State Council of Higher Education for Virginia
Agenda Item

**Item:** II.D – Resources and Planning Committee – Action on Institutions’ Enrollment Projections

**Date of Meeting:** October 23, 2023

**Presenter:** Tod Massa
Policy Analytics Director
todmassa@schev.edu

**Most Recent Review/Action:**
- No previous Council review/action
- Previous review/action
  - **Date:** September 18, 2023
  - **Action:** The Committee reviewed information on the enrollment-projection process, the degree-estimation process and the status of the 2023 projections and estimates.

**Purpose of Agenda Item:** The purpose of this item is to inform Council’s review of and action on the six-year enrollment projections and degree estimates from Virginia’s public and Tuition Assistance Grant-eligible private non-profit institutions.

**Background Information/Summary of Major Elements:** Review of and action on public institutions’ enrollment projections and degree estimates is the fourth of Council’s general statutory duties:

4. Review and approve or disapprove all enrollment projections proposed by each public institution of higher education. The Council's projections shall be organized numerically by level of enrollment and shall be used solely for budgetary, fiscal, and strategic planning purposes. The Council shall develop estimates of the number of degrees to be awarded by each public institution of higher education and include those estimates in its reports of enrollment projections. The student admissions policies for such institutions and their specific programs shall remain the sole responsibility of the individual governing boards but all baccalaureate public institutions of higher education shall adopt dual admissions policies with comprehensive community colleges as required by § 23.1-907.

During the 2011 legislative session, *The Virginia Higher Education Opportunity Act*, also known as “Top Jobs for the 21st Century,” added requirements for the nonprofit private institutions participating in the Tuition Assistance Grant (TAG) program in § 23.1-304:
C. To assist the General Assembly in determining the per student amount provided for in subsection A and its relation to the per student amount provided to nonprofit private institutions of higher education pursuant to the Tuition Assistance Grant Act (§ 23.1-628 et seq.), each nonprofit private institution of higher education eligible to participate in the Tuition Assistance Grant Program shall submit to the Council its Virginia student enrollment projections for that fiscal year and its actual Virginia student enrollment for the prior fiscal year in a manner determined by the Council. The student admissions policies for such private institutions and their specific programs shall remain the sole responsibility of the governing boards of such individual institutions.

Summary of Enrollment Projections: As of October 1, the total projected enrollment for all institutions (public and Tuition Assistance Grant-eligible private institutions) will grow from fall 2022’s total of 519,093 to 532,464 in the fall of 2029. Total in-state undergraduate enrollment is projected to drop from 307,117 students to 300,334 over the same time, with projected losses coming from the community colleges, which anticipate total fall enrollments dropping from 140,341 to 126,292 in-state students. If existing patterns hold, a third of those enrollments will come from dual-enrolled high school students. On average, 77% of the public two-year college projected in-state enrollments will be a combination of continuing students and high school dual-enrollment students.

Public four-year colleges and universities are projecting to grow in-state enrollment from 137,589 to 140,240 undergraduates, with about 73% coming from continuing enrollment. Out-of-state undergraduate enrollment is projected to increase from 34,456 to 38,600 with 70% coming from continuing students. These institutions are planning to increase undergraduate distance enrollment from 15,899 in fall of 2022 to 19,457 in fall of 2029, with most of the growth planned at Old Dominion University. First professional enrollment (medicine, law, veterinary medicine, and pharmacy) is expected to remain essentially flat, from 4,886 to 4,889 total enrollment, averaging about 45% in-state enrollment. Graduate enrollment is expected to increase from 44,208 to 48,323. Overall, total enrollment growth is projected from 221,120 to 237,982 in fall 2029.

Independent colleges and universities project in-state undergraduate growth from 28,700 to 31,502 in fall 2029. On average, 71% of this enrollment comes from continuing student enrollment. Out-of-state undergraduate students are projected from 56,076 to 58,343, with an average of 73% based on continuing student enrollment. Undergraduate distance enrollment at the independent institutions is projected to be flat, comprising an average of just over 40,000 students, or almost 49% of undergraduate enrollment. First professional enrollment is projected to grow from 4,559 to 5,058 students. Graduate enrollment will grow slightly from 57,469 to 60,173. Overall, independent institutions project growth from 149,280 to 155,078.

