

Preparing for Future Enrollment Changes: Relevant Findings and Potential Actions

**Council Meeting
March 21, 2023**

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**STATE COUNCIL OF HIGHER
EDUCATION FOR VIRGINIA**

Objectives for Today

In fulfillment of the work group's charge:

- 1. Identify key questions and the data necessary to answer those questions to effectively plan for statewide enrollment changes;**
- 2. Discuss potential actions that Council, the Commonwealth and/or the institutions might consider in preparation for future enrollment changes; and**
- 3. Identify next steps.**

Context and Key Questions

Chair's Charge to the Enrollment Work Group

Work Group Charge: To prepare materials for discussion at a future Council meeting regarding statewide planning for enrollment changes.

The review should focus primarily on undergraduate enrollment at public and private four-year and two-year institutions, and comprehend the following topics and their implications for higher education planning in Virginia:

- current and projected in-state and out-of-state enrollment;
- variations and trends in enrollment overall and by gender, geography, income, and race;
- institutional strategies to address variations in enrollment;
- Impact of enrollment changes on facilities planning;
- inter-institutional effects of enrollment, applications, admission yields and student retention.

The presentation should include relevant findings and potential actions the Council, the state or the institutions might consider as we prepare for future enrollment changes.

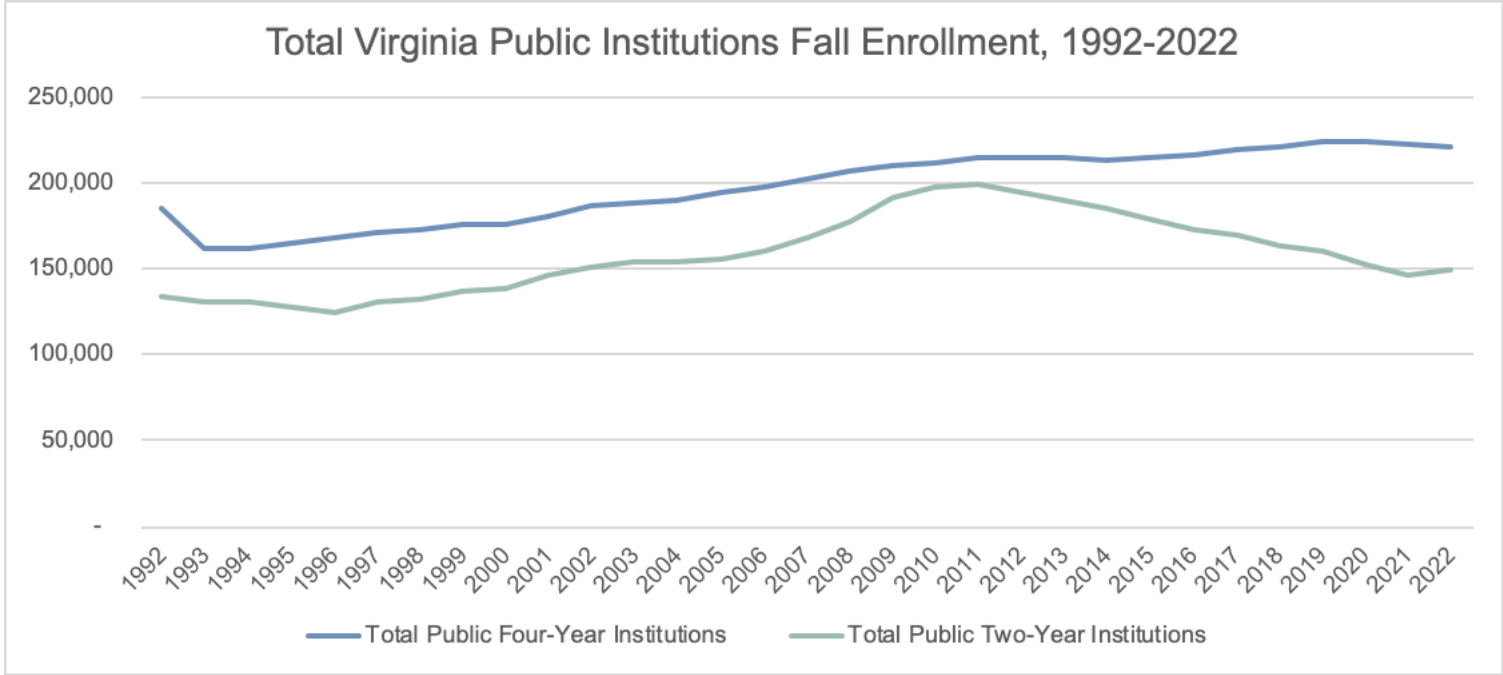
Key Questions and Data Needs

Key questions and data needed to answer those questions and effectively plan for statewide enrollment changes:

1. What is on the minds of high school students in terms of post-secondary plans?
2. What are the enrollment gaps/trends by region, gender, income and race/ethnicity?
3. What do we know about the choices high school students are making?
4. What are the national enrollment trends, and how do they impact/relate to Virginia's enrollment?
5. What are the statewide enrollment trends across Virginia's public and private institutions?
6. What programs, initiatives and strategies are currently being implemented by institutions and the state to address enrollment issues?

