USM Enrollment Projections
Board of Regents Finance Committee
March 27, 2019
Outline

Short-term Enrollment Plan
- Institutions expecting growth
- Institutions expecting stable enrollment
- Institutions expecting decreases

National and Statewide Trends
- Maryland student migration
- WICHE estimates HS graduates

USM Long-Term Enrollment Projections
- Institutions planning long-term growth
- Institutions planning long-term stability
- Institutions planning long-term decreases

Summary
Short-Term Enrollment Plan
+1,100 for Fall 2019
Institutions Planning One-Year Growth

- Bowie + 85  -- Same input; some retention; some RHEC growth
- Frostburg +71 – Same input; some retention; some RHEC growth
- Salisbury +133 – Increase input; some RHEC growth
- Towson + 207 – Increase input; some RHEC growth
- UMBC +151 – Increase input; some RHEC growth
- UMCP +175 – No plan/yield dependent; some RHEC growth
- UMUC +606– new student growth in new markets
Institutions Planning Stable Enrollment

- Coppin – maintain new enrollment successes and sustain retention.
- UMB – no changes to enrollment plans
Institutions Planning Enrollment Recovery

• UB (-233)  
  Short-term decrease because preceding larger undergraduate cohorts are graduating and replaced by smaller cohorts. There is some expected decrease in graduate student enrollment. UB is focused on rebalancing undergraduate enrollment between first-time and transfer students. Some graduate enrollment increase planned for next year.

• UMES (-61) – Short-term decrease because preceding larger undergraduate cohorts are graduating and were replaced by substantially smaller cohorts. Institutional focus on rebuilding a sustainable new enrollment pipeline and increasing retention.
Maryland is Net Exporter

What is the trend for Maryland?

From out-of-state to Maryland Institutions +8,000
Primarily from:
- New York
- Pennsylvania
- Virginia
- New Jersey

Maryland Residents to out-of-state institutions -15,000
Primarily to:
- Pennsylvania
- Virginia
- North Carolina
- South Carolina
Of 75,000 applicants for first-time admission, a subset of 25,624 (34%) enrolled in Maryland institutions.
Of 75,000 applicants for first-time admission, a subset of 36,041 enrolled in out-of-state institutions.

Over 13,000 did not enroll at any higher education institution.
High School Graduates in the **Northeast Region**
(Primary Location of In-Migration)

WICHE projections for Northeast high school graduates FY19-FY30 (Public and Private)

- FY19: 612,637
- FY20: 562,466
- FY21: 530,000
- FY22: 540,000
- FY23: 550,000
- FY24: 560,000
- FY25: 570,000
- FY26: 580,000
- FY27: 590,000
- FY28: 600,000
- FY29: 610,000
- FY30: 620,000

Total decrease: -50,000
### Applicants by USM Institution—Students that Enrolled in Non-Maryland Mid-Atlantic Institutions

<table>
<thead>
<tr>
<th>Institution</th>
<th>Number of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMCP</td>
<td>9,849</td>
</tr>
<tr>
<td>Towson</td>
<td>3,031</td>
</tr>
<tr>
<td>Bowie</td>
<td>2,935</td>
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<tr>
<td>UMBC</td>
<td>2,379</td>
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<tr>
<td>Salisbury</td>
<td>1,923</td>
</tr>
<tr>
<td>Coppin</td>
<td>1,180</td>
</tr>
<tr>
<td>UMES</td>
<td>1,075</td>
</tr>
<tr>
<td>Frostburg</td>
<td>536</td>
</tr>
<tr>
<td>UB</td>
<td>67</td>
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</table>
High School Graduates in the South Region (Primary Location for Out-Migration)

WICHE projections for Southern high school graduates FY19-FY30 (Public and Private)

![Graph showing WICHE projections for Southern high school graduates FY19-FY30 (Public and Private)]
Applicants by USM Institution—
Students that Enrolled in Southern Institutions

- UMCP: 3,754
- Bowie: 1,113
- Towson: 783
- Coppin: 592
- UMBC: 564
- Salisbury: 537
- UMES: 535
- Frostburg: 121
- UB: 51
Potential Maryland High School Graduates

WICHE Projections for Maryland’s high school graduates FY19-FY30 (Public and Private)

<table>
<thead>
<tr>
<th>Year</th>
<th>Projections</th>
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<tbody>
<tr>
<td>FY19</td>
<td>62,688</td>
</tr>
<tr>
<td>FY20</td>
<td>69,964</td>
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<tr>
<td>FY21</td>
<td>65,125</td>
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<tr>
<td>FY22</td>
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<tr>
<td>FY23</td>
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<td>FY24</td>
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<td>72,000</td>
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<tr>
<td>FY30</td>
<td>65,125</td>
</tr>
<tr>
<td>FY31</td>
<td>-4,000</td>
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FY19-FY32
Potential Maryland High School Graduates – African-American

