

# **Fall Enrollment (EF) Retention Rates: Four-year Institutions Tutorial Script 2023-24 Data Collection Cycle**

This tutorial discusses the reporting of retention data and the calculation of retention rates in IPEDS.

The IPEDS retention rate for four-year institutions is designed to identify the percentage of first-time bachelor's degree-seeking students beginning in a Fall that are still enrolled for credit in that same institution the following Fall or had completed their bachelor's degree at that institution, by the following Fall. Retention rates are calculated separately for full-time and part-time students.

Examples of students who are not retained at an institution are students who transfer to another institution before completing their program, or students who drop-out.

It is important to emphasize that for four-year institutions, retention rates are based on the bachelor's degree-seeking cohort only. For institutions that only offer a bachelor's degree, the first-time bachelor's degree-seeking cohort will be the same as their total number of first-time degree/certificate-seeking students reported in the institution's prior year Fall Enrollment survey.

But for institutions offering bachelor's degrees as well as an associate's degree or sub-baccalaureate certificates, the bachelor's degree-seeking cohort is a subset of the total first-time degree/certificate-seeking students reported in the institutions' prior year Fall Enrollment survey. As a result, the bachelor's degree-seeking cohorts reported for retention purposes are expected to be less than or equal to the total first-time degree/certificate-seeking students reported in the prior year Fall Enrollment survey.

Academic reporting institutions determine their retention cohorts using the institution's official fall reporting date, as of October 15th.

Program reporting institutions determine their retention cohort based on students who were enrolled in the institution at any time between August 1st and October 31st.

Note that a student's cohort — full- or part-time — is based on their attendance status in the Fall when they first enrolled, regardless of whether the student's attendance status changed between the first and second fall.

When applicable, institutions may report exclusions to the retention cohorts. These particular students are then not included in the retention rate calculation. Allowable exclusions are students who left the institution for any of the following reasons:

- To serve in the armed forces, including those called to active duty;
- To serve with a foreign aid service of the Federal Government, such as the Peace Corps;
- To serve on official church missions; or
- Died or were totally and permanently disabled

When applicable, institutions may report inclusions to the retention cohorts. An institution's freshman study abroad

students that were excluded from the prior year first-time enrollment count can be added back into the prior year's first-time cohort for the current year's retention calculation.

Freshman study abroad students can be added to the first-time cohort by reporting them in inclusions. Report in inclusions for the Fall cohort first-time bachelor's degree/certificate seeking study abroad students who were excluded from the first-time cohort but who have re-enrolled at the institution their second year.

The original cohort minus the reported exclusions plus the reported inclusions results in the adjusted cohort. It is the adjusted cohort that is used to calculate the institution's retention rate.

First-time bachelor's degree-seeking students from the prior Fall that are still enrolled for credit at the institution or that completed their bachelor's degree are reported as retained. Note that the number of first-time bachelor's degree-seeking students who attain a bachelor's degree by their second Fall term is expected to be zero or very small. In exceptional cases when a first-time student does satisfy all bachelor's degree seeking requirements including full credit completion, they are to be considered "retained" for EF reporting purposes.

Sophomore study abroad students that have been excluded from an institution's Fall Enrollment count because they are taking classes in a foreign country can be included as part of the institution's retention calculation.

Sophomore study abroad students are considered part of the retained cohort even though they may not be included in the institution's Fall Enrollment count. Count these students in the retained cohort.

Academic reporting institutions should report students retained as of the institution's official fall reporting date or as of October 15th. Program reporting institutions should report students retained as of August 1st.

The retention rate is then calculated as follows: students from the prior year cohort still enrolled for credit in the current Fall plus any students from the prior year cohort that completed their bachelor's degree as of the current Fall, divided by the adjusted prior year Fall cohort, times 100.

The institution's first-time, full-time, and part-time bachelor's cohort retention rates are posted on the College Navigator website along with any context box text entered by the institution.

For more information on the material presented in this tutorial, please contact the IPEDS Help Desk.