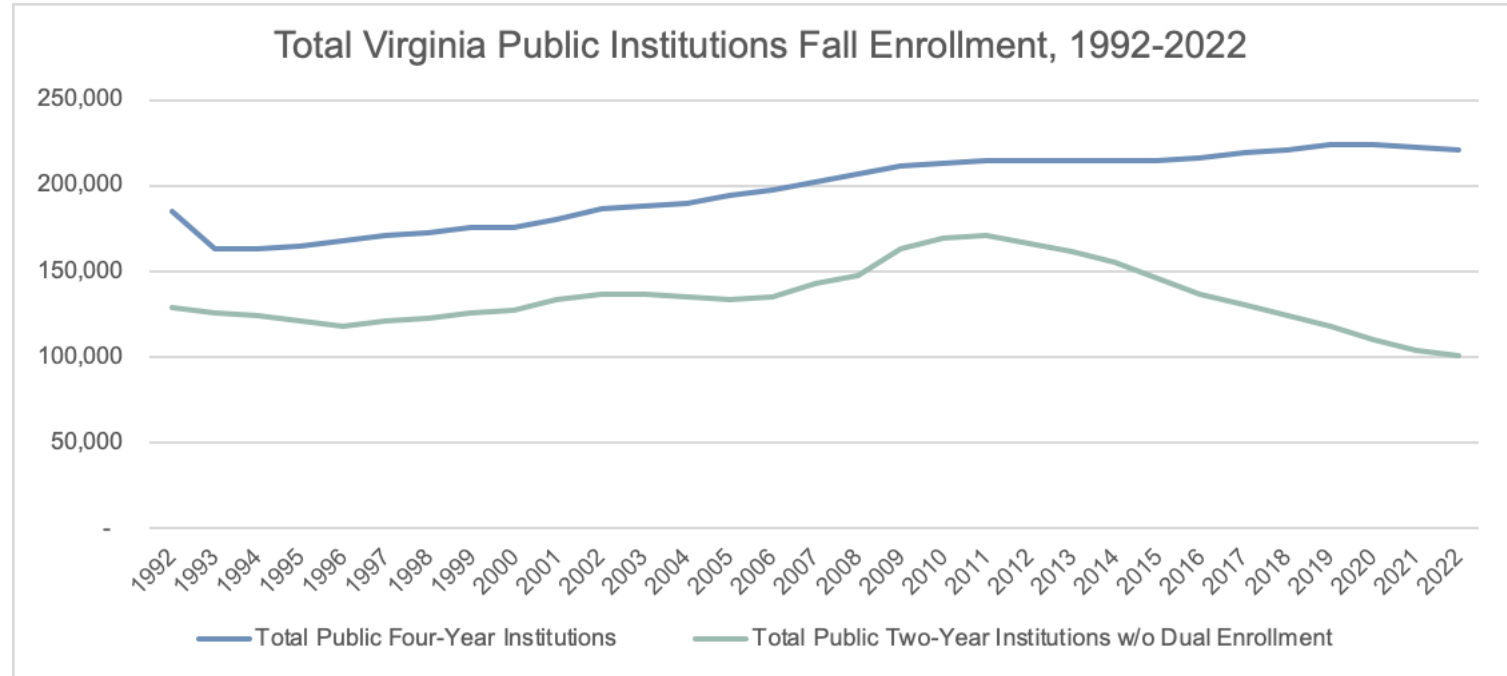
Statewide Trends and Projections

Total Virginia Public Institution Fall Enrollment, 1992-2022



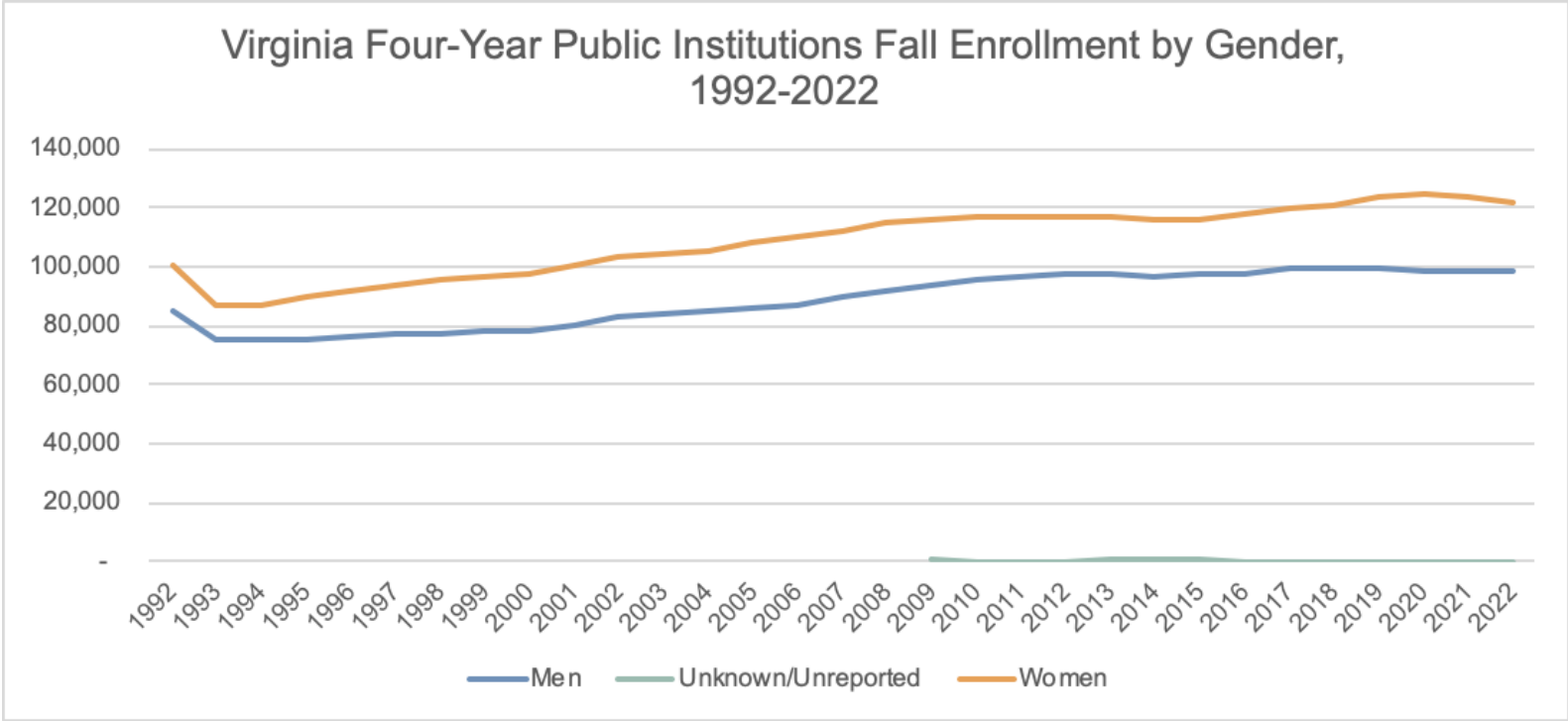
Source: SCHEV E03 Report; Two-year data include dual enrollment.

Total Virginia Public Institution Fall Enrollment, 1992-2022 (Not Including Dual Enrollment)



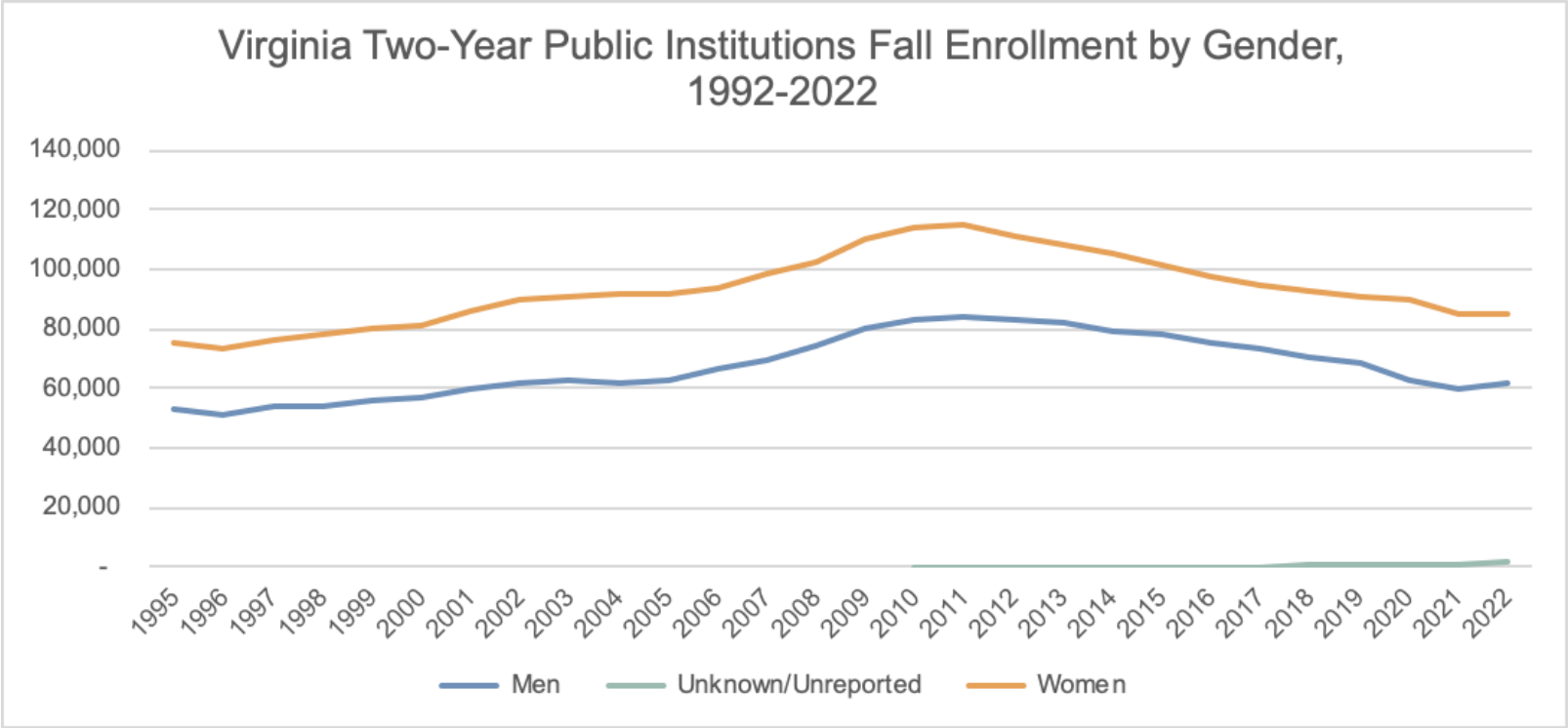
Source: SCHEV E03 Report; Two-year data exclude dual enrollment.

Virginia Four-Year Public Institution Fall Enrollment by Gender, 1992-2022



Source: SCHEV E03 Report.

