

# USM Enrollment Projections

Board of Regents Finance Committee

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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

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# Short-Term Enrollment Plan +1,100 for Fall 2019

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# 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

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# 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.

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# Future Trends

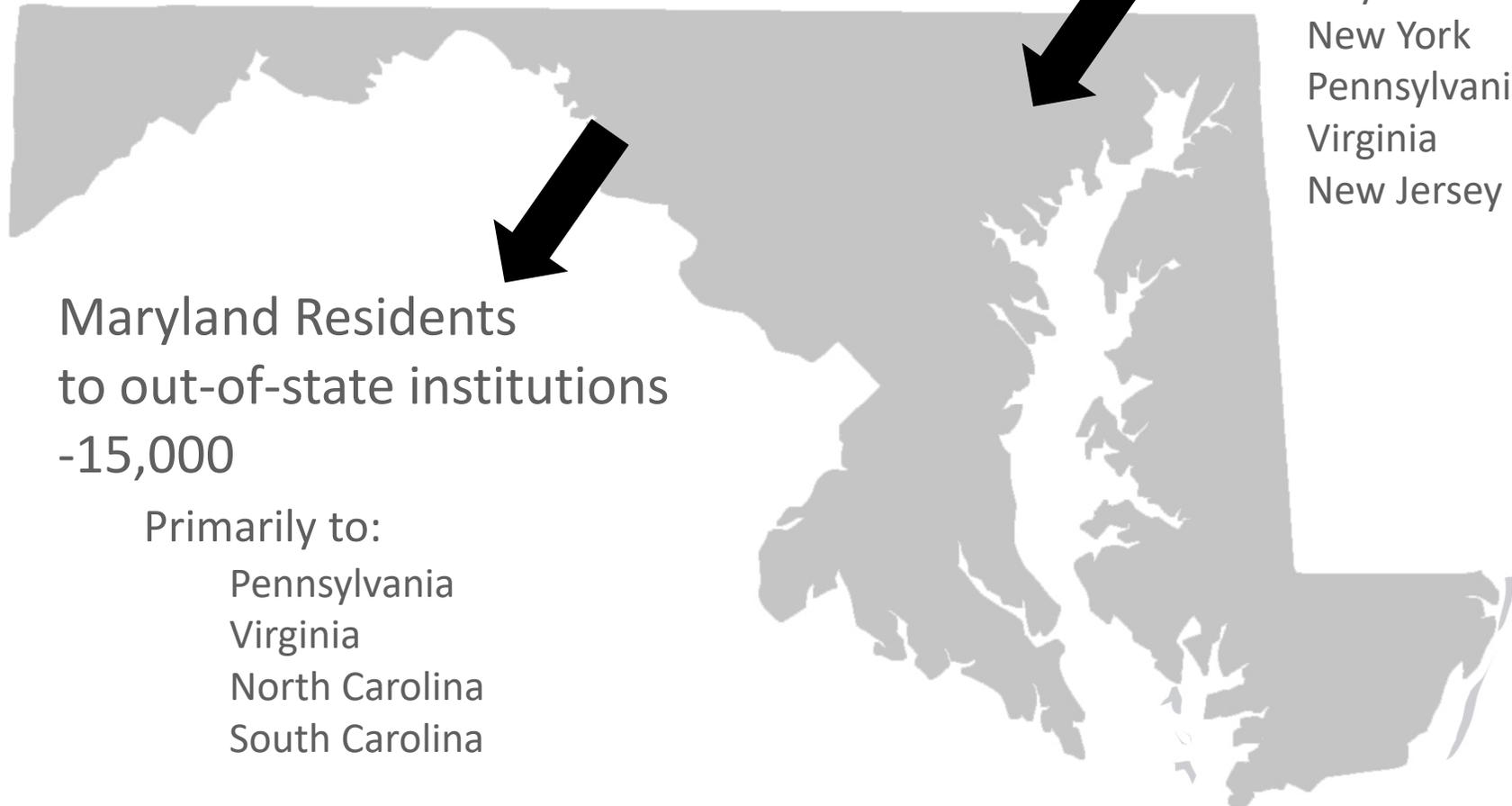
# Maryland is Net Exporter

## What is the trend for Maryland?

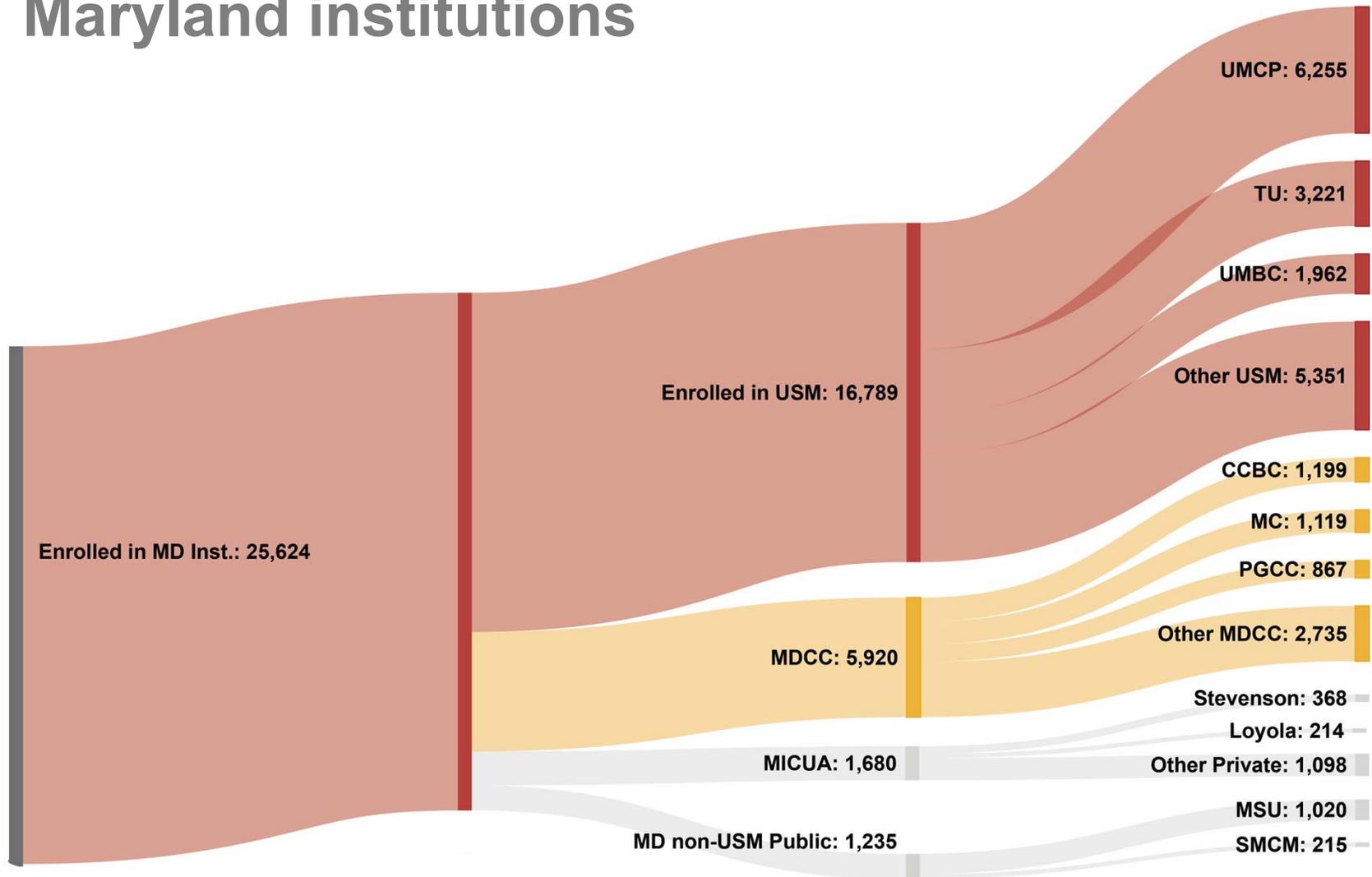
From out-of-state to  
Maryland Institutions  
+8,000

Primarily from:

