

College and University Enrollment Projections

Tod R. Massa

Resources & Planning Committee



**STATE COUNCIL OF HIGHER
EDUCATION FOR VIRGINIA**

§ 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..*

§ 23.1-304(C). Per student enrollment-based funding.

C. In order 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 private nonprofit institutions of higher education pursuant to the Tuition Assistance Grant Act (§ 23.1-628 et seq.), each private nonprofit 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 the private institutions and their specific programs shall remain the sole responsibility of the governing boards of the individual institutions.

What does Council approval mean?

- **Approval for use by state entities for planning**
 - Planning for new classrooms and other college facilities
 - Modeling of potential impact on institutional budget and student financial aid
 - Planning for state and local services
 - Estimating adequacy of educational opportunities for Virginians
- **Endorsement of the feasibility of the projections**

Projections and IPS

- **The enrollment projections and degree estimates are used for many of institutional performance standards.**
- **The metrics are focused on meeting 95% of the specific projections used.**
- **There are no penalties for exceeding enrollment projections – by any amount.**

The process

- **Staff initiates the process in February of odd-numbered years**
- **After consultation with Op-Six, SCHEV provides instructions to institutions, which include an assessment of the current environment**
- **Institutions submit initial plans in May**
- **The projections remain “draft” through the six-year planning process**
- **Council approves projections in October**

Key findings and trends

- **2023 enrollment projections are not dramatically different from prior years**
- **Total enrollment is projected to increase from 519,000 in 2022 to 532,000 in 2029**
- **Significant variance by institution in projections of in-state “first-time in college” students from high school**
- **In-state enrollment projections are attainable; out-of-state projections are optimistic**

Key findings and trends

- **Independent colleges set aggressive targets to increase FTIC enrollment (17.4%, or 964 students)**
- **Other growth areas include master's degree, transfer and out-of-state students (both sectors)**
- **Increase in out-of-state distance-learning undergrads by 10,000, including 6,000 at the public four-years**

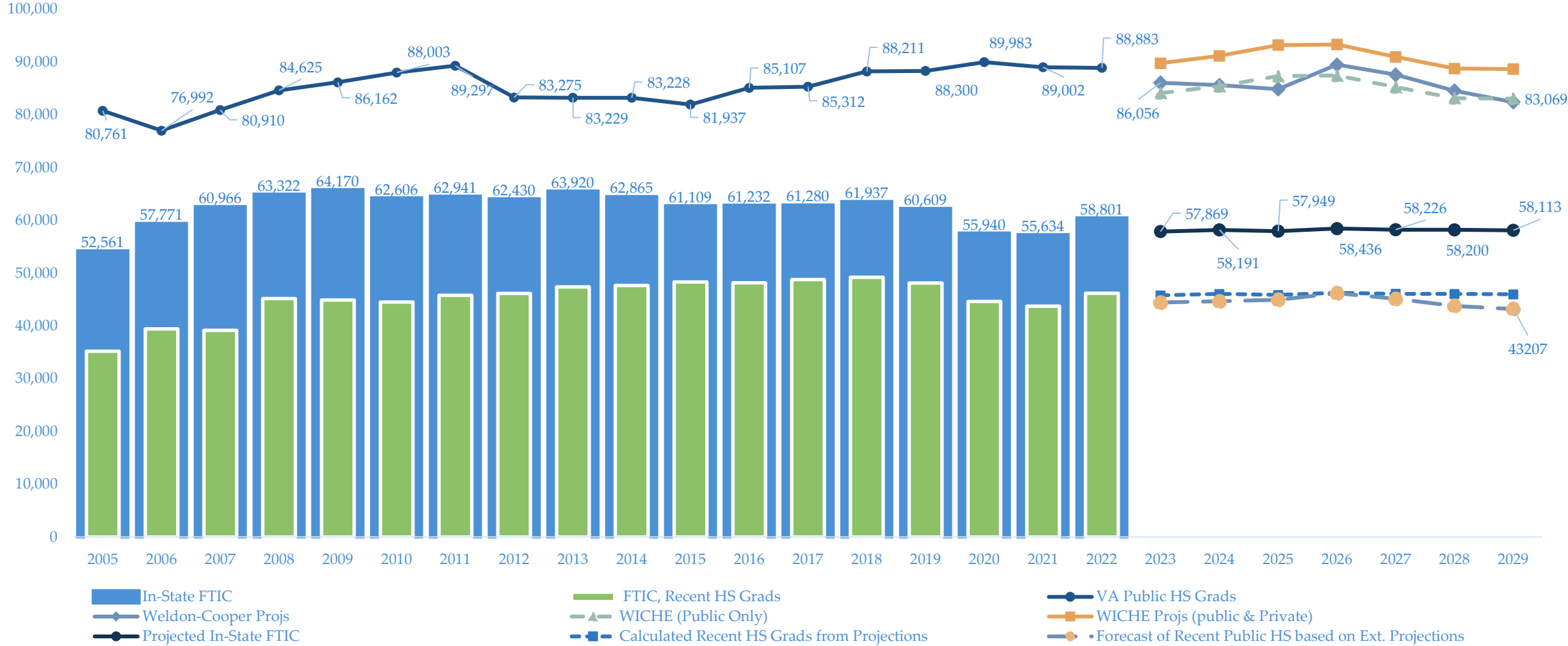
Key findings and trends

- **We remain on track to meet The Virginia Plan goal to add a cumulative 1.5 million degrees and credentials by 2030**
- **Council continues to estimate that, by 2030, 70% of Virginia's working-age population will have an associate's or bachelor's degree or other relevant workforce credential**