As of this writing, the enrollment projections and degree estimates continue to be a matter of discussion among members of Op-Six (Secretary of Education, Secretary of Finance,
Director of Planning and Budget, staff directors of Senate Finance & Appropriations and House Appropriations committees, and SCHEV Director). Op-Six members do not want to discourage institutions from pursuing ambitious targets, but they also want institutions to be cautious about the implications of potentially not meeting the projections. While SCHEV staff recommends approval of the projections, staff also encourages selected institutions to consider modeling future financial conditions based on more conservative estimates.

Staff acknowledges significant interest in the enrollment of first-time in college (FTIC) students, particularly those direct from Virginia high schools, given projected demographic changes. Staff’s analysis relied on the most current projections from the Western Interstate Compact for Higher Education (WICHE), Weldon-Cooper Center at the University of Virginia and SCHEV’s data resources. Please note: In the materials provided for Council’s September meeting, the projections in the corresponding table were incorrect – the data incorrectly deflated the number of high school graduates, based on a previous model, and which were several thousand lower than should have been used. The projections used herein from both Weldon-Cooper and WICHE are the original projections.

Overall, the institutions – public and private – project a modest decrease of in-state enrollment from 58,801 to 58,113 first-time in college (FTIC) students; however, these figures include students of non-traditional age and those more than one-year from college graduation. Modeling the percentage of FTIC enrollment likely to be direct from high school, based on the last decade of enrollment, suggests a minor decrease from 46,138 students to 45,988 students.

To determine the feasibility of these projections, a similar model of likely FTIC students direct from high school was applied against the average of the two projections of public high school graduates from WICHE and Weldon-Cooper. Comparing the estimates from the institutional projections against the estimates derived from the high school graduate projections suggests that the institutions have been cautious in their projections. Two staff findings of note:

(i) the WICHE projections historically have always been noticeably lower than the actuals (an average of 1,788 graduates over the last five years); and

(ii) the institutions’ projections are not exclusive to public high school graduates, and WICHE typically projects 4,000-5,000 graduates annually from private high schools in Virginia.
Table 1: Projections of High School Graduates

<table>
<thead>
<tr>
<th></th>
<th>Weldon-Cooper</th>
<th>WICHE (Public only)</th>
<th>Average of Weldon-Cooper and WICHE (Public)</th>
<th>WICHE Total (includes private HS estimates)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022-23/Fall 23</td>
<td>90,254</td>
<td>88,260</td>
<td>89,257</td>
<td>96,700</td>
</tr>
<tr>
<td>2023-24/Fall 24</td>
<td>89,819</td>
<td>89,630</td>
<td>89,725</td>
<td>98,180</td>
</tr>
<tr>
<td>2024-25/Fall 25</td>
<td>89,026</td>
<td>91,620</td>
<td>90,323</td>
<td>100,210</td>
</tr>
<tr>
<td>2025-26/Fall 26</td>
<td>93,899</td>
<td>91,740</td>
<td>92,820</td>
<td>100,160</td>
</tr>
<tr>
<td>2026-27/Fall 27</td>
<td>91,907</td>
<td>89,440</td>
<td>90,674</td>
<td>97,800</td>
</tr>
<tr>
<td>2027-28/Fall 28</td>
<td>88,710</td>
<td>87,250</td>
<td>87,980</td>
<td>95,650</td>
</tr>
<tr>
<td>2028-29/Fall 29</td>
<td>86,471</td>
<td>87,160</td>
<td>86,816</td>
<td>95,550</td>
</tr>
</tbody>
</table>

The projections from the Weldon-Cooper Center rely on the use of birth rates, the fall membership (enrollment) reports from VDOE and the on-time graduation counts from VDOE. They count only the federally recognized diplomas – standard, advanced and International Baccalaureate, thus excluding GEDs, special and modified diplomas. The current estimate of these diplomas from 2022-23 is about 91,000. Two possibly significant differences exist in Weldon-Cooper’s approach. First, Weldon-Cooper’s data are more recent and use the most recent information from VDOE that capture the jump in graduation rates during the pandemic. The second is that the figures reflect a greater loss of families of moving out of Virginia in the later years. Given the existence of two sets of projections with some differences and given that SCHEV has historically used the WICHE projections, staff have chosen to use an average of the Weldon-Cooper projections and WICHE’s public-high-school-only projections. Such is consistent with advice from Weldon-Cooper, specifically when using projections beyond five years.

