector:** Public two-year colleges have experienced the steepest enrollment and capacity declines. Private four-year institutions exhibit lower utilization than public peers due to resource-intensive models (student to faculty ratios)
- **Selectivity:** Highly selective institutions operate at the lowest utilization levels due to lower student-to-faculty ratios, which are intentionally limited to bolster reputation; in contrast, less selective institutions may face greater financial and efficiency pressures and therefore operate with higher utilization levels
- **Institution type:** R1 and regional universities historically exceeded national utilization levels but have seen declines over time, while Historically Black Colleges and Universities (HBCUs), Tribal Colleges and Universities (TCUs), and liberal arts institutions have maintained relatively stable utilization, often slightly below national levels
- **State and regional:** No state operated above 90% utilization of higher education capacity in FY25. Utilization ranged from 61% to 90%. Some states are projected to see further declines, while others may experience modest gains through continued enrollment growth or staffing reductions

Managing instructional capacity and utilization

Institutions continue to face headwinds from shrinking traditional-age student populations, increasing demands on staff members and rapidly evolving workforce needs, all of which affect instructional capacity and utilization. Leaders at the institution and state policy levels could consider the following utilization improvement "levers" to guide dialogue and evaluate potential, context-specific responses. Their relevance will vary based on institutional mission, student population, financial position, labor and governance constraints, and state policy context.

1. **Grow enrollment and improve utilization outside of traditional segments:** Target adult learners, non-degree credential seekers, and "some college, no degree" populations; increase college-going rate of recent high school graduates; improve student retention and enrollment intensity through flexible offerings and student support
2. **Streamline existing program offerings:** Align faculty hiring with enrollment trends; consolidate underutilized programs or campuses
3. **Leverage shared services and partnerships:** Pursue administrative and academic collaborations to reduce costs and improve efficiency
4. **Consider structural changes:** Explore mergers or closures where necessary to improve utilization and financial sustainability

These strategies, along with detailed regional and segment-level analyses, are explored in more detail in this report.

2 Evolving higher education context

2.1 Introduction

The US higher education system continues to navigate profound change shaped by evolving demographics, policy shifts, economic forces and rapid technological advancement. Declining birth rates have raised concerns about a shrinking pool of traditional, college-bound domestic students in the coming decades. At the same time, shifts in federal policy such as stricter student visa requirements, student loan reforms and reduced research funding have created additional financial pressures. Additionally, as average cost of attendance reaches historic highs, skepticism about the return on investment of higher education is growing among students and families. Meanwhile, intensified competition for students is contributing to rising operational costs from the upkeep of expansive campuses, increased financial aid needs and challenges attracting a shrinking domestic and international student base.

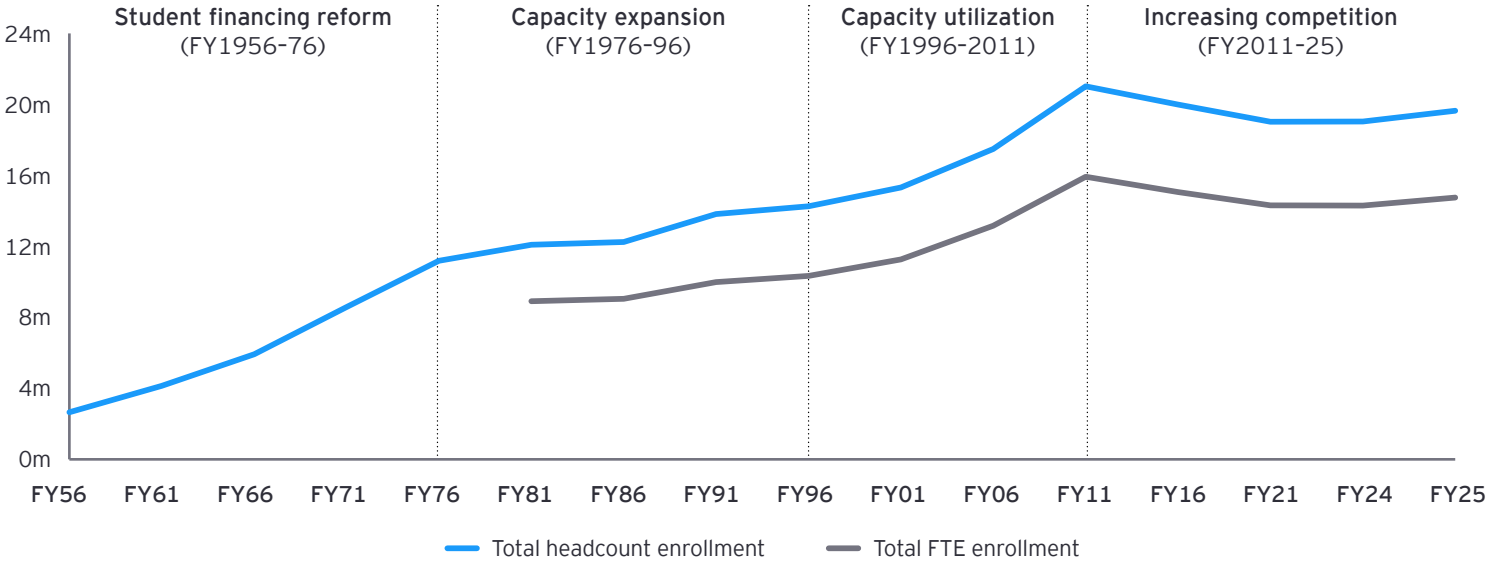
These converging pressures underscore the urgency of understanding instructional capacity utilization in higher education. This report analyzes utilized instructional capacity nationally, regionally and at the state level, providing both policymakers and institutions with insights into historical and potential future trends. This is an important backdrop against which states and institutions can consider their individual options to address surplus capacity.

[1] FY25 is the latest year of available final release data in The Integrated Postsecondary Education Data System (IPEDS) for enrollment and staff figures.

2.2 Historical context

From the 1950s through the early 2000s, the US higher education sector experienced consistent enrollment growth, myriad institution openings and the expansion of a teaching faculty base. As the American economy grew, demand for educated workers increased, and the system evolved to serve these needs. However, the Great Recession in 2008 disrupted this period of growth. As the US recovered from the Great Recession, growth turned into stagnation. Enrollments dipped, resulting in a period of increased competition, while costs continued to rise. Today, institutions continue to compete with one another on "value proposition" to students, which manifests itself in a variety of ways, including academic enhancements, flexible learning options, robust student and career services, and campus life.

Figure 1: Higher education total enrollment by headcount and FTE, *FY56–FY25*[2,3,4]



	FY56-FY76	FY76-FY96	FY96-FY11	FY11-FY25
Change in headcount enrollment	+8.5m	+3.1m	+6.8m	-1.4m
Change in FTE enrollment	–	+1.4m	+5.6m	+1.2m

[2] Data is representative of enrollments in US, Title IV, degree-granting institutions.

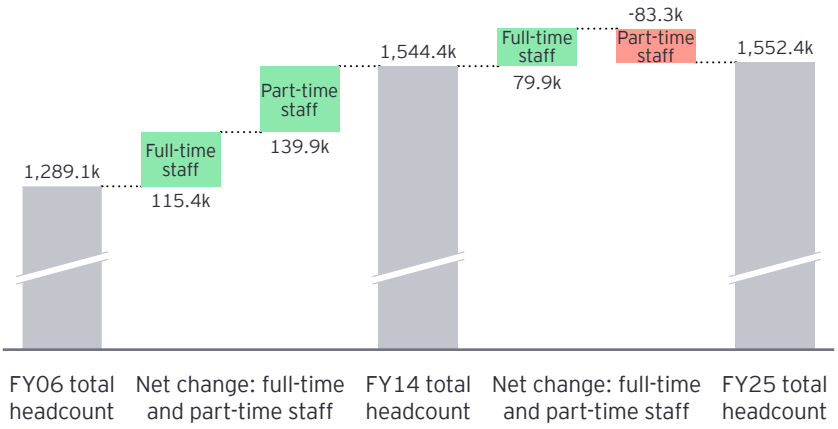
[3] FTE data is unavailable in IPEDS prior to FY81; calculated FTE change for the FY76–FY96 column reflects the FY81–FY96 change due to data availability.

[4] IPEDS

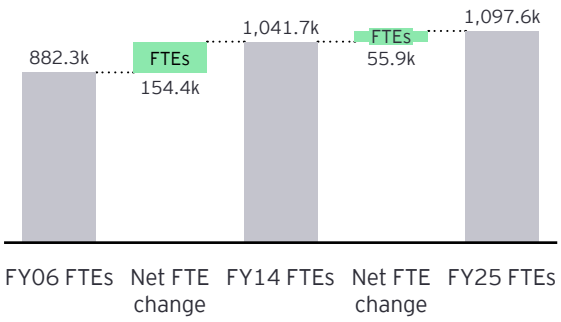
Common strategies for increasing the academic value proposition to students have included growing program portfolios, shrinking class sizes for greater personalization, and expanding research, all of which require additional instructional staff members. For the purposes of this analysis, "instructional staff" refers to instructional, research and public service staff, as designated by IPEDS.[5] The figure below depicts how instructional staff by headcount and by FTEs has increased by 20% and 24%, respectively, since FY06. From FY06 to FY14, a period of very high enrollment growth for the sector overall, instructional staff headcount increased by ~255k. Since FY14, instructional FTEs have continued to grow, with a 5% net increase in total instructional FTEs from FY14 to FY25.[6]

Figure 2: Trends in instructional staff headcount and FTEs, *FY06, FY14[7] and FY25[8]*

Growth and decline in instructional, research and public service staff headcount, *FY06, FY14 and FY25*



Growth in instructional, research and public service FTE staff count, *FY06, FY14 and FY25*



Changes in instructional staff from FY14 to FY25 also varied by sector. Public four-year and private not-for-profit four-year institutions expanded instructional staff, with FTE counts rising by 15% and 12%, respectively. This was particularly evident among R1 institutions, which grew instructional FTEs by in instructional FTEs. This trend is likely due to the sector experiencing large drops in enrollment from FY14 to FY25 and adjusting instructional staffing accordingly.

[5] This variable was chosen to A) capture all staff operating in any instructional capacity (e.g., faculty members who primarily conduct research, but also teach) and B) analyze data prior to FY13, as instructional, research and public service staff were reported together prior to disaggregation beginning in FY13.

[6] According to IPEDS, staff FTE is calculated by adding full-time staff members and part-time FTE equivalents, which are derived by multiplying part-time headcount by 1/3.

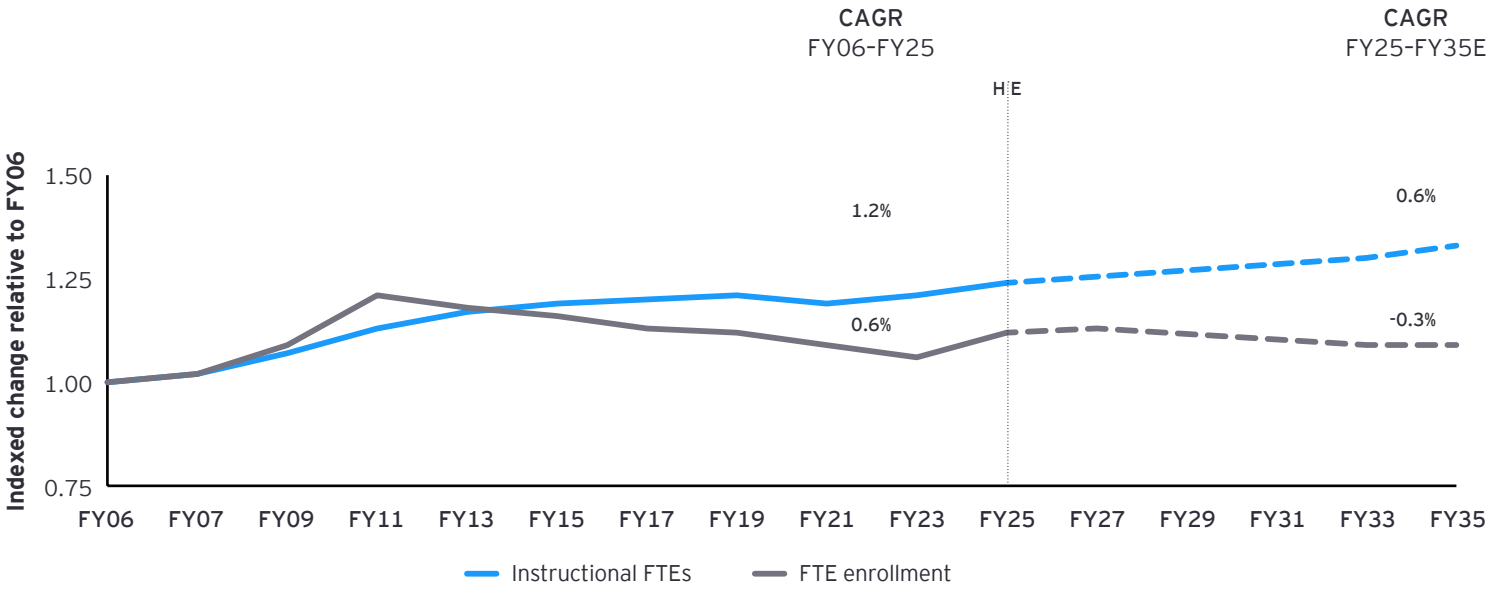
[7] IPEDS and EY-Parthenon analysis

3 Rising available capacity in the US

3.1 Capacity and utilization analysis methodology

Many institutions have continued to build instructional capacity by adding programs and hiring additional faculty even as enrollments stagnated or declined. New academic programs are often added in response to student and employer demand, but they are typically additions instead of replacements, resulting in larger program portfolios. This growth in instructional staff relative to growth in enrollments over time is illustrated below.