Virginia Two-Year Public Institution Fall Enrollment by Gender, 1992-2022



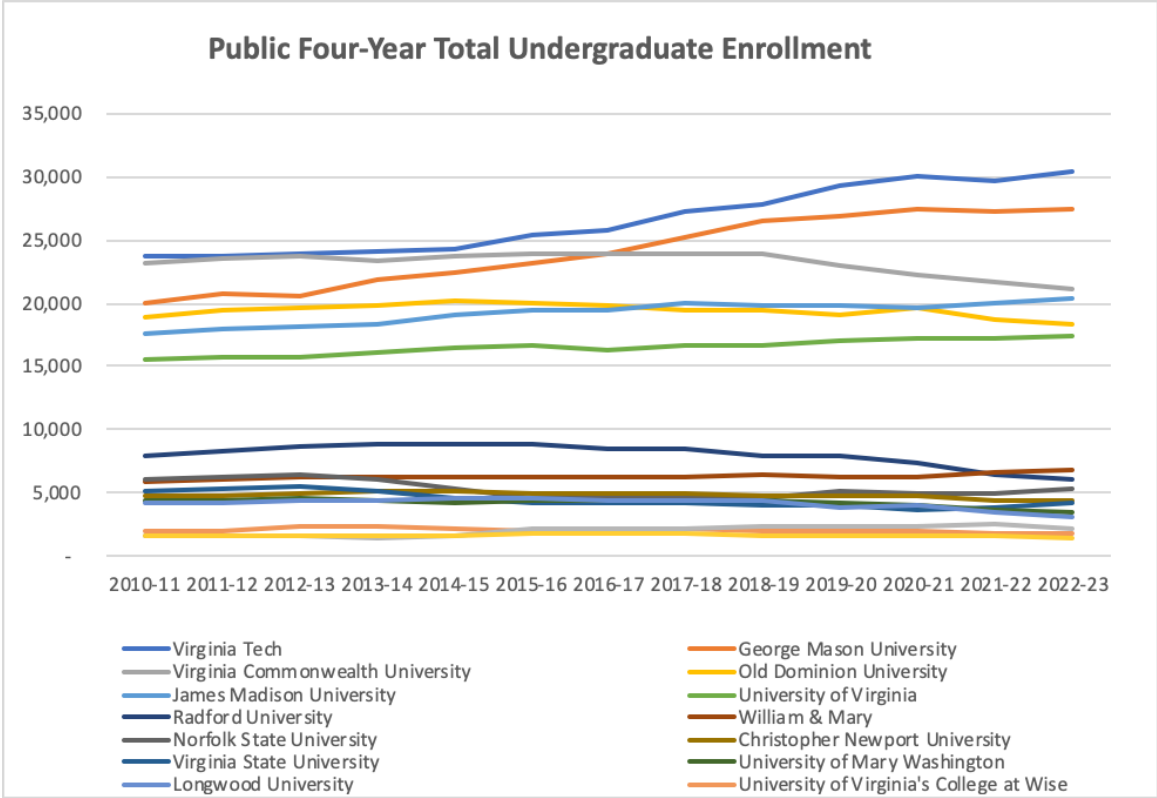
Source: SCHEV E03 Report.

Total Public Undergraduate Enrollment: 2010 - 2022

Institution	2010	2012	2014	2016	2018	2020	2022
Christopher Newport University	4,778	5,046	5,096	4,930	4,857	4,758	4,449
George Mason University	20,094	20,602	22,342	24,009	26,491	27,528	27,519
James Madison University	17,657	18,107	19,144	19,548	19,924	19,727	20,346
Longwood University	4,125	4,354	4,572	4,386	4,324	3,940	3,154
Norfolk State University	6,131	6,368	5,356	4,739	4,660	4,992	5,337
Old Dominion University	18,965	19,612	20,115	19,793	19,372	19,622	18,375
Radford University	7,950	8,610	8,885	8,453	7,926	7,307	6,008
University of Mary Washington	4,354	4,515	4,167	4,357	4,410	3,993	3,493
University of Virginia	15,569	15,794	16,460	16,298	16,753	17,274	17,334
University of Virginia's College at Wise	1,990	2,420	2,182	2,221	2,065	1,906	1,737
Virginia Commonwealth University	23,212	23,687	23,751	23,999	23,933	22,183	21,207
Virginia Military Institute	1,569	1,664	1,700	1,713	1,685	1,698	1,512
Virginia State University	5,075	5,570	4,498	4,155	3,986	3,656	4,300
Virginia Tech	23,690	23,859	24,247	25,791	27,811	30,020	30,434
William & Mary	5,898	6,171	6,299	6,276	6,377	6,236	6,797
Public Four-Year (Total)	161,057	166,379	168,814	170,668	174,574	174,840	172,002
Richard Bland College	1,587	1,540	1,528	2,203	2,357	2,314	2,140
VCCS	195,417	192,895	183,443	170,869	161,587	150,761	146,553
Public (Total)	358,061	360,814	353,785	343,740	338,518	327,915	320,695

Source: SCHEV E02
Report

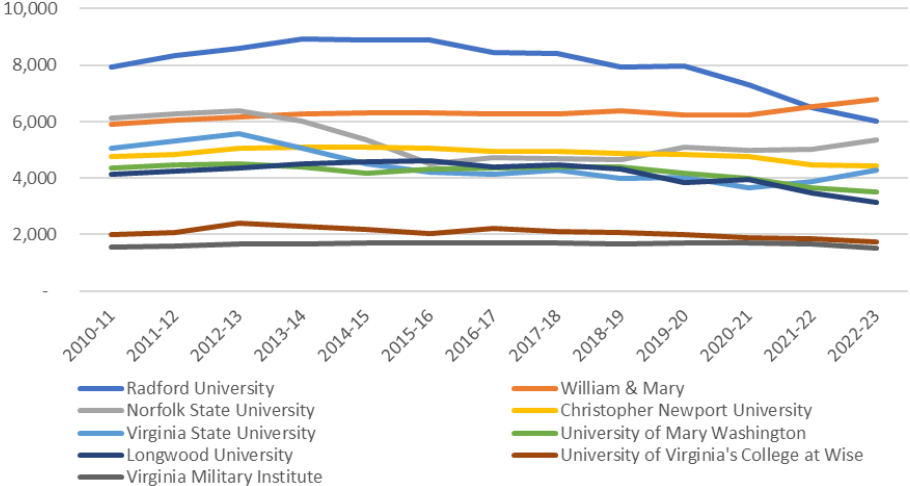
Total Public Undergraduate Enrollment: 2010 - 2022



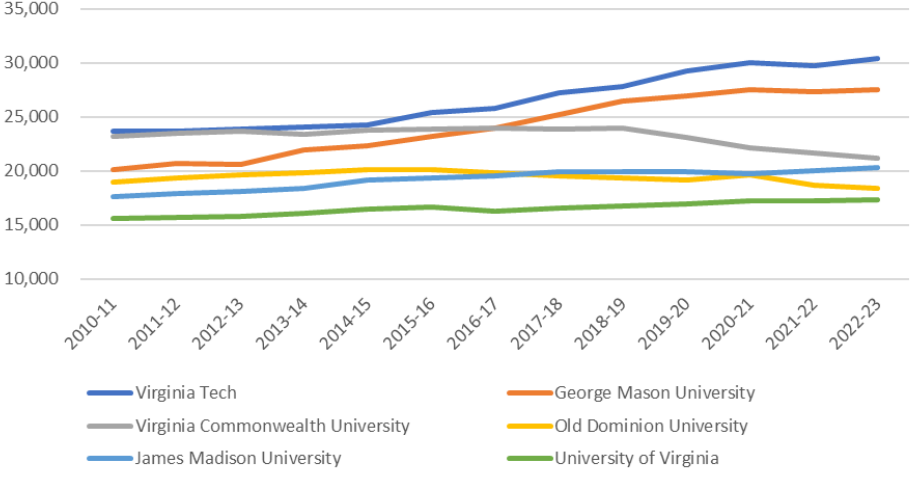
Source:
SCHEV E02
Report

Total Public Undergraduate Enrollment: 2010 - 2022

Public Four-Year Total Undergraduate Enrollment (<10k)



Public Four-Year Total Undergraduate Enrollment (>10k)



Source: SCHEV E2 Report

First Time in College, In-State Four-Year Enrollment: 2016 - 2022

Institution	2016	2017	2018	2019	2020	2021	2022
Christopher Newport University	1,145	1,198	1,123	1,154	1,099	958	1,083
George Mason University	2,777	2,967	3,126	3,223	3,112	3,359	3,409
James Madison University	3,271	3,403	3,316	3,357	3,432	3,781	3,605
Longwood University	920	1,016	995	766	809	690	765
Norfolk State University	724	749	753	837	749	747	847
Old Dominion University	2,494	2,588	2,900	2,907	2,945	2,702	2,895
Radford University	1,623	1,692	1,597	1,499	1,212	1,138	1,098
University of Mary Washington	867	848	842	791	690	561	649
University of Virginia	2,600	2,727	2,687	2,698	2,694	2,528	2,623
University of Virginia's College at Wise	805	687	756	263	227	284	476
Virginia Commonwealth University	3,750	3,823	4,180	4,114	3,402	3,754	3,807
Virginia Military Institute	267	256	260	274	290	262	218
Virginia State University	697	828	646	726	567	637	1,009
Virginia Tech	4,358	4,436	4,342	5,117	4,845	4,047	4,583
William & Mary	945	992	965	947	1,020	1,073	982
Public (Total)	27,243	28,210	28,488	28,673	27,093	26,521	28,049
Private (Total)	5,747	5,512	5,994	5,842	5,522	5,372	5,631

