

USM Enrollment Projections and Fall 2020 Scenarios

Board of Regents Finance Committee
March 26, 2020



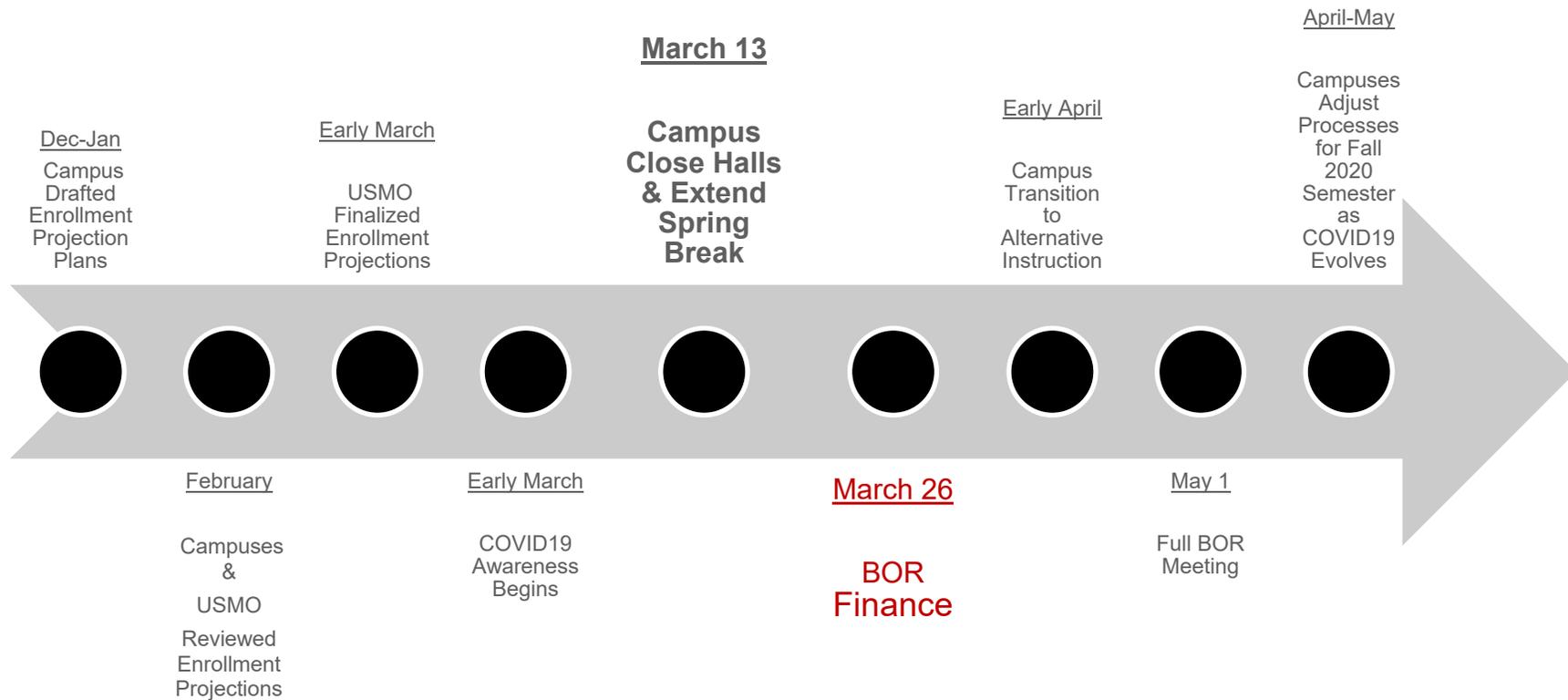
Outline For Enrollment Projection Discussion

- Timeline of the Enrollment Projection Process and COVID19

Information For Discussion

- Review: Pre-Crisis Regional and National Enrollment Trends
- Positives and Negatives
- Overview of Enrollment During Crises – Historical Lessons Learned
- Scenario 1: Revisit Submitted Projections (Pre-COVID19 Optimistic)
- Scenario 2: Mid-level Enrollment Loss Projections (Limited Impact)
- Scenario 3: Significant Enrollment Loss Projections (Pessimistic)
- Key Unknown Information