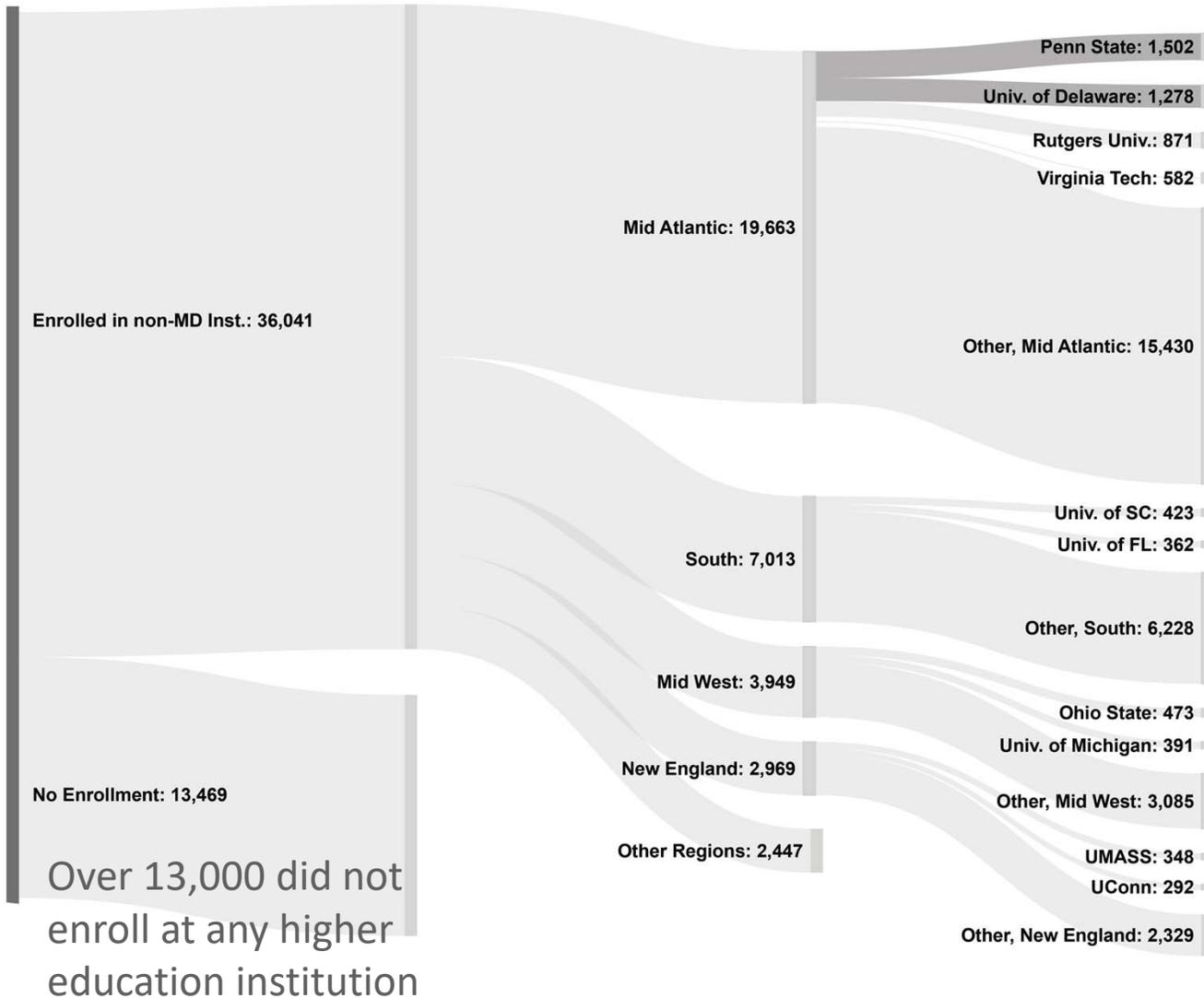
New York  
Pennsylvania  
Virginia  
New Jersey



