

# Updated USM Enrollment Projections FY 2021 to FY 2030

Board of Regents Finance Committee  
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# 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

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# Fall 2020 Enrollment Projection Comments

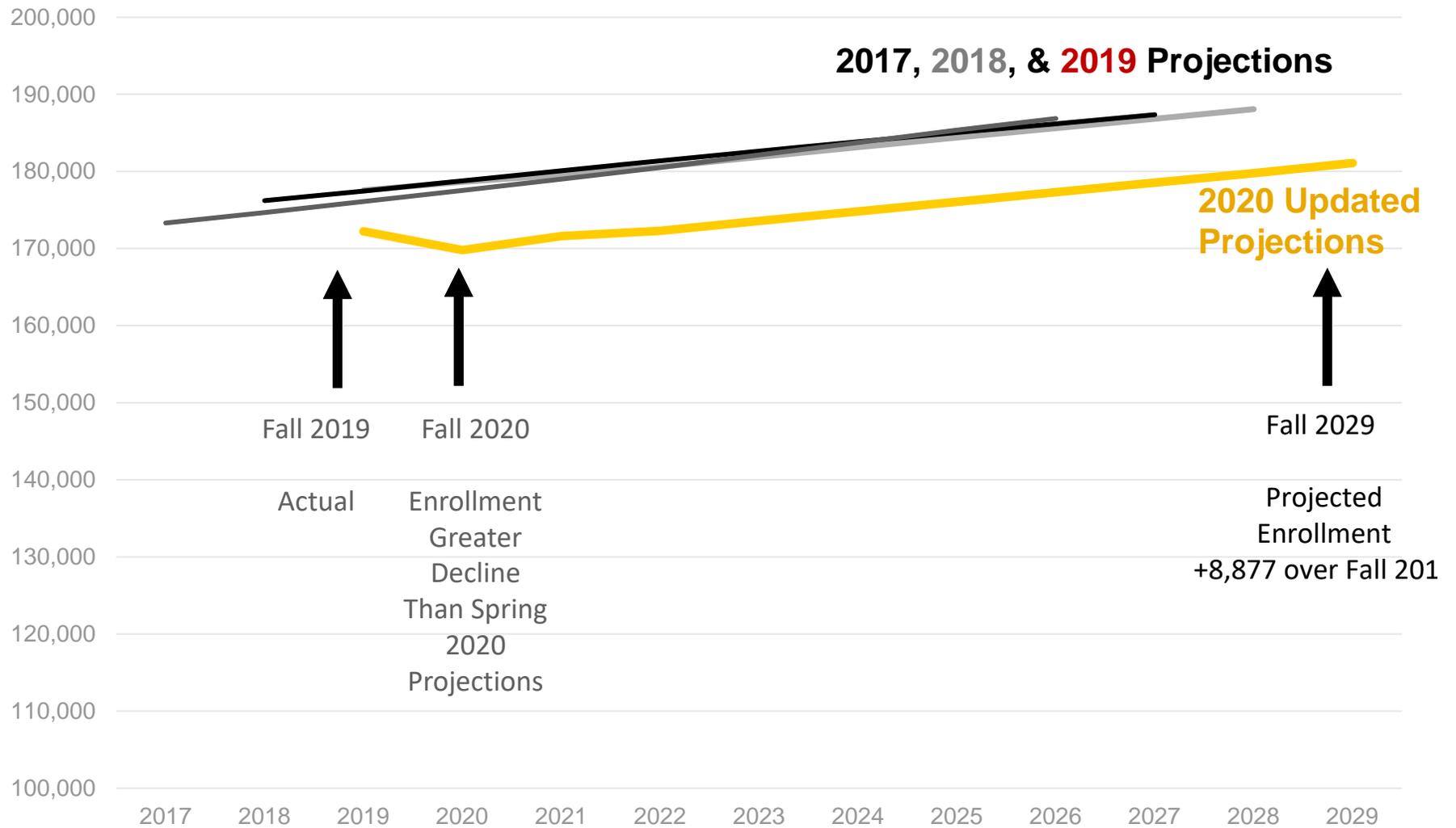
- Projected with students still registering before drop/add deadline
- Campuses noted enrollment mix changes
  - International
  - Out-of-state
  - Full-time
  - Graduate
- Retention and preferred learning environment
- UMGC vs other institutions
  - Online increase
  - In-person decreases (e.g., first-time) is a multi-year impact