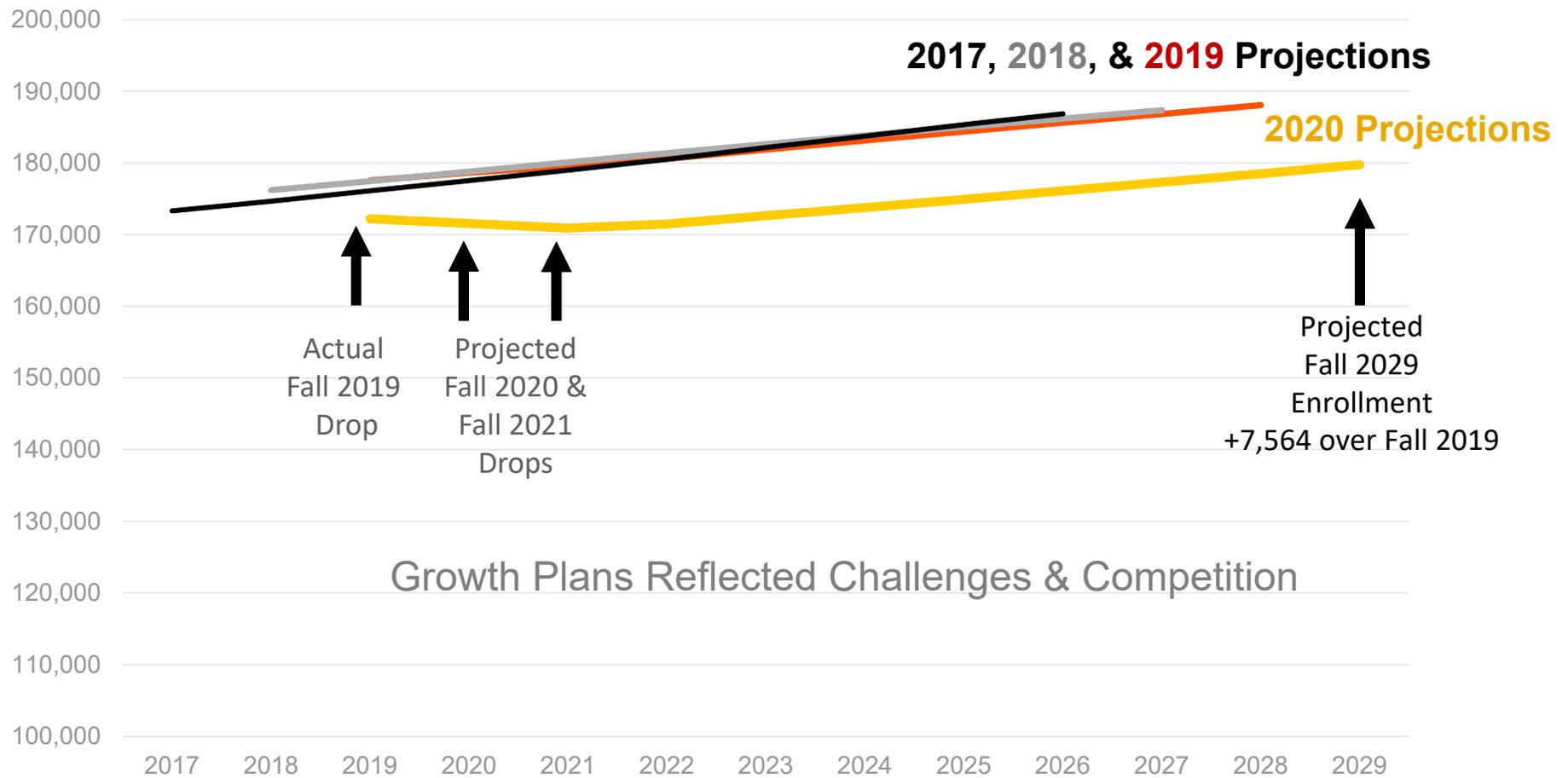
Spring 2020 Timeline



Review of Regional and National High School Graduate Trends Pre-COVID19

- Maryland high school graduations are increasing until 2025 & decreasing after 2025
- Maryland will produce at least 62,000 high school graduates per year through 2030 with USM enrolling about 12,000-13,000 in fall/spring
 - 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 institutions have doubled enrollment of Hispanic students
- Combined, the South and Northeast will decrease by -150,000 high school graduates between 2025-2030
- Because **Maryland is a net-exporter** with a very diverse high school graduate population, USM can expect increased competition