Table 2: Estimates of First-time (FTIC) in College Enrollments

<table>
<thead>
<tr>
<th></th>
<th>Est. of FTIC Based on Average of W-C &amp; WICHE</th>
<th>Est of FTIC based on WICHE Total</th>
<th>FTIC from Inst. Projections</th>
<th>Est of FTIC based on Most Recent 5 Years Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 23</td>
<td>46,610</td>
<td>50,497</td>
<td>57,869</td>
<td>46,138</td>
</tr>
<tr>
<td>Fall 24</td>
<td>46,854</td>
<td>51,270</td>
<td>58,191</td>
<td>45,795</td>
</tr>
<tr>
<td>Fall 25</td>
<td>47,167</td>
<td>52,330</td>
<td>57,949</td>
<td>46,050</td>
</tr>
<tr>
<td>Fall 26</td>
<td>48,470</td>
<td>52,304</td>
<td>58,436</td>
<td>45,858</td>
</tr>
<tr>
<td>Fall 27</td>
<td>47,350</td>
<td>51,072</td>
<td>58,226</td>
<td>46,244</td>
</tr>
<tr>
<td>Fall 28</td>
<td>45,943</td>
<td>49,949</td>
<td>58,200</td>
<td>46,078</td>
</tr>
<tr>
<td>Fall 29</td>
<td>45,335</td>
<td>49,897</td>
<td>58,113</td>
<td>46,057</td>
</tr>
</tbody>
</table>
The table above uses the three sets of projections of Virginia high school graduates – those from Weldon-Cooper, the public-high-school-only projections from WICHE and the combined public and private high school projections from WICHE to produce estimates of new first-time in college enrollments that are direct from high school. Further, using the most recent five-year average of the proportion of recent high school graduates enrolling as first-time in college students in the fall, staff calculated estimates of those enrollments against the average of two public high school projections and against the total-graduates projections from WICHE. Staff then provide projected numbers of in-state first-time in college students from the institutions’ submissions and calculated an estimate of those projections likely to be recent high school graduates, again from the most recent five-year average. Data in the final column (derived from institutional projections) indicate likely adequate numbers of high school graduates available to meet these projections when compared against the WICHE estimates for total graduates. However, a shortfall does appear possible in the last two years when compared against the estimates based on the average of the public high school projections. This potential shortfall becomes more acute if we rely solely on the Weldon-Cooper projections, which estimate a likely population of 45,155 in Fall 2029, as opposed to 45,335.

As a general statement, the opinion of staff is that these projections are feasible, in terms of in-state undergraduates at the state level. This conclusion is bolstered by the number of institutions reporting rebounding enrollments, such as Norfolk State, Virginia Commonwealth, Virginia Union, and the VCCS. Significant variability exists in the projections for the individual institutions, with George Mason projecting an increase of 542 in-state FTIC by 2029, and a few other institutions projecting increases of significance to their size or recent history.

Context and Focus on Public Four-year Institutions
Throughout this analysis, staff have anchored the data to the period from fall 2005 through to fall 2022 because of the availability of admissions data by locality (allowing staff to create regional aggregations) and because 2005 also represents a year of lower numbers of high school graduates than Virginia can expect between now and 2029. During this period, total enrollment at the public four-year institutions grew 19% (from 194,422 to 221,640). Most of this growth occurred between 2005 and 2012, with a 15% increase (to 214,640 students). Focusing specifically on in-state undergraduates, enrollment increased 16% from 2005 (116,662) to 2012 (135,833), but by only one percent (to 137,311) in 2022.

Between 2012 and 2022, ten of the 15 public four-year institutions lost in-state enrollment, ranging from 1% to 33%. During the same period, George Mason University grew by 32%, James Madison University grew by 22%, University of Virginia by 11%, Virginia Tech by
17% and William & Mary by 9%. These five institutions were responsible for a total increase of 13,129 students, which offset the 11,651 lost by the other 10 by a total of 1,478 students. Of the 13,129 increase, 5,679 were at George Mason University.