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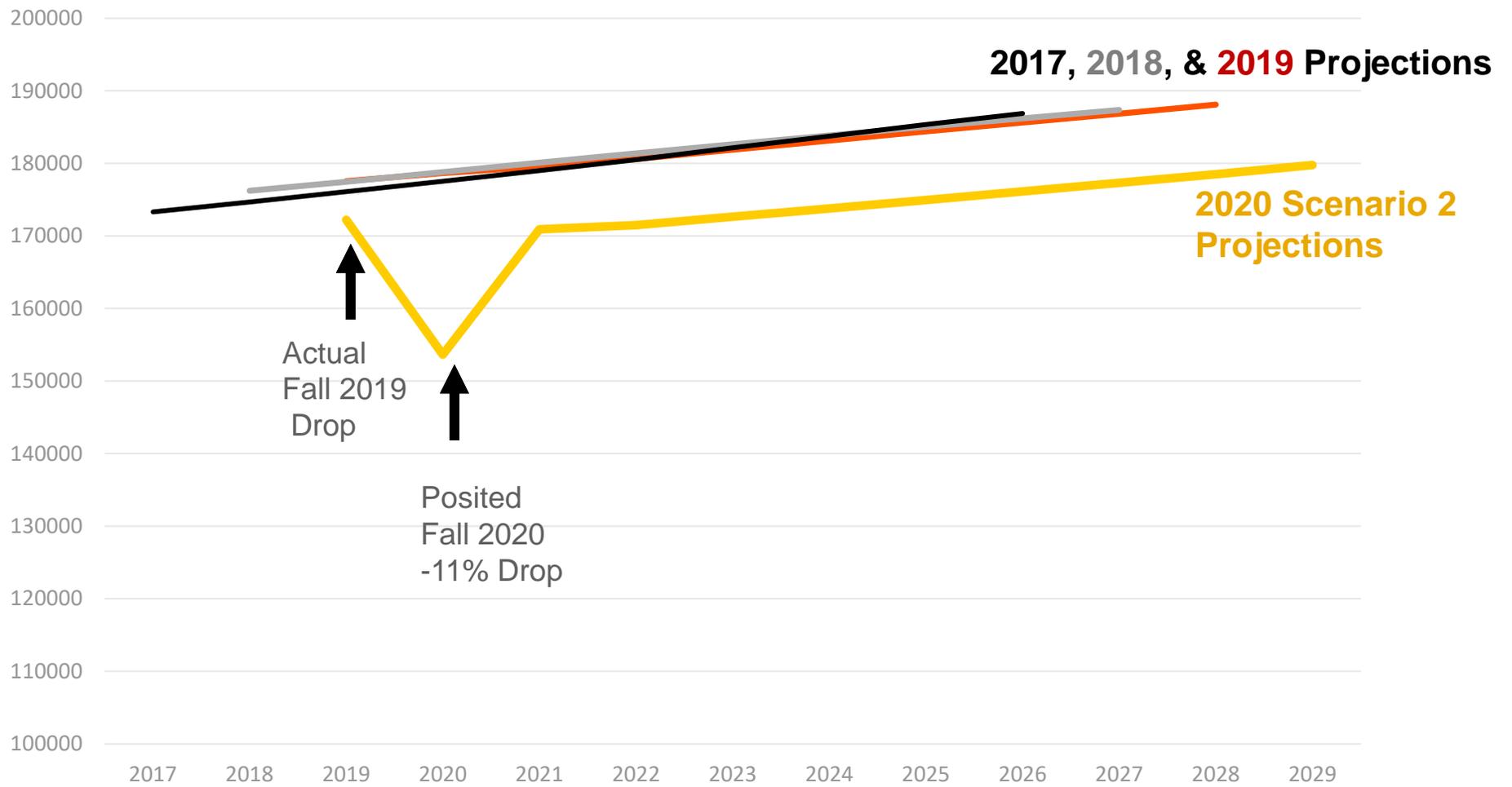
# Longer-Term Enrollment Projection Comments