# Of 75,000 applicants for first-time admission, a subset of 25,624 (34%) enrolled in Maryland institutions

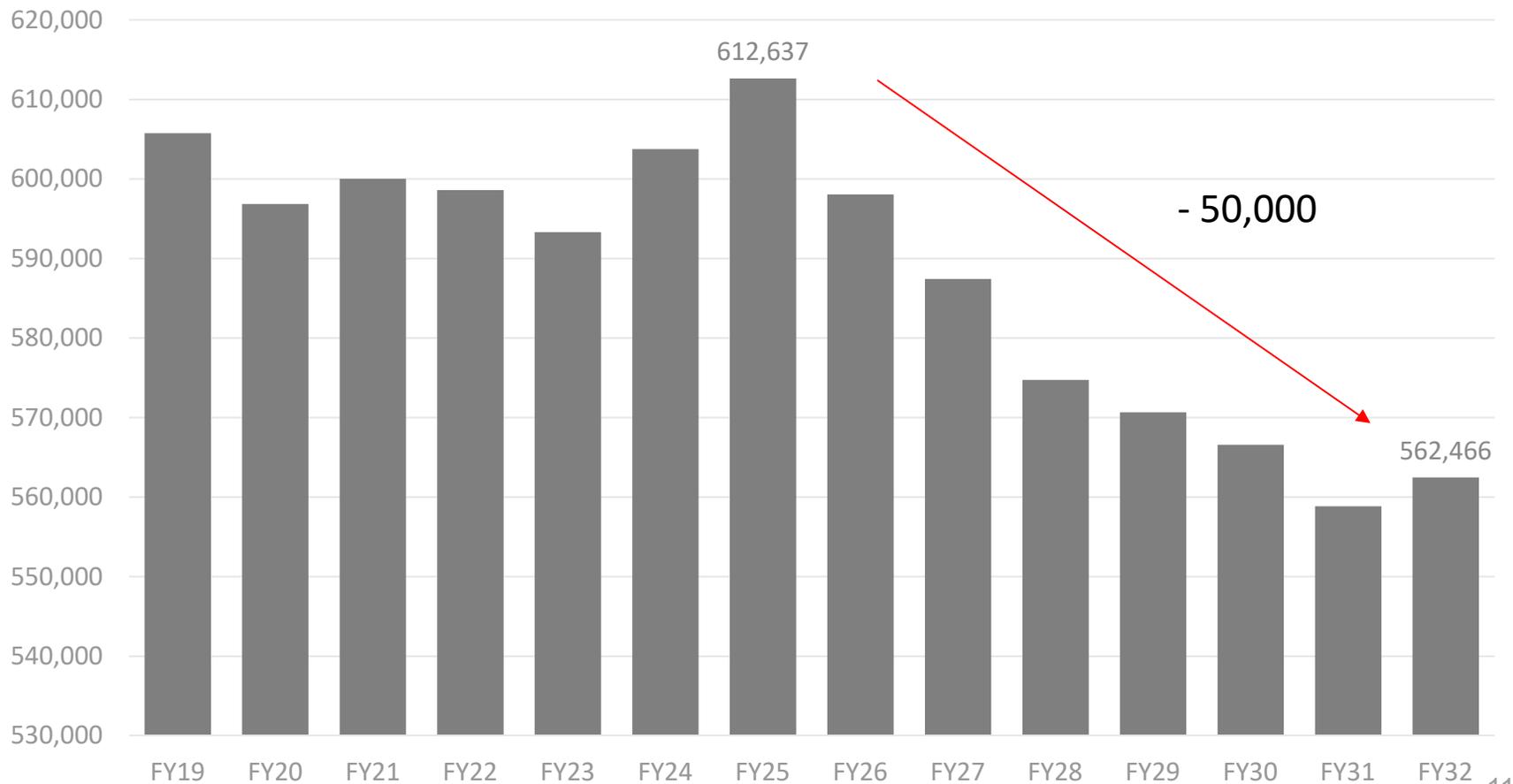


# Of 75,000 applicants for first-time admission, a subset of 36,041 enrolled in out-of-state institutions

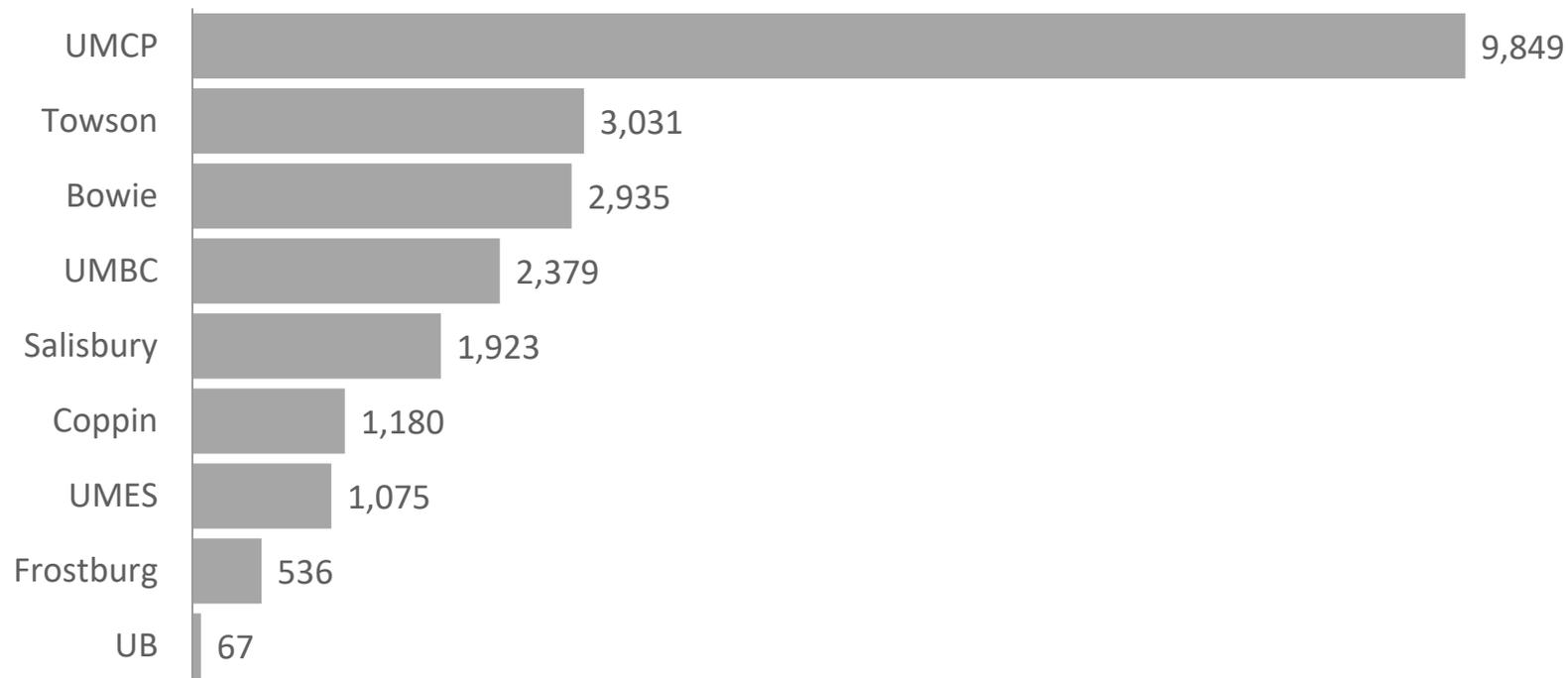


# High School Graduates in the Northeast Region (Primary Location of In-Migration)

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

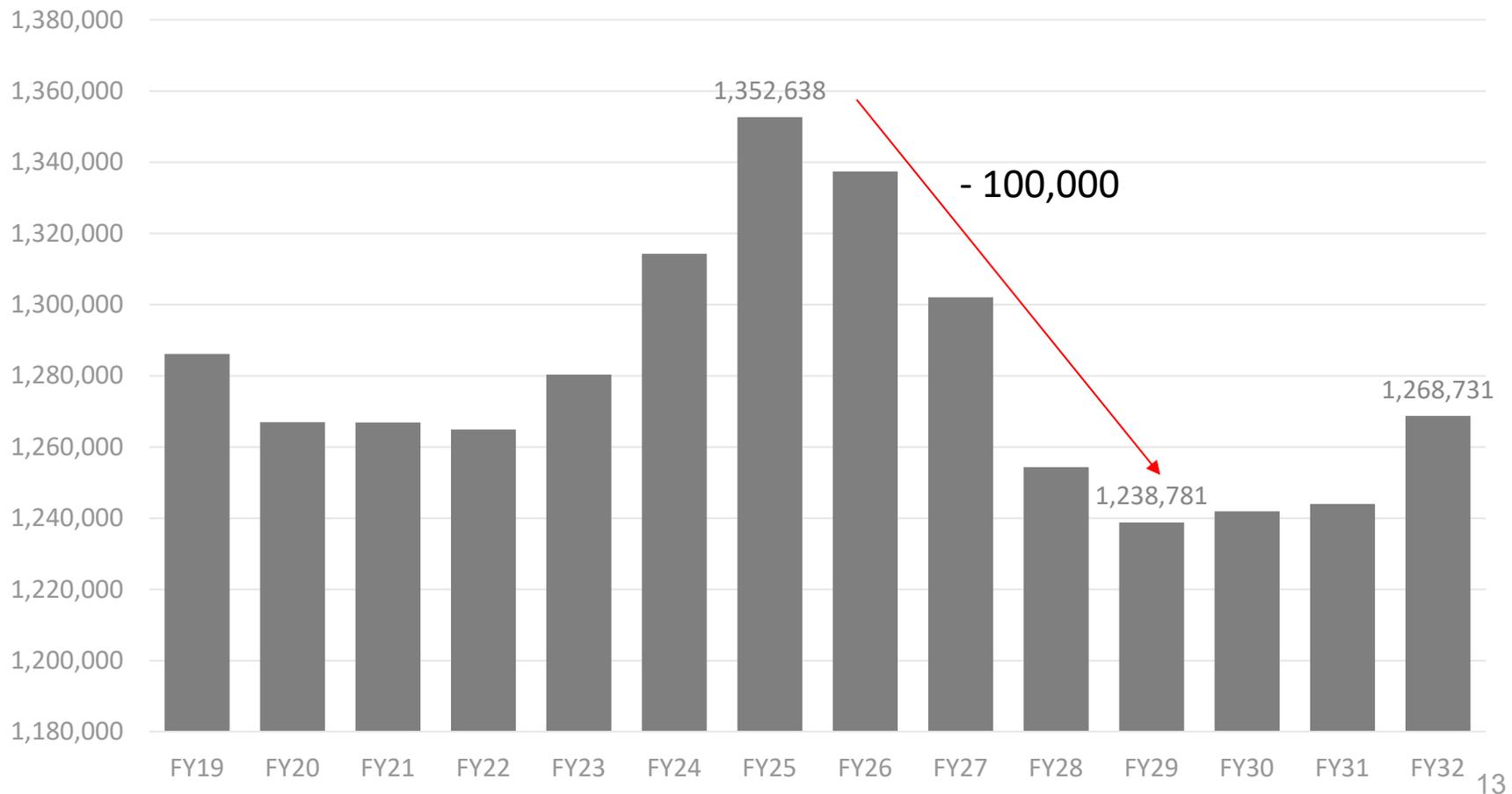


