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

Dec-Jan
Campus Drafted Enrollment Projection Plans

Early March
USMO Finalized Enrollment Projections

February
Campuses & USMO Reviewed Enrollment Projections

Early March
COVID19 Awareness Begins

March 13
Campus Close Halls & Extend Spring Break

Early April
Campus Transition to Alternative Instruction

March 26
BOR Finance

April-May
Campuses Adjust Processes for Fall 2020 Semester as COVID19 Evolves

May 1
Full BOR Meeting
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 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

• 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

2017, 2018, & 2019 Projections

2020 Projections

Projected Fall 2029 Enrollment +7,564 over Fall 2019

Growth Plans Reflected Challenges & Competition
Framing Alternative Enrollment Scenarios—Lessons Learned from Previous Crises
## Fall 2020: Campuses Will Experience COVID19 Differently

<table>
<thead>
<tr>
<th>Positives</th>
<th>Negatives</th>
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<tbody>
<tr>
<td>• Knowledge economy not industrial</td>
<td>• Global impact</td>
</tr>
<tr>
<td>• More capable with technology</td>
<td>• Loss of academic support systems for students</td>
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<tr>
<td>• No physical campus damage</td>
<td>• Part-time and lower-income students are most vulnerable</td>
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<tr>
<td>• As “net-exporter,” thousands of students may return to Maryland</td>
<td>• Heightened risk of a major economic downturn</td>
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<td>• Economic downturns typically increase demand for education &amp; retooling</td>
<td>• Inequities among campuses in technological capacity</td>
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<td>• Temporary decrease in costs to students with greater stimulus-fueled financial aid support</td>
<td>• Increased risk of stopping/dropping out</td>
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<td>• Many campuses had residential challenges yet enrolled local students</td>
<td>• Increased risk of longer time-to-degree, delay to work, and unemployment</td>
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## Enrollment Following Weather Crises

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

<table>
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<th>Impact</th>
<th>Enrollment</th>
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<tbody>
<tr>
<td><strong>Dot Com Bust 2000</strong></td>
<td>• Temporary graduate drop at Research Universities&lt;br&gt;• Students return to re-tool</td>
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<td>Public 4YR and 2YR Increased for many years</td>
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<tr>
<td><strong>Housing Bust Began in 2007</strong></td>
<td>• Students return to re-tool&lt;br&gt;• For-profits institutions grew</td>
</tr>
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<td>Public 4YR and 2YR Increased many years</td>
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</tbody>
</table>

- National Undergraduate
- National Graduate
- Private Non-Profit 4YR
- Private For-Profit 4YR

- Public 4YR
- Public 2YR
- Dot Com Bust
- Housing Bust
## Enrollment Following Health Crisis

**Impact**

- Recruitment/ Yield
- Decrease Fall 2009 Enrollment in CA Part-time Students;
- Minimal in VA or PA

**Enrollment**

- Minus 0-2%
- No Closures

**Location**

- California
- Virginia
- Pennsylvania

### Timeline

- **April 2009**: First Case in California
- **September**: Vaccine Approved
- **October**: Vaccinations Began/ Peak of Pandemic
- **November**: CDC Releases First Estimates
- **June**: WHO Labeled H1N1 Pandemic

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**H1N1 Pandemic 2009-2010**
Revisit Scenario 1: Pre-COVID19 Submitted Projects

Question: Were Campus Projections Already Adjusted?

- **2017, 2018, & 2019 Projections**
  - Fall 2019: Nearly -7,000 less than last year’s projection
  - Fall 2021: Nearly -7,000 less than last year’s projection

- **2020 Projections**
  - Fall 2020 & Fall 2021 Drops
  - Fall 2026 Original Projection
  - Fall 2028 Nearly 9,000 less

- **Actual Fall 2021**
  - -3,800 Decrease

- **Projected Fall 2019**
  - (Fall 2018 Level)
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

2017, 2018, & 2019 Projections

Actual Fall 2019 Drop

Projected Fall 2020 -11% Drop

Fall 2026 Projected (Fall 2018 Level)

2020 Projections
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

2017, 2018, & 2019 Projections

Fall 2026
Projected
(Fall 2018 Level)

2020 Projections

Actual
Fall 2019
Drop

Projected
Fall 2020 – Fall 2022
21.5% Drop
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

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