Figure 3: Instructional FTEs and student FTE enrollment over time, *FY06–FY35E indexed to FY06*[8,9]



This paper builds off the prior EY-Parthenon and Lumina Foundation report, "Quantifying the impact of excess capacity in higher education"[10] released in October 2020 that provided a view of utilized capacity at-scale through a standardized analysis across US institutions through FY19. In this updated analysis, we continue to evaluate capacity and utilization though the lens of **instructional capacity** and follow the previously established methodology through FY25, the latest year of available data in IPEDS as of March 2026. This instructional capacity calculation is designed to measure how many students an institution could theoretically serve if it were operating at its most efficient level as determined by its maximum historical student-to-faculty ratio.

[8] Represents total fall full-time-equivalent student enrollment and total instructional, research, and public service FTEs.

[9] IPEDS and EY-Parthenon analysis

[10] "Quantifying the impact of excess capacity in higher education," EY-Parthenon and Lumina Foundation, 2020.

Figure 4: Formula for calculating available capacity

(Size of the instructional workforce in a given year **x** Maximum student-to-faculty ratio over the full time period) **-** Current FTE enrollment **=** **Available capacity**

1. **Maximum instructional capacity:** This figure is calculated by multiplying an institution's current instructional workforce[11] by its maximum previously demonstrated student-to-faculty[12] ratio.
   - **Current instructional workforce:** The number of instructional, research and public service FTEs in a given year
   - **Maximum student-to-faculty ratio:** Maximum student-to-faculty ratio from FY06 to FY25
2. **Enrollment:** After establishing the maximum instructional capacity for a given institution, this figure is compared to the **number of student FTEs that are enrolled in the institution**.
3. **Available capacity:** The difference between maximum instructional capacity and enrollment provides an estimate of available surplus expressed in terms of additional "seats" or enrolled student FTEs. This figure can also be expressed in terms of utilization.

In addition to assessing how capacity and utilization have trended historically, it is important to understand the implications of continued decreases in utilization and therefore increases in available capacity. To understand how the sector is expected to evolve, The EY-Parthenon Education Practice created a forward-looking analysis to understand how capacity and utilization could change over the next decade through FY35, assuming that demographic trends and trends in instructional FTE hiring continue. EY-Parthenon used the following methodological assumptions to assess how capacity could evolve if existing trends hold:

- **Maximum student to faculty ratio:** Assume the continuation of the historical maximum from the original evaluation period
- **Instructional FTEs:** Grow or shrink the number of FTEs based on institution-level trends over the last five years
- **Student FTE enrollment:** Estimate higher education FTE enrollment by state based on age group segmentation and census projections, adjusting for state and macro factors

For a more detailed description of methodology, please refer to Appendix A.

[11] For the purposes of this analysis, "Instructional FTEs" refer to institution staff captured in the IPEDS "instructional, research, and public service FTE" variable in order to most reliably compare data for staff that act in any instructional capacity across institutions.

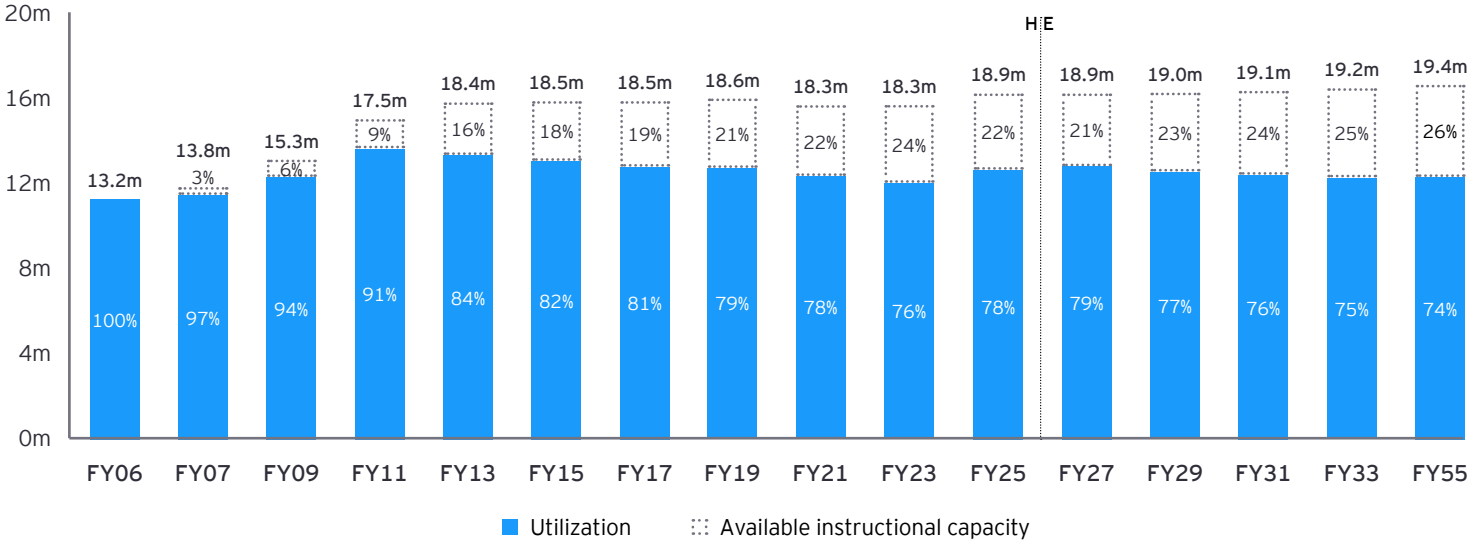
[12] For the purposes of this analysis, student-to-faculty ratio refers to the ratio of total FTE students enrolled in an institution relative to the number of instructional, research and public service FTEs at that institution. This variable is derived from IPEDS and calculated by EY-Parthenon.

3.2 National results

The EY-Parthenon capacity and utilization analysis yields the following results in the longitudinal analysis:

- Over the 10-year period of FY15 to FY25, the total higher education system capacity remained relatively stable, but utilization dropped from 82% in FY15 to 78% in FY25
- In FY25, the sector operated at 78% utilization with an estimated available capacity of approximately 4.2m FTE seats. Utilization is expected to drop by 4 percentage points to 74% in FY35 if trends continue
- In FY35, maximum capacity is estimated to be 19.4m student FTE seats and FTE enrollment is expected to be 14.4m; therefore, future available capacity would be 5.1m FTE seats or 26% if current trends continue

Figure 5: Capacity and utilization in the US higher education system, *FY06–FY35E*[13,14]



[13] Since FY06 is the base year, utilization appears as 100%. This is because, with only a single year of data to compare, each institution's maximum student-to-faculty ratio is set using FY06 alone. As a result, all institutions are depicted as operating at full capacity in the initial year.

[14] IPEDS and EY-Parthenon analysis

3.3 Capacity and utilization by higher education segment

Given different operating dynamics for different types of institutions, it is important to assess capacity utilization by different sub-segments. Our analysis considers the following segmentations: institution sector, institution selectivity and selected institution types.

Institution segment

This report focuses on (1) public two-year, (2) public four-year, and (3) private, not-for-profit four-year institutions. The combined enrollment of these sectors accounts for 94% of US higher education enrollments. The remaining sectors, accounting for approximately 6% of total enrollment, are private, not-for-profit two-year institutions and for-profit institutions.

Figure 6: Utilization drivers by sector, *FY15–FY25 and FY25–FY35E*[15]

	CAGR FY15–25		CAGR FY25–35				
Sector	FTE enrollment	Instructional FTEs	FTE enrollment	Instructional FTEs	FY15 utilization	FY25 utilization	FY35 utilization
Public four-year	0.3%	1.3%	-0.3%	1.0%	87%	80%	72% ↙
Public two-year	-1.4%	-1.2%	-0.2%	-0.9%	82%	78%	83% ↗
Private, not-for-profit four-year	0.7%	1.0%	-0.2%	0.8%	79%	77%	72% ↙

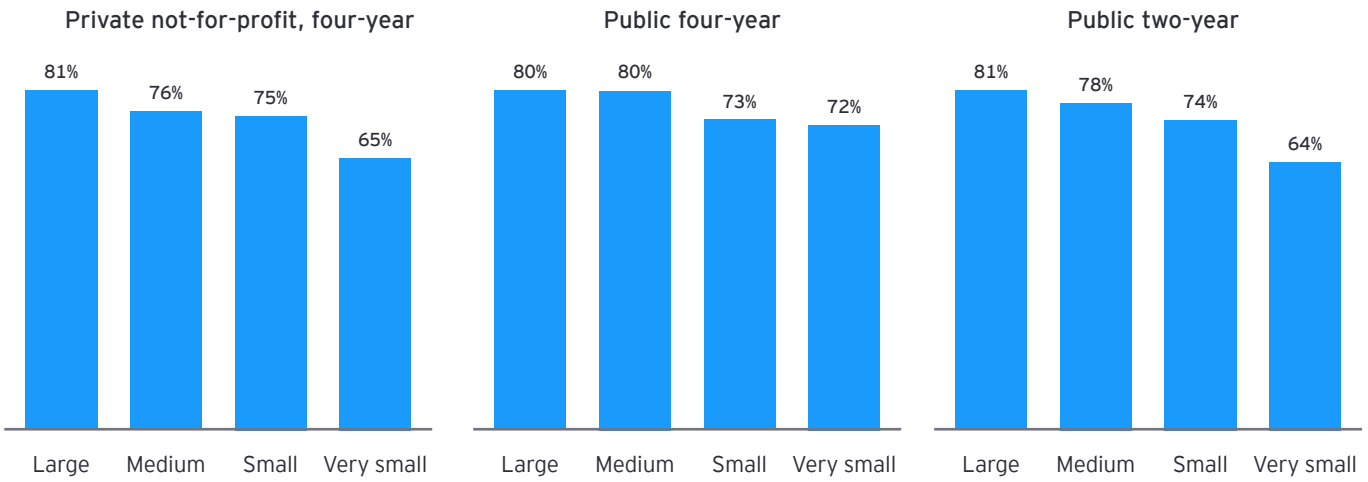
In FY25, public four-year institutions had the highest utilization levels across all sectors. However, overall utilization has declined since FY15, with public four-year institutions down seven percentage points in FY25. Looking ahead, public institutions in the US are expected to see relatively flat enrollment over the next decade. If instructional headcount continues to rise, utilization will likely fall further.

Public two-year institutions have experienced the steepest enrollment declines since FY15, reducing utilization. Enrollment in public two-year institutions is expected to grow modestly during the next decade and paired with decreasing levels of instructional capacity, potentially due to a shift toward adjunct faculty within community colleges, utilization could increase over time.

Lastly, private, not-for-profit four-year institutions had lower utilization levels than public peers. These utilization levels may keep falling if growth in instructional staff continues to outpace enrollment.

[15] Ibid.

Figure 7: Utilization by sector and size, *FY25*[16,17]



Across sectors, larger institutions tend to have higher utilization levels. Notably, the largest institutions – those with 10k+ FTEs enrolled – all operated at a similar utilization levels of 80%–81% in FY25. Similarly, small institutions operated at 65%–72% utilization. Medium and very small sectors showed slightly more variation but followed similar trends relative to their counterparts across sectors.

Note: *The following sub-segment trends are expressed in terms of historical figures up to FY25. Future-facing analyses were performed at the state and sector levels based on data availability.*

Institution selectivity

EY-Parthenon assessed Institutions were assessed by selectivity level according to the following categorizations:

- Highly selective: Fewer than 25% of applicants admitted
- Selective: 26%–50% of applicants admitted
- Less selective: 51%–75% of applicants admitted
- Non-selective: More than 75% of applicants admitted

Historically, utilization across all selectivity levels has mirrored national trends and declined over time. Upon assessment, no substantial differences in utilization were found between institutions of different selectivity bands. In FY25, highly selective institutions showed the lowest levels of utilization. This trend may be partially attributed to differing levels of resource availability at highly selective institutions that allow for lower student-to-faculty ratios over time and more instructional and research FTEs available to enhance programs. Institutions with higher admissions rates may face greater competition for students and operating constraints, driving higher utilization and efficiency. For additional details, please refer to Appendix B.