Of the 10 institutions that lost enrollment, Christopher Newport University (13%), Longwood University (30%), Norfolk State University (29%), Radford University (33%), UVa’s College at Wise (33%) and University of Mary Washington (21%) had the largest decreases. Of these six institutions, five (all but Mary Washington) also decreased in-state enrollment between 2005 and 2022; Radford University had a 30% reduction. In short, the enrollment gains made by these institutions in the lead up to the 2008 recession were temporary, or the institutions were simply unable to hold on to these gains.

**Applications, Admission, and Yield Rates**

Members of Council, the Administration and legislative staff have commented on the trend in increasing rates of admission of first-time in college students and the parallel drop in the yield (enrollment) rate of those students. What Virginia is experiencing now reflects the national trend since 2001. Using the federally-collected data in the Integrated Postsecondary Education Data System (IPEDS), Jon Boeckenstedt, Vice Provost of Enrollment at Oregon State University, has been tracking and reporting these phenomena for a number of years to help explain the impact of the Common Application and its ability to allow students to apply to more colleges with greater ease and lower cost.

Between 2005 and 2021 (the most recent data published), public institutions, excluding open-enrollment institutions such as community colleges, saw a 37% increase in the number of FTIC enrollments. To enroll those students, they worked through a 160% increase in applications of 3.19 million to 6.87 million applications and admitted 64% in 2005 and 67% in 2021, a 161% increase in the number of admitted students. The yield rates of enrolled students dropped from 41.4% to 23.3% nationally, representing the shifting market as tens of thousands of potential students submitted many more applications than previous years.

In Virginia, the pattern has been somewhat similar, but with striking differences. Virginia public four-years experienced only an 18% increase in FTIC enrollment between 2005 and 2021, from 30,024 to 35,284. Applications increased by 86% from 122,079 to 226,658, but the number of admitted applicants increased 101% from 74,936 to 150,424, reflecting a change in admission rates from 61% to 66%, while yield rates dropped from 60.1% to 23.5% over the period.

Narrowing the focus to in-state applicants to Virginia public four-year institutions, FTIC enrollment increased by 14% (from 22,977 to 26,252) from 2005 to 2021. Applications increased 64% (from 72,247 to 118,473) with an 87% increase in the number of admitted applicants (from 46,505 to 86,828). The admission rate supporting this increase rose from
64% to 73%, while the yield rate dropped from 49% to 30% of admitted applicants enrolling.

Although the comparing of admission rates and yield rates in Virginia to the national average suggests potentially little difference in what has happened since 2005, it is notable that overall applications here increased at a much lower rate – 86% in Virginia compared to 115% nationally. Further, while admissions in Virginia increased 101%, a greater increase than the increase in applications, Virginia’s increase has been much lower than the 126% increase in admissions nationally. Which is not to say that no problem exists in Virginia, but that perhaps the situation is less severe than nationally. Staff, and others, certainly have concerns about institutions that admit 90% of their applicants, and lacking good data on who is applying, SCHEV cannot perform much objective evaluation. Thus, the consensus of staff has become that SCHEV should return to collecting individual records on every applicant to each Virginia institution, a collection that was dropped in 2001 to reduce burden on institutions and comply with directives on decentralization.

The benefits of an applicant record collection are significant. First, SCHEV would be able to evaluate the numbers of applicants that apply to multiple institutions, and to which institutions they apply and whether they are admitted and subsequently enroll. Additionally, SCHEV would be able to enhance admissions reporting to include disaggregation by locality as reported now, to include gender, race and ethnicity. Further, SCHEV could match the entire record set with National Student Clearinghouse for better understanding of where applicants to Virginia institutions attend out of state. The downside to such a collection is the imposition of an additional burden on the institutions and the need for the agency to absorb additional costs.

Regional Changes in Enrollment Demand and Behavior
As described previously, from 2005 to 2021, in-state FTIC enrollment at public four-year institutions increased from 22,977 to 26,252, and then increased to 27,646 in fall of 2022. Restricting the same numbers to those students who had graduated high school within the 12 months prior to applying, enrollment was 21,417 in 2005 and 26,015 in 2022, a 21.5% increase. The changes by region varied by -31% from Southwest Virginia and +63% from Northern Virginia. In 2022, 40% or 10,424 students entering students who were recent high school graduates came from Northern Virginia, dwarfing all other regions, with only Hampton Roads (19%) and Greater Richmond (17%) coming close.