## Applicants by USM Institution— Students that Enrolled in Non-Maryland Mid-Atlantic Institutions

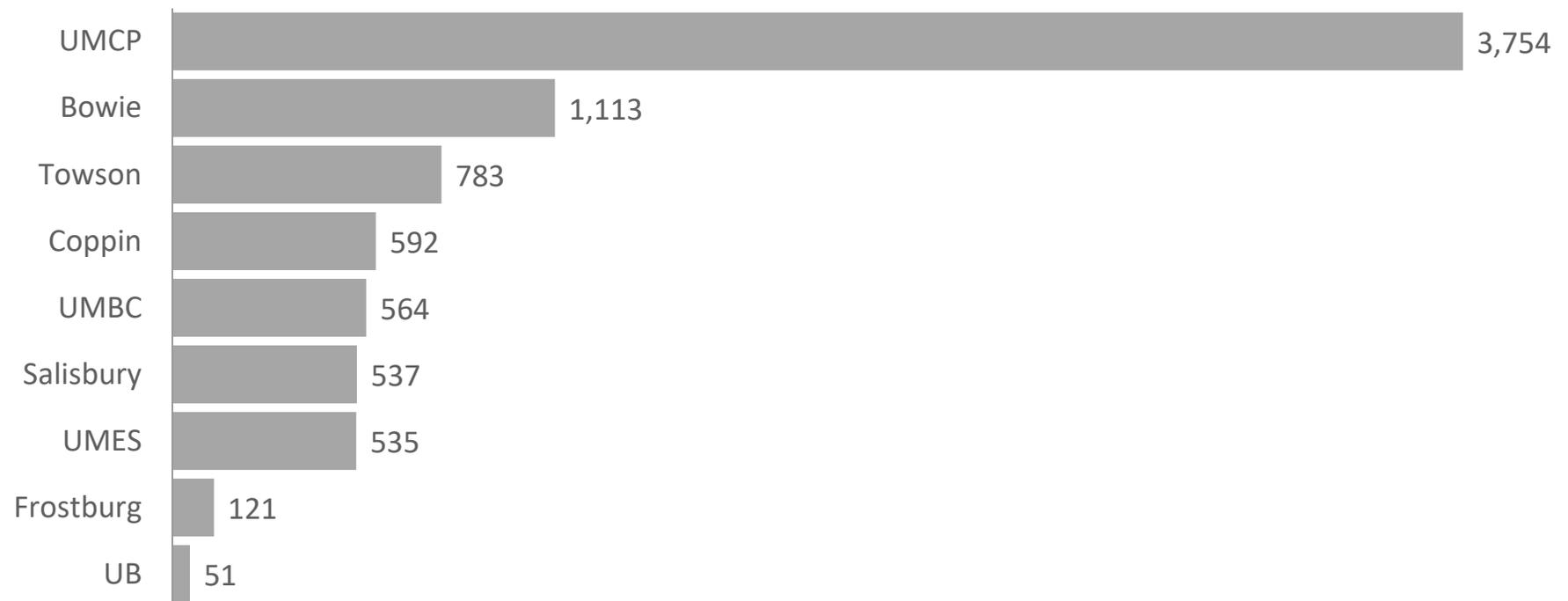


## High School Graduates in the South Region (Primary Location for Out-Migration)

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

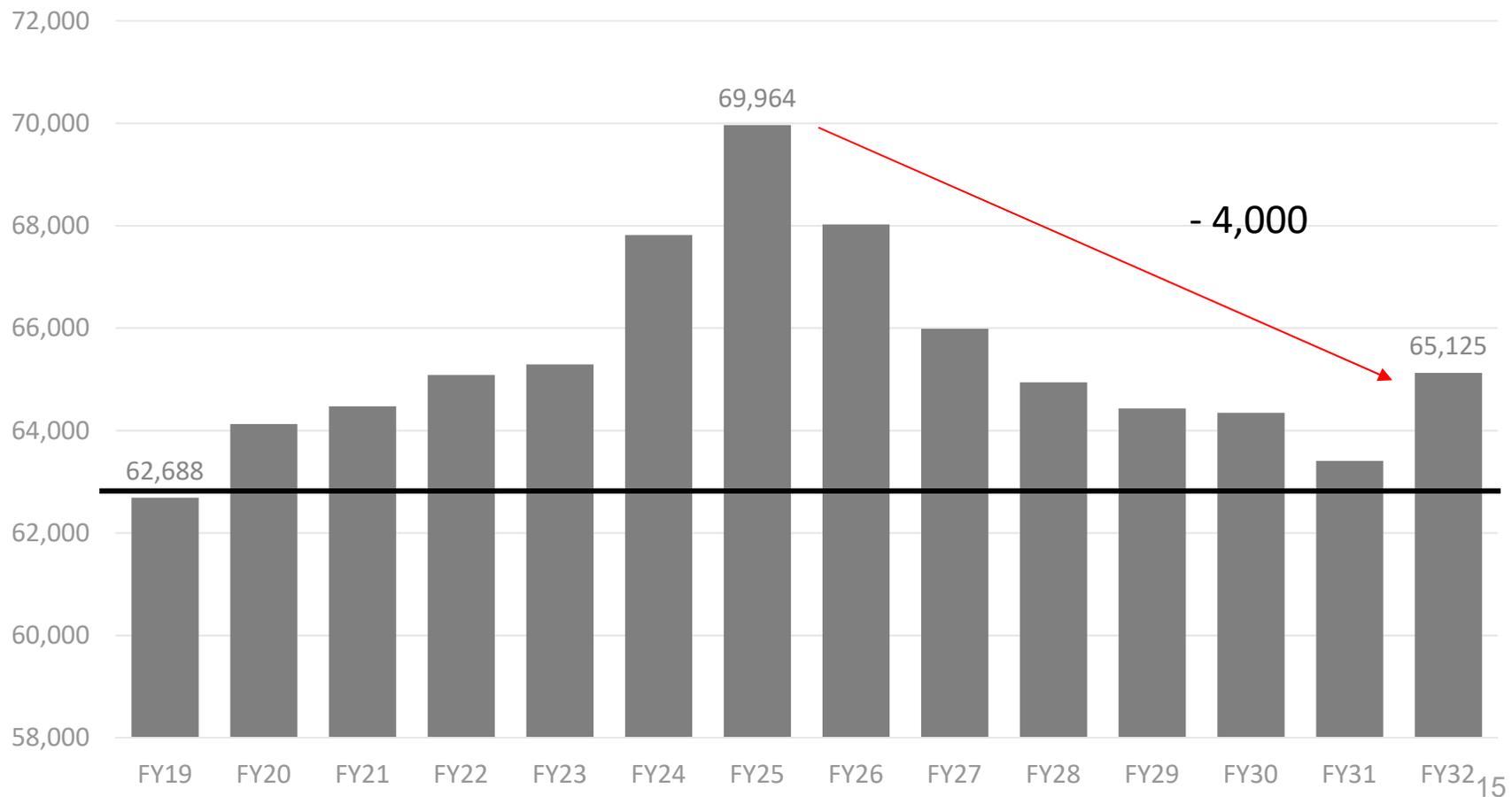


## Applicants by USM Institution— Students that Enrolled in Southern Institutions



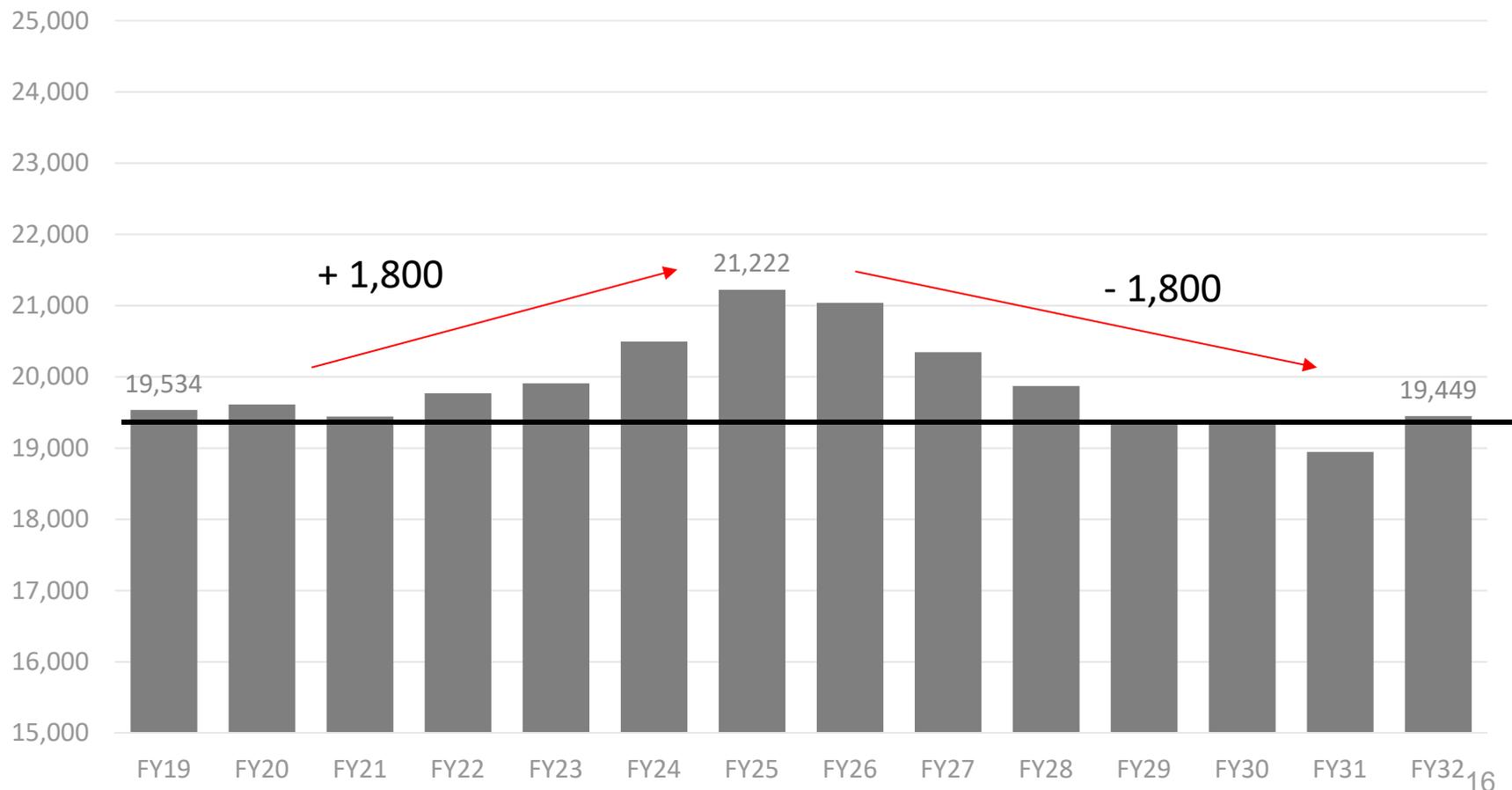
# Potential Maryland High School Graduates