Scenario 1 (Submitted Pre-COVID19): USM Projections were Increasingly Conservative





Framing Alternative Enrollment Scenarios—Lessons Learned from Previous Crises

Fall 2020: Campuses Will Experience COVID19 Differently

Positives

- Knowledge economy not industrial
- More capable with technology
- No physical campus damage
- As “net-exporter,” thousands of students may return to Maryland
- Economic downturns typically increase demand for education & retooling
- Temporary decrease in costs to students with greater stimulus-fueled financial aid support
- Many campuses had residential challenges yet enrolled local students

Negatives

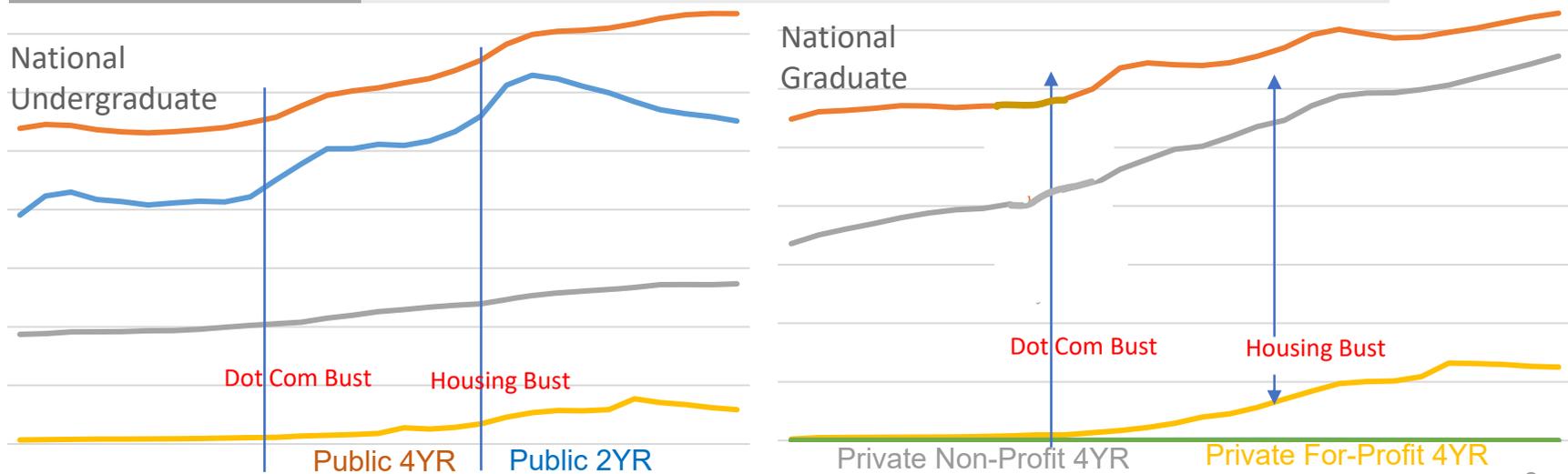
- Global impact
- Loss of academic support systems for students
- Part-time and lower-income students are most vulnerable
- Heightened risk of a major economic downturn
- Inequities among campuses in technological capacity
- Increased risk of stopping/dropping out
- Increased risk of longer time-to-degree, delay to work, and unemployment

Enrollment Following Weather Crises

	Impact	Enrollment	Examples
Short term (2 weeks to 1 month)	Recruitment, housing, daily life, employment	Minus 1-3%	Non-catastrophic weather events and temporary closures
Entire Spring Semester	Significantly altered living arrangements Academic Support Issues	Minus 5-15%	Local impacts of Hurricane Sandy and Maria
Through Summer	No summer bridge activity No Summer tours Delayed registration	Minus 10-20%	Louisiana after Hurricane Katrina and Rita Institutions with minimal physical damage.
Through Fall	Substantial damage to campus & infrastructure No Academic Support	Minus 20-50%	New Orleans in the fall after Katrina/Rita.