To understand more about these students, staff looked at the numbers of advanced diploma graduates produced by Virginia public high schools in each region. The advanced diploma is closely aligned to the admission requirements of the public four-year colleges and represent more than 90% of in-state FTIC who are recent high school graduates. From 2005 to 2022, most regions increased the number of advanced diploma graduates, with only two regions – Southside and Southwest – decreasing by 7% and 5%
respectively. Likewise, enrollment of their graduates in public four-year institutions decreased by 12% from Southside and 32% from Southwest.

Over the same period, the number advanced diploma graduates from Northern Virginia increased by 72% (to 20,227), followed by a 42% increase from Greater Richmond, 39% increase from Greater Fredericksburg, 33% from Shenandoah, 31% from Greater Charlottesville, 18% from Hampton Roads and 7% from Roanoke/New River/Lynchburg. However, the total increase in advanced diploma graduates outside of Northern Virginia was only 73% that of the increase from Northern Virginia. This growth of Northern Virginia graduates and their choices is a key driving factor in the enrollment changes at Virginia public four-years.

From 2005 to 2022, four of the 15 public four-year institutions lost enrollment from recent high school graduates from Northern Virginia (CNU, LU, RU, UVA-W); one (VSU) had zero change; and the remaining 10 universities increased their enrollment from Northern Virginia (NoVa) between 8% and 213%, with the University of Mary Washington the only one with single-digit growth, and all others growing by at least a 33% increase. The largest percentage increase was at Virginia Commonwealth University, growing from 446 to 1,398 NoVa students, for a 213% increase. George Mason University grew NoVa FTIC enrollment by 107% (from 1,114 to 2,310) for net gain of 1,196 students. Virginia Tech had a net gain of 702 students (62%), James Madison University had a net gain of 640 (76%) students, University of Virginia added 455 (57%) net new students, Old Dominion University increased 255 (121%) net new students, with 123 net new students at William & Mary, 18 net new students at Norfolk State University and 14 at Virginia Military Institute.

George Mason University’s 2022 FTIC fall enrollment of recent high school graduates totaled 2,964 students with 2,310 or 78% from Northern Virginia, and a net loss of nine students from the other eight regions, as its increases were not enough to offset losses from Hampton Roads and, to a lesser degree, Greater Charlottesville. Given that GMU is the only major public university in Northern Virginia, it is not surprising that its home region is the source of GMU’s growth.

As for the four institutions that lost enrollment from Northern Virginia, they struggled in other regions from 2005 to 2022. Christopher Newport University experienced net gains only in students from the Greater Richmond region. Longwood University had net gains from the Shenandoah Valley and Southwest, but those gains amounted to 12 students. Radford University had net losses across all nine regions. University of Virginia’s College at Wise also had net losses across eight regions, and no net change in the ninth. With losses like these, it seems difficult to attribute these losses to any one or two institutions, when other institutions found the ability to maintain or grow.
One can argue that selecting 2005 as the base year hides the worst of the enrollment losses. Staff does not disagree; however, the opinion of staff is that much of the enrollment leading up to the enrollment peaks around 2012 and 2013, depending on the institution, was “unearned;” i.e., that it was driven by high unemployment rates. The average statewide unemployment of 4% in fall of 2005 is much closer to that which the Commonwealth is currently experiencing (2.5% in August). The number of standard and advanced diploma graduates in 2012 and 2013 were significantly lower than these numbers have been in recent years, as many as 5,000 - 6,000 graduates fewer. For these reasons, staff has used a consistent set of years for comparison in these analyses.

**Student Outcomes**
From the fall entering class of 2005 through that 2021, first-year retention of in-state undergraduates that were recent high school graduates has held remarkably constant – from 85% to 86% -- despite changes in applications, admissions rates and yield rates. Of course, this is the overall picture. At individual institutions, both struggles and successes have occurred.

- **Christopher Newport University:** From a 53% admission rate and 79% retention rate to an 89% admission rate and 86% retention rate, down from a high of 88% in 2016.

- **George Mason University:** From a 78% admission rate and 84% retention rate to a 91% admission rate and 87% retention rate that was as high as 90% in 2013.

- **James Madison University:** From a 61% admission rate and 93% retention rate to an 81% admission rate and 90% retention rate that was as high as 94% in 2013.