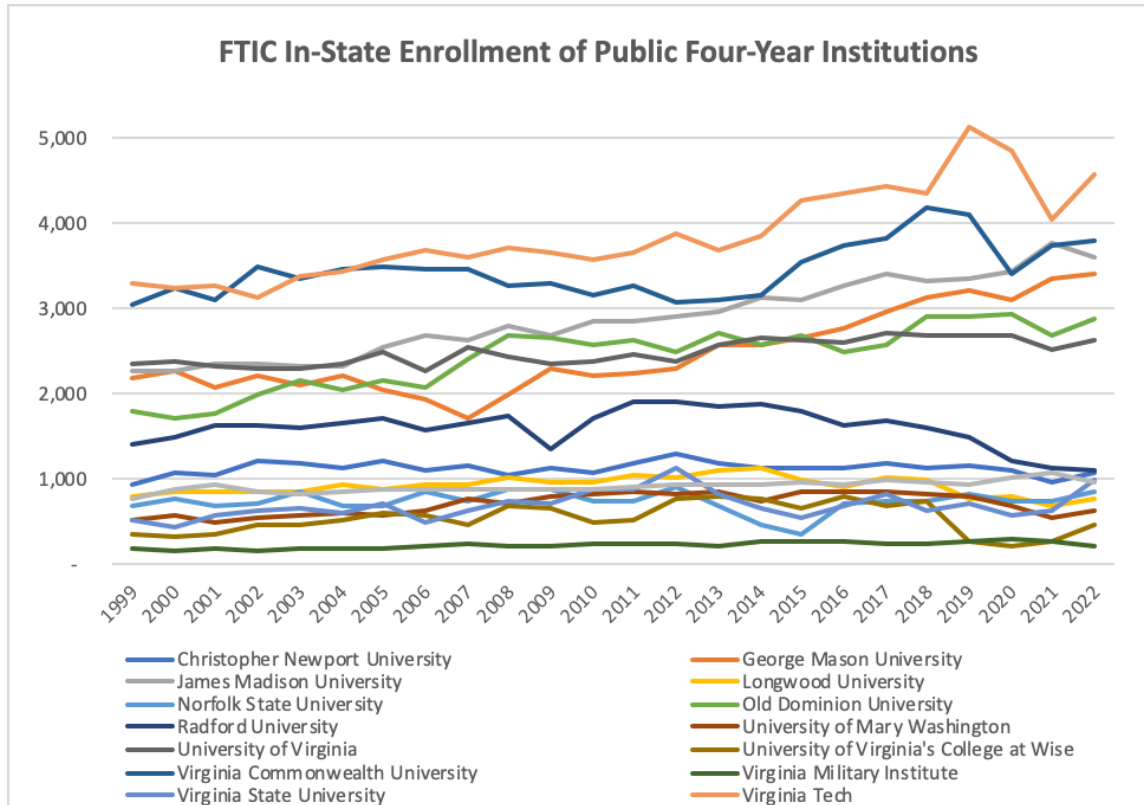
Source:
SCHEV E02
Report

Enrollment, Percent First Time in College: 2016 - 2022

Institution	2016	2017	2018	2019	2020	2021	2022
Christopher Newport University	3.91%	3.81%	3.62%	3.67%	3.62%	3.31%	3.56%
George Mason University	8.56%	8.81%	8.92%	9.46%	8.30%	10.38%	9.79%
James Madison University	11.13%	11.06%	10.69%	10.91%	11.71%	12.74%	11.66%
Longwood University	2.73%	3.02%	2.85%	2.14%	2.36%	2.05%	2.20%
Norfolk State University	2.18%	2.21%	2.19%	1.82%	2.07%	2.35%	2.47%
Old Dominion University	8.03%	8.10%	9.00%	8.78%	9.48%	8.56%	8.69%
Radford University	5.30%	5.36%	4.99%	4.72%	3.98%	3.68%	3.41%
University of Mary Washington	2.60%	2.73%	2.68%	2.54%	2.21%	1.85%	2.01%
University of Virginia	8.35%	8.28%	8.01%	8.40%	8.86%	8.17%	8.16%
University of Virginia's College at Wise	0.98%	0.71%	0.81%	0.76%	0.65%	0.69%	0.60%
Virginia Commonwealth University	11.26%	11.26%	12.98%	12.88%	10.08%	12.69%	11.76%
Virginia Military Institute	0.91%	0.84%	0.85%	0.90%	1.01%	0.92%	0.72%
Virginia State University	0.76%	2.59%	1.19%	2.29%	1.94%	2.14%	3.17%
Virginia Tech	14.34%	14.29%	13.41%	16.38%	16.38%	13.42%	14.56%
William & Mary	3.07%	3.14%	3.05%	2.99%	3.44%	3.67%	3.19%
Public (Total)	84.11%	86.20%	85.24%	88.64%	86.10%	86.61%	85.96%
Private (Total)	15.74%	13.62%	14.59%	11.35%	13.90%	13.39%	14.04%

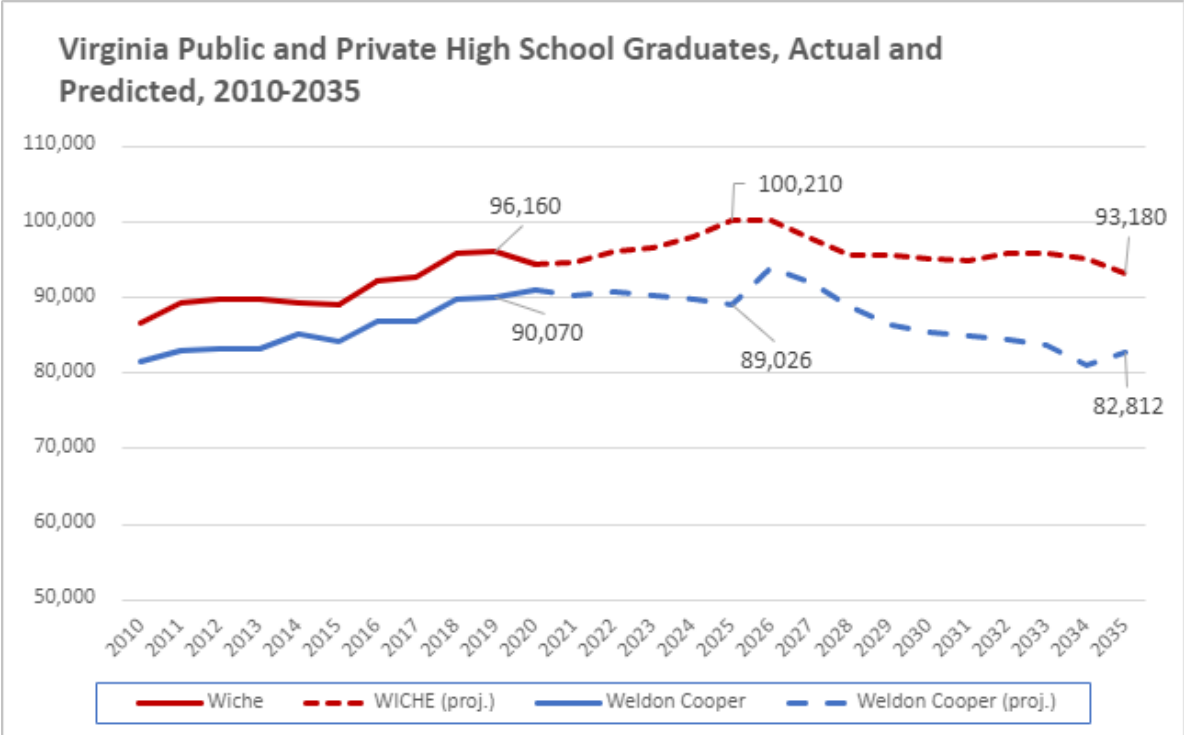
Source:
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First Time in College, In-State Four-Year Enrollment: 1999 - 2022



