Enrollment Projections & Degree Estimates Institutional Briefings

Tod R. Massa

STATE COUNCIL OF HIGHER EDUCATION FOR VIRGINIA

Authority – Public Institutions

§ 23.1-203.4 Duties of Council generally.

4. Review and approve or disapprove all enrollment projections proposed by each public institution of higher education. **The Council's projections shall be in numerical terms by level of enrollment and shall be used for budgetary and fiscal planning purposes only.** *The Council shall develop estimates of the number of degrees to be awarded by each institution and include those estimates in its reports of enrollment projections.* **The student admissions policies for the institutions and their specific programs shall remain the sole responsibility of the individual boards of visitors;** *however, all four-year institutions shall adopt dual admissions policies with the community colleges, as required by § 23.1-907.*

The (current) Goals

Award 1.5 Million undergraduate degrees and credentials between 2014-15 and 2029-30.
Established by the SCHEV in 2014 with the intent of making Viginia the "best state for education" and reaching a 70% attainment rate of undergraduate degrees, certificates, and workforce credentials of working age adults.

Total awarded so far:	1,004,970
Total certificates:	165,329
Total associate's degrees:	219,061
Total bachelor's degrees:	620,580
Total Workforce Credential Grant Program (WCGP) Credentials:	53,828

These projections include estimates of 549,484 undergraduate degrees, exclusive of WCGP credentials by 2029-30.

Top Jobs for the 21st Century

Award 100,000 cumulative undergraduate degrees to in-state students between 2010-11 and 2024-25.
Established in *the Virginia Higher Education Opportunity Act of 2011, the goal to place the Commonwealth among the most highly educated states and countries by awarding 100,000 cumulative additional undergraduate degrees on Virginians from public institutions between 2011 and 2025, accompanied by a comparable percentage increase in privately conferred undergraduate degrees in the Commonwealth over the same period.*

Cumulative Additional Total since 2010-11	0	3,579	8,255	12,813	17,983	24,884	31,250	37,281	43,591	49,829	58,255	65,021	70,431	75,864
Associates Degrees	0	1,928	4,457	6,686	8,998	11,977	14,434	16,657	18,684	20,479	23,226	25,361	26,444	27,760
Bachelors Degrees	0	1,651	3,798	6,127	8,985	12,907	16,816	20,624	24,907	29,350	35,029	39,660	43,987	48,104