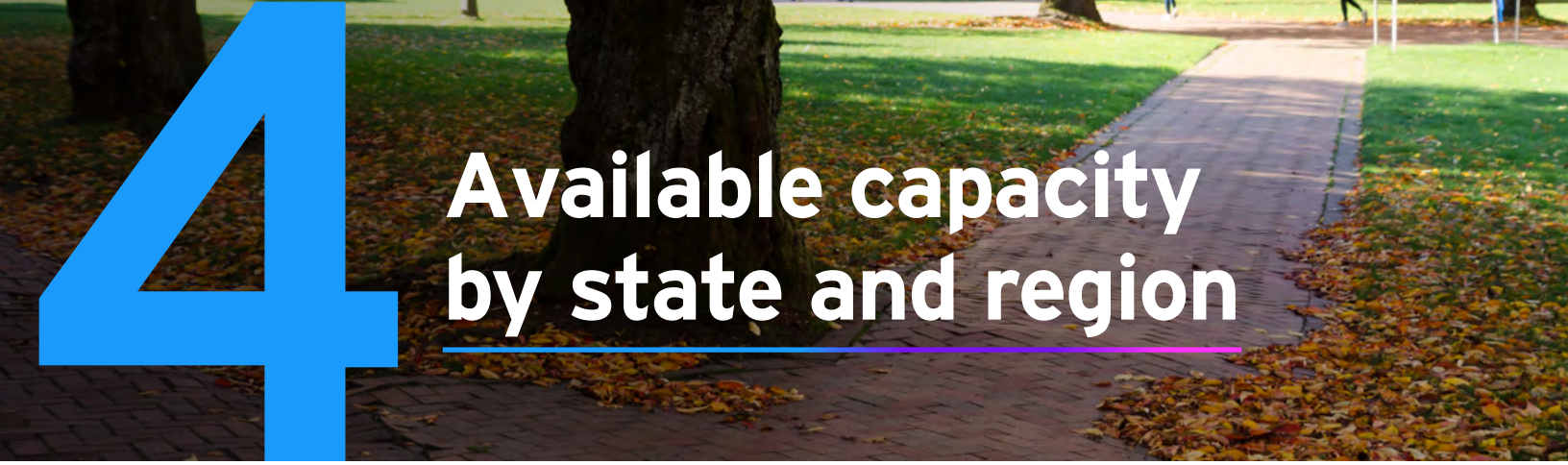
Select institution types

Utilization for several key institution types of interest was assessed for the following groups: R1 institutions, HBCUs/TCUs, liberal arts colleges and regional institutions.[18] R1 and regional institutions have historically exceeded national utilization of 84%, 80%, and 78% in FY15, FY20, and FY25, respectively. However, both segments have experienced declining utilization over time. Conversely, specialized institutions such as HBCUs, TCUs, and liberal arts institutions maintained consistent levels of utilization, tending to slightly lag national figures. This may be in part due to intentional levels of additional instructional resources. On the whole, no significant differences in utilizations were found across institution types. For additional details, please refer to Appendix B.

[16] Ibid.

[17] Large institutions are defined as having more than 10,000 FTEs, medium as having 3,000–9,999 FTEs, small as having 1,000–2,999 FTEs and very small as having fewer than 1,000 FTEs.

[18] HBCUs refer to Historically Black Colleges and Universities; TCUs refer to Tribal Colleges and Universities.



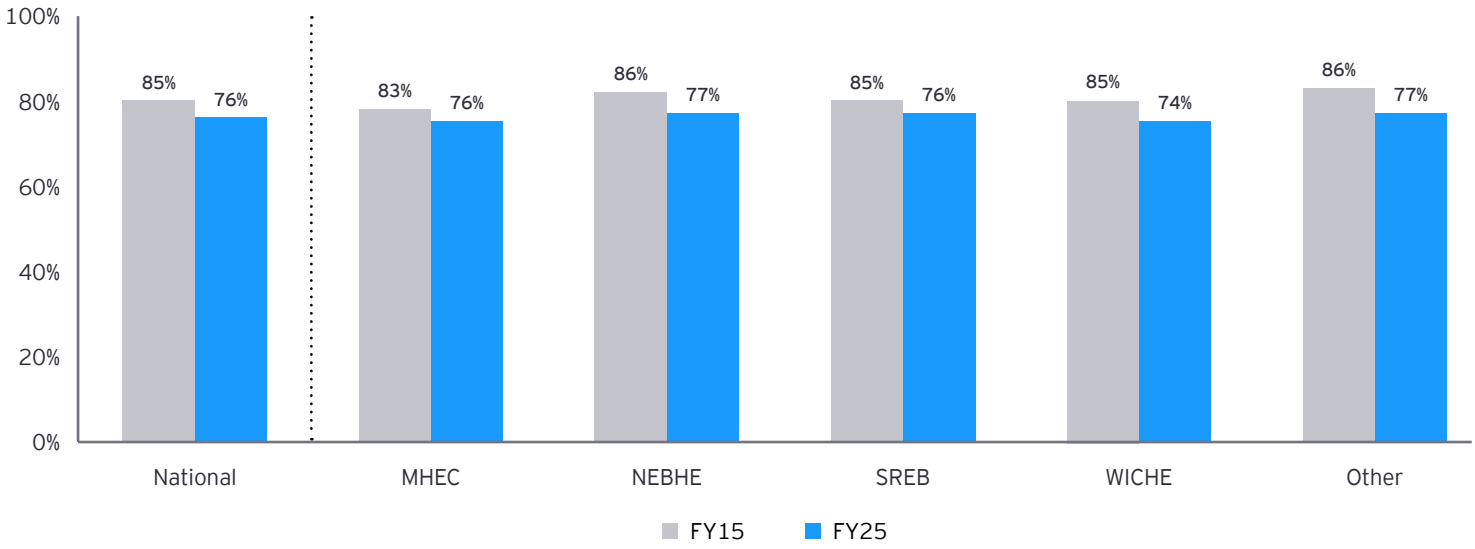
4 Available capacity by state and region

Assessing capacity and utilization at the regional and state levels is useful to understand the nuances that may be masked in the aggregate, national results. This section will provide regional and state-level segmentation. States are grouped into regions based on their higher education regional compact membership. A list of states by regional compact can be found in Appendix C. Additional detailed state data can be found in Appendix B.

4.1 Summary by region

Across all regions, aggregate utilization has decreased since FY15. In FY25, states in the Midwestern Higher Education Compact (MHEC) and the Western Interstate Commission for Higher Education (WICHE) have slightly lower utilization relative to the nation overall and other regions. Conversely, states that are part of the Southern Regional Education Board (SREB) and the New England Board of Higher Education (NEBHE) have historically exceeded national median utilization.

Figure 8: Aggregate utilization levels by regional education compact, *FY15 and FY25*[19,20,21]



Looking ahead, all regions are expected to see declining utilization though FY35. All regions are expected to face enrollment pressure from FY25–FY35, but the magnitude varies meaningfully; MHEC states face the most pronounced declines (six percentage points), NEBHE and SREB states are expected to experience moderate contraction, and WICHE states show relatively greater resilience.

[19] 'Other' category is inclusive of states that are not members of any of the listed regional compacts. This includes New Jersey, New York, Pennsylvania and Washington D.C.

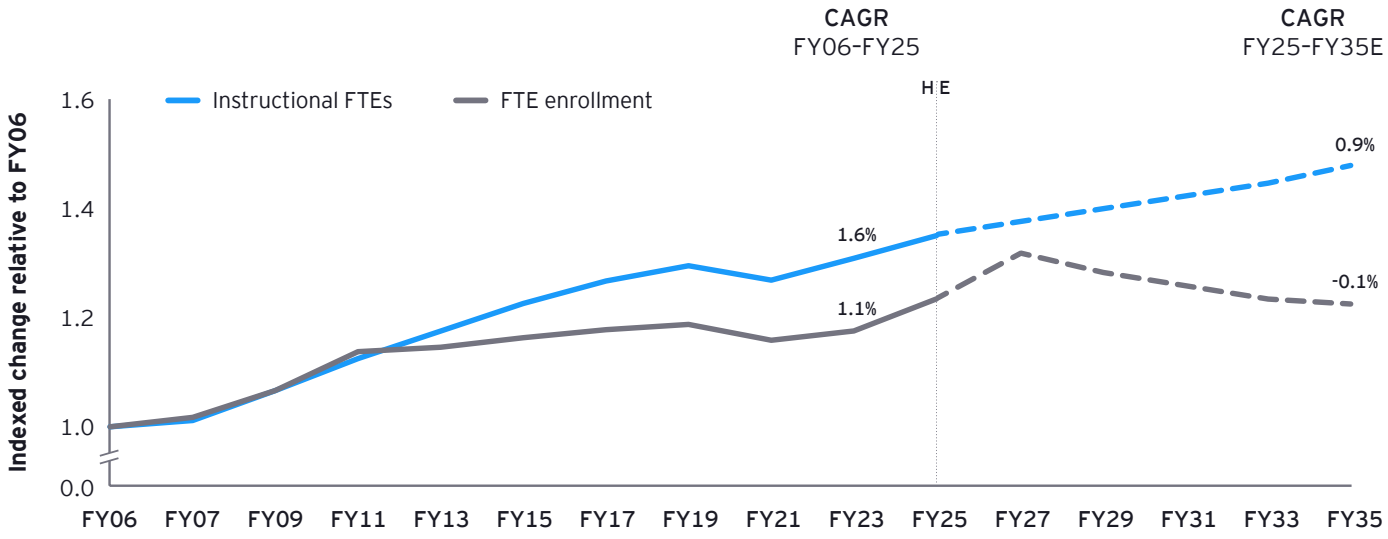
[20] For each compact group, aggregate utilization is calculated as the ratio of total FTE enrollment to total maximum instructional capacity across all member states.

[21] IPEDS and EY-Parthenon analysis

Northeast — New England Board of Higher Education (NEBHE)

This section includes data for states that are part of the NEBHE regional compact. This group includes Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island and Vermont.

Figure 9: Change in FTE enrollment[22] and instructional FTEs[23] in NEBHE states, *FY06–FY35F indexed to FY06*[24]



	FY06	FY07	FY09	FY11	FY13	FY15	FY17	FY19	FY21	FY23	FY25	FY27	FY29	FY31	FY33	FY35
FTE enrollment	693k	705k	740k	789k	795k	807k	817k	824k	804k	816k	857k	915k	890k	871k	855k	849k
Instructional FTEs	60k	61k	64k	67k	70k	73k	76k	78k	76k	78k	81k	82k	83k	85k	87k	89k

Across NEBHE states, growth in instructional FTEs has outpaced enrollment growth over the last decade. This trend is expected to persist, driving further surplus instructional capacity. All NEBHE states except for Vermont have increased instructional FTEs since FY06, though at varying rates. Connecticut, Rhode Island, and New Hampshire show the largest historical increases in instructional FTEs. FTE enrollments for New Hampshire are expected to increase from FY25 to FY35, although to a lesser degree than instructional FTEs; therefore, utilization is estimated to decline. Rhode Island and Connecticut are expected to see decreased enrollment and increased instructional FTEs from FY25 to FY35 and are expected to have decreased utilization as a result.

Notably, New Hampshire has increased its instructional FTEs by 68% from FY06 to FY25, largely in response to enrollment increases and educational demand. Over the same period, student FTE enrollment increased nearly 3X, from ~56k in FY06 to ~154k in FY25. Online expansion, especially through Southern New Hampshire University's transformation as a national leader in online education, allowed New Hampshire to attract out-of-state students, offsetting local demographic declines.[25] Conversely, Vermont and Maine are estimated to see decreases in instructional FTEs from FY25 to FY35, assuming historical hiring trends persist. FTE enrollment is expected to remain relatively stable over this period for both states, resulting in utilization gains through FY35.