Source:
SCHEVE2
Report

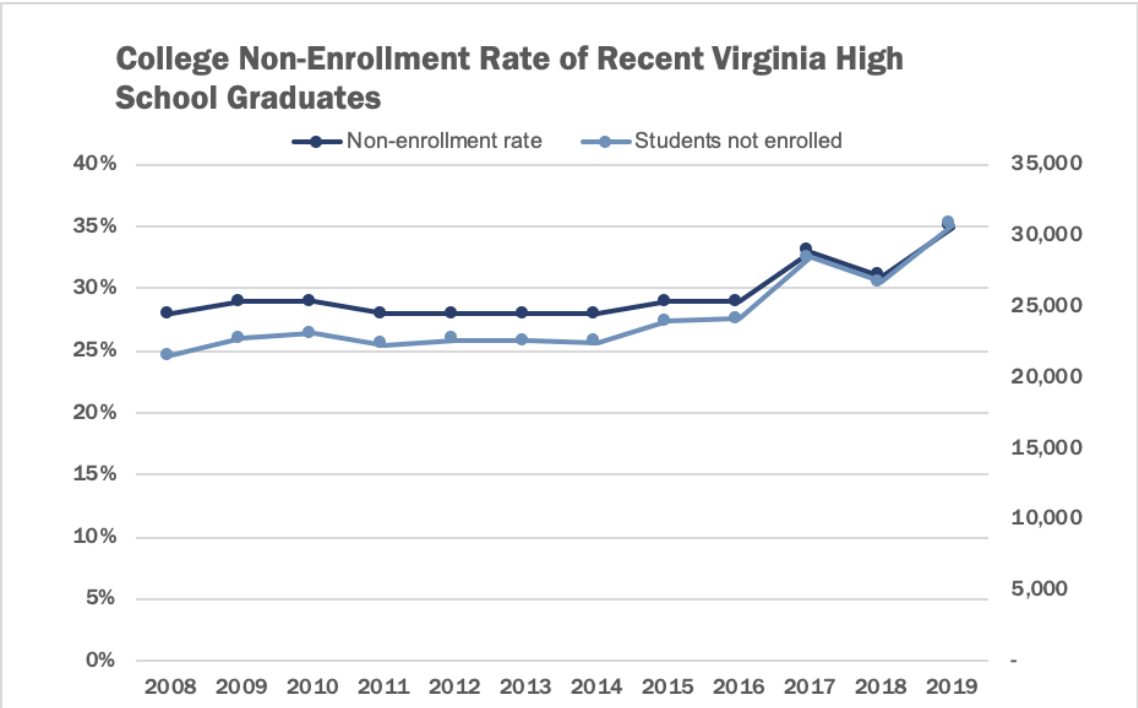
Actual and Predicted Virginia High School Graduates



In all states, including Virginia, the decline of high-school graduates from affluent families is projected to be higher than the overall decline. It is the affluent students who are sought after by universities as they recruit out-of-state students.

Sources: Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2020
 WICHE includes private high school graduates. Weldon Cooper only includes public high school graduates.

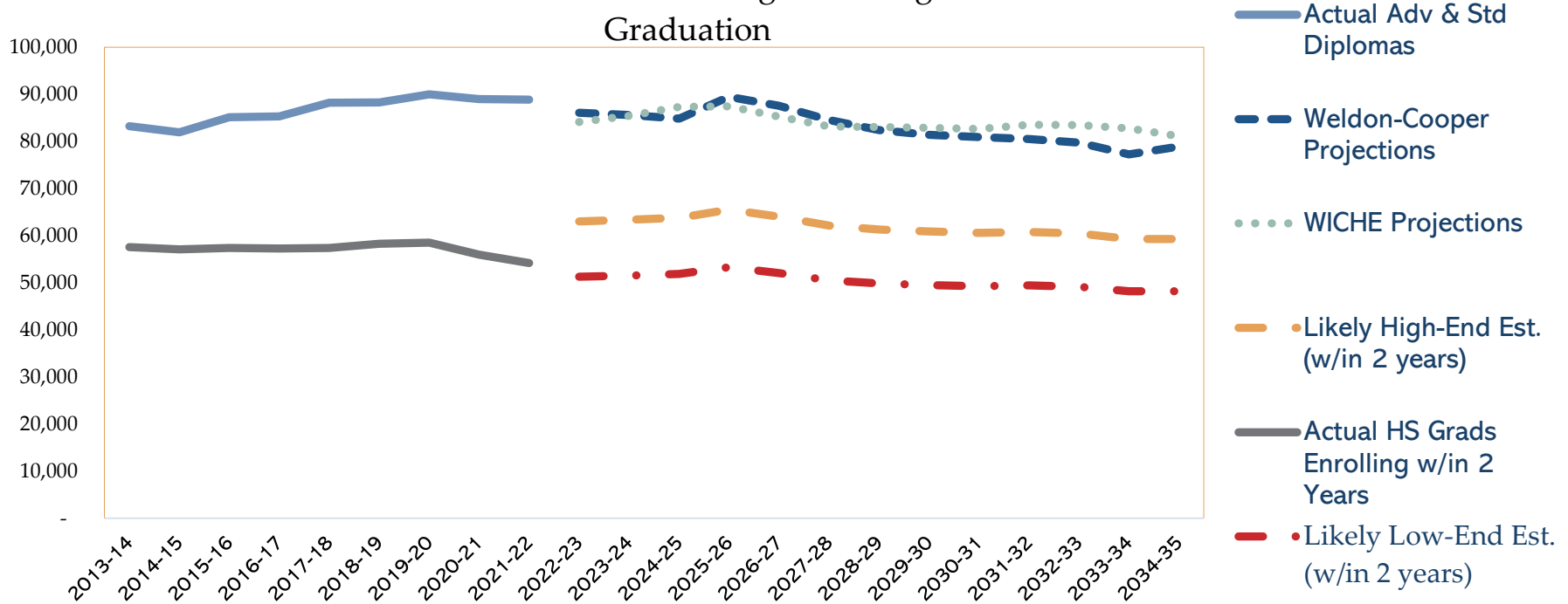
College Non-Enrollment Rate – High School Graduates



Source: VDOEC11 Report. Non-enrollment are graduates of Virginia high schools who did not enroll in a post-secondary program within 16 months.

Projections of HS to College Pipeline

VA Public HS Graduates & Enrollment in Virginia Colleges within 2 Years of HS



Excludes 6,000-8,000 annual private high school graduates, and diplomas other than the advanced and standard diplomas

What We Know (and Don't Know) About High School Students' Post-secondary Plans

High School Student Post-secondary Plans

Existing and available data, surveys and focus groups indicate:

- Majority of students (boys and girls) intend to pursue two-year or four-year college or other continuing education.
- Remainder intend to pursue (in order greatest to least): employment, the military or did not specify plans.
- Gender gap evident across various data sources with more girls than boys intending to pursue post-secondary education.
- Cost of college is a major concern across both genders.
- Covid-learning loss/burn out and summer melt are some (not all) contributing factors between post-high school plans and actual enrollment.

Sources: Gear Up Virginia fall 2022 8th grade survey and high school focus groups. You Science National Survey findings from 500 recently graduated high school students. Refer to appendices for methodology.

High School Student Post-secondary Plans cont'd.

Main reasons given by surveyed 18-30 year-olds as to why they ended up not going to college or finishing their degree:

- Too expensive/did not want to take on (more) debt.
- Too stressful/too much pressure.
- More important to get a job and make money.
- Unsure about major/future career.
- Not worth the money it costs to attend.

Source: HCM-EDGE Research “Where are the Students?” Refer to appendix for methodology.

Potential Survey of Virginia High School Students

Considerations about what the purpose of the study is, who is the audience for the findings, which kind of analysis and reporting is needed, etc., would shape decisions about what a survey program might look like.

- Probability sampling or convenience sampling?
- Open-ended written survey responses or closed-ended categorized responses?
- Where is the list of high school students from which to sample?
- What other partners or stakeholders (i.e., Virginia Department of Education, high schools) need to be involved?
- What are considerations around surveying minors?
- What is the best means to communicate with potential respondents?

SCHEV is contracting with the VCU Survey and Evaluation and Research Laboratory to assess the current environment and propose options for next steps.