Population Estimates
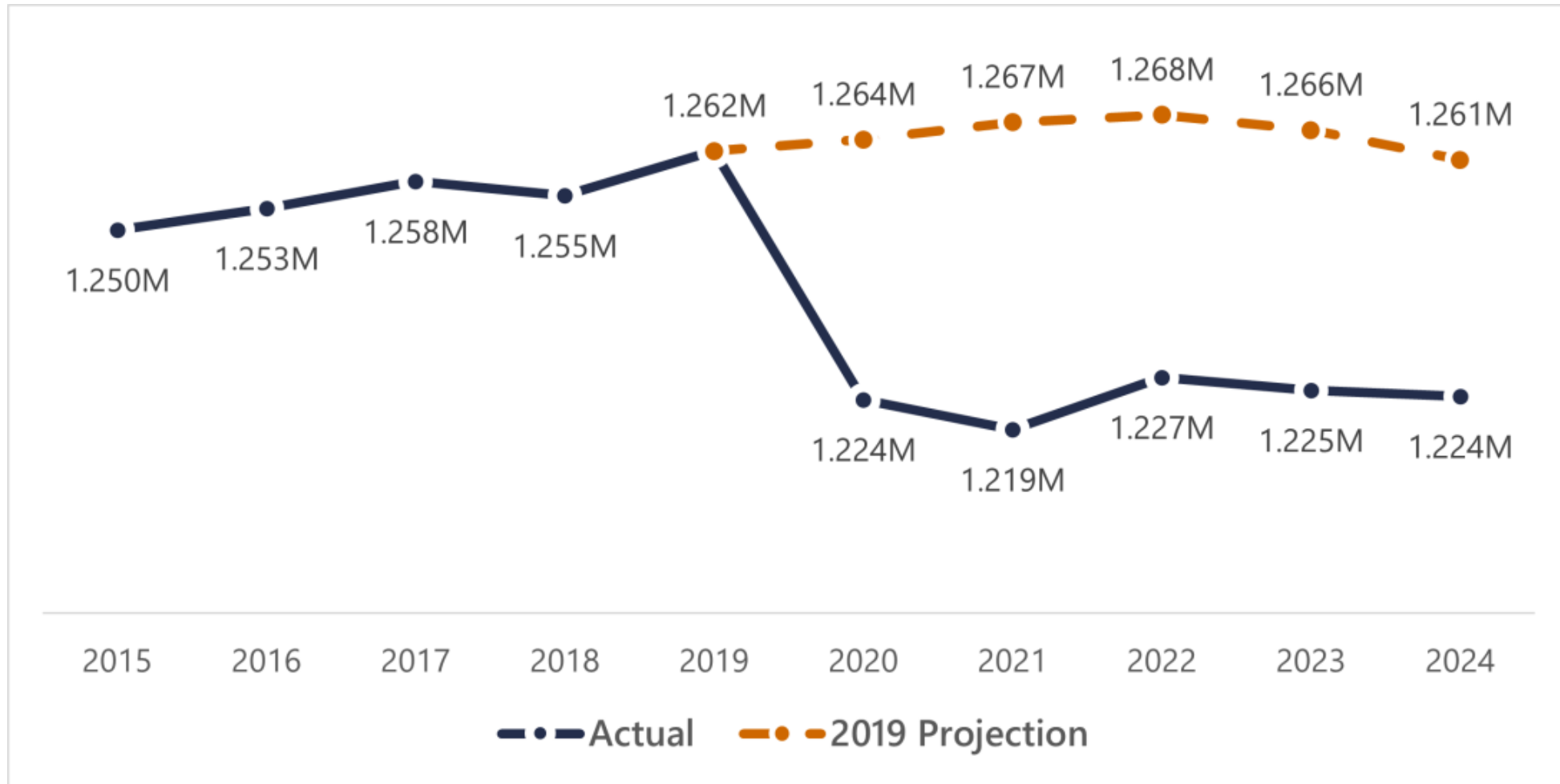
From Weldon-Cooper

Projections of Population Estimates

Region	Population Est. 2020	Population Est. 2030	% Change from 2020	Population Est. 2040	% Change from 2020	Population Est. 2050	% Change from 2020
R1) Southwest Virginia	370,977	335,332	-10%	316,426	-15%	302,255	-19%
R2) Roanoke/New River/Lynchburg	779,658	786,095	1%	810,991	4%	848,026	9%
R3) Southside	366,042	343,061	-6%	327,103	-11%	316,041	-14%
R4) Greater Richmond	1,300,469	1,404,356	8%	1,515,375	17%	1,649,074	27%
R5) Hampton Roads	1,749,192	1,804,199	3%	1,858,681	6%	1,940,982	11%
R6) Greater Fredericksburg	525,595	573,817	9%	639,995	22%	715,752	36%
R7) Northern Virginia	2,550,377	2,828,990	11%	3,149,442	23%	3,517,032	38%
R8) Shenandoah Valley	547,000	576,681	5%	618,882	13%	670,347	23%
R9) Greater Charlottesville	442,083	476,471	8%	522,476	18%	576,301	30%

Virginia (total)

Region	Population Est. 2020	Population Est. 2030	% Change from 2020	Population Est. 2040	% Change from 2020	Population Est. 2050	% Change from 2020
Virginia	8,644,727	9,129,002	6%	9,759,371	13%	10,535,810	22%

Public School Enrollment Projections

Source: Weldon-Cooper Center, https://www.coopercenter.org/research/where-k-12-enrollment-headed