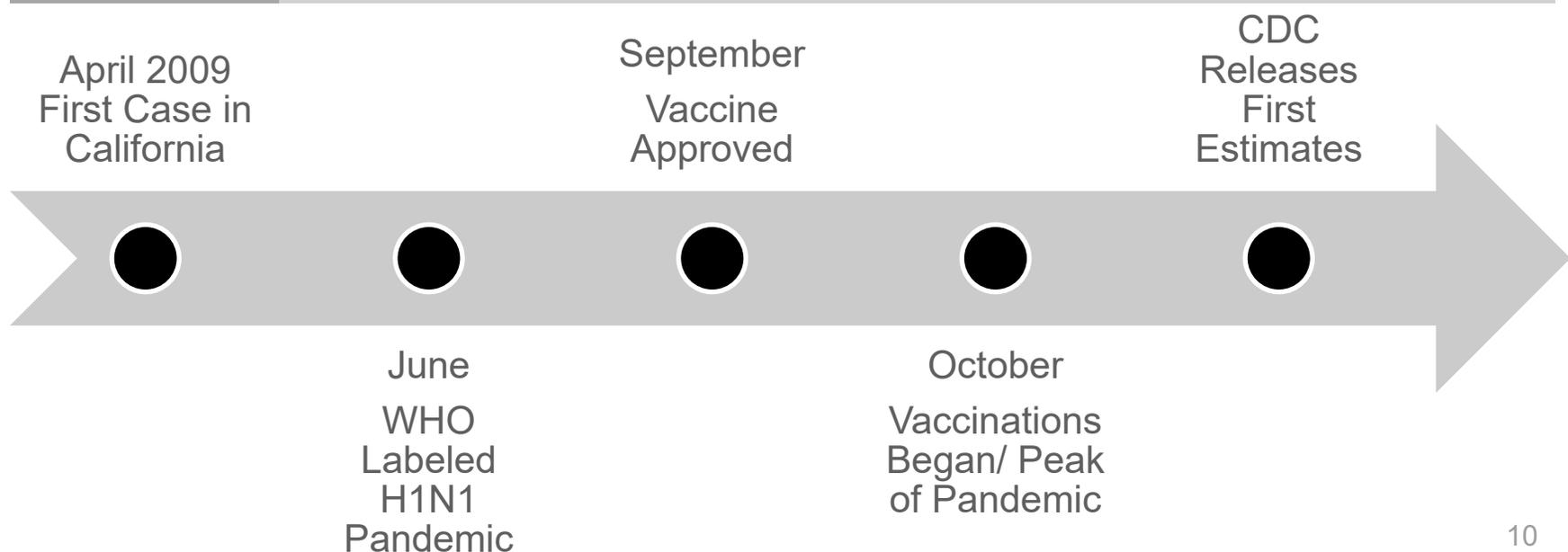
Enrollment Following Economic Crisis

	Impact	Enrollment
Dot Com Bust 2000	<ul style="list-style-type: none"> • Temporary graduate drop at Research Universities • Students return to re-tool 	Public 4YR and 2YR Increased for many years
Housing Bust Began in 2007	<ul style="list-style-type: none"> • Students return to re-tool • For-profits institutions grew 	Public 4YR and 2YR Increased many years