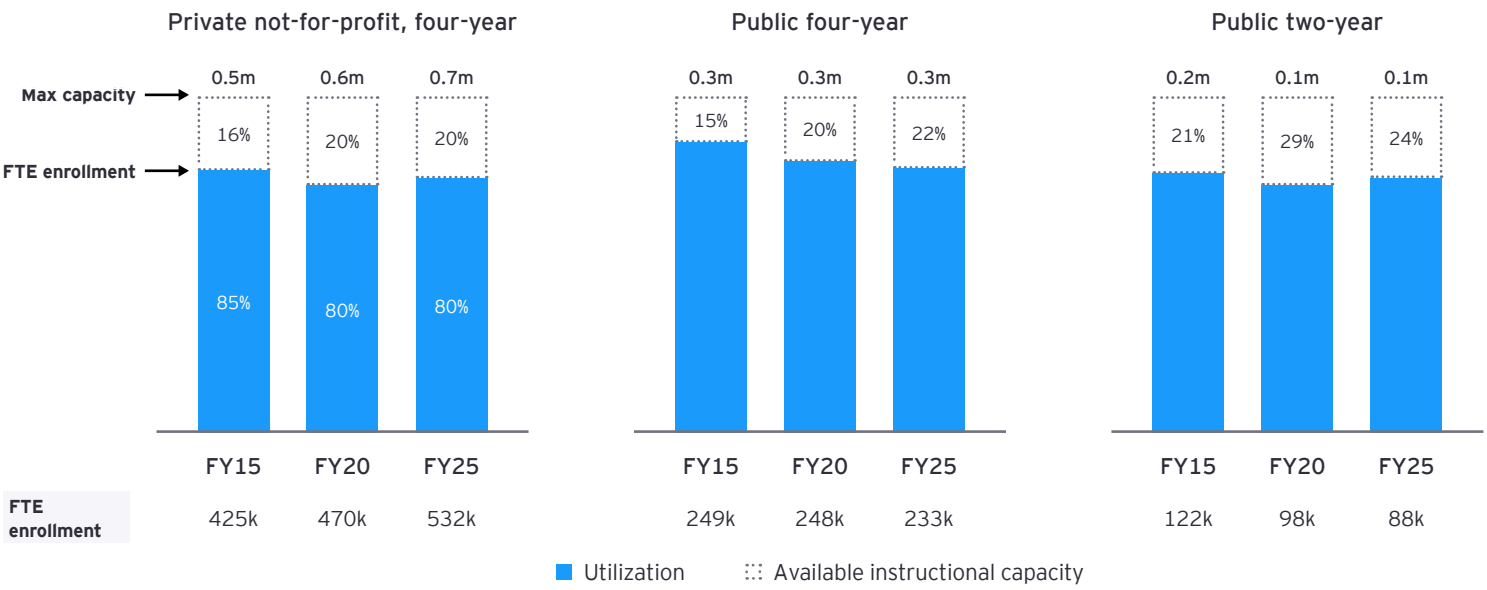
[22] Representative of total fall enrollment (FTEs)

[23] Includes Instructional, Research and Public Service FTEs

[24] IPEDS and EY-Parthenon analysis

[25] Lederman, Doug, "How marketing helped Southern New Hampshire University make it big online," Inside Higher Ed, 8 October 2019

Figure 10: Available instructional capacity and utilization by sector in NEBHE states, *selected years*[26]



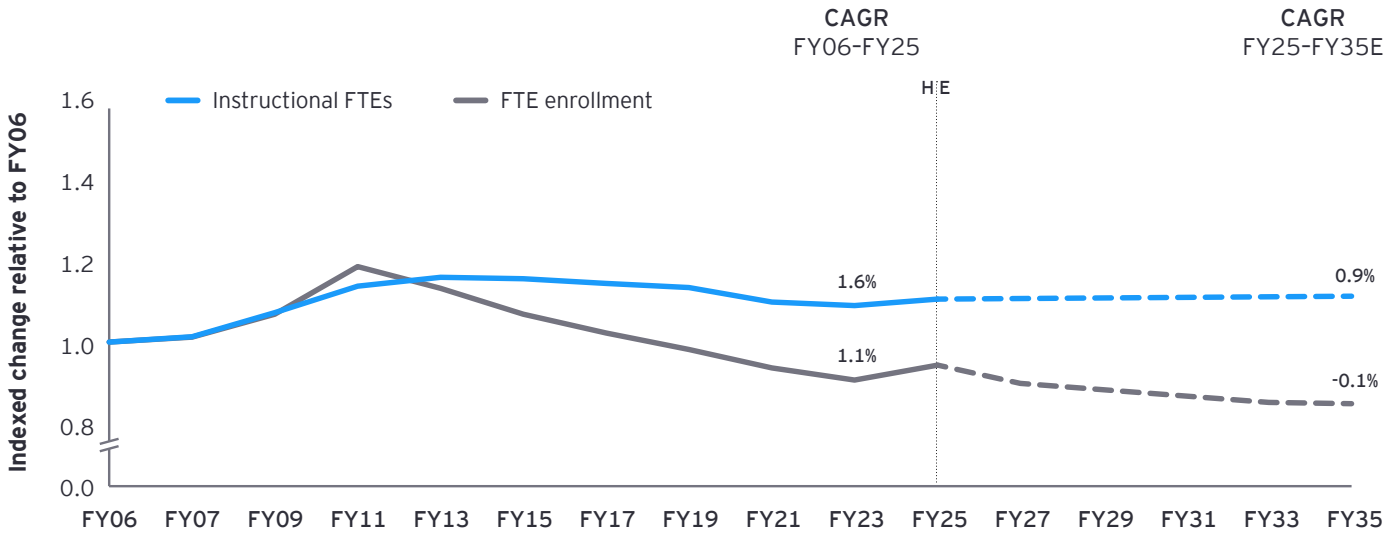
Utilization for NEBHE member states has declined across all sectors from FY15 to FY25. Public four-year and two-year institutions witnessed a decrease in their FTE enrollments over this period, driving additional available instructional capacity. In contrast, private not-for-profit, four-year institutions have experienced a significant increase in FTE enrollments, from ~425k to ~532k from FY15 to FY25. However, a sharp increase in instructional FTE offset utilization improvements that would have been afforded by enrollment gains. Thus, overall utilization decreased.

[26] IPEDS and EY-Parthenon analysis

Midwest — Midwestern Higher Education Compact (MHEC)

This section includes data for states that are part of the MHEC. This group includes 12 member states: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

Figure 11: Change in FTE enrollment and instructional FTEs in MHEC states, *FY06-FY35F indexed to FY06*[27]



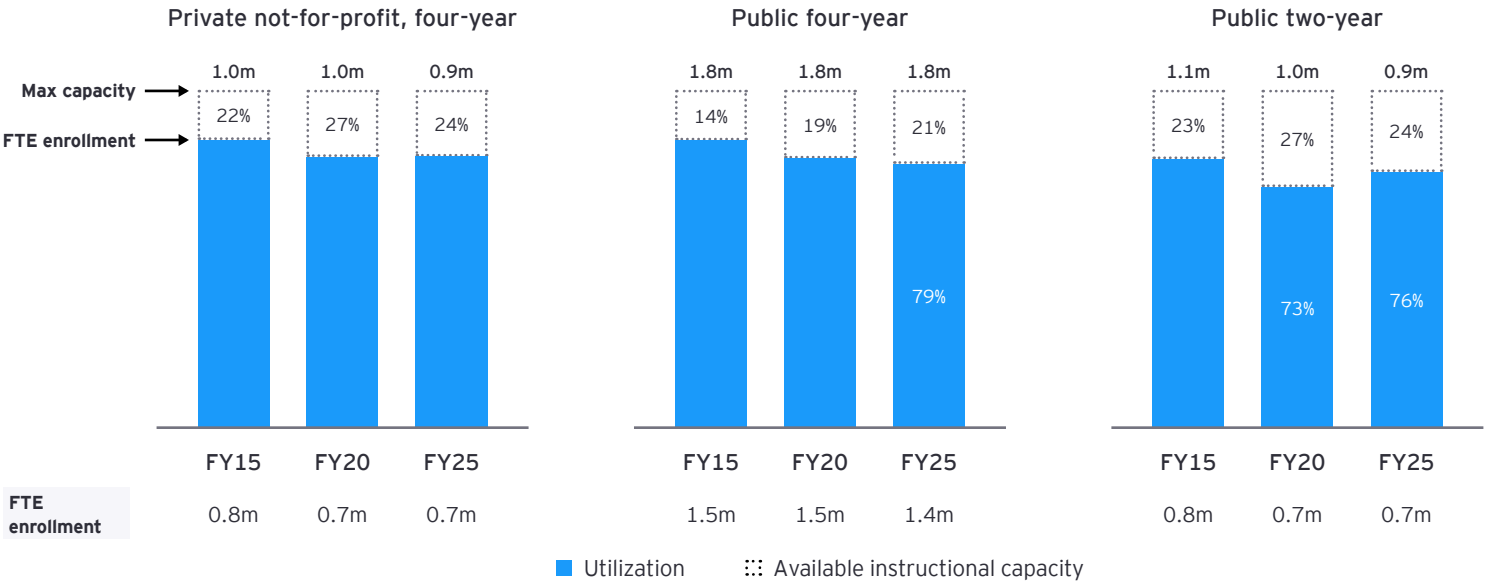
	FY06	FY07	FY09	FY11	FY13	FY15	FY17	FY19	FY21	FY23	FY25	FY27	FY29	FY31	FY33	FY35
FTE enrollment	3.2m	3.2m	3.4m	3.8m	3.6m	3.4m	3.2m	3.1m	2.9m	2.9m	3.0m	2.8m	2.8m	2.7m	2.7m	2.7m
Instructional FTEs	205k	208k	221k	235k	239k	239k	236k	234k	226k	224k	228k	227k	227k	227k	228k	229k

Across MHEC states, growth in instructional FTEs has outpaced enrollment growth over the last decade. This trend is expected to continue in future years, which could potentially further decrease utilization rates.

All MHEC states except for Missouri have grown instructional FTEs since FY06, though the speed and extent of growth have varied. States that have added the most instructional FTEs over FY06 to FY25 include Indiana, Illinois and Minnesota. Over this timeframe, Illinois FTE enrollments declined, and Indiana's growth in instructional FTEs exceeded growth in FTE enrollments, leading to a drop in the states' utilization. In Minnesota, growth in instructional FTEs has outpaced modest enrollment growth, resulting in declining utilization.

[27] Ibid.

Figure 12: Available instructional capacity and utilization by sector in MHEC states, *selected years*[28]



Despite decreases in FTE enrollments across all sectors, utilization for public and private, not-for-profit four-year institutions in MHEC member states decreased from FY15 to FY25. Utilization in FY25 was lowest among public two-year and private, not-for-profit four-year institutions. This could be attributed to public two-year institutions' greater reliance on part-time and adjunct faculty compared to four-year institutions. An adjunct-heavy model may lead to more instructors teaching fewer courses each, inflating instructional FTE relative to FTE enrollments.[29]

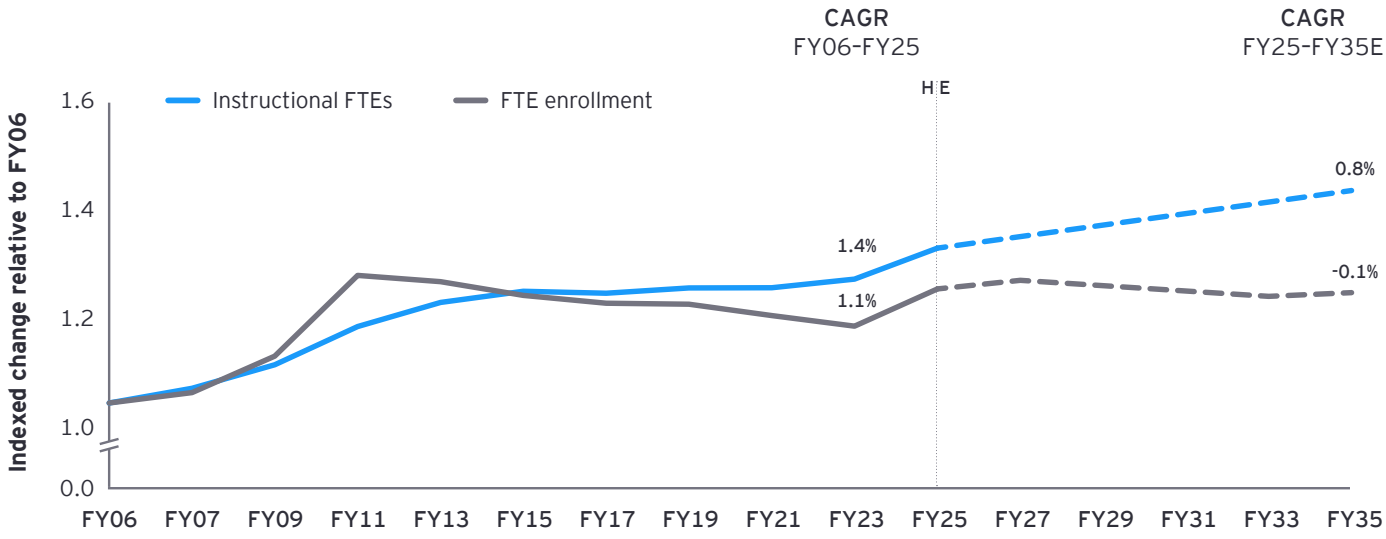
[28] IPEDS and EY-Parthenon analysis

[29] "Background Facts on Contingent Faculty Positions," American Association of University Professors website.