- **Longwood University:** From a 60% admission rate and 75% retention rate to a 92% admission rate and 76% retention rate that had reached a high of 80% in 2012.

- **Norfolk State University:** From a 73% admission rate and 69% retention rate to a 92% admission rate and 73% retention rate, that was as high as 77% in 2010.

- **Old Dominion University:** From a 60% admission rate and 75% retention rate to a 92% admission rate and 76% retention rate, previously 80% in 2012.

- **Radford University:** From an 81% admission rate and 74% retention rate to a 95% admission rate and 69% retention rate that had reached 78% in 2012.

- **University of Mary Washington:** From a 57% admission rate and 86% retention rate to an 86% admission rate and 84% retention rate that reached a high of 87% in 2010.
• University of Virginia: From a 52% admission rate and 98% retention rate to a 32% admission rate and 98% retention rate (a rate with only tiny changes over the years).

• University of Virginia’s College at Wise: From a 92% admission rate and 65% retention rate to a 96% admission rate and 71% retention rate, a rate that has been lower more often over the years than higher, between 56% and 76%.

• Virginia Commonwealth University: From a 73% admission rate and 82% retention rate to a 93% and 85% retention rate that had been has high as 88% in 2012 and 2013.

• Virginia Military Institute: From a 55% admission rate and 83% retention rate to a 66% admission rate and 85% retention rate, that has usually been in the mid- to upper-80s, but one time as was as high as 95% in 2014.

• Virginia State University: From a 72% admission rate and 76% retention rate to an 87% admission rate and 74% retention rate. Other than in 2006, the three other years with higher retention rates all admission rates of 87% or greater and those retention rates topped out at 78%.

• Virginia Tech: From a 64% admission rate and 90% retention rate to a 44% admission rate and 93% retention rate that had previously averaged around 94% when admission rates where typically in the 64% to 68% range.

• William & Mary: From a 47% admission rate and 96% retention rate to a 44% admission rate and 96% retention rate has seen little variance in retention rate and only moderate variance in its admission rate.

For the most part, these institutions do not appear to be enrolling under-qualified students and struggling to retain them. George Mason University, James Madison University, Longwood University, Old Dominion University, Radford University, and Virginia Commonwealth University all saw their highest retention rates during the height of the recession when the cost of dropping out, particularly dropping out with student debt, was at its highest. They also saw minor dips during the pandemic years, and the student-level data being submitted this fall will indicate whether retention is rebounding for the students who first enrolled in the fall of 2022. Staff does believe it is in the best interests of the institutions, the Commonwealth and the students of these institutions to ensure that increased admission rates do not have negative impacts on student success and that area/topic is one for Council to monitor going forward.

Program Draw as an Enrollment Factor
In its six-year-plan meeting presentation, George Mason University argued that its growth was not the cause of enrollment decreases at other institutions because it was losing enrollment in the same program areas as they were. In follow-up, staff again looked at in-state undergraduate enrollment between 2005-06 and 2022-23, using annual unduplicated enrollment by program at the broad discipline level – Business & Communications, Education, Health Professions, Liberal Arts, Social Sciences, and STEM (Science, Technology, Engineering and Math).

Overall, the proportional changes in enrollment by discipline at the public four-years saw most dramatic in STEM programs, moving from 17% to 24% of the total. Education program enrollment increased by two percentage points to five percent, and health professions enrollment increased by two points to six percent. Liberal Arts decreased from 18% to 13% of the total enrollment, and Social Sciences decreased from 19% to 17% of the total, with other disciplines remaining flat or experiencing modest increases. It is notable that the raw number of Liberal Arts majors dropped by only 2,069 students or 10%, but since the overall population of students increased by 28,280 students annually (unduplicated major counts across fall, spring, and summer) and the number of STEM majors increased by almost 15,000, the proportion of Liberal Arts majors dropped drastically. STEM enrollments increased proportionally everywhere.

At the institutions where enrollment increased since 2005 (all except CNU, LU, NSU, RU, UVA-Wise), George Mason University had no significant change, and University of Virginia, Virginia Commonwealth University, Virginia Military Institute and Virginia Tech had growth in Liberal Arts enrollment, between 15% and 67%. If program draw is a factor, then it might be as much a function of institutional size as anything else. Reviewing specific programs within the Liberal Arts (and Humanities), we see that English, and all foreign language programs, declined in enrollment at these institutions, except for Virginia Military Institute. The growth in visual and performing arts was at Virginia Commonwealth University, which had initiated several new programs during that time period with substantial enrollments that do not exist elsewhere.