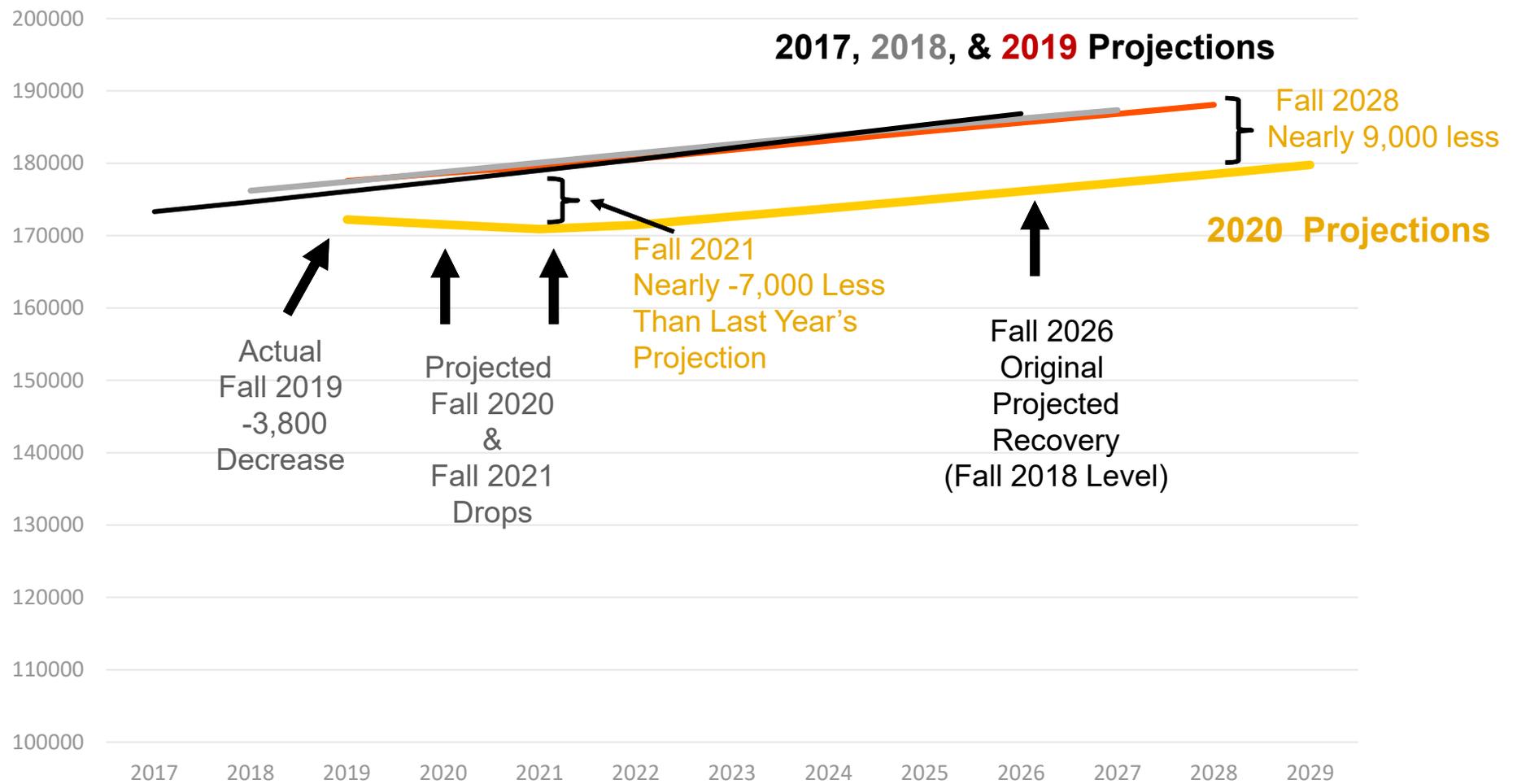
Enrollment Following Health Crisis

	Impact	Enrollment	Location
H1N1 Pandemic 2009-2010	<ul style="list-style-type: none"> Recruitment/ Yield Decrease Fall 2009 Enrollment in CA Part-time Students; Minimal in VA or PA 	Minus 0-2% No Closures	California Virginia Pennsylvania November



Revisit Scenario 1: Pre-COVID19 Submitted Projects

Question: Were Campus Projections Already Adjusted?