The College Decision Process

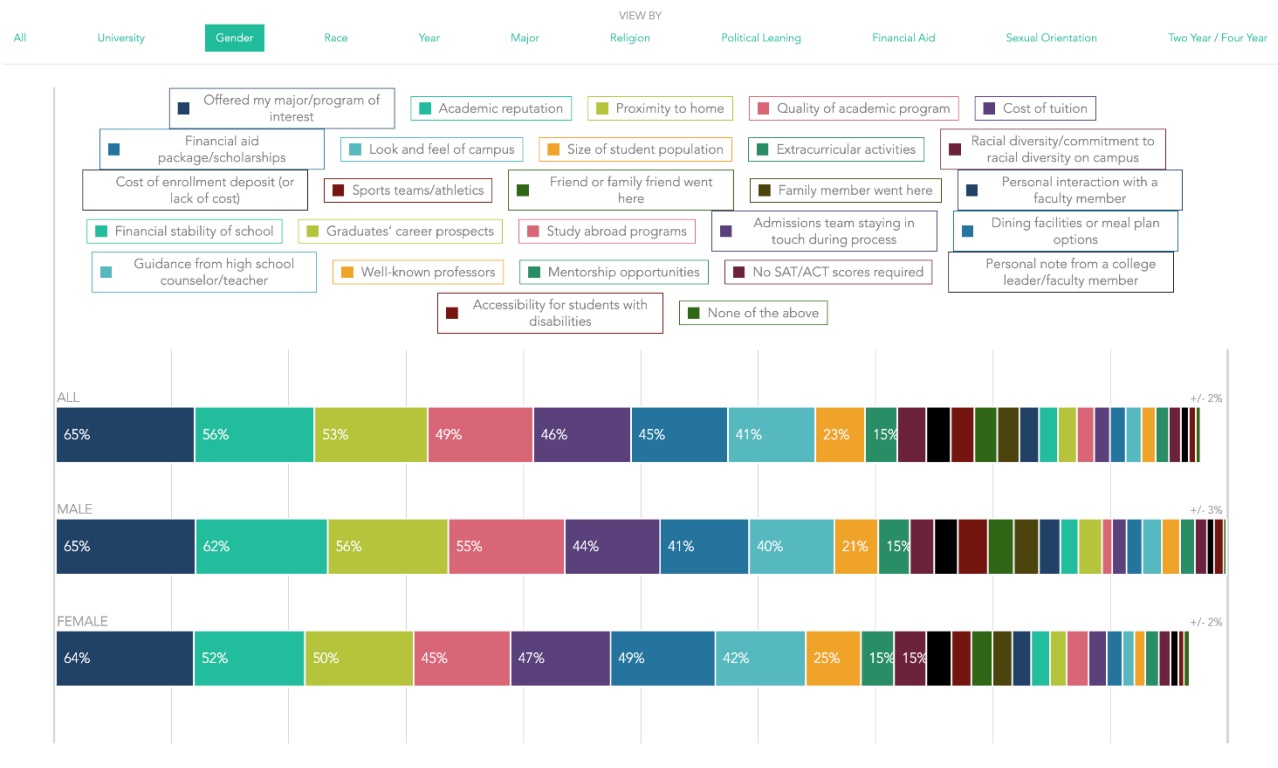
Top Factors in Making the College Choice

A multitude of factors influence where students choose to go to college. Decisions are often based years in advance and apply to in- and out-of-state choices. Top factors include:

- **Major/program of interest offered – 65%**
- **Academic reputation – 56%**
- **Proximity to home – 53%**
- **Quality of academic program – 49%**
- **Cost of tuition – 46%**
- **Financial aid package/scholarship – 45%**
- **Look and feel of campus – 41%**
- **Size of student population – 23%**
- **Extracurricular activities – 15%**
- **Sports teams/athletics – 11%**

Source: [StudentVoice survey](#) from *Inside Higher Ed* and College Pulse. Survey of 2,001 undergraduates in early 2022 . Refer to appendix for detailed methodology.

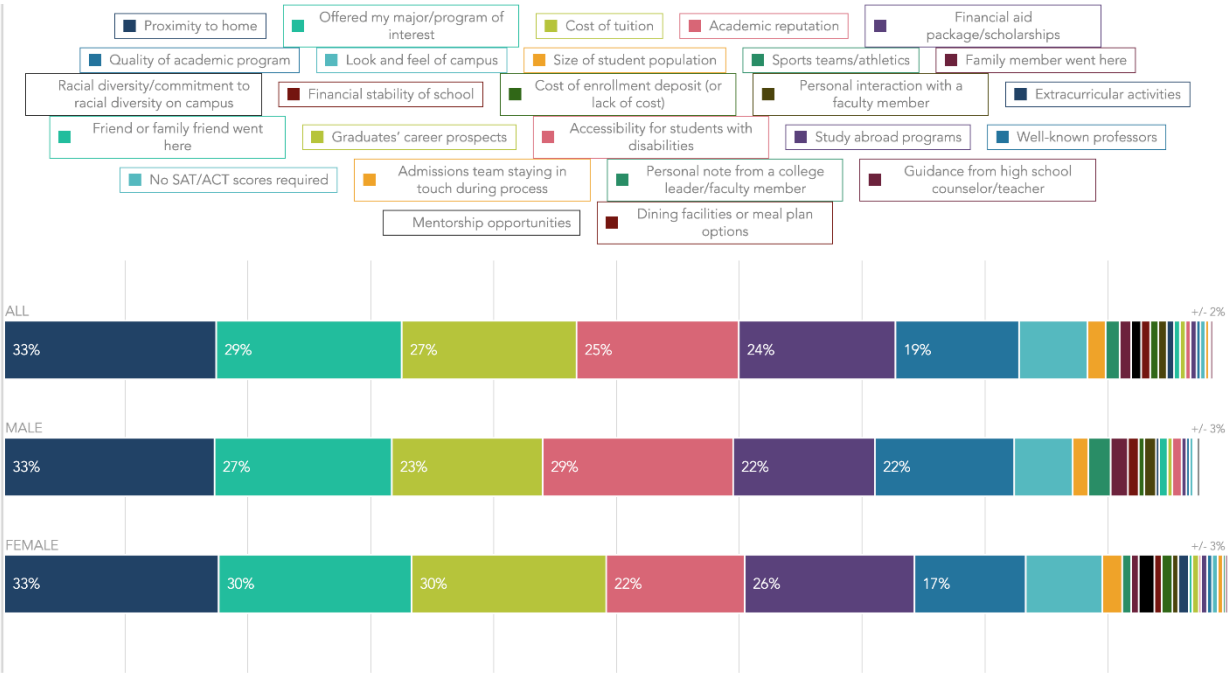
Top Factors in Making the College Choice by Gender



Source: [Student Voice survey](#) from *Inside Higher Ed* and *College Pulse*. Survey of 2,001 undergraduates in early 2022. Refer to appendix for detailed methodology.

Two Most Important Factors in Deciding to Enroll at a College by Gender

VIEW BY: All University Gender Race Year Major Religion Political Leaning Financial Aid Sexual Orientation Two Year / Four Year



Source: [StudentVoice survey](#) from *Inside HigherEd* and *College Pulse*. Survey of 2,001 undergraduates in early 2022. Refer to appendix for detailed methodology.

Facts versus Feelings in College Decisions

Students need facts and information to make their college selection decision but for many students their final decision will be driven more by how they feel about the college (i.e. sense of belonging).

**MALES: 36% Use facts more than feelings
29% Use feelings more than facts**

**FEMALES: 39% Use facts more than feelings
43% Use feelings more than facts**

Note: The difference are the people who say they use facts and feelings equally.

KEY FEELINGS AND THE PERCENTAGE OF STUDENTS CITED THIS FEELING AS IMPACTING THEIR FINAL DECISION:

- **See self there - 67%**
- **Campus atmosphere - 67%**
- **Sense of community - 64%**
- **Feel comfortable - 60%**
- **Was excited - 58%**
- **Felt right - 58%**
- **Felt welcomed - 57%**
- **Felt like home - 52%**
- **Proud to attend - 48%**
- **Care about me - 42%**