South – Southern Regional Education Board (SREB)

This section includes data for states that are part of the SREB regional compact. This group includes Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia.

Figure 13: Change in FTE enrollment and instructional FTEs in SREB states, *FY06–FY35F indexed to FY06*[30]



	FY06	FY07	FY09	FY11	FY13	FY15	FY17	FY19	FY21	FY23	FY25	FY27	FY29	FY31	FY33	FY35
FTE enrollment	4.2m	4.3m	4.6m	5.3m	5.3m	5.2m	5.1m	5.1m	5.0m	4.9m	5.2m	5.3m	5.2m	5.2m	5.2m	5.2m
Instructional FTEs	284k	293k	306k	328k	341k	348k	347k	350k	350k	355k	372k	377k	383k	389k	397k	405k

Across SREB states, growth in instructional FTEs surpassed enrollment growth over the last decade. FTE enrollment increased by 1% from FY15 to FY25. Over the same period, instructional FTEs increased by 7%. Enrollment is expected to stabilize in future years, but if staff growth continues, the gap could widen, increasing surplus capacity. Despite projected enrollment declines from demographic shifts, SREB states are expanding workforce programs, dual enrollment and online offerings – requiring more instructional staff. If these efforts continue to be successful and drive additional enrollment, they may serve as a means of managing instructional capacity and maintaining or increasing utilization.

[30] IPEDS and EY-Parthenon analysis

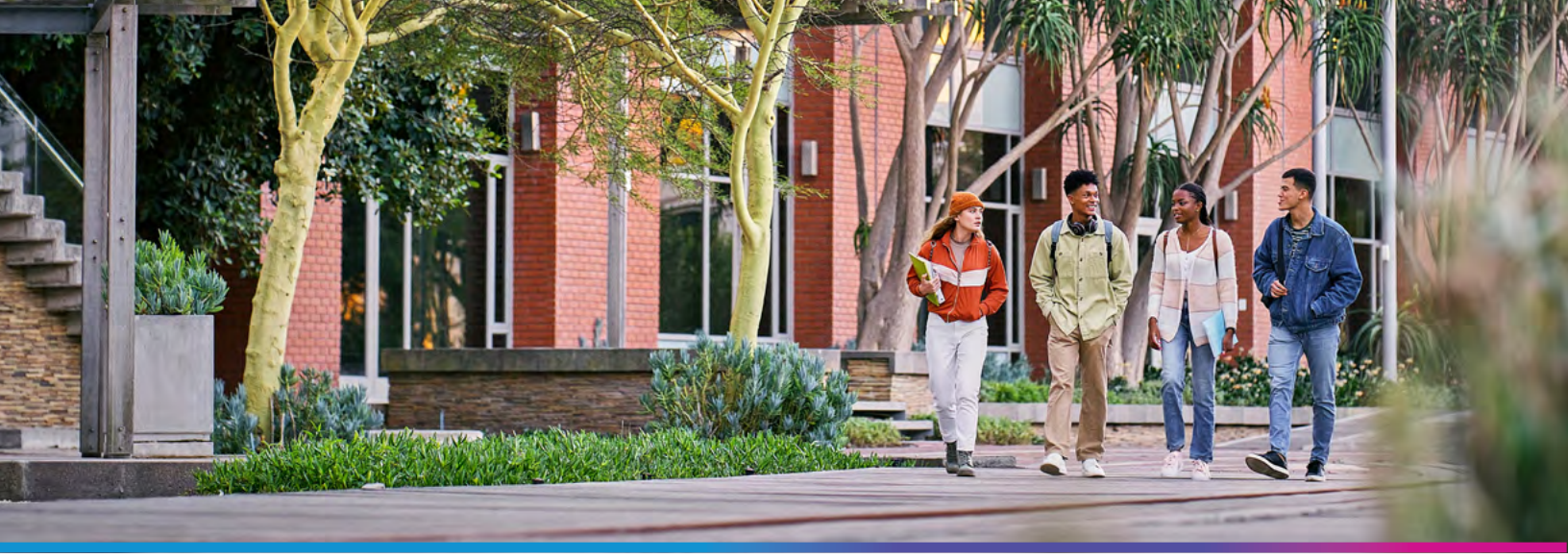
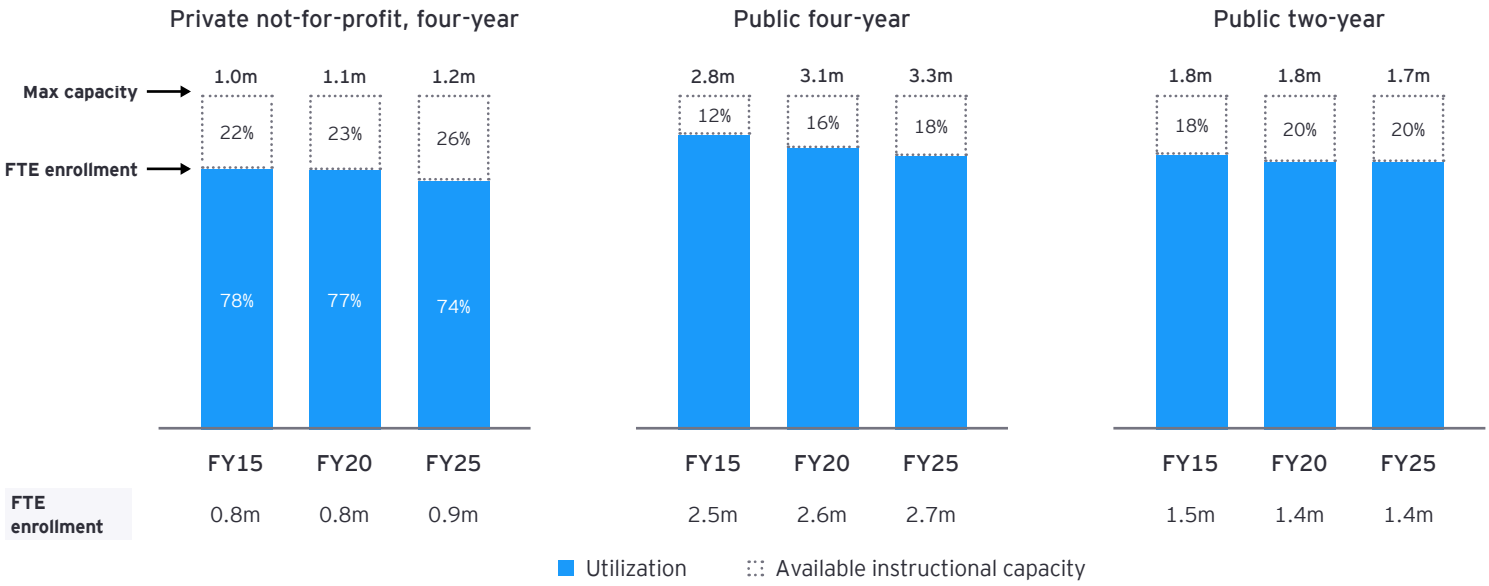


Figure 14: Available instructional capacity and utilization by sector in SREB states, *selected years*[31]



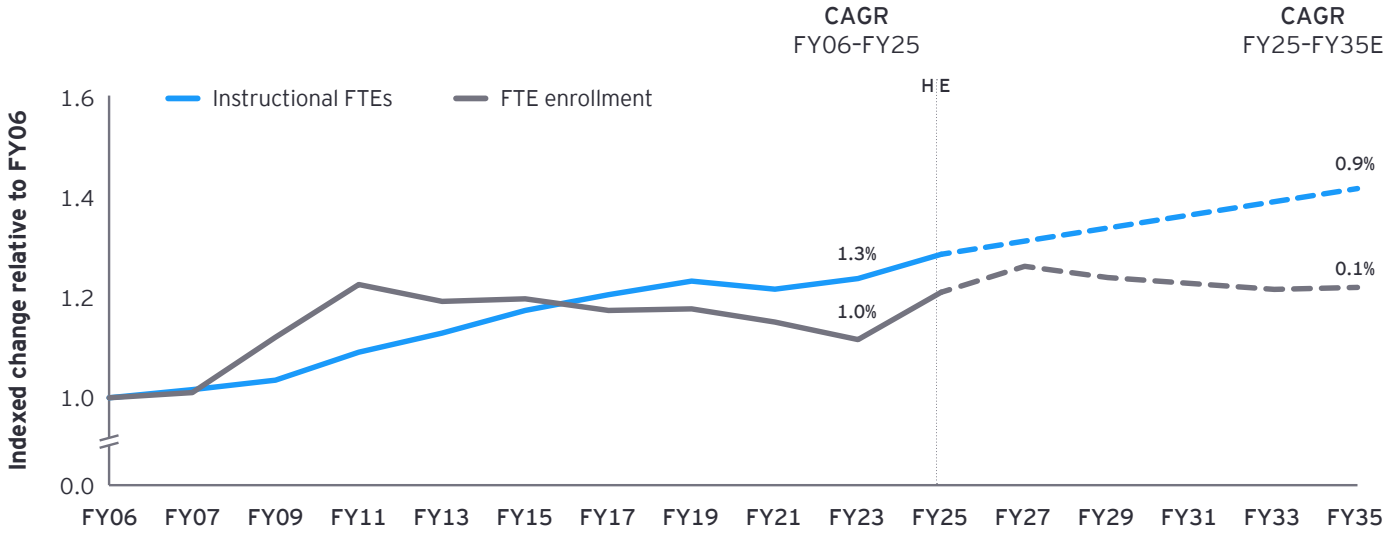
Utilization has declined in all sectors as instructional FTE growth has outpaced enrollment. Public four-year and private not-for-profit four-year institutions experienced enrollment gains from FY15 to FY25 (9% and 8%), but larger increases in instructional FTEs (18% and 10%) contributed to reduced utilization. Public two-year institutions experienced an 8% enrollment decline over the same period and began to downsize instructional staffing as a result. The 9% decline in instructional FTEs is expected to compensate for this decline and stabilize utilization over the next decade if historical trends continue.

[31] Ibid.

West — Western Interstate Commission for Higher Education (WICHE)

This section includes data for states that are part of the WICHE. This group includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Utah, Washington and Wyoming.[32]

Figure 15: Change in FTE enrollment and instructional FTEs in WICHE states, *FY06–FY35F indexed to FY06*[33]



	FY06	FY07	FY09	FY11	FY13	FY15	FY17	FY19	FY21	FY23	FY25	FY27	FY29	FY31	FY33	FY35
FTE enrollment	3.3m	3.3m	3.7m	4.0m	3.9m	3.9m	3.8m	3.8m	3.8m	3.6m	3.9m	4.1m	4.0m	4.0m	4.0m	4.0m
Instructional FTEs	197k	200k	204k	215k	222k	230k	236k	242k	239k	243k	252k	255k	260k	265k	270k	277k

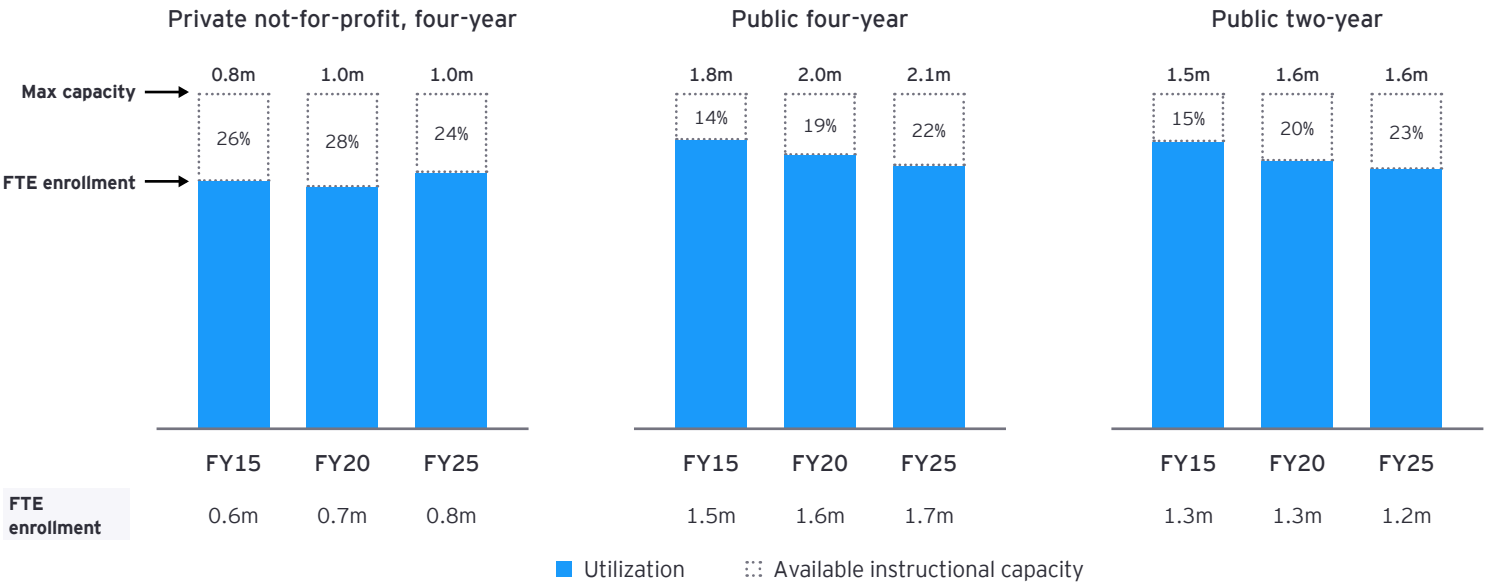
Since FY15, growth in instructional FTEs has outpaced growth in enrolled students across WICHE states. Enrollment in this region has grown modestly since FY15, barring a dip during the COVID-19 pandemic. In parallel, the number of instructional FTEs climbed during the same period. Looking ahead, demographic and macro trends are expected to drive modest enrollment growth in WICHE states. In some states, like Utah, Idaho, Arizona, and Colorado, strong estimated population growth could contribute to further growth in college-aged residents and, in turn, higher enrollment levels.[34] Higher levels of FTE enrollment have historically led to increased instructional FTE hiring; if the recent rate of instructional FTE hiring persists, the gap between instructional FTE growth and enrollment growth in WICHE states could widen in the next decade.