VA High School Graduates
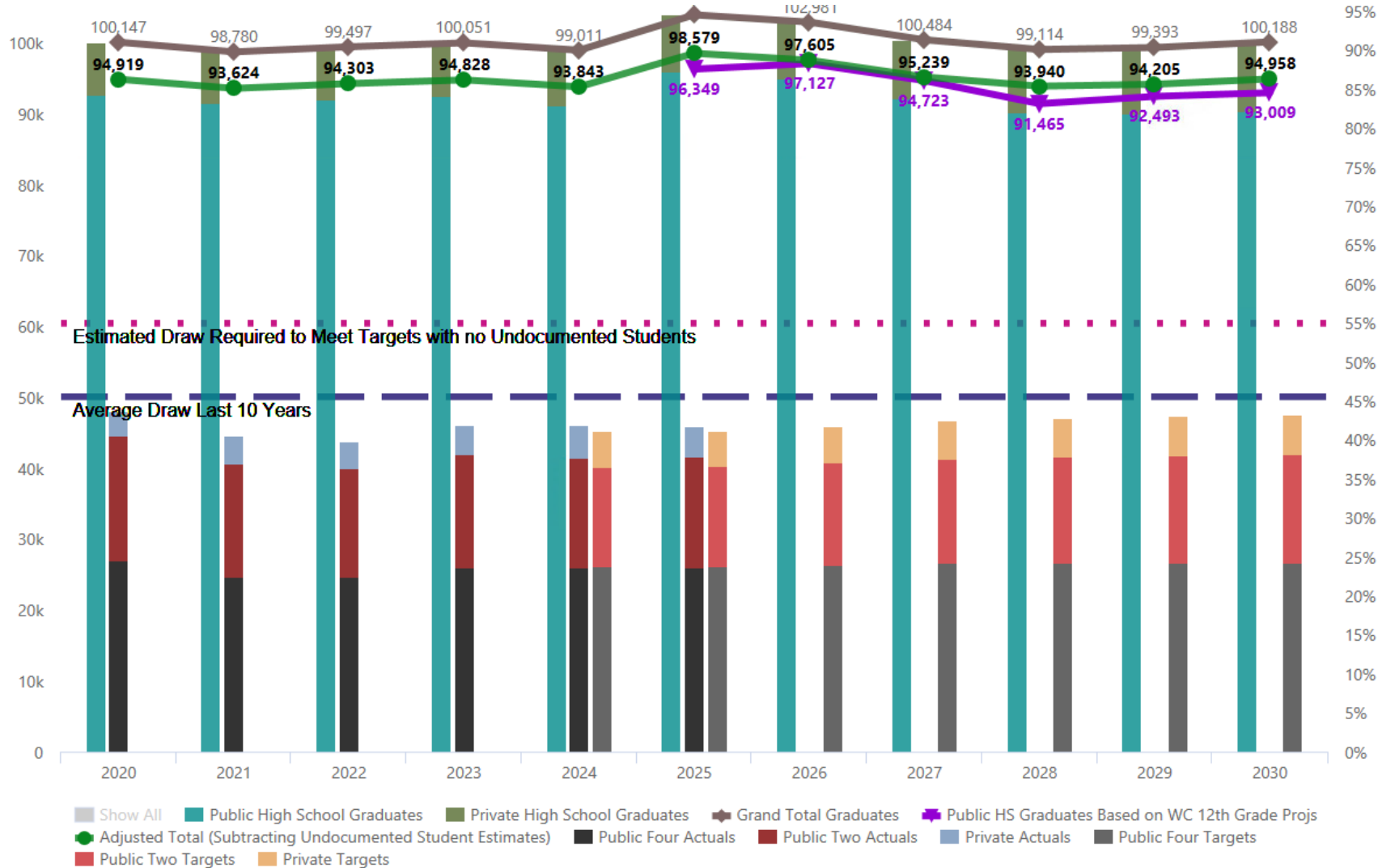
- The Higher Ed Immigration Portal, in 2018 there were approximately **5,000 undocumented students** graduating from Virginia high schools annually
- DACA students have decreased from 1,288 in 2019 to 228 in 2024

Application Counts are Misleading

- There were 103,300 unique VA FTIC college applicants to VA four-years
    - 72,688 were recent HS graduates
    - 35,123 submitted one application
    - 37,565 submitted 132,187 applications (avg of 3.5 apps)
- Of those that were not recent HS graduates, 30,612 applicants submitted 51,043 applications

Competition Among Colleges - Public

	Total Apps		Most Apps in Common	Apps in Common	% Overlap
Christopher Newport University	6,042		James Madison University	5,782	96%
George Mason University	16,204		Virginia Tech	14,505	90%
James Madison University	20,315		Virginia Tech	19,248	95%
Longwood University	4,897		James Madison University	4,547	93%
Norfolk State University	3,220		Old Dominion University	2,835	88%
Old Dominion University	11,140		Virginia Commonwealth University	8,070	72%
Radford University	7,622		James Madison University	6,805	89%
University of Mary Washington	4,286		James Madison University	3,963	93%
University of Virginia	15,776		Virginia Tech	14,379	91%
Virginia Commonwealth University	17,882		James Madison University	15,611	87%
Virginia Military Institute	815		Virginia Tech	490	60%
Virginia State University	4,261		Virginia Commonwealth University	3,318	78%
Virginia Tech	20,811		James Madison University	18,803	90%
William & Mary	7,954		University of Virginia	7,600	96%