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

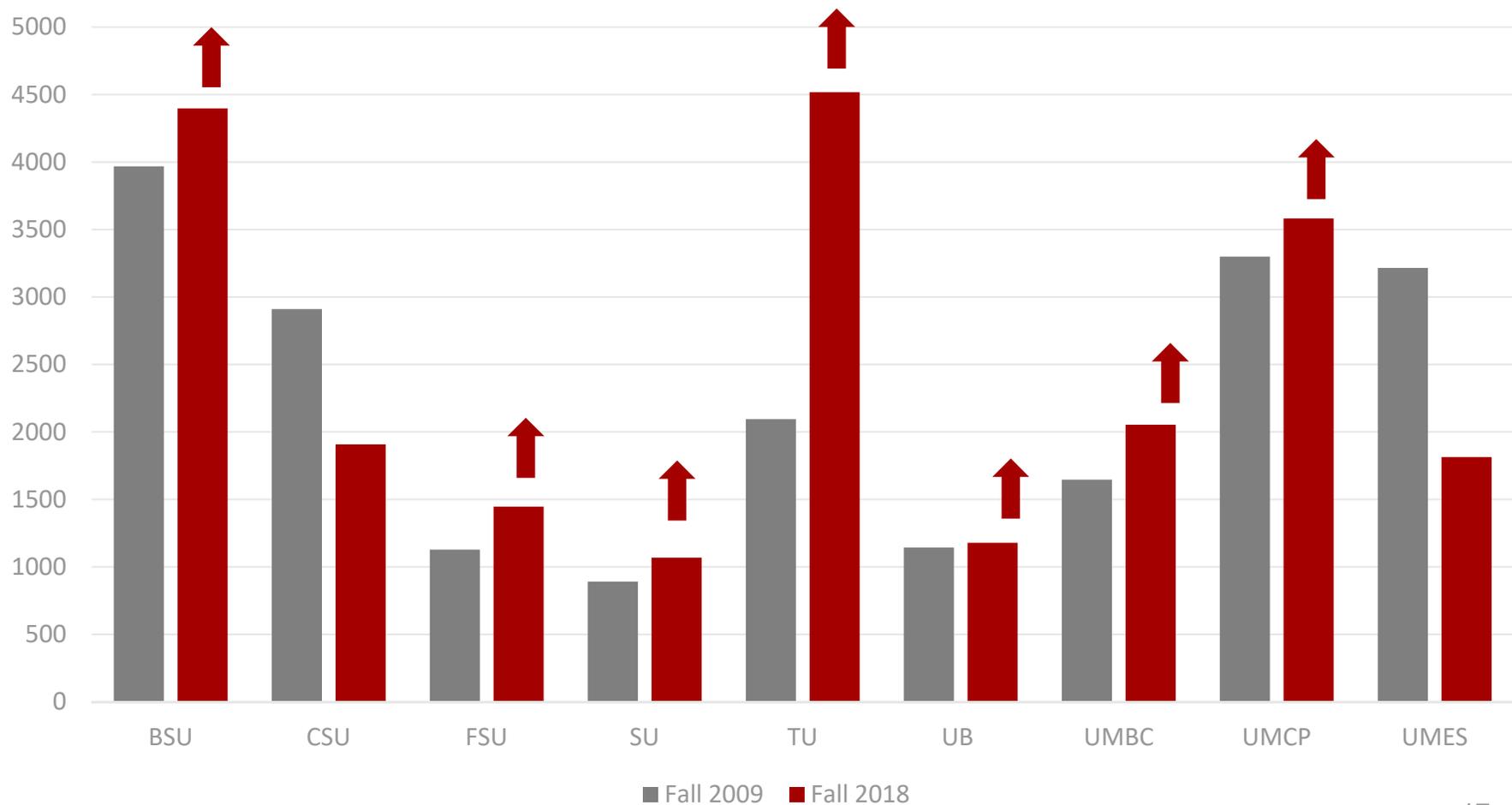


# Potential Maryland High School Graduates – African-American

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

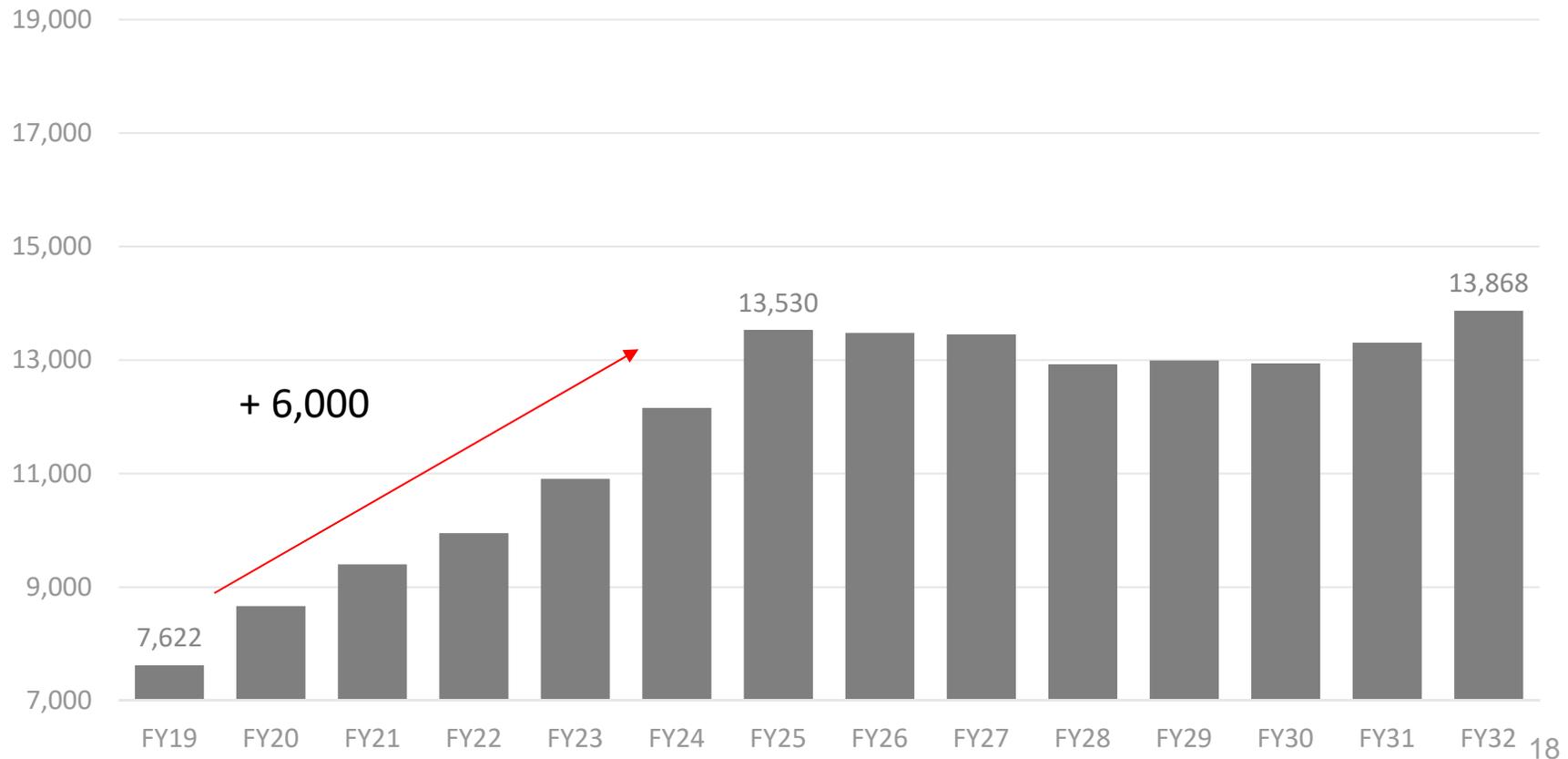


## Change in African-American Undergraduate Enrollment at Traditional Campuses

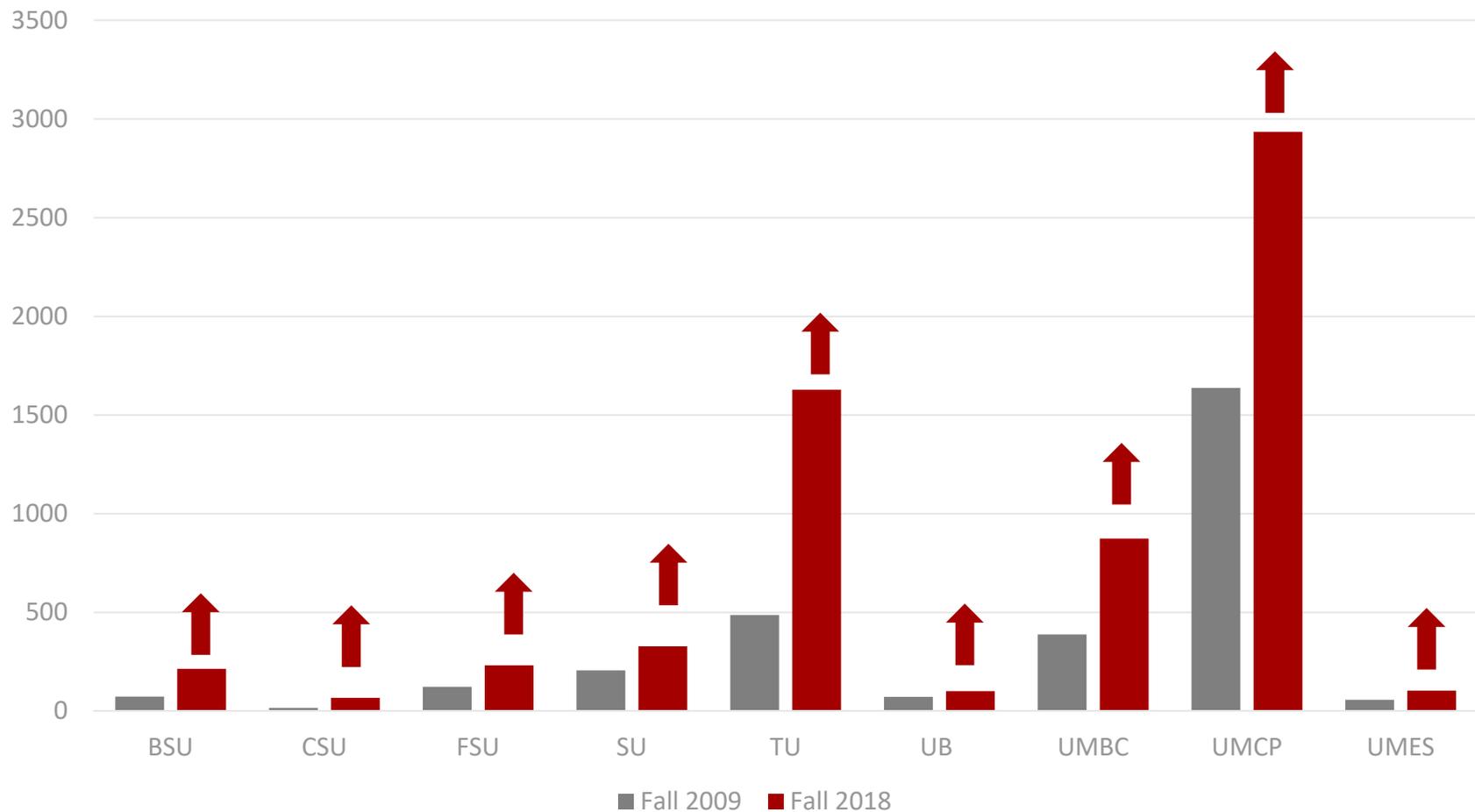


# Potential Maryland High School Graduates – Hispanic/Latino

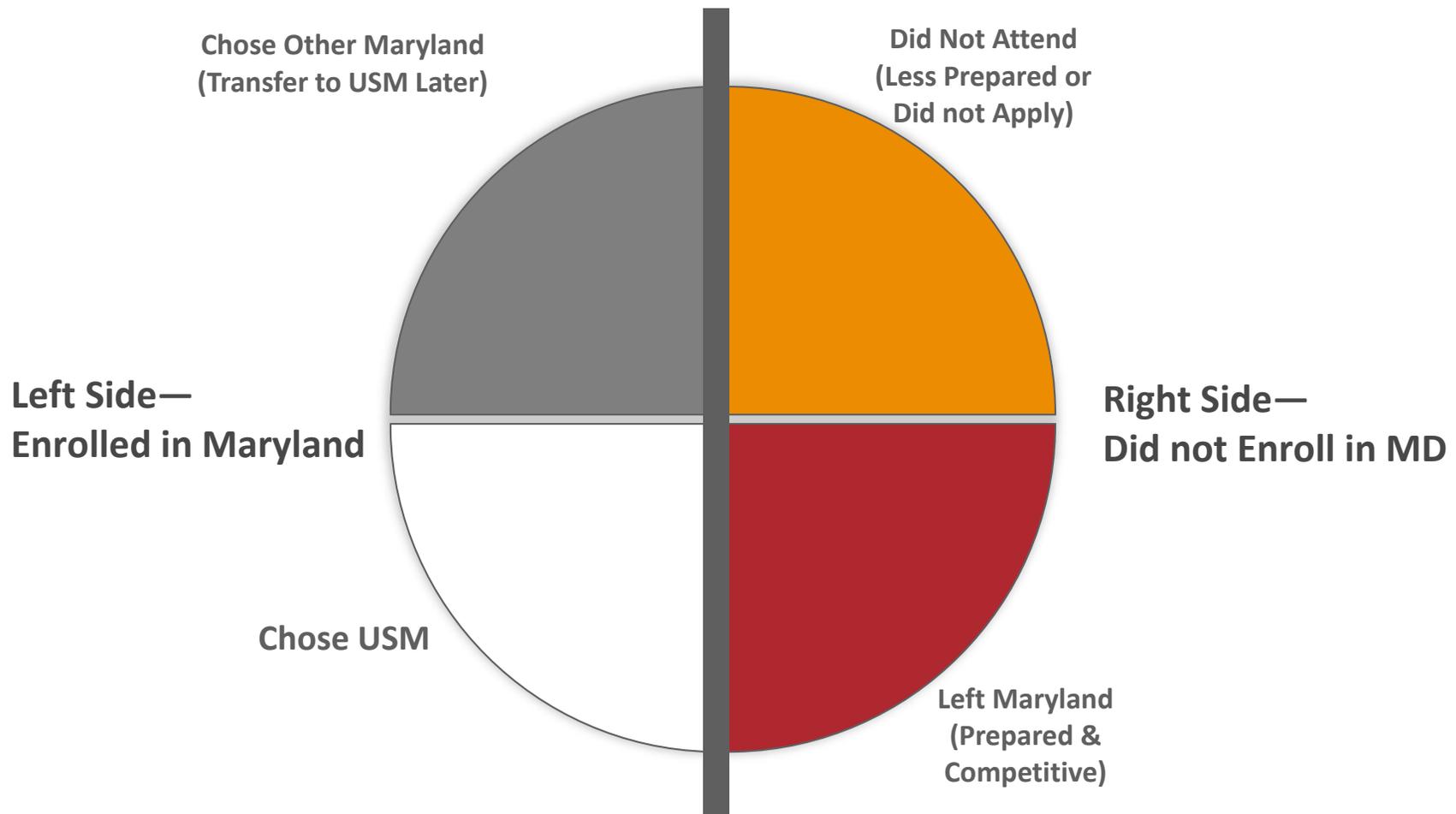
WICHE Projections for Maryland’s Hispanic/Latino high school graduates FY19-FY30 (Public and Private)