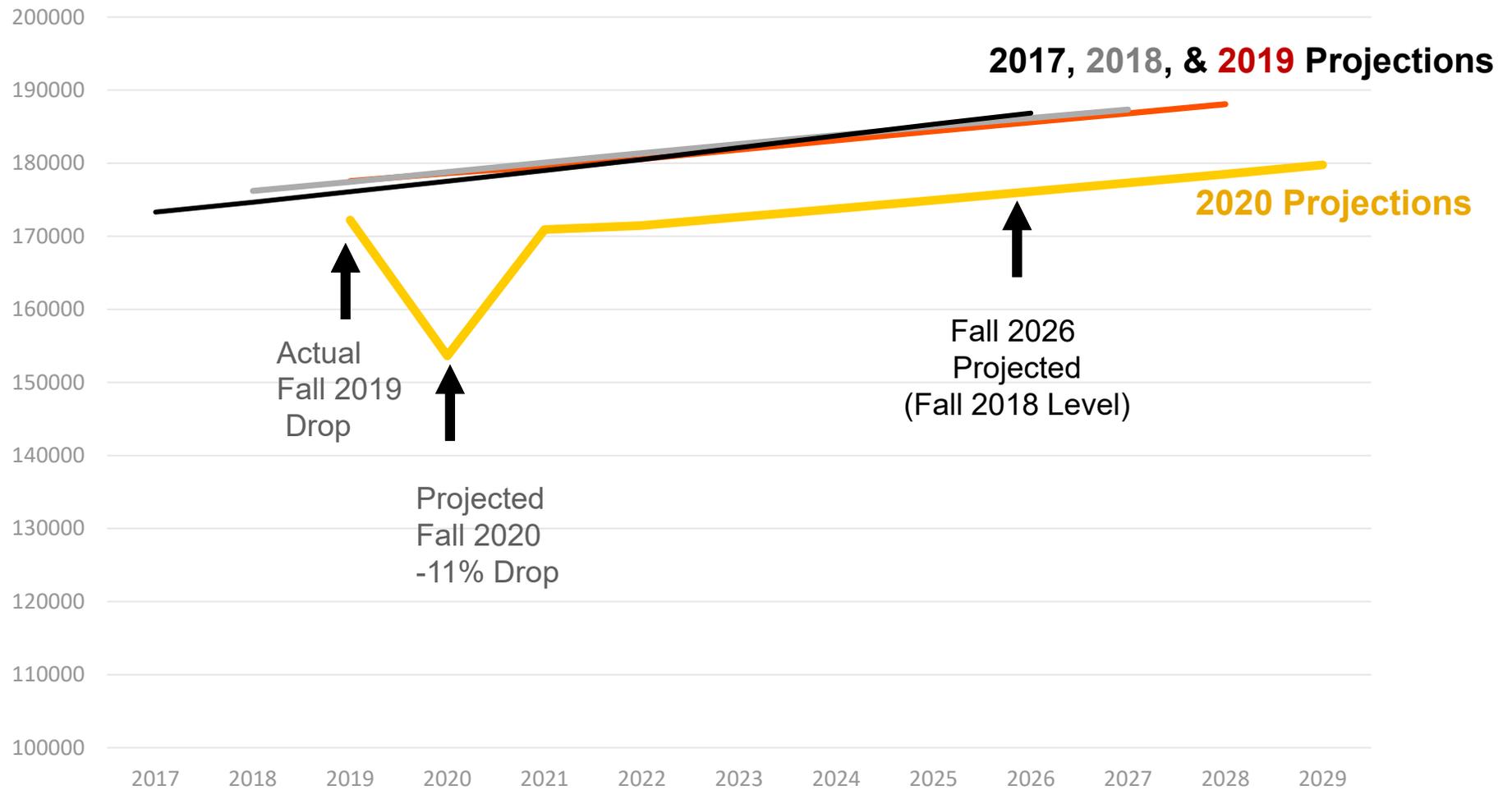


Scenario 2: Limited Impact With Recovery

For One Year—temporary displacement and delayed shift to new economic realities; recover back to Scenario 1

- Part-time undergraduate at traditional Campuses decreases 25%
-2,600
- No Drop at UMGC – Benefits from student displacement
+1,200
- 10% drop (mainly out-of-state & international; some Pell) in full-time undergraduate enrollment including delayed entry of first-time students
-8,500
- 20% drop in graduate enrollment at traditional campuses (international student travel)
-8,000