Competition Among Colleges - Private

	Total Apps		Most Apps in Common	Apps in Common	% Overlap
Averett University	679		Radford University	479	71%
Bluefield University	599		Radford University	348	58%
Bridgewater College	2,498		James Madison University	2,300	92%
Christendom College	109		William & Mary	5	5%
Eastern Mennonite University	1,002		James Madison University	890	89%
ECPI University (For-Profit)	2,467		Tidewater Community College	230	9%
Emory & Henry College	1,262		Radford University	990	78%
Ferrum College	1,116		Radford University	897	80%
Hampton University	233		Virginia Commonwealth University	170	73%
Hollins University	731		Radford University	646	88%
Liberty University	5,674		James Madison University	1,385	24%
Mary Baldwin University	1,935		Virginia Commonwealth University	1,782	92%
Marymount University	2,311		George Mason University	2,141	93%
Randolph College	1,478		Radford University	1,267	86%
Randolph-Macon College	2,348		James Madison University	2,164	92%
Regent University	624		Liberty University	132	21%
Roanoke College	2,687		James Madison University	243	9%
Shenandoah University	2,041		James Madison University	1,861	91%
Southern Virginia University	143		Virginia State University	65	46%
Sweet Briar College	371		James Madison University	318	86%
University of Lynchburg	2,329		Liberty University	57	2%
University of Richmond	2,413		University of Virginia	2,298	95%
Virginia Union University	1,897		Virginia State University	1,502	79%
Virginia Wesleyan University	1,815		Virginia Commonwealth University	1,584	87%
Washington and Lee University	897		University of Virginia	737	82%

New Student Projections

Total Public Four-Year Institutions

PUB4: Headcount Enrollment – First-Time-in-College and New Transfer										
	First-Time in College					New Transfer				
	In-State HC		Out-of-State HC		Total	In-State HC		Out-of-State HC		Total
Fall	(n)	(%)	(n)	(%)	(n)	(n)	(%)	(n)	(%)	(n)
2024	28,482	74.5%	9,768	25.5%	38,250	9,612	87.9%	1,322	12.1%	10,934
2025	28,410	74.3%	9,814	25.7%	38,224	9,408	87.8%	1,307	12.2%	10,715
2026	28,777	74.6%	9,822	25.4%	38,599	9,447	86.9%	1,425	13.1%	10,872
2027	28,918	74.4%	9,925	25.6%	38,843	9,593	86.9%	1,447	13.1%	11,040
2028	29,102	74.3%	10,043	25.7%	39,145	9,695	86.8%	1,473	13.2%	11,168
2029	29,214	74.2%	10,152	25.8%	39,366	9,738	86.7%	1,489	13.3%	11,227
% Chg. 2024 - 2029	2.6%		3.9%		2.9%	1.3%		12.6%		2.7%

New Student Projections

Total Private, Four-Year Institutions

PRIV4: Headcount Enrollment - First-Time-in-College and New Transfer

| Fall | First-Time in College | | | | | New Transfer | | | | |
| | In-State HC | | Out-of-State HC | | Total | In-State HC | | Out-of-State HC | | Total |
	(n)	(%)	(n)	(%)	(n)	(n)	(%)	(n)	(%)	(n)
2024	6,597	41.8%	9,171	58.2%	15,768	3,659	35.7%	6,580	64.3%	10,239
2025	6,180	37.1%	10,485	62.9%	16,665	2,269	28.0%	5,840	72.0%	8,109
2026	6,176	36.4%	10,787	63.6%	16,963	2,284	27.7%	5,969	72.3%	8,253
2027	6,337	36.7%	10,943	63.3%	17,280	2,340	27.9%	6,046	72.1%	8,386
2028	6,444	36.7%	11,106	63.3%	17,550	2,418	28.3%	6,132	71.7%	8,550
2029	6,435	36.3%	11,299	63.7%	17,734	2,457	28.3%	6,215	71.7%	8,672
% Chg. 2024 - 2029	-2.5%		23.2%		12.5%	-32.9%		-5.5%		-15.3%