## Change in Hispanic Undergraduate Enrollment at Traditional Campuses (Doubled)



# USM Must Cut the Pie Differently by Developing New Pipelines to Increase/Sustain Maryland Enrollment



\*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 be 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

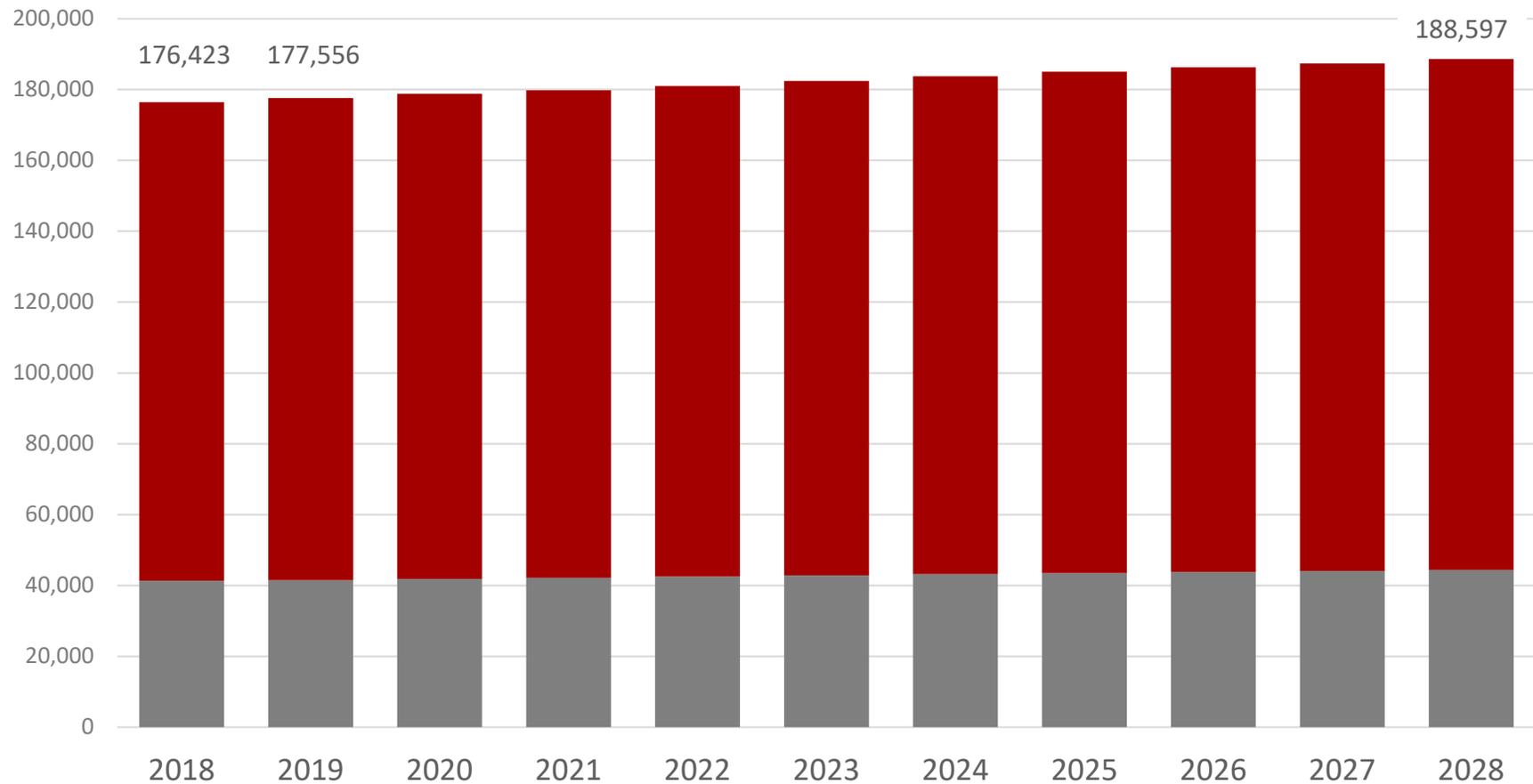
**USM institutions must secure the Maryland high school market share (2020-2025) and hold the market share when competition increases after 2025**

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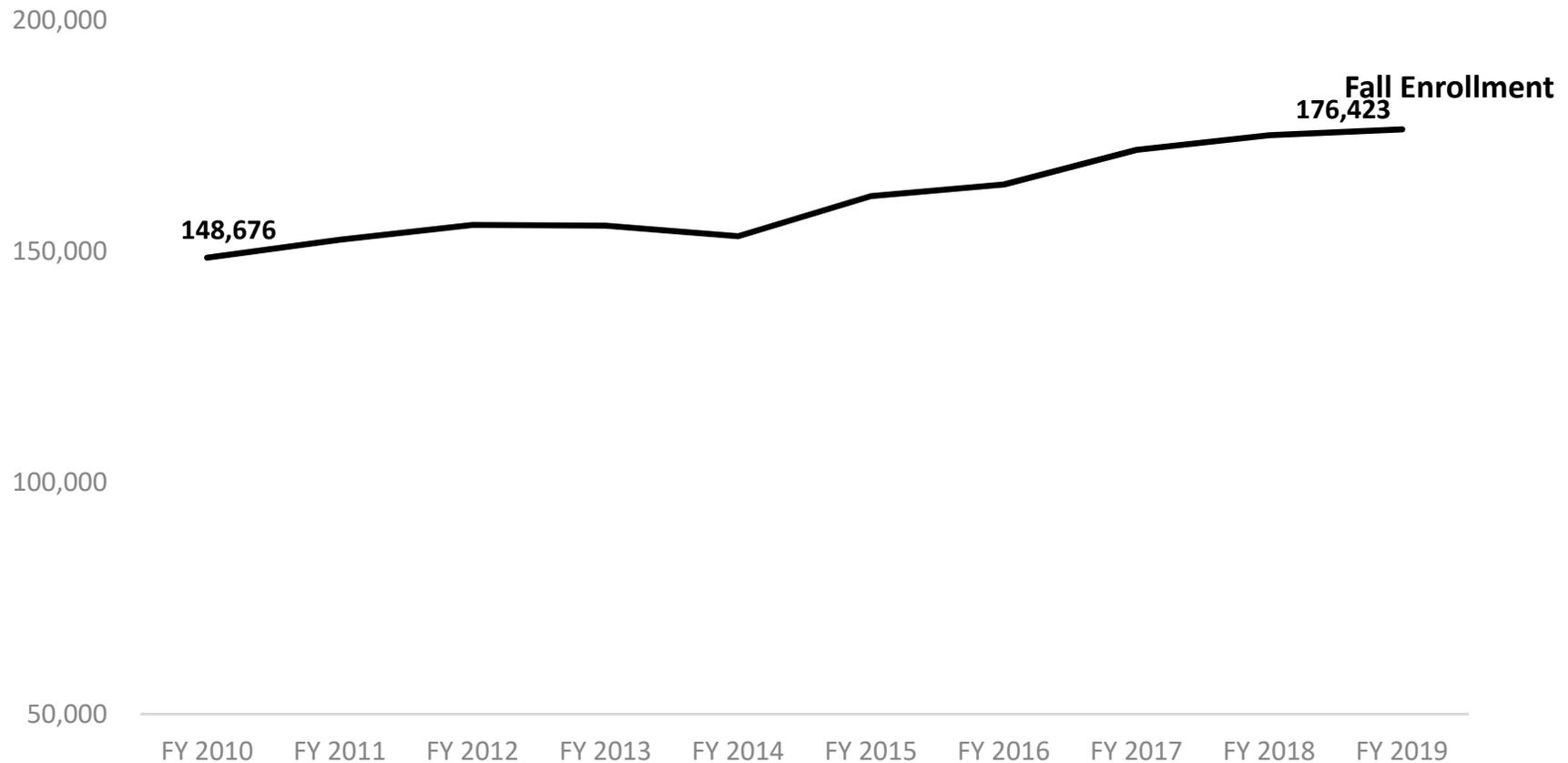