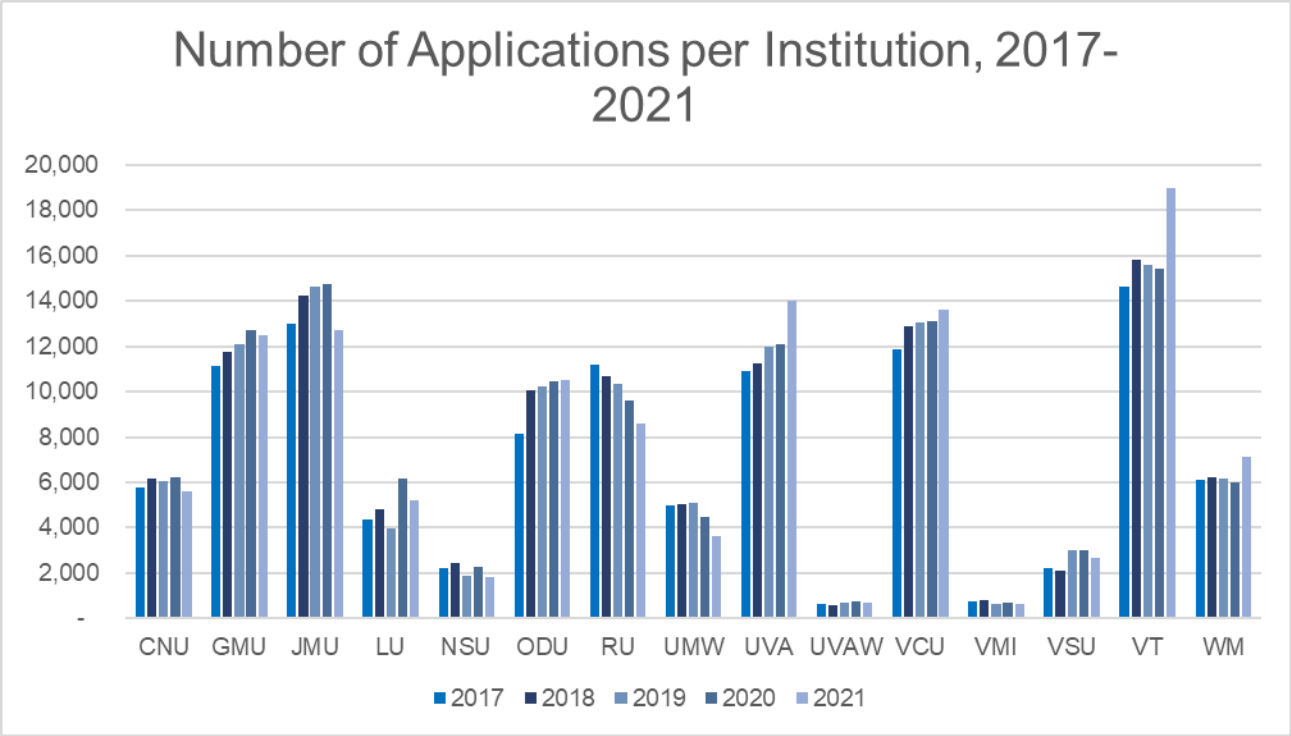
Source: Longmire & Co survey, 2017. In this study, 55,000 students received the survey. The project yielded over 13,000 survey responses. Data were not available disaggregated by gender or other subgroups.

Responses from public institution pools accounted for 60% of the sample while 40% originated from private institution pools.

The margin of error on the total sample is +/- 0.86 at the 95% confidence level.

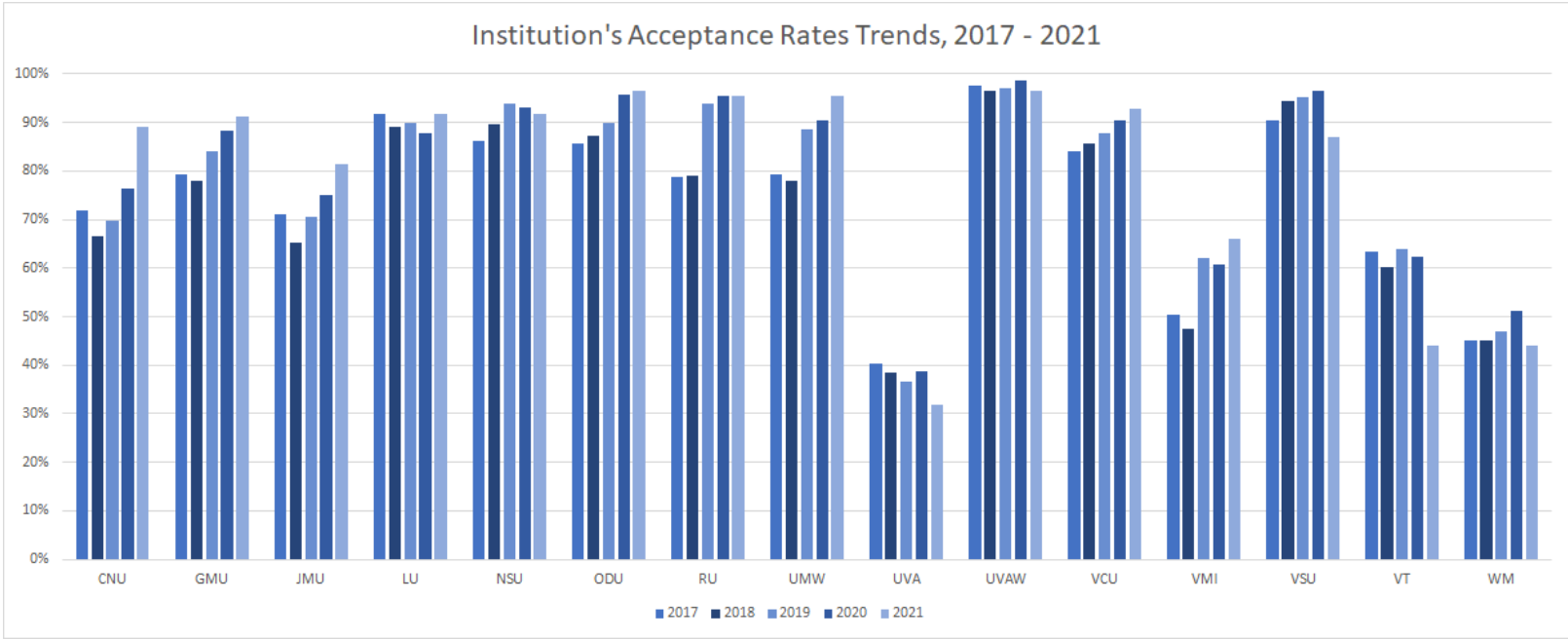
What We Know About Admissions and Enrollment Outcomes