New Student Projections

Total Public Two-Year Institutions

2YRS: Headcount Enrollment - First-Time-in-College and New Transfer										
	First-Time in College					New Transfer				
	In-State HC		Out-of-State HC		Total	In-State HC		Out-of-State HC		Total
Fall	(n)	(%)	(n)	(%)	(n)	(n)	(%)	(n)	(%)	(n)
2024	25,027	91.9%	2,203	8.1%	27,230	6,051	85.0%	1,068	15.0%	7,119
2025	25,319	93.1%	1,888	6.9%	27,207	6,003	86.2%	962	13.8%	6,965
2026	25,752	93.1%	1,920	6.9%	27,672	6,109	86.2%	980	13.8%	7,089
2027	26,051	93.1%	1,943	6.9%	27,994	6,182	86.2%	991	13.8%	7,173
2028	26,266	93.1%	1,959	6.9%	28,225	5,346	85.7%	889	14.3%	6,235
2029	26,416	93.1%	1,970	6.9%	28,386	6,272	86.2%	1,004	13.8%	7,276
% Chg. 2024 - 2029	5.6%		-10.6%		4.2%	3.7%		-6.0%		2.2%

Overall Projections, p1

PUB4: Fall Headcount Enrollment, Total											
	Undergraduate			**First Professional**			**Graduate**			**All**
Fall	**FT**	**PT**	**Total**	**FT**	**PT**	**Total**	**FT**	**PT**	**Total**	**Total**
2024	158,077	18,742	176,819	5,101	109	5,210	25,148	19,633	44,781	226,810
2025	160,335	19,169	179,504	5,077	112	5,189	24,538	20,614	45,152	229,844
2026	161,345	19,046	180,391	5,113	115	5,228	24,688	20,759	45,447	231,065
2027	162,521	19,078	181,599	5,133	115	5,248	25,197	21,076	46,273	233,122
2028	163,644	19,200	182,844	5,179	117	5,296	25,714	21,467	47,181	235,322
2029	164,735	19,294	184,029	5,217	117	5,334	26,231	21,818	48,049	237,411
% Chg. 2024 - 2029	4.2%	2.9%	4.1%	2.3%	7.3%	2.4%	4.3%	11.1%	7.3%	4.7%

Overall Projections, p2

PUB4: Full-Time Equivalent Enrollment, Total

	Regular Session FTE						Annual FTE		
	Undergraduate		First Professional		Graduate		All		
Fiscal Year	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	Total
2025	134,268	37,489	2,802	3,024	20,026	16,678	157,329	57,258	214,587
2026	135,123	37,845	2,786	3,045	19,804	16,408	157,944	57,365	215,309
2027	136,172	38,174	2,788	3,085	20,040	16,492	159,225	57,819	217,044
2028	137,533	38,539	2,795	3,109	20,434	16,776	160,981	58,492	219,474
2029	138,820	38,849	2,814	3,162	20,792	17,060	162,645	59,134	221,779
2030	140,188	39,200	2,828	3,206	21,148	17,334	164,379	59,803	224,182
% Chg. 2025 - 2030	4.4%	4.6%	0.9%	6.0%	5.6%	3.9%	4.5%	4.4%	4.5%

Overall Projections, p3

PRIV4: Fall Headcount Enrollment, Total

Fall	Undergraduate			First Professional			Graduate			All
	FT	PT	Total	FT	PT	Total	FT	PT	Total	Total
2024	62,295	26,021	88,316	3,084	542	3,626	28,452	30,876	59,328	151,270
2025	63,174	26,271	89,445	3,118	548	3,666	28,814	31,168	59,982	153,093
2026	63,979	26,475	90,454	3,148	551	3,699	29,126	31,460	60,586	154,739
2027	64,950	26,839	91,789	3,196	577	3,773	29,454	31,927	61,381	156,945
2028	65,937	27,177	93,114	3,257	597	3,854	29,927	32,412	62,339	159,306
2029	66,633	27,518	94,151	3,298	619	3,917	30,395	32,932	63,327	161,396
% Chg. 2024 - 2029	7.0%	5.8%	6.6%	6.9%	14.2%	8.0%	6.8%	6.7%	6.7%	6.7%