WICHE Projections for Maryland’s African-American high school graduates FY19-FY30 (Public and Private)
Change in African-American Undergraduate Enrollment at Traditional Campuses
Potential Maryland High School Graduates – Hispanic/Latino

WICHE Projections for Maryland’s Hispanic/Latino high school graduates FY19-FY30 (Public and Private)

<table>
<thead>
<tr>
<th>Year</th>
<th>Graduates</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY19</td>
<td>7,622</td>
</tr>
<tr>
<td>FY20</td>
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<td>FY21</td>
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<tr>
<td>FY31</td>
<td>31,000</td>
</tr>
<tr>
<td>FY32</td>
<td>33,000</td>
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+ 6,000
Change in Hispanic Undergraduate Enrollment at Traditional Campuses (Doubled)
USM Must Cut the Pie Differently by Developing New Pipelines to Increase/Sustain Maryland Enrollment

Did Not Attend (Less Prepared or Did not Apply)
Left Maryland (Prepared & Competitive)
Chose Other Maryland (Transfer to USM Later)
Chose USM

Left Side—Enrolled in Maryland
Right Side—Did not Enroll in MD

*Pie graph for illustrative purposes only. Actual percentage of Maryland high school graduates varies.
Trends Summary

• In the near-term, high school students are increasing and graduates are expected to decrease in the long-term.

• Because Maryland is a net-exporter with a very diverse high school graduate population, the change in the number of high school graduates produced in competitive regions will impact USM institutional yield.

• Combined, the South and Northeast will decrease 150,000 high school graduates between 2025-2030 potentially increasing demand for Maryland high school graduates.

• Maryland will produce at least 62,000 per year;
  ▪ African-American will remain approximately steady
    - USM traditional institutions have increased enrollment of African-American students
  ▪ Hispanic graduates will increase while white graduates decrease
    - USM traditional institution have doubled enrollment of Hispanic students

USM institutions must secure the Maryland high school market share (2020-2025) and hold the market share when competition increases after 2025.
Long-Term Enrollment Plan
+11,656 by Fall 2028
Campuses’ plans call for +11,656 students
USM Grew at a Modest Rate
FY 2010-FY 2019

Fall Enrollment

FY 2010: 148,676
FY 2019: 176,423
USM Continues a Conservative Growth Plan with a Modest Rate of Increase

2017, 2018 & 2019 Projections
UMUC Growth Plan: +6,340
Traditional USM Institutions with Modest Growth Plans: +6,128
Traditional USM Institutions Planning Stability

UMB

2019: 6,764
2020: 6,797
2021: 6,779
2022: 6,779
2023: 6,779
2024: 6,779
2025: 6,779
2026: 6,779
2027: 6,779
2028: 6,779

CSU

2019: 2,741
2020: 2,766
2021: 2,766
2022: 2,766
2023: 2,766
2024: 2,766
2025: 2,766
2026: 2,766
2027: 2,766
2028: 2,766
After Years of Constant Growth, UMCP is Planning a Long-Term Decrease
Path to 2028
+11,656 Students and +8,021 FTE

Traditional Campuses:
  Undergraduate Retention Increases – +3,000 to 3,500
  First-time students– +500 to 1,000
  Total Transfers (MDCC and Other)— +1,500
  Some New Graduate Student Increases -- +800

UMUC Growth—50/50 increased retention and modest new student increases

Regional Center Growth +800 FTE by 2025
Enrollment Plan Summary

In the short-term:
- USM is planning to grow 1,100 students. This includes institutions planning short-term decreases.

Trends:
- Maryland is a net-exporter that sends students out-of-state in the Mid-Atlantic and South regions.
  - 2020-2025: High school graduates increasing and more diverse
  - After 2025: High school graduates are expected to decline in the Northeast and South
- USM institutions’ enrollment management plans are focused on securing an increased market share (2020-2025) and maintaining market share of Maryland high school graduates after 2025.

In the long-term:
- USM is planning modest and sustainable growth (+11,656).
- UMUC’s planned growth accounts for half of the USM growth. Towson, UMBC, Salisbury, Bowie, UMES, Frostburg and UB planned modest growth that will account for the other half of USM’s growth.
- Coppin and UMB are planning stable campus size.
- UMCP will decrease enrollment.
Questions and Comments

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