Outline For Enrollment Projection Presentation

- Comments About Fall 2020 and Longer-term

- Compare Updated Enrollment Projections to March BOR Finance Scenarios:
  - Original Projections “Scenario 1”
  - Hypothesized Projections “Scenario 2”

- Specific Changes by Headcount, FTE and Campus Headcounts

- Close with our Unknown Information
Fall 2020 Enrollment Projection

Comments

• Projected with students still registering before drop/add deadline

• Campuses noted enrollment mix changes
  ▪ International
  ▪ Out-of-state
  ▪ Full-time
  ▪ Graduate

• Retention and preferred learning environment

• UMGC vs other institutions
  ▪ Online increase
  ▪ In-person decreases (e.g., first-time) is a multi-year impact
Longer-Term Enrollment Projection Comments

- Projected with an assumption about an eventual return-to-normal

- Enrollment mix challenges are still in play due to demographic changes
  - International
  - Out-of-state
  - Full-time
  - Graduate

- Retention is a key enrollment growth component

- UMGC vs other institutions
  - Starting point at UMGC is higher;
  - Lower at other campuses
  - In-person decreases (e.g., first-time) is a multi-year impact
Updated Projections: FY 2021 to FY 2030

Fall 2019: Actual

Fall 2020: Enrollment Greater Decline Than Spring 2020 Projections

Fall 2029: Projected Enrollment +8,877 over Fall 2017, 2018, & 2019 Projections
Revisit Scenario 2: Limited Impact With Recovery

2017, 2018, & 2019 Projections

2020 Scenario 2 Projections

Actual Fall 2019 Drop

Posited Fall 2020 -11% Drop
Revisit 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%
  Hypothesized -2,600          Actual -300

• No Drop at UMGC – Benefits from student displacement
  Hypothesized +1,200          Actual +1,400

• 10% drop (mainly out-of-state & international; some Pell) in full-time undergraduate enrollment including delayed entry of first-time students
  Hypothesized -8,500          Actual -3,000

• 20% drop in graduate enrollment at traditional campuses (international student travel)
  Hypothesized -8,000          Actual -1,000
Revisit Scenarios and Updated Projections

2017, 2018, & 2019 Projections

Original Scenario 1  Scenario 2  Updated Projections
# Fall 2020 Changes VS Fall 2019 By Campus

<table>
<thead>
<tr>
<th>Campus</th>
<th>Update</th>
<th>Pre-COVID19</th>
<th>Expected Recovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bowie</td>
<td>Flat</td>
<td>+150</td>
<td>Fall 2020</td>
</tr>
<tr>
<td>Coppin</td>
<td>-500</td>
<td>Flat</td>
<td>Fall 2027</td>
</tr>
<tr>
<td>Frostburg</td>
<td>-300</td>
<td>Flat</td>
<td>Fall 2023</td>
</tr>
<tr>
<td>Salisbury</td>
<td>-350</td>
<td>+100</td>
<td>Fall 2025</td>
</tr>
<tr>
<td>Towson</td>
<td>-1,000</td>
<td>+100</td>
<td>Beyond Fall 2029</td>
</tr>
<tr>
<td>UB</td>
<td>-500</td>
<td>-360</td>
<td>Beyond Fall 2029</td>
</tr>
<tr>
<td>UMB</td>
<td>+225</td>
<td>+150</td>
<td>Achieved More Growth</td>
</tr>
<tr>
<td>UMBC</td>
<td>-360</td>
<td>+400</td>
<td>Fall 2021</td>
</tr>
<tr>
<td>UMCP</td>
<td>-750</td>
<td>-70</td>
<td>Continue Planned Decrease</td>
</tr>
<tr>
<td>UMES</td>
<td>-250</td>
<td>Flat</td>
<td>Fall 2026</td>
</tr>
<tr>
<td>UMGC</td>
<td>+1,400</td>
<td>-1,200</td>
<td>Reverse Anticipated Decline</td>
</tr>
<tr>
<td>USM</td>
<td>-2,400</td>
<td>-675</td>
<td>Fall 2022 or Fall 2023</td>
</tr>
<tr>
<td>W/O UMGC</td>
<td>-3,800*</td>
<td>+500</td>
<td>Fall 2024</td>
</tr>
<tr>
<td>FTE</td>
<td>-3,100</td>
<td>Flat</td>
<td>FY 2024</td>
</tr>
<tr>
<td>W/O UMGC FTE</td>
<td>-3,450</td>
<td>+700</td>
<td>FY 2025</td>
</tr>
</tbody>
</table>
Updated Projections: FY 2021 to FY 2030 (Without UMGC)

2020 Updated Projections W/O UMGC

Fall 2021

Some “bounce”

Multi-Year Recovery
Key Pieces of Unknown Information

Decisions Influencing Enrollment:

- Phase II of the Pandemic
- Announcement of vaccine & availability – *Earliest date is Nov 1*
- Competitor decisions with housing/in-person instruction
  - Net exporter to South and, if open, more students may prefer to pursue face-to-face
  - In contrast, if students are unable or unwilling to live in other states, Maryland has more HS Graduates than available first-time enrollment slots
- Family financial position in new economy
  - Delayed Entry or Community College Start?
- International and national travel restrictions
- Research delays, international graduate students, & grant funding
- Institutional accessibility with remote education
Future Enrollment Conversations

- Board Workgroup Meetings (September and May)
- Fall Headcount and FTE Update (November)
- Next round of Enrollment Projections (March)
Questions and Discussion