Overall Projections, p4

PRIV4: Full-Time Equivalent Enrollment, Total

| Fiscal Year | Regular Session FTE | | | | | | Annual FTE | | |
| | Undergraduate | | First Professional | | Graduate | | All | | |
	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	Total
2025	28,662	62,332	1,869	1,861	11,458	45,640	42,096	110,007	152,103
2026	25,194	43,884	1,817	1,875	11,186	46,660	38,299	92,595	130,894
2027	28,422	63,474	1,851	1,885	11,204	47,340	41,581	112,881	154,462
2028	29,765	63,629	1,882	1,922	11,579	47,819	43,336	113,561	156,896
2029	30,199	64,364	1,929	1,957	11,776	48,323	44,017	114,843	158,860
2030	30,654	65,019	1,959	1,993	11,966	49,094	44,701	116,314	161,014
% Chg. 2025 - 2030	6.9%	4.3%	4.8%	7.1%	4.4%	7.6%	6.2%	5.7%	5.9%

Overall Projections, p5

2YRS: Fall Headcount Enrollment, Total

Fall	Undergraduate			First Professional			Graduate			All
	FT	PT	Total	FT	PT	Total	FT	PT	Total	Total
2024	45,530	115,012	160,542	0	0	0	0	0	0	160,542
2025	45,376	110,972	156,348	0	0	0	0	0	0	156,348
2026	46,164	112,925	159,089	0	0	0	0	0	0	159,089
2027	46,714	114,320	161,034	0	0	0	0	0	0	161,034
2028	47,112	115,317	162,429	0	0	0	0	0	0	162,429
2029	47,381	116,030	163,411	0	0	0	0	0	0	163,411
% Chg. 2024 - 2029	4.1%	0.9%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%

Overall Projections, p6

2YRS: Full-Time Equivalent Enrollment, Total

| Fiscal Year | Regular Session FTE | | | | | | Annual FTE | | |
| | Undergraduate | | First Professional | | Graduate | | All | | |
	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	In-State	Out-of-State	Total
2025	91,301	3,870	0	0	0	0	91,314	3,870	95,184
2026	90,479	2,938	0	0	0	0	90,479	2,938	93,417
2027	91,773	3,628	0	0	0	0	91,773	3,628	95,401
2028	93,101	3,679	0	0	0	0	93,101	3,679	96,780
2029	94,654	3,074	0	0	0	0	94,654	3,074	97,728
2030	95,290	3,095	0	0	0	0	95,290	3,095	98,385
% Chg. 2025 - 2030	4.4%	-20.0%	0.0%	0.0%	0.0%	0.0%	4.4%	-20.0%	3.4%

Observations

- Public four-years project a moderate increase in FTIC (2.5% in-state), but a significantly larger increase in in-state undergraduate enrollment (4.2% headcount, 4.4% FTE)
- Private four-years project decreased in-state FTIC (-2.5) and a –5.5% decrease in transfers, combining to make 7% increase in both full-time enrollment and FTE

Notes continued

- Public two-years project a 5.6% increase in FTIC (excludes HSDE) and a 3.7% increase in new transfers, with overall increase in FT in-state of 4.1% and 4.4% increase in FTE.
- At the sector-level, these are the only projections with mathematical consistency.

Questions we can't answer with current template

- How much of projected enrollment is high school dual enrollment?
- What percentage of enrollments, by level, are solely distance/online?
- How many seats are actually being used each year?

Answering the Questions

- There is significant dissatisfaction with my inability to answer the previous questions beyond, "It is not part of the projections."
- We propose a set of changes, to implement immediately under the guidance of a Council working group :
  - Modify the collection template
  - Re-issue with a deadline of October 15
  - Provide an update, and if possible, a preview at the October meeting
  - Publish the projections by November 15
  - Council may choose to take action in a special meeting or in January

The Current Template (1 sheet per year)

		ALL CAMPUS SITES												NOT MAIN CAMPUS SITES	
Actuals: 2021-22		**FALL COHORTS (FT/PT)**				**FALL HEADCOUNT**						**REGULAR SESSION**		**FALL HC**	**SESSION**
		New Students (FTIC or At Level)		New Transfer Students		Full-Time		Part-Time		Total (Calculated)			FTE		(DO NOT INCLUDE DISTANCE)
ON-CAMPUS/NON-DISTANCE		Total	% In-State	Total	%In-State	Total	% In-	Total	% In-	In-State	Out-of	Total	Total	% In-	HC	FTE
STUDENT LEVEL	**LINE**					(1)	(2)	(4)	(5)	(7)	(8)	(9)	(10)	(11)	(12)	(13)
Undergraduate																
Remedial	01									0	0	0				
Lower-Ocd/Tech	02									0	0	0				
Lower-Bach Cred	03									0	0	0				
Upper	04									0	0	0				
First Professional																
Law	05									0	0	0				
Medicine	06									0	0	0				
Dentistry	07									0	0	0				
Vet Med/Pharm	08									0	0	0				
Graduate																
First-Year	09									0	0	0				
Advanced	10									0	0	0				
Unclassified																
Undergraduate	11									0	0	0				
Graduate	12									0	0	0				
Grand Total	13	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0	0	0	0.00%	0	0