[32] The US Pacific territories and freely associated states are also members of WICHE, but are not included as part of this report

[33] IPEDS and EY-Parthenon analysis

[34] 2020, 2030, and 2040 US population by age, U.S. Census Bureau, University of Virginia, Cooper Center

Figure 16: Available instructional capacity and utilization by sector in WICHE states, *selected years*[35]



The trends described above can be observed in declining utilization levels across public four-year and two-year institutions, which experienced slight changes in total FTE enrollment between FY15 and FY25. However, utilization overall continued to decrease as a result of additional instructional FTE hiring during that period. Private, not-for-profit institutions experienced slightly increased utilization between FY15 and FY25; however, growth in instructional FTEs is estimated to eclipse enrollment increases, assuming prior trends persist, which may reinforce pressure on staffing.

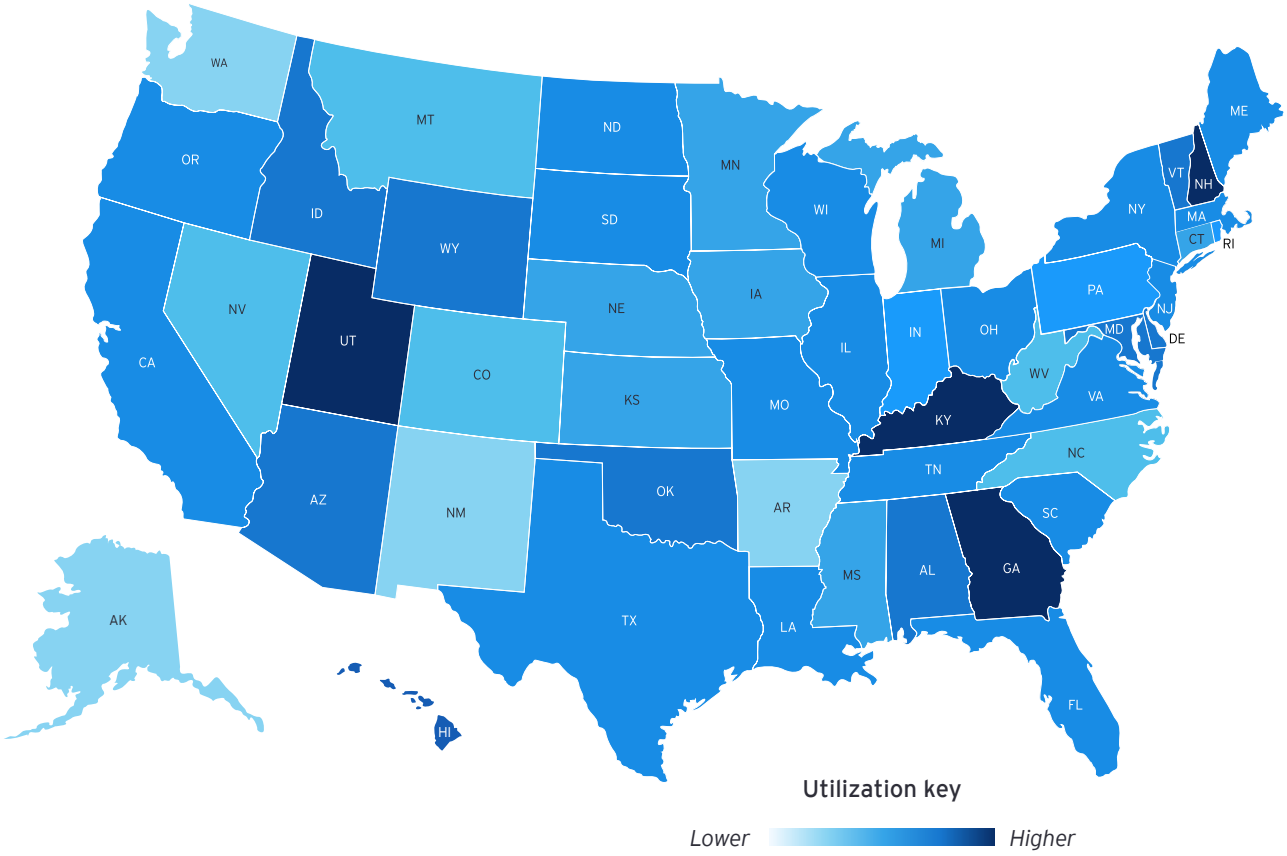
[35] IPEDS and EY-Parthenon analysis

4.2 State-level summary

As of FY25, no US state was operating with a utilization above 90%, which could be considered the threshold of efficient utilization of instructional capacity. The states with the highest levels of utilization in FY25 were New Hampshire, Georgia and Hawaii. The states with the highest levels of FY25 utilization typically have experienced enrollment increases and/or instructional staff decreases; those with the greatest historical utilization gains have experienced a combination of both. For example, New Hampshire, the state with the highest utilization level of 90%, saw both instructional FTEs and FTE enrollments increase from FY06 to FY25. However, the growth in enrollments, likely attributed to the state's expansion of online enrollments and adult learners, outpaced the state's increase in its instructional FTEs, thus resulting in higher utilization.

In contrast, Alaska, New Mexico and Washington demonstrated the lowest levels of utilization in FY25. Alaska and New Mexico experienced a sharp decline in their student FTE enrollments over FY06 to FY25 (-22% decrease and -15% decrease, respectively), although Washington experienced a 3% increase. During this period, all three states increased their instructional FTEs. In tandem, these factors contribute to the states' low utilization levels in FY25.

Figure 17: Utilization level by state in the US, *FY24*[36]



[36] Ibid.

As depicted below, most states are estimated to experience modest-to-moderate changes in utilization if demographic trends continue impacting enrollment and institutions continue on their instructional staff hiring trajectories. However, some WICHE and SREB member states could see more extreme changes due to greater fluctuations in enrollment and/or instructional FTEs over time.

If trends in enrollment and faculty hiring continue across states, Delaware, Idaho and Vermont could see some of the largest gains in utilization. In all three states, instructional FTEs are estimated to decrease between FY25 and FY35 if prior trends continue. These efficiency gains from the instructional staff side are enough to outweigh slight decreases in enrollment in Vermont to improve overall utilization. On the other hand, Delaware and Idaho's enrollments are expected to grow during the same period, compounding the efficiencies gained from decreasing instructional FTE counts.

In contrast, New Mexico will likely see the greatest losses in utilization. If trends continue, this state is expected to experience the sharpest decline nationally in FTE enrollment of 2% annually paired with a 1% annual increase in instructional FTEs, potentially leading to a drop in utilization from FY25 to FY35. As an alternate example, FTE enrollments in NH are anticipated to grow by 0.2% annually from FY25-FY35, however, instructional FTE growth, based on historical trends, could outpace that by more than 5X at a 1.1% annual growth rate, resulting in overall lower utilization over the next decade.

Figure 18: Change in utilization by state, *FY25 and FY35E*[37]

[37] Ibid.

5 Conclusion: Looking ahead and managing instructional capacity

5.1 Trends shaping capacity and utilization in higher education

As the higher education landscape continues to evolve, leaders should be aware of the following key trends impacting instructional capacity and utilization management the future.

Headwinds – Challenges to utilization management in the sector

- **Decline in traditional-age students:** As a result of declining birth rates across the US, the number of high school graduates, and therefore the available pool of traditional-age college students, is expected to decrease. According to WICHE's 2024 *Knocking at the College Door* report, the number of US high school graduates is expected to peak in 2025 and decline over the next 15 years.[38]
- **Rapidly evolving talent needs creating program gaps:** New technology is quickly reshaping the workforce and the skills that are most in-demand. Institutions are adding programs and instructional staff to meet these evolving needs. But without reassessing legacy programs and making proportional reductions in programmatic offerings, instructional staffing can grow beyond demand, further exacerbating surplus capacity.
- **Increased non-instructional demands on institutions and faculty:** As perceptions of higher education's purpose evolve, students and families increasingly expect more support and offerings to students (e.g., expanded student services, greater faculty availability for advising, experiential learning with faculty oversight). These additional commitments can strain faculty time and resources, consuming theoretical available capacity that could have been used for instructional purposes.

Tailwinds – Opportunities for utilization management in the sector

- **Growth in markets for adult and lifelong learning:** While the rapid evolution of talent needs presents a challenge for institutions, it also provides an opportunity to reach non-traditional, adult learners for programs and credentials designed to reskill, upskill, and support lifelong learning while leveraging existing instructional capacity.
- **Technology adoption among students and institutions:** Since the COVID-19 pandemic, today's undergraduate and graduate students are interested in flexible learning models that allow for full or partial online learning.[39] As institutions have built the infrastructure to deliver, they are positioned to access student populations outside of their immediate geographical areas.
- **Growth in collaboration across institutions:** As institutions have confronted increasing operating and financial pressures in recent years, there has been a greater shift toward shared resources and collaboration across institutions. Examples include the Pennsylvania State System of Higher Education Shared Services Center,[40] the University System of Georgia Shared Services Center,[41] and New Mexico's Collaborative for Higher Education Shared Services (CHESS).[42] These models may present solutions for other similar systems to manage instructional capacity going forward.

[38] Western Interstate Commission for Higher Education, *Knocking at the College Door: 11th Edition*, WICHE, 2024.

[39] EDUCAUSE, 2025 Students and Technology Report, EDUCAUSE.

[40] "Shared Services," PASSHE website

[41] "Shared Services Center," University System of Georgia website

[42] "Collaborative for Higher Education Shared Services," CHESS website

5.2 Managing instructional capacity and utilization

This section is intended to provide a framework for considering how stakeholders across higher education may engage with questions of instructional capacity and utilization. The four broad levers below are not intended to serve as universal recommendations, but rather as practical tools that higher education, policy and philanthropy leaders can use to guide dialogue, identify areas for further analysis, and consider where targeted action may be warranted. The relevance and applicability of each lever will vary based on institutional mission, student population, financial position, labor and governance constraints, and state policy context. The following four "levers" could promote increased instructional capacity utilization: grow enrollment, streamline program offerings, engage in shared services (shared academic or administrative functions), and take capacity offline:

1. **Grow FTE enrollment/utilization:** To drive increased utilization, institutions could expand initiatives that increase enrollments and build capabilities to access growing segments of the higher education student population. Traditional students are increasingly more difficult to reach, given a shrinking domestic pool of students, declines in the overall college-going rate of recent high school graduates, and new barriers to attracting international students. However, institutions could consider adapting to better serve new and growing learner segments: such as dual credit and dual enrollment students, "some college, no degree" students, non-degree credential-seekers, adult learners, and corporate employees desiring to reskill or upskill. Examples of such adaptations could include flexible course schedules and modalities to attract non-traditional or part-time students. Institutions could also consider increasing enrollment intensity and retention for existing students. This could include efforts to encourage part-time to full-time conversion such as offering multiple start dates, flexible class schedules, etc. It could also entail increased student support and well-being resources to promote retention.
2. **Streamline existing program offerings:** Regularly reviewing programs to identify misalignment between program resource levels and student enrollment or ROI can be an effective method for reducing available, unused capacity. Deliberate, regular review of new and legacy programs can reveal potential opportunities to better align institutional resources with student demand by taking steps such as consolidating programs or re-orienting faculty toward higher-demand areas. In cases where surplus capacity persists to the detriment of students and the institutions, leadership may also consider reductions in instructional headcount or program discontinuation.
3. **Share more to reduce cost base:** Consortia, shared service agreements, and institutional mergers can help improve utilization and reduce the overall cost base by facilitating administrative and academic collaboration. These arrangements can enable institutions to consolidate functions, reduce administrative overhead for non-student-facing functions, and improve operating efficiency without compromising on student support. Institutions that are smaller in scale or located in close proximity can benefit from the increased scale provided by a shared or merged infrastructure.
4. **Take capacity offline:** Finally, states, university systems and individual institutions can improve utilization and reduce overall cost through closure of underutilized institutions. In instances where streamlining program offerings is insufficient and consolidation is not an option, institutions may resort to full or partial closures. This has the potential to improve efficiency across state/regional academic and administrative systems and ensure long-term financial sustainability.