- 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



## Revisit Scenario 2: Limited Impact With Recovery

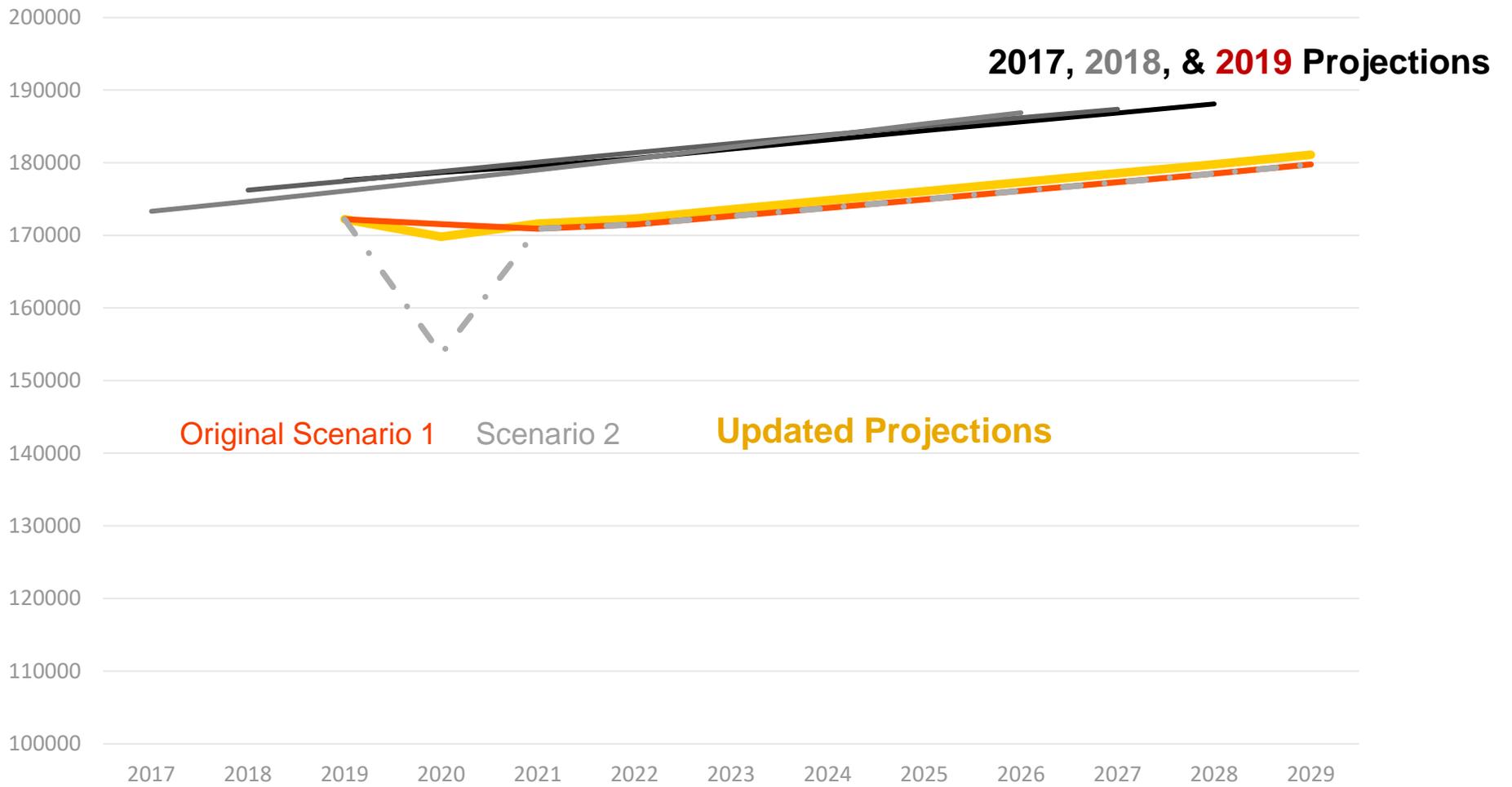


## Revisit Scenario 2: Limited Impact With Recovery

### 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

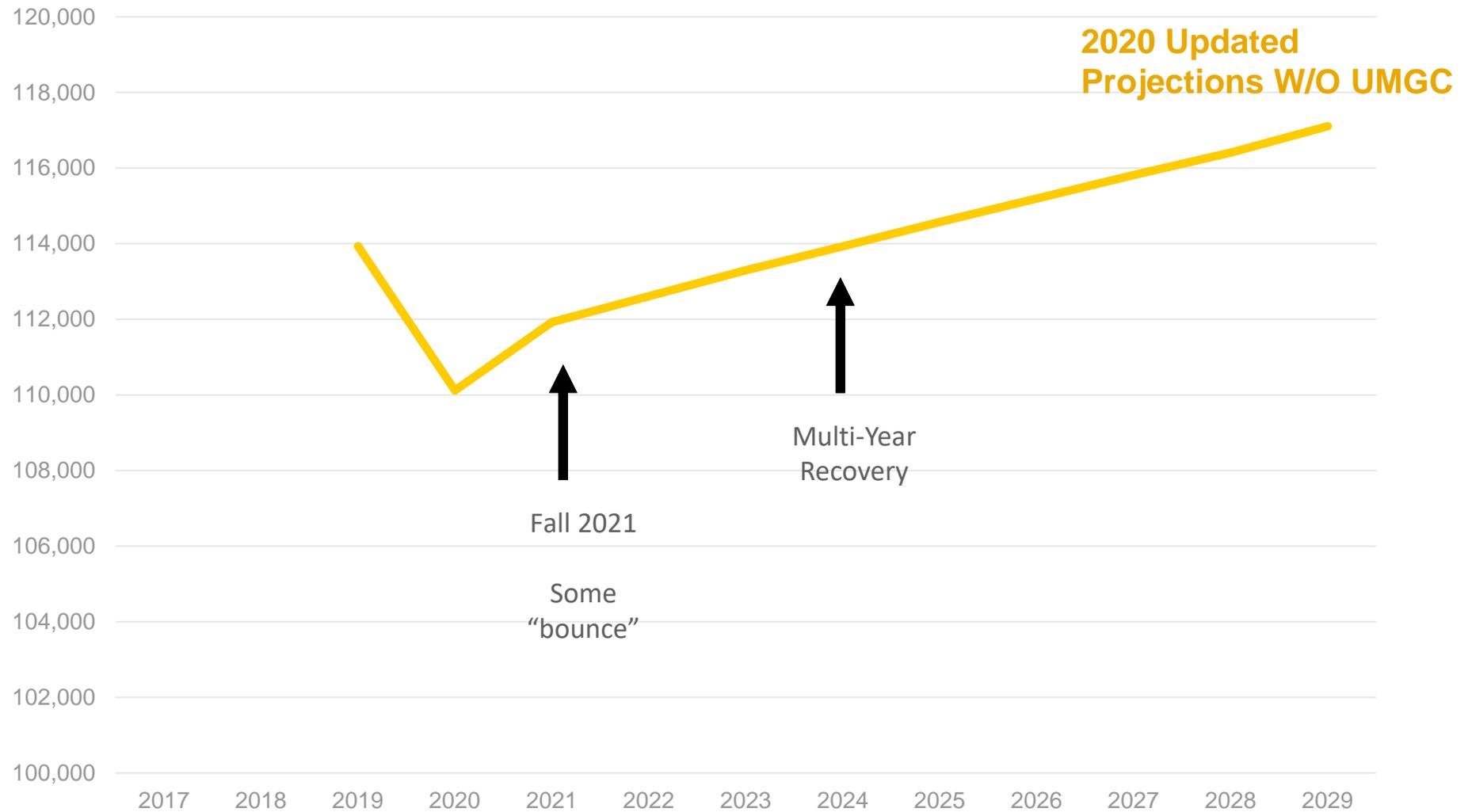


# Fall 2020 Changes VS Fall 2019

## By Campus

<u>Campus</u>	<u>Update</u>	<u>Pre-COVID19</u>	<u>Expected Recovery</u>
Bowie	Flat	+150	Fall 2020
Coppin	-500	Flat	Fall 2027
Frostburg	-300	Flat	Fall 2023
Salisbury	-350	+100	Fall 2025
Towson	-1,000	+100	Beyond Fall 2029
UB	-500	-360	Beyond Fall 2029
UMB	+225	+150	Achieved More Growth
UMBC	-360	+400	Fall 2021
UMCP	-750	-70	Continue Planned Decrease
UMES	-250	Flat	Fall 2026
UMGC	+1,400	-1,200	Reverse Anticipated Decline
USM	-2,400	-675	Fall 2022 or Fall 2023
W/O UMGC	-3,800*	+500	Fall 2024
FTE	-3,100	Flat	FY 2024
W/O UMGC FTE	-3,450	+700	FY 2025

## Updated Projections: FY 2021 to FY 2030 (Without UMGC)



# 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



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