DISTANCE

Undergraduate	D1									0	0	0				
First Professional	D2									0	0	0				
Graduate	D3									0	0	0				
Unclassified Undergrad	D4									0	0	0				
Unclassified Graduate	D5									0	0	0				
Grand Total	D6	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0	0	0	0.00%		

		HEADCOUNT			FTE	
		In-State	Out-of State	Total	Total	% In-State
SUMMER						
Undergraduate	S1			0		
First Professional	S2			0		
Graduate	S3			0		
Unclassified Undergrad	S4			0		
Unclassified Graduate	S5			0		
Grand Total	S6	0	0	0	0	0.00%

Template Changes

- Solely remedial students (Line 1) have not been reported in years, replace with HS Dual Enrolled
- Add six additional lines under Distance Education to specify the subset that are solely Distance/Online students that never have to come to a campus

Proposed Row Changes

Actuals: 2024-25

ON-CAMPUS

STUDENT LEVEL	LINE
Undergraduate	
HS Dual Enrolled	01
Lower-Occ/Tech	02
Lower-Bach Cred	03
Upper	04
First Professional	
Law	05
Medicine	06
Dentistry	07
Vet Med/Pharm	08
Graduate	
First-Year	09
Advanced	10
Unclassified	
Undergraduate	11
Graduate	12
Grand Total	13

TOTAL DISTANCE ENROLLMENT (INCLUDING HYBRID)

Undergraduate	D1		
First Professional	D2		
Graduate	D3		
Unclassified Undergraduate	D4		
Unclassified Graduate	D5		
Grand Total	D6		

DISTANCE ENROLLMENT ONLY (SUBSET OF TOTAL)

Undergraduate	E1	
First Professional	E2	
Graduate	E3	
Unclassified Undergraduate	E4	
Unclassified Graduate	E5	
Grand Total	E6	

SUMMER TOTAL ENROLLMENT

Undergraduate	S1	
First Professional	S2	
Graduate	S3	
Unclassified Undergraduate	S4	
Unclassified Graduate	S5	
Grand Total	S6	

SUMMER DISTANCE ENROLLMENT ONLY (SUBSET OF SUMMER)

Undergraduate	T1	
First Professional	T2	
Graduate	T3	
Unclassified Undergraduate	T4	
Unclassified Graduate	T5	
Grand Total	T6	

Additional Sheets for Each Year

		Low Range (Worst Case Scenario)							High Range (Best Case SCenario)					
Projections: 2025-26		FALL HEADCOUNT					REGULAR SESSION		FALL HEADCOUNT					REGULAR SESSION
		New Students (FTIC or At Level)	New Transfer Students	Full-Time	Part-Time		FTE		New Students (FTIC or At Level)	New Transfer Students	Full-Time	Part-Time		FTE
ON-CAMPUS		Total	Total	Total	Total	Total	Total		Total	Total	Total	Total	Total	Total
STUDENT LEVEL	LINE			(L1)	(L4)	(L9)	(L10)				(H1)	(H4)	(H9)	(H10)
Undergraduate						0							0	
HS Dual Enrolled	01					0							0	
Lower-Occ/Tech	02					0							0	
Lower-Bach Cred	03					0							0	
Upper	04					0							0	
First Professional						0							0	
Law	05					0							0	
Medicine	06					0							0	
Dentistry	07					0							0	
Vet Med/Pharm	08					0							0	
Graduate						0							0	
First-Year	09					0							0	
Advanced	10					0							0	
Unclassified						0							0	
Undergraduate	11					0							0	
Graduate	12					0							0	
Grand Total	13	0	0	0	0	0	0		0	0	0	0	0	0

Distance and Summer rows excluded here for clarity; we will assume the main body of projections is middle scenario.

Collection Changes

- Add a "Distance Only" flag to the student-level collections for each term of enrollment.
- Ensure the site codes in the course enrollment file include values for each high school or other location where HS dual enrollment is taking place and providing edits to ensure they are consistent with student status

Discussion Points

- Rationality of institutional projections
- Should the enrollment projection model be modified?
- Is the proposed timeline reasonable?