5.3 Starting the conversation

The following set of questions provides a starting point for various stakeholders within the higher education landscape to initiate conversations with peers and colleagues regarding how to assess and address instructional capacity utilization within their own institutions, systems, and states.

Institution leaders

- **Measurement:** Where are there data gaps (e.g., capturing enrollment and enrollment intensity of student populations enrolling in noncredit courses or non-degree programs)? Which additional, granular institution metrics are available to address them?
- **Intra-institution variability:** How does capacity and utilization differ across various schools, departments and programs within my institution?
- **Institution-specific nuances:** What does efficient utilization look like given my institution's characteristics (sector, selectivity, size) and what levels are desirable? How can my institution's programs be evaluated in a way that balances efficient utilization with ROI for students and for the institution, given those same characteristics?
- **Strategic resource allocation:** How do current levels of available capacity affect the ability to invest in new programs that may be needed? How can instructional staff be allocated across existing programs to minimize unused capacity and improve utilization? Under what circumstances might maintaining surplus capacity provide a strategic advantage, such as leveraging small class sizes to attract students?
- **Financial implications:** What is the financial impact of maintaining surplus capacity? How will this change in the long term?
- **Partnerships:** Are there collaborations (administrative, academic) that might change the capacity / utilization equation and enable both my institution and the partner institution(s) to operate more efficiently?

State leaders and policymakers

- **Measurement:** Is there more granular data available at the state level that could be used to provide a more nuanced state-specific picture of instructional capacity and utilization?
- **State trends:** How have various macro and policy factors affected the level of instructional capacity and utilization in our state over time? What is expected in the future?
- **Institution sectors:** How does capacity and utilization differ across higher education sectors in my state? Are there ways in which state level policy could have a positive impact on utilization in various sectors?
- **Financial implications:** What is the financial impact of maintaining current available capacity levels? How might trends in available capacity affect the long-term viability of individual institutions and the overall state higher education system? What steps, if any, could be taken to right size and plan for the future?
- **Collaboration:** How can state or regional collaboration be leveraged to minimize surplus capacity?

6 Appendix

6.1 Methodology

EY-Parthenon instructional capacity calculation

Each component of the capacity formula (student-to-faculty ratio, maximum total instructional FTEs, instructional capacity, FTE enrollment) is first calculated at the institution-level for historical data years. These results are then aggregated to the institutional sector, state, and national levels.

- **Maximum instructional capacity** is a metric derived from an institution's maximum demonstrated student-to-faculty ratio multiplied by the current number of instructional FTEs. This represents the total theoretical number of student FTEs an institution could serve if it was operating with its highest historical student-to-faculty ratio.
  - For the purposes of this analysis, student-to-faculty ratio refers to the ratio of total full-time-equivalent (FTE) fall enrollments divided by the number of instructional, research, and public service FTEs at that institution. This variable is derived from IPEDS and calculated by EY-Parthenon. This variable is distinct from the IPEDS-reported "student-to-faculty ratio" that only accounts for undergraduate students. Ratios identified as outliers due to large year-to-year fluctuations were adjusted to more closely align with values typical for similar institution types.
- In this analysis, instructional FTEs refers to the IPEDS variable "Instruction, Research, and Public Service FTEs" to be inclusive of all staff members who could play a role in student instruction.
  - IPEDS began reporting instructional, public service, and research FTE figures in FY06; therefore, this analysis begins in FY06.
  - Institutions that reported zero instructional, public service, and research FTEs are excluded from the analysis.
- **Enrollment utilization** is defined as an institution's FTE enrollment in a given year. Historical FTE enrollment data (FY06–FY25) reflects IPEDS fall full-time equivalent counts. This metric is inclusive of students across all levels (undergraduate, graduate, etc.). Unlike headcount, which measures the number of individual students enrolled, FTE enrollment converts part-time students into full-time equivalents for greater comparability. This metric better represents true instructional demand by capturing course-taking intensity and allows for direct comparison across institutions.

EY-Parthenon instructional capacity future-facing analysis

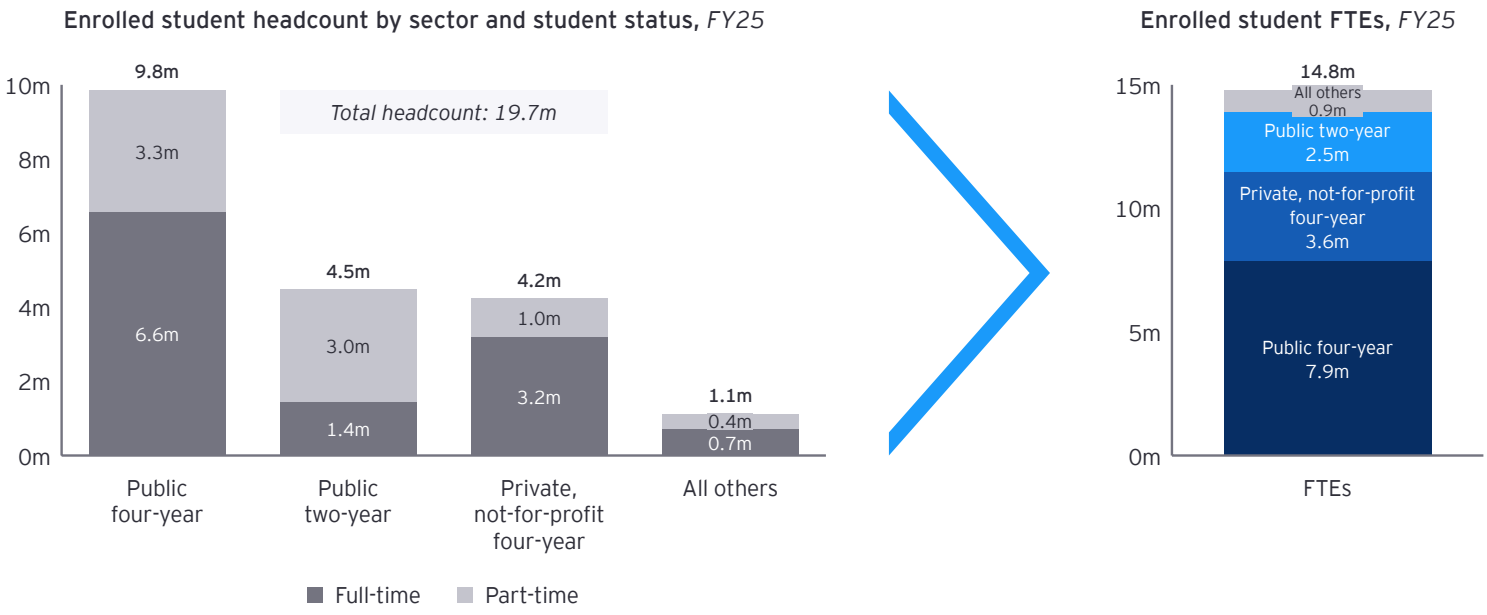
The EY-Parthenon Education Practice created a forward-looking analysis to understand how capacity and utilization could change over the next decade (through FY35) based on demographic-driven enrollment trends and institution-specific trends in instructional FTE hiring. This analysis is trend-based and is designed to illustrate what could happen if demographic and hiring trends continue to unfold over time. It does not account for multiple scenarios, individual institution responses and needs, etc. The following assumptions were used to establish the methodology:

- **Maximum student to faculty ratio:** Assumed the continuation of the historical maximum from the original evaluation period of FY06–FY25.
- **Instructional FTEs:** Scaled the number of FTEs based on institution-level trends over the last five years, adjusted to account for outlier historical growth rates.
- **Student enrollment:** Estimated higher education enrollment by state based on age group segmentation and census projections, adjusting for state and macro factors.
  - **Demographics:** Leveraged census projections by state and age group to assess the annual growth rate of different age groups of residents in each state. Applied growth rates to FY25 FTE enrollment figures by age group to estimate how each group in each state will change over time. Because FY25 reporting of enrollment by age group was optional in IPEDS, EY-Parthenon assumed enrollment by age group in each state using FY24 proportions applied to FY25 total enrollment by state.
  - **State factors:** Adjusted demographic estimates to account for state-specific dynamics, such as in-state and out-of-state flows, based on historical differences between demographic-predicted enrollment and actual enrollment.
  - **Macro factors:** Adjusted state enrollment estimates to account for macro dynamics, such as broader national policy and unemployment trends, informed by EY-Parthenon macroeconomic team's estimates.
  - Enrollment estimates are derived at the state level and allocated across instructional sectors using FY25 enrollment proportions.

Additional methodological notes

- **Time period and fiscal year alignment:** The Integrated Postsecondary Education Data System (IPEDS) provides full-time equivalent (FTE) enrollment variables each fall. For the purposes of this report, we have structured the analysis on a fiscal year basis. For example, fall enrollments reported in IPEDS for Fall 2024 reflect the 2024–2025 academic year, corresponding to FY25. The analysis was conducted using historical IPEDS data from Fall 2005 to Fall 2024, corresponding to FY06 through FY25.
- **Institution sector cohort methodology:** To account for institutions that change their sector classification (e.g., moving from a two-year to a four-year designation), this analysis applies a "cohort" approach. Each institution is assigned to the sector in which it was first classified in IPEDS, and this assignment remains fixed over time, even if subsequent IPEDS data indicate a different classification. For example, an institution initially listed as a private two-year school that later appears as a four-year institution will continue to be included in the private two-year sector under this cohort methodology.
- **Enrollment FTE use:** This analysis uses IPEDS fall enrollment FTEs variables throughout. Enrollments are assessed on an FTE basis to provide a standardized, comparable measure of instructional demand regardless of variations in full-time vs. part time students across institutions. In IPEDS, FTE enrollment is calculated as the sum of full-time enrollments and part-time FTE equivalents, which are derived by multiplying the part-time enrollment by IPEDS-determined factors that vary by control and level of institution and level of student ranging from .34 to .60. The graphic on the next page shows this conversion from FY25 fall enrollment headcount to FTEs.

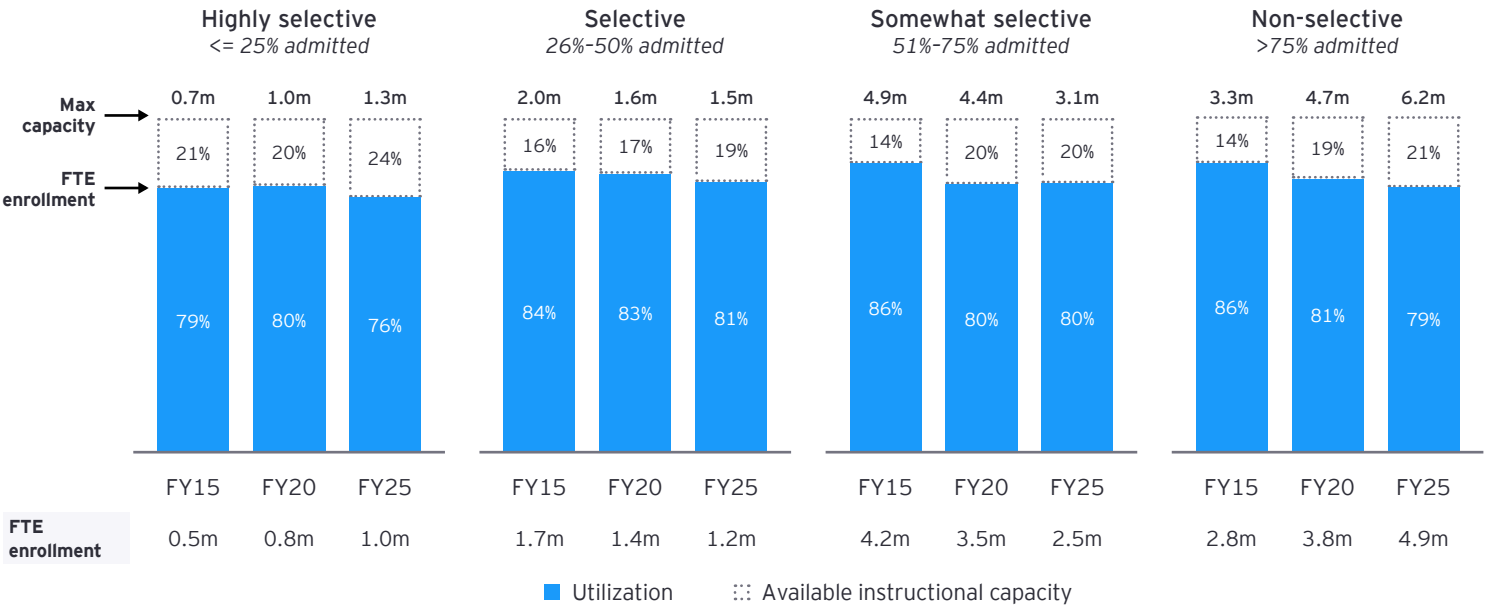
Figure 19: FY25 Headcount to FTE conversion by sector, *FY25*[43]