# Long-Term Enrollment Plan +11,656 by Fall 2028

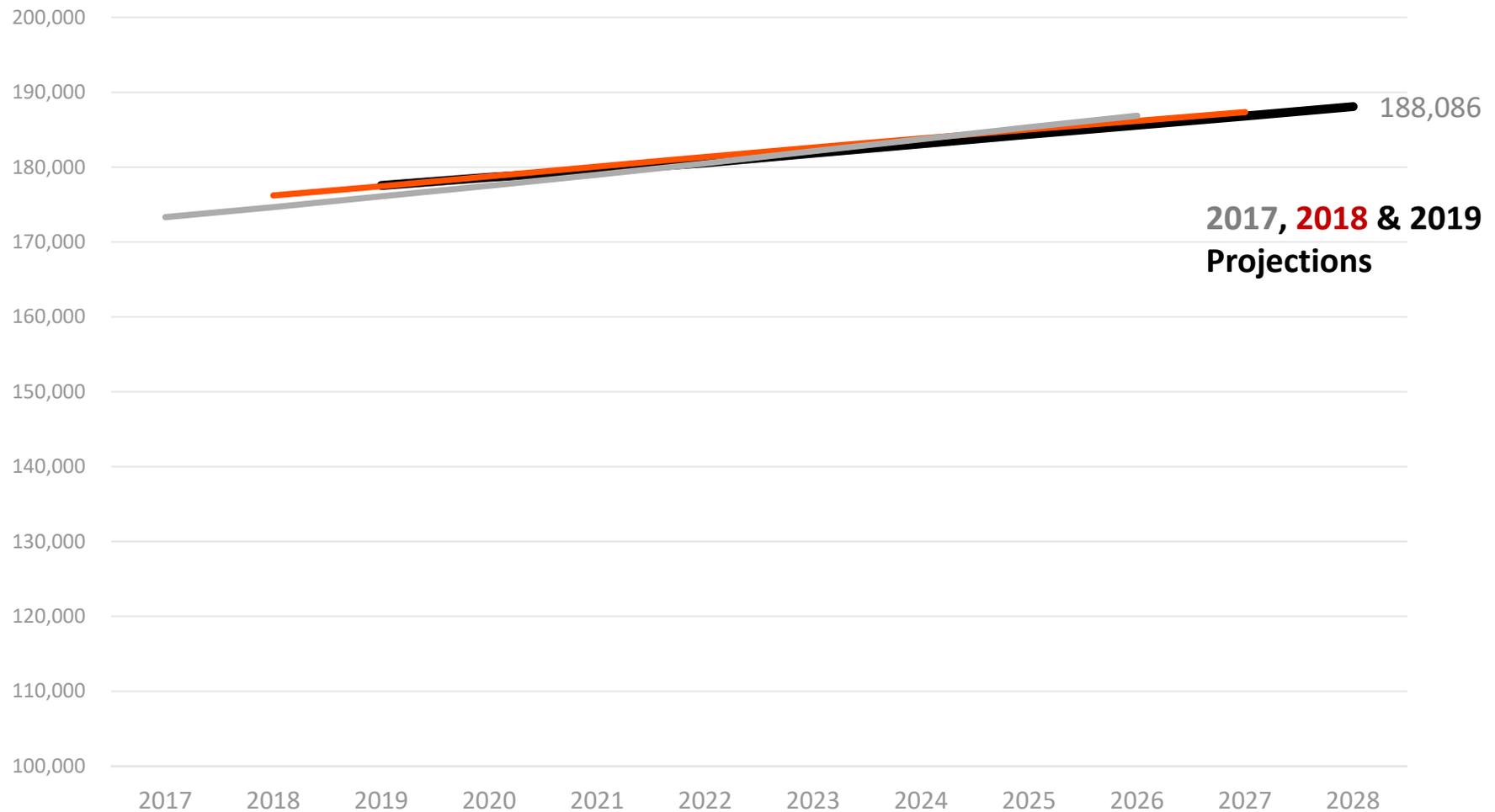
# Campuses' plans call for +11,656 students



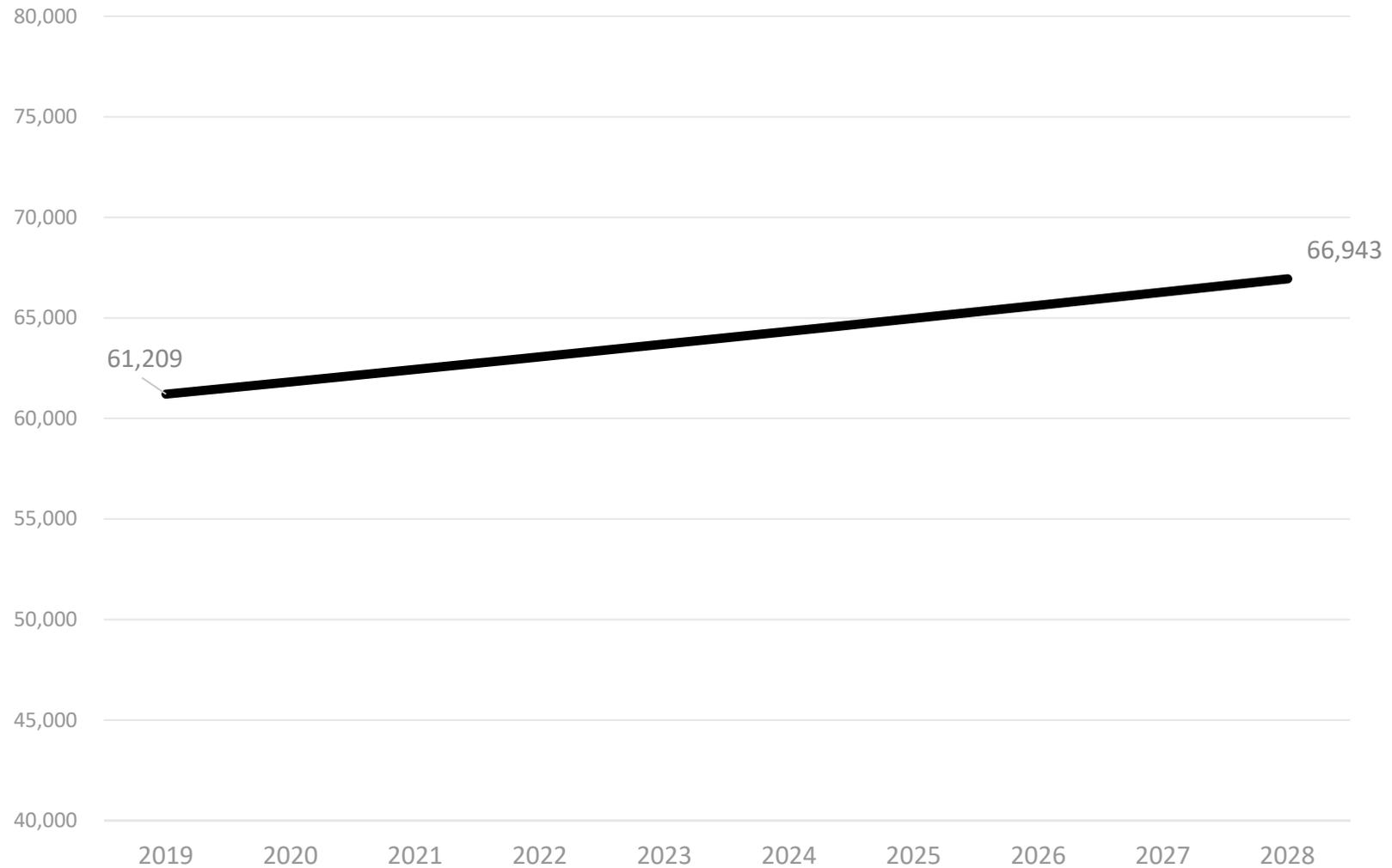
# USM Grew at a Modest Rate FY 2010-FY 2019



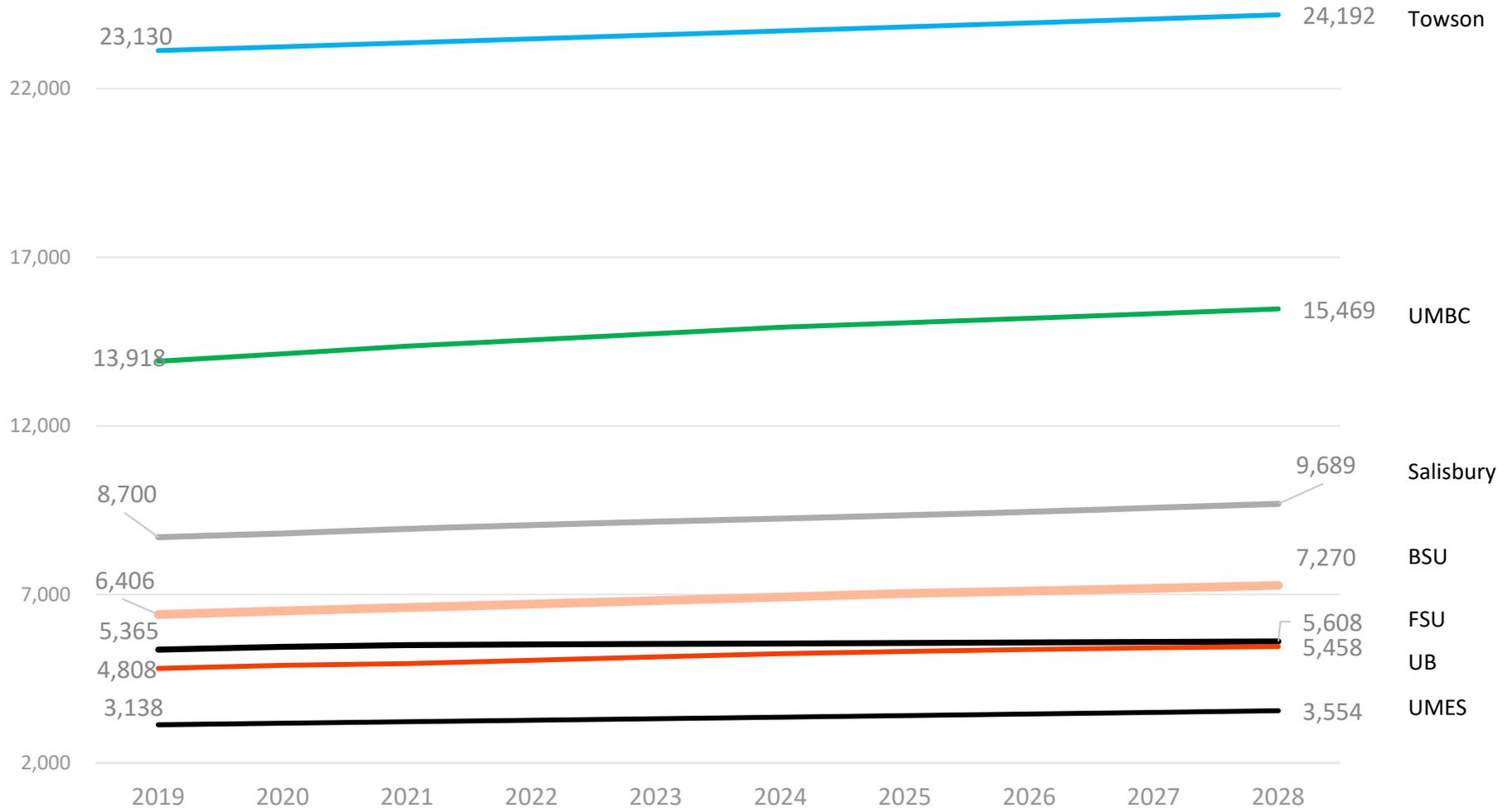
# USM Continues a Conservative Growth Plan with a Modest Rate of Increase