Applications per Institution, 2017-2021



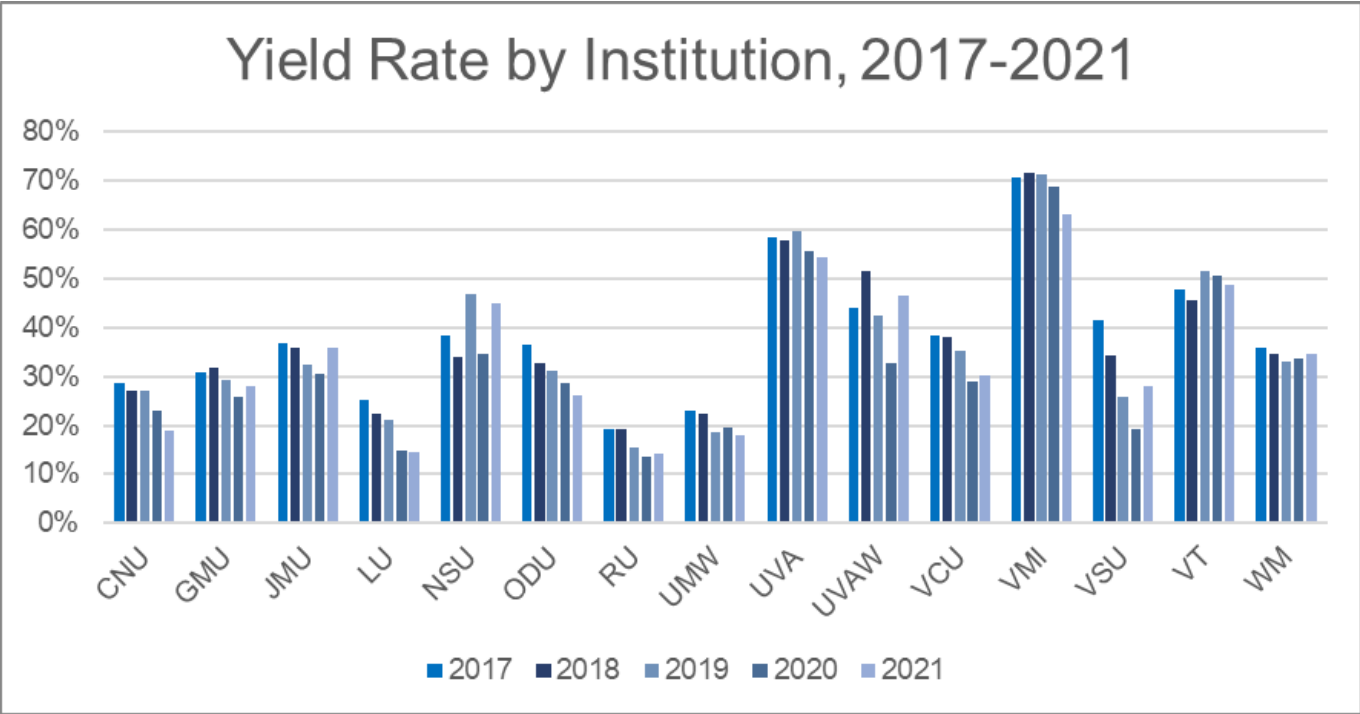
Source: SCHEV B08 Report

Institution Acceptance Rate Trends, 2017-2021



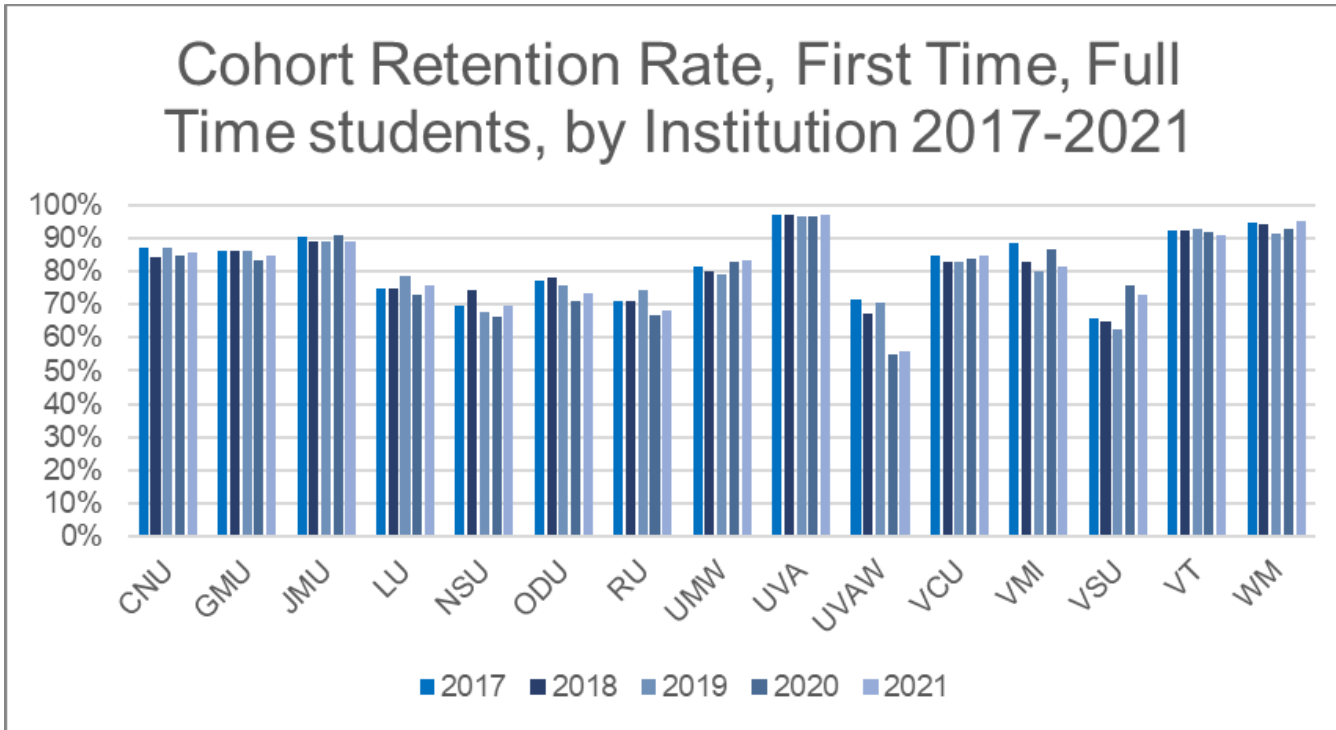
Source: SCHEV B08 Report

Yield Rate by Institution, 2017-2021



Source: SCHEV B08 Report

FTIC Cohort Retention Rate by Institution, 2017-2021



Source: SCHEV RT01 Report

Where are Virginians going to college?

Where are Virginians going to college? - 2020			
Rank	State	Number	% of Total
-	Virginia	47,272	80.27%
1	North Carolina	1,316	2.23%
2	Pennsylvania	1,278	2.17%
3	New York	869	1.48%
4	South Carolina	740	1.26%
5	Tennessee	578	0.98%
6	West Virginia	578	0.98%
7	Florida	555	0.94%
8	District of Columbia	519	0.88%
9	Maryland	499	0.85%
10	Ohio*	417	0.71%
1-10	TOP 10 TOTAL	7,349	12.48%
-	All Other States	4,273	7.26%

Only includes first-time in college students who graduated high school within 12 months of enrolling.

Well-resourced schools from these states may increase their number of out-of-state admits.

*Note: New in 2020. Not on 2010 list.

Source: IPEDS

Where are students in Virginia coming from?

Where are students in Virginia coming from? – 2020			
Rank	State	Number	% of Total
-	Virginia	47,272	78.14%
1	Maryland	1,770	2.93%
2	North Carolina	1,376	2.27%
3	Pennsylvania	1,282	2.12%
4	New Jersey	1,262	2.09%
5	New York	942	1.56%
6	Foreign countries	511	0.84%
7	Florida	496	0.82%
8	Texas*	443	0.73%
9	Georgia*	424	0.70%
10	California*	398	0.66%
1-10	TOP 10 TOTAL	8,904	14.72%
-	All Other States	4,317	7.14%

Only includes first-time in college students who graduated high school within 12 months of enrolling

The competition from other out-of-state schools for students from these states will increase.

*Note: New in 2020. Not on 2010 list.

Source: IPEDS

Inter-state Analysis – Projected Percent Change

Where are Students in Virginia coming from? – 2020 And Percent Change of High School Graduates over Time		
Rank	State	% Projected Percent Change of High School Graduates from Class 2019 to 2037
-	Virginia	-6%
1	Maryland	7%
2	North Carolina	-3%
3	Pennsylvania	-7%
4	New Jersey	-6%
5	New York	-14%
6	Foreign countries	n/a
7	Florida	18%
8	Texas	4%
9	Georgia	-8%
10	California	-15%

In all states, including Virginia, the decline of high-school graduates from affluent families is projected to be higher than the overall decline. It is the affluent students who are sought after by universities as they recruit out-of-state students.

Source: IPEDS and WICHE

Approaches to Increase Enrollment

Institutional Efforts to Increase Enrollment

Key approaches

- Targeted scholarships, grants and other supports for under-served students.
- Improved financial aid communication and simplified processes.
- Community/high school/student outreach: student-to-student connections and campus tours.
- College prep and summer bridge programs.
- Alternative growth/counterbalance strategies.
- Strengthen existing services/student persistence.
- Strategic recruitment planning.
- Ease of access to talk with institutional contacts (i.e. admissions, financial aid).

State Access Initiatives to Increase Enrollment

- **Virginia College Advising Corps (VCAC)**
 - Targeted approach that places advisers in high-need schools to address non-academic barriers to post-secondary matriculation
- **Direct Student Services**
 - GEAR UP Virginia
 - Middle School Campus Visits (6000+ students from low-income middle schools visiting 2 and 4 year, public and private institutions)
- **Outreach**
 - 1-2-3 Go! Campaign (Virginia College Application Week, Super FAFSA Project, Decision Day VA)
 - FAFSA Completion Portal pilot for high schools to access student-level data
- **Professional Development**
 - Statewide FAFSA training for school counselors & college access providers
 - Annual Virginia College Access Network conference
- **Dual Enrollment**
- **Financial Aid Strategies**

Potential Policy Considerations

Potential Policy Considerations

- **Right-size institutions to align with their current and projected enrollment.**
- **Consider additional, relevant program offerings that reduce time-to-degree, are in-demand or for which demand is growing.**
- **Re-evaluate policies on institutional growth and size.**
- **Target-fund selected institutions so that they can lower tuition.**
- **Establish an enrollment monitoring unit.**
- **Authorize selected institutions to enroll more out-of-state students.**

Potential Policy Considerations cont'd.

- **Authorize institutions to charge out-of-state students less than 100% of cost.**
- **Lower tuition/increase financial aid.**
- **Expand outreach to non-traditional audiences.**
- **Develop full-scale college marketing campaign.**
- **Survey high school students regarding their plans after graduation and, if they don't intend to pursue continuing education, ask why.**