Sources: IPEDS (all Title IV, degree-granting institutions in the US), US Census Bureau, The Weldon Cooper Center for Public Service at the University of Virginia, and EY-Parthenon Higher Education Macroeconomic Forecast

6.2 Additional capacity and utilization charts

Figure 20: Capacity and utilization by institution selectivity at four-year institutions, *selected years*[44,45]

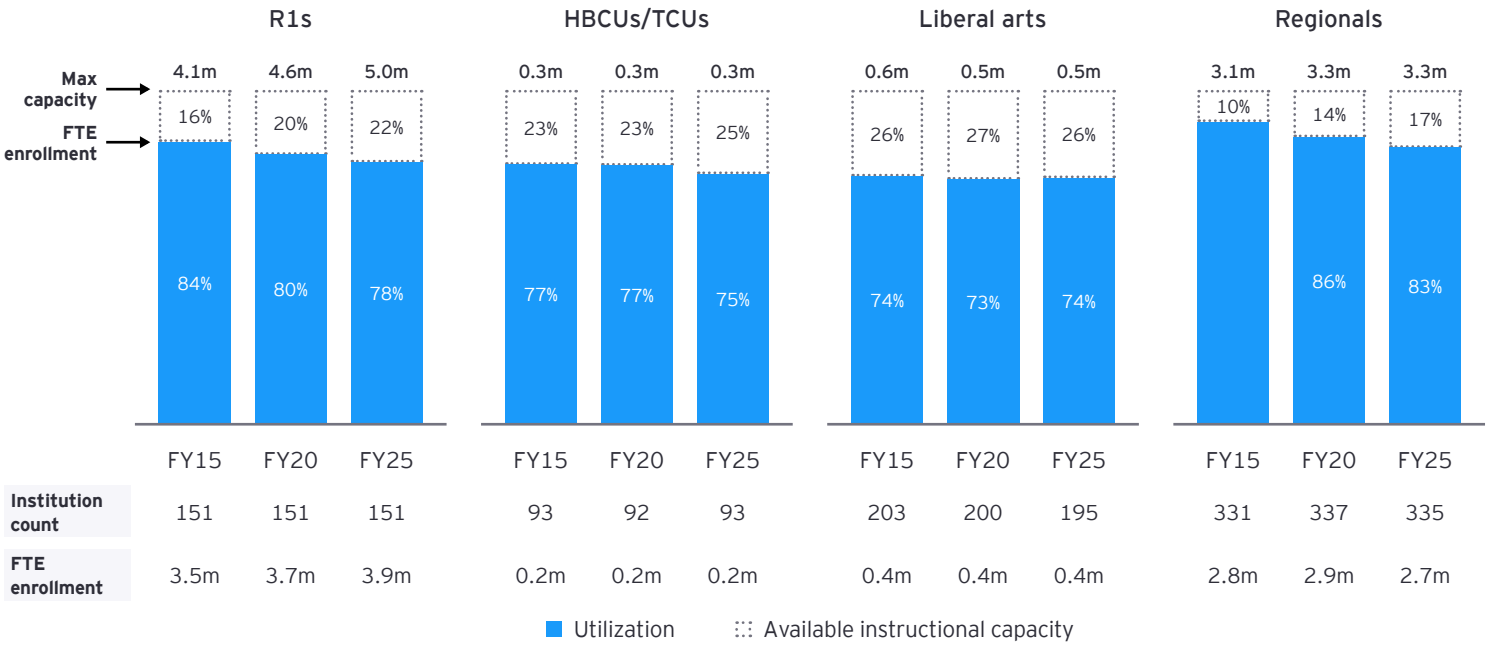


[43] IPEDS and EY-Parthenon analysis

[44] Excludes institutions that do not report their acceptance rate, representing mostly very small/small, for-profit, or two-year institutions

[45] IPEDS and EY-Parthenon analysis

Figure 21: Capacity and utilization for selected institution types, *selected years*[46]



The following definitions were used to determine relevant data for the figure above:

- **R1 institutions:** Any degree-granting, public and private not-for-profit four-year institutions that are classified as doctoral universities with extensive research activities by the 2000 Carnegie Classification
- **Regional institutions:** Any university designated as a Regional Public University (RPU) by the Alliance for Research on Regional Colleges (ARRC)
- **HBCUs and Tribal Colleges:** Any degree-granting, public and private not-for-profit four-year and above institutions that are designated as a Historically Black College or University or Tribal College in IPEDS
- **Liberal arts institutions:** Any degree-granting, public and private not-for-profit four-year and above institutions that are classified as "Baccalaureate College – Liberal Arts" by the 2000 Carnegie Classification

[46] Ibid.

6.3 Detailed state-level data[47]

	FY25						FY35E					
State	Utilization	Total enrollment FTEs	Maximum instructional capacity	Number of institutions	Enrollment FTEs CAGR FY15-FY25	Instructional FTEs CAGR FY15-FY25	Utilization	Total enrollment FTEs	Maximum instructional capacity	Enrollment FTEs CAGR FY25-FY35	Instructional FTEs CAGR FY25-FY35
AL	82%	241k	295k	57	-0.1%	0.6%	75%	238k	317k	-0.2%	0.8%
AK	61%	16k	26k	10	-4.2%	-4.1%	59%	13k	22k	-1.9%	-1.6%
AZ	84%	501k	597k	70	-0.4%	-0.4%	69%	434k	630k	-1.4%	1.3%
AR	66%	120k	182k	52	-0.8%	0.8%	66%	110k	168k	-0.8%	0.5%
CA	78%	1888k	2427k	431	-0.2%	1.1%	78%	1937k	2483k	0.3%	0.8%
CO	68%	268k	395k	57	0.4%	1.7%	63%	267k	425k	0.0%	1.5%
CT	71%	156k	220k	29	0.1%	1.7%	60%	152k	253k	-0.3%	2.1%
DE	85%	45k	53k	6	-0.3%	-0.5%	102%	49k	47k	0.8%	-1.0%
DC	82%	81k	98k	18	1.0%	-0.4%	90%	93k	103k	1.4%	1.0%
FL	79%	794k	1009k	160	-0.4%	0.7%	74%	779k	1049k	-0.2%	0.7%
GA	87%	442k	507k	106	0.6%	1.5%	81%	425k	526k	-0.4%	1.2%
HI	87%	43k	49k	16	-2.3%	-1.9%	86%	38k	44k	-1.3%	-1.0%
ID	83%	91k	110k	16	0.9%	1.1%	100%	105k	105k	1.4%	-0.4%
IL	79%	527k	669k	145	-1.3%	-0.4%	67%	454k	674k	-1.5%	0.6%
IN	79%	347k	437k	69	0.3%	0.3%	76%	328k	432k	-0.6%	0.4%
IA	73%	156k	213k	54	-2.8%	-1.7%	71%	133k	186k	-1.6%	-1.0%
KS	71%	143k	201k	62	-1.7%	-0.1%	65%	138k	212k	-0.3%	0.9%
KY	86%	208k	242k	60	0.3%	-0.1%	83%	197k	237k	-0.6%	0.1%
LA	78%	197k	252k	57	0.1%	0.5%	74%	192k	260k	-0.3%	0.7%
ME	79%	59k	75k	28	0.8%	0.3%	82%	60k	74k	0.2%	-0.2%
MD	82%	243k	298k	51	-0.5%	0.2%	80%	237k	298k	-0.2%	0.2%
MA	79%	391k	496k	103	-0.5%	0.6%	77%	385k	499k	-0.1%	0.6%
MI	75%	369k	495k	89	-2.1%	-0.8%	68%	305k	450k	-1.9%	-0.4%
MN	71%	281k	395k	78	-1.0%	-0.6%	71%	260k	368k	-0.8%	-0.5%
MS	72%	135k	187k	35	-0.7%	-0.4%	71%	125k	177k	-0.7%	-0.4%
MO	78%	257k	332k	94	-2.1%	-0.8%	73%	222k	305k	-1.5%	0.2%
MT	68%	38k	57k	23	-1.1%	0.9%	63%	37k	58k	-0.4%	0.2%
NE	76%	105k	139k	33	-0.1%	0.7%	77%	105k	136k	0.0%	-0.3%
NV	70%	88k	126k	21	0.4%	2.6%	63%	92k	147k	0.4%	1.5%
NH	90%	154k	171k	23	6.7%	3.1%	76%	157k	206k	0.2%	1.1%
NJ	78%	310k	399k	86	-0.5%	0.2%	76%	296k	387k	-0.5%	0.0%
NM	62%	77k	125k	36	-2.5%	-0.7%	44%	62k	140k	-2.1%	1.2%
NY	80%	939k	1178k	290	-1.1%	0.5%	79%	907k	1140k	-0.4%	0.4%

[47] IPEDS and EY-Parthenon analysis

	FY25						FY35E					
State	Utilization	Total enrollment FTEs	Maximum instructional capacity	Number of institutions	Enrollment FTEs CAGR FY15–FY25	Instructional FTEs CAGR FY15–FY25	Utilization	Total enrollment FTEs	Maximum instructional capacity	Enrollment FTEs CAGR FY25–FY35	Instructional FTEs CAGR FY25–FY35
NC	70%	436k	624k	137	-0.1%	1.7%	63%	431k	687k	-0.1%	1.3%
ND	77%	41k	54k	20	-0.5%	-0.4%	79%	43k	54k	0.4%	0.1%
OH	78%	463k	591k	158	-1.2%	-0.2%	71%	409k	572k	-1.2%	0.0%
OK	81%	152k	187k	50	-0.9%	-1.1%	75%	139k	187k	-0.9%	0.0%
OR	78%	153k	195k	46	-1.9%	-0.3%	75%	138k	183k	-1.1%	0.1%
PA	78%	519k	669k	196	-1.8%	-0.2%	76%	476k	626k	-0.9%	-0.1%
RI	76%	65k	85k	14	-0.7%	1.0%	71%	63k	89k	-0.2%	1.0%
SC	80%	203k	254k	64	0.0%	0.8%	75%	208k	278k	0.2%	1.2%
SD	78%	41k	52k	20	-0.1%	-0.6%	81%	41k	51k	0.1%	-0.4%
TN	79%	266k	336k	81	0.0%	-0.3%	75%	255k	342k	-0.4%	0.2%
TX	80%	1205k	1498k	235	1.0%	1.2%	77%	1276k	1663k	0.6%	1.5%
UT	86%	407k	474k	24	6.2%	3.7%	78%	472k	608k	1.5%	2.4%
VT	85%	32k	37k	13	-1.3%	-1.5%	92%	30k	33k	-0.5%	-0.9%
VA	80%	436k	545k	104	0.1%	-0.1%	75%	440k	589k	0.1%	0.5%
WA	65%	269k	411k	73	-0.9%	1.2%	63%	274k	438k	0.2%	0.8%
WV	71%	94k	133k	38	-1.5%	-0.2%	61%	83k	137k	-1.2%	0.2%
WI	79%	242k	305k	64	-1.3%	-0.5%	78%	221k	285k	-0.9%	0.0%
WY	84%	22k	26k	9	-1.2%	-1.2%	80%	20k	25k	-0.8%	-0.3%

6.4 Regional higher education compacts

Table 2: US higher education regional compacts and participating states[48]

Regional compact	Participating states/territories
Midwestern Higher Education Compact (MHEC)	Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin
New England Board of Higher Education (NEBHE)	Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
Southern Regional Education Board (SREB)	Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia
Western Interstate Commission for Higher Education (WICHE)	Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Utah, Washington, Wyoming, the U.S. Pacific territories and freely associated states

North Dakota and South Dakota belong to both MHEC and WICHE compact regions and their data is reflected in both regional sections. States that are not part of any of the regional compacts listed above include New Jersey, New York, Pennsylvania, and the District of Columbia.

[48] "Regional Education Compacts," *NC-SARA website*

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