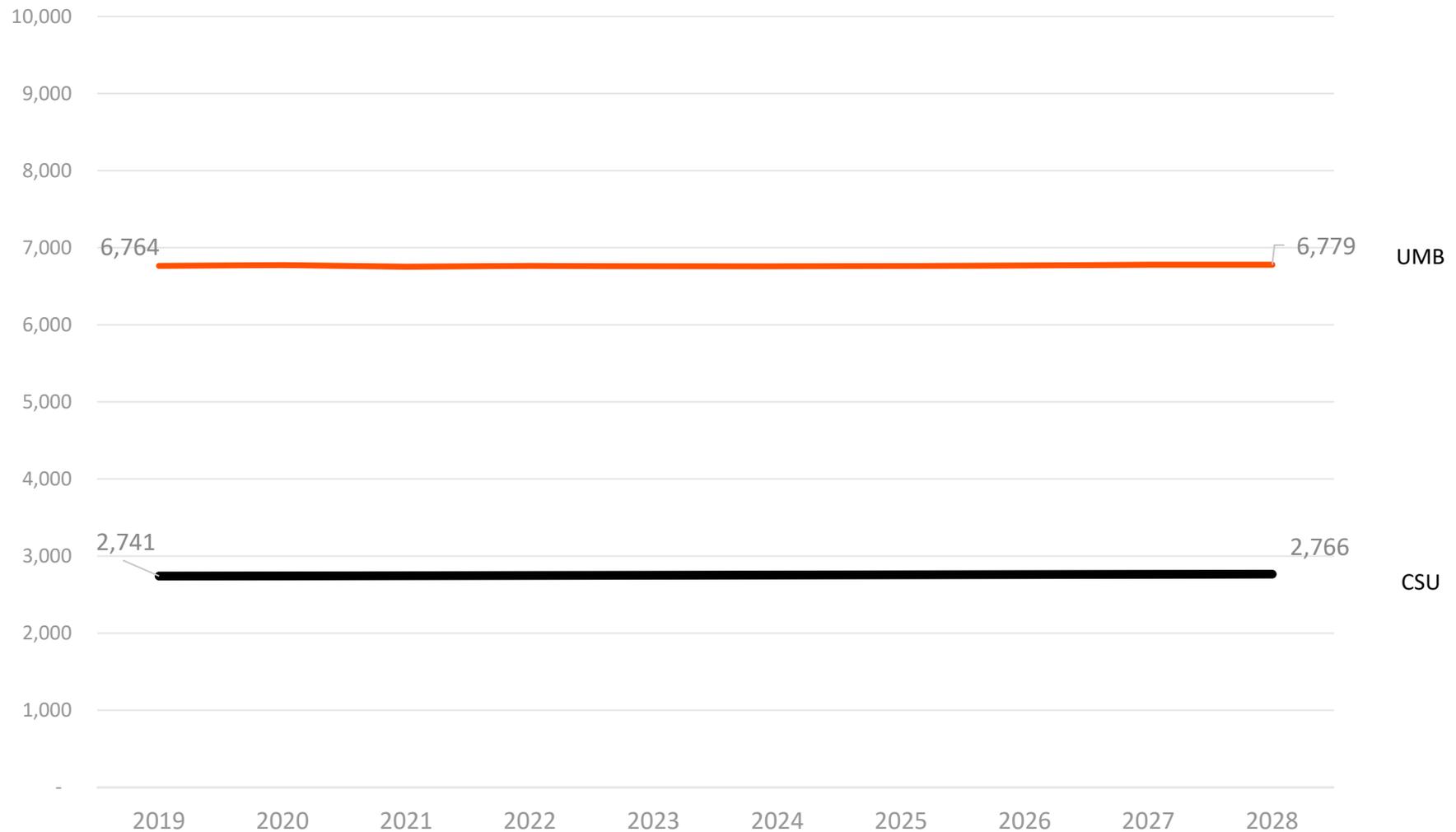
## UMUC Growth Plan: +6,340



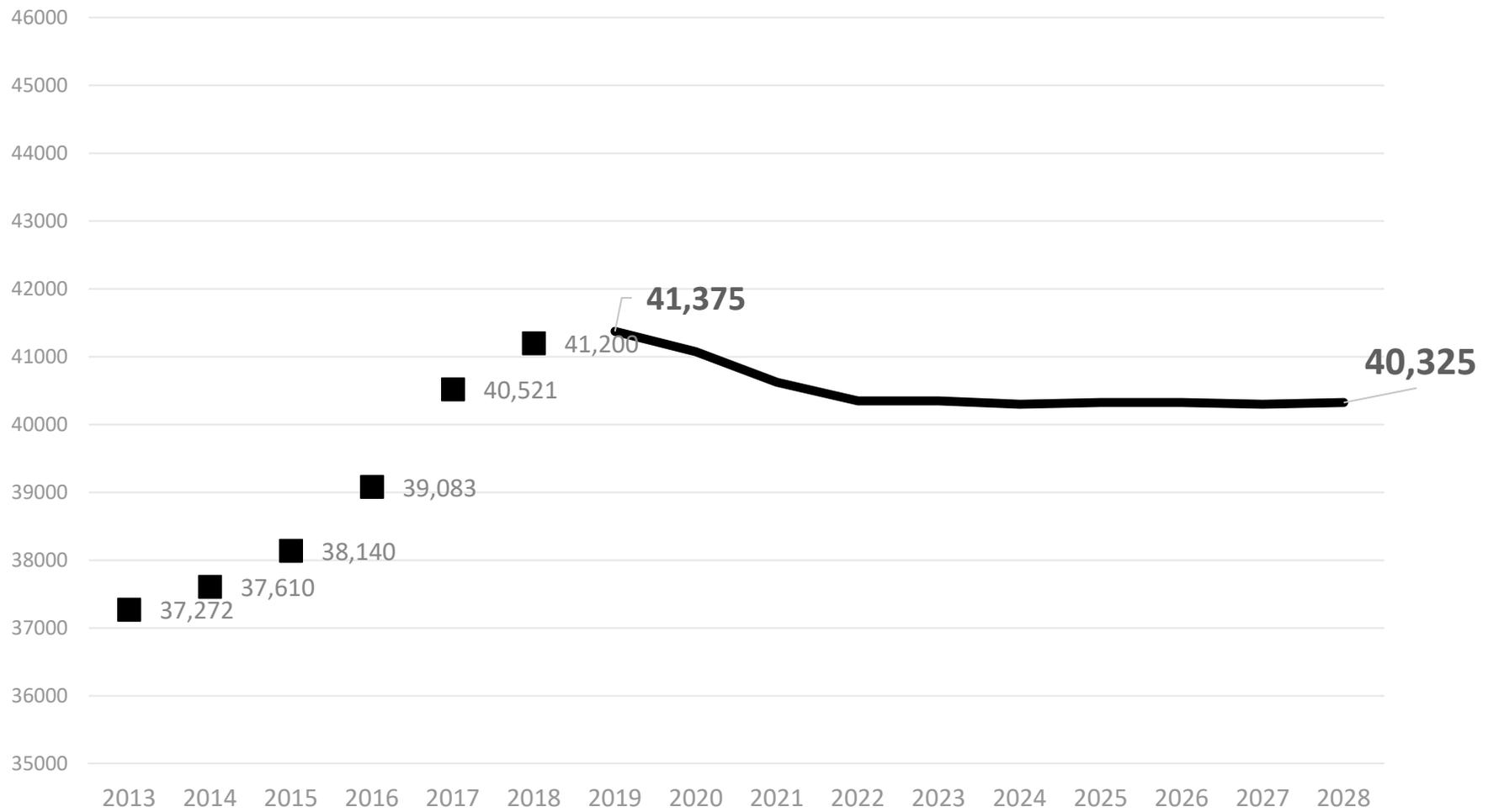
# Traditional USM Institutions with Modest Growth Plans: +6,128



## Traditional USM Institutions Planning Stability



# After Years of Constant Growth, UMCP is Planning a Long-Term Decrease



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# 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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