Conclusions
The years leading up to 2012 and the height of the last recession, with unemployment rates in Virginia around seven percent and significant enrollment increases year after year, may have left many institutions unprepared for a strengthening economy and shifting higher education market changes that followed. While George Mason University and Virginia Tech made frequent headlines for their growth and student recruitment, they were not the only institutions to grow, as James Madison University, University of Virginia and William & Mary were able to grow, and with all five institutions gaining heavily from Northern Virginia high school graduates.

The institutions that have struggled the most since 2012 have also fallen below their 2005 enrollment levels. Christopher Newport University, Longwood University, Radford
University, and University of Virginia’s College at Wise have generally experienced enrollment losses from most regions of the state, especially from Northern Virginia, except for CNU, which has seen only small decreases across the state.

The number of applications has increased as the percentages of admitted students has increased at most institutions in response to the use of the Common App and more students applying to multiple colleges. Such is part of a national phenomenon and Virginia’s numbers track with the nation’s. Understandable concern exists that this is leading to decline in student quality; however, based on first-year retention rates, staff does not see immediate evidence of such. Staff recommends that Council and others pay increased attention to early indicators of student success, such as retention and other measures that might be developed.

The evidence is clear that a greater proportion of students are enrolled in STEM fields than ever before. While psychology was still the most popular major among undergraduates at public four-year institutions last year, it was followed by biology, computer science, nursing, and business & commerce. This is a notable change from 2005, when the order was psychology, biology, business administration, English, and history. Students are moving away from liberal arts and humanities majors, and this trend may be affecting those institutions that lack enough STEM and other “majors of interest” to attract students. Larger institutions generally have more majors across the spectrum and so may be the beneficiaries of this market shift.

In short, institution size and program offerings (and national recognition) may be the key factors driving student choice over the last decade.

**Issues with the Projections**

Given the ambitious growth in George Mason University’s projections, the university should understand that approval of these projections comes with no guarantees of future funding for such growth or capital investment. The institution should be prepared to fund this growth on its own.

The following institutions have enrollment targets that are less ambitious in raw numbers, but in terms of scale and history, staff considers them ambitious and recommends them for approval – with the proviso that the institutions should begin contingency financial planning with more conservative numbers, based on in-state, out-of-state or both.

- Christopher Newport University
- Longwood University
- Norfolk State University
- Radford University
- University of Mary Washington
- University of Virginia’s College at Wise
Materials Provided:
To supplement the background and summary information immediately above, a set of tables are provided below, as well as the tables and charts found at: https://research.schev.edu/rdPage.aspx?rdReport=Projections.Submissions2023

Financial Impact:
N/A

Relationship to Goals of The Virginia Plan for Higher Education:
Enrollment relates directly to the plan’s goals of closing gaps in access and completion. It also serves as a mechanism to reach the plan’s attainment objective of 70% of working-aged Virginians having a certificate, degree or credential by 2030. Enrollment further supports the plan’s vision of “Best State for Education.” The Enrollment Projections and Degree Estimates serve as the Council’s tool for projecting progress toward these objectives.

Timetable for Further Review/Action:
Council’s actions on the resolutions below will determine the timetable for further review and/or action.

Resolutions:
Staff offers for Council consideration the following resolution, the end of which provides two options between which Council is asked to choose:

BE IT RESOLVED that the State Council of Higher Education for Virginia approves the FY2023 - FY2029 institutional enrollment projections and degree estimates for the purposes of budgetary and fiscal planning and performance measurement. Staff is directed to make the detailed enrollment targets and degree estimates available to the public via the SCHEV website, with full detail.

BE IT FURTHER RESOLVED that approval of these institutional enrollment targets does not constitute either implicit or explicit approval of any new degree program, instructional site, higher education center or campus determined by an institution as necessary to achieve these targets. Further, approval of these projections does not provide assurance or guarantee of future funding for additional enrollment.
BE IT FURTHER RESOLVED that the State Council directs staff to replace the existing aggregate collection of application and admission data with a person-level collection beginning in Spring, 2025.