Scenario 2: Limited Impact With Recovery

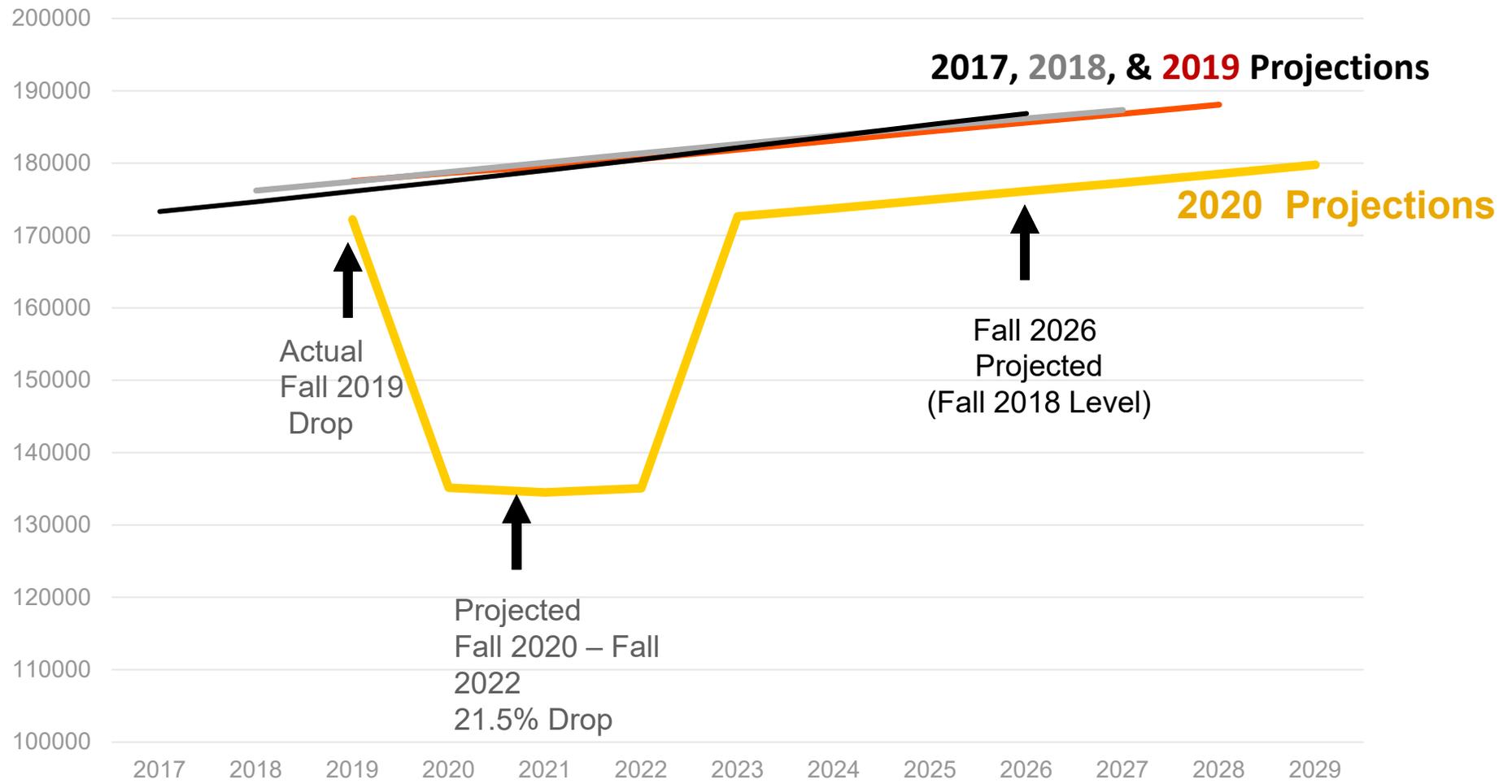


Scenario 3: Significant Impact and Delayed Recovery

For Three Years – Sustained “Dot Com” Bust & like Katrina where some campuses take much longer to recover back to Scenario 1

- Part-time undergraduate at Traditional Campuses decreases 50%
-5,200 per year
- UMGC undergraduate as submitted in Scenario 1
- 20% drop (mainly out-of-state & international; some Pell) in full-time undergraduate enrollment including delayed entry of first-time students
-15,250 per year
- 40% drop in graduate enrollment including UMGC
-15,950 per year

Scenario 3: Significant Impact and Delayed Recovery



Fall 2020 Key Pieces of Unknown Information

Key Decisions Influencing Fall 2020:

- Admitted student deposits -- **May or June**
 - Delayed deadline
 - Students staying local or delaying first-time entry
- Fall 2020 registration by returning students and new transfers -- **August**
 - Academic eligibility after spring 2020
 - Stopping out due to instructional format or course availability
- Announcement of vaccine and availability -- **???**
- When other states decide when re-open institutions/public spaces -- **???**
 - Net exporter to South and if open, more students may prefer to pursue face-to-face
 - Likewise, if Maryland is open and Northeast or other states are closed
- Family financial position in new economy
- International travel announcement -- **???**
- Availability of research grants sponsoring research assistants

Questions and Discussion



Chad Muntz
Assistant Vice Chancellor
Institutional Research, Data, & Analytics
Office of Administration and Finance
cmuntz@usmd.edu