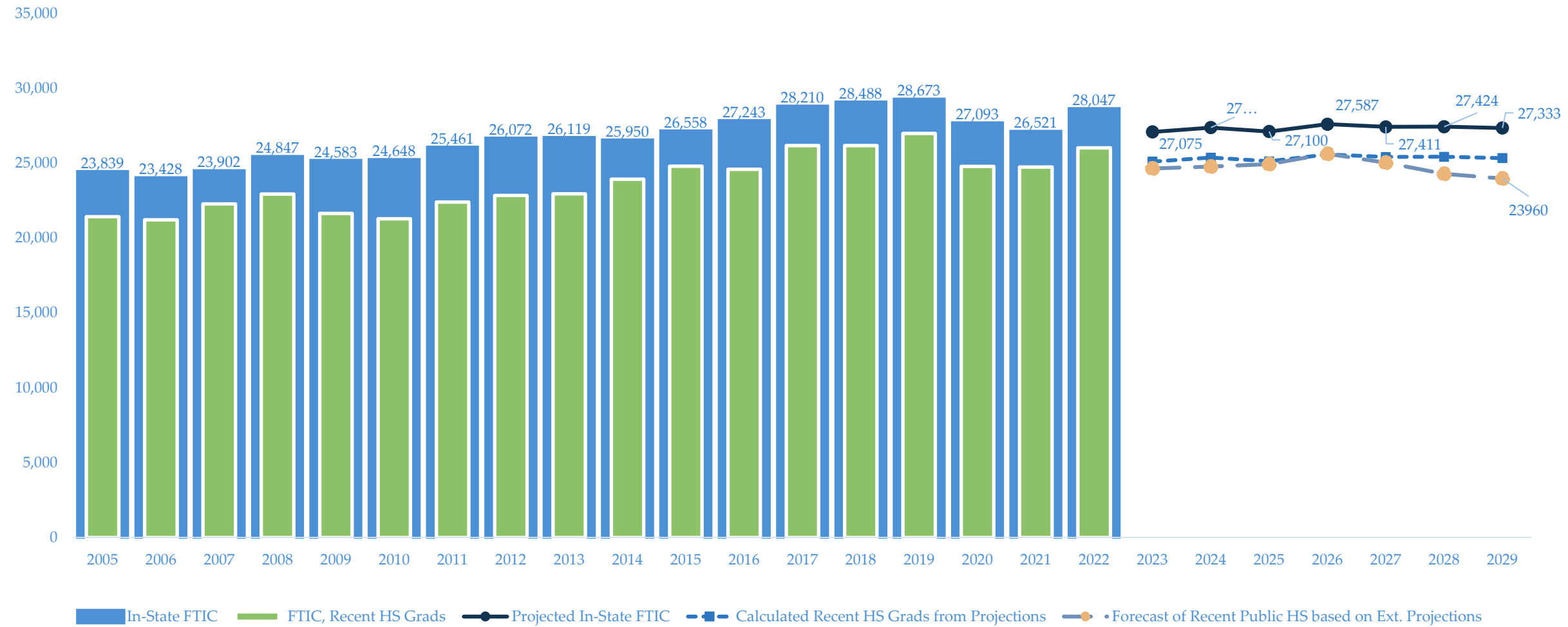
Other findings: four-year publics

- Overall decrease in in-state FTIC enrollment (1.7% or 484 students)
- Even split between institutions that project growth and those that project lower enrollments
- Undergraduate “distance” enrollment increases from 6.8% to 8.9% of total
- Continuing students comprise 73% of annual undergraduate projections

In-State, First-time in College (FTIC), All Institutions



In-State, First-time in College (FTIC), Public Four-year Institutions



In-State FTIC, Public Four-years

	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Net Change from 2022	
Christopher Newport University	1,083	1,035	1,035	1,035	1,057	1,057	1,080	1,080	-0.3%	(3)
George Mason University	3,541	3,681	3,718	3,752	3,793	3,814	3,850	3,890	9.9%	349
James Madison University	3,628	3,450	3,449	3,448	3,448	3,448	3,448	3,448	-5.0%	(180)
Longwood University	757	746	727	710	692	678	668	663	-12.4%	(94)
Norfolk State University	939	946	950	957	971	1,000	1,000	1,026	9.3%	87
Old Dominion University	2,892	2,780	2,804	2,823	2,842	2,861	2,882	2,882	-0.3%	(10)
Radford University	1,097	982	1,000	1,017	1,034	1,052	1,079	1,096	-0.1%	(1)
University of Mary Washington	648	650	655	662	678	695	713	733	13.1%	85
University of Virginia	2,505	2,612	2,612	2,613	2,613	2,613	2,613	2,613	4.3%	108
University of Virginia's College at Wise	192	217	224	231	238	246	253	260	35.4%	68
Virginia Commonwealth University	3,809	3,754	3,791	3,828	3,647	3,475	3,311	3,311	-13.1%	(498)
Virginia Military Institute	208	240	267	282	282	291	291	291	39.9%	83
Virginia State University	948	714	729	759	716	717	718	765	-19.3%	(183)
Virginia Tech	4,583	4,249	4,389	3,964	4,554	4,445	4,501	4,254	-7.2%	(329)
William & Mary	977	1,011	1,011	1,011	1,011	1,011	1,011	1,011	3.5%	34
	27,807	27,067	27,361	27,092	27,576	27,403	27,418	27,323	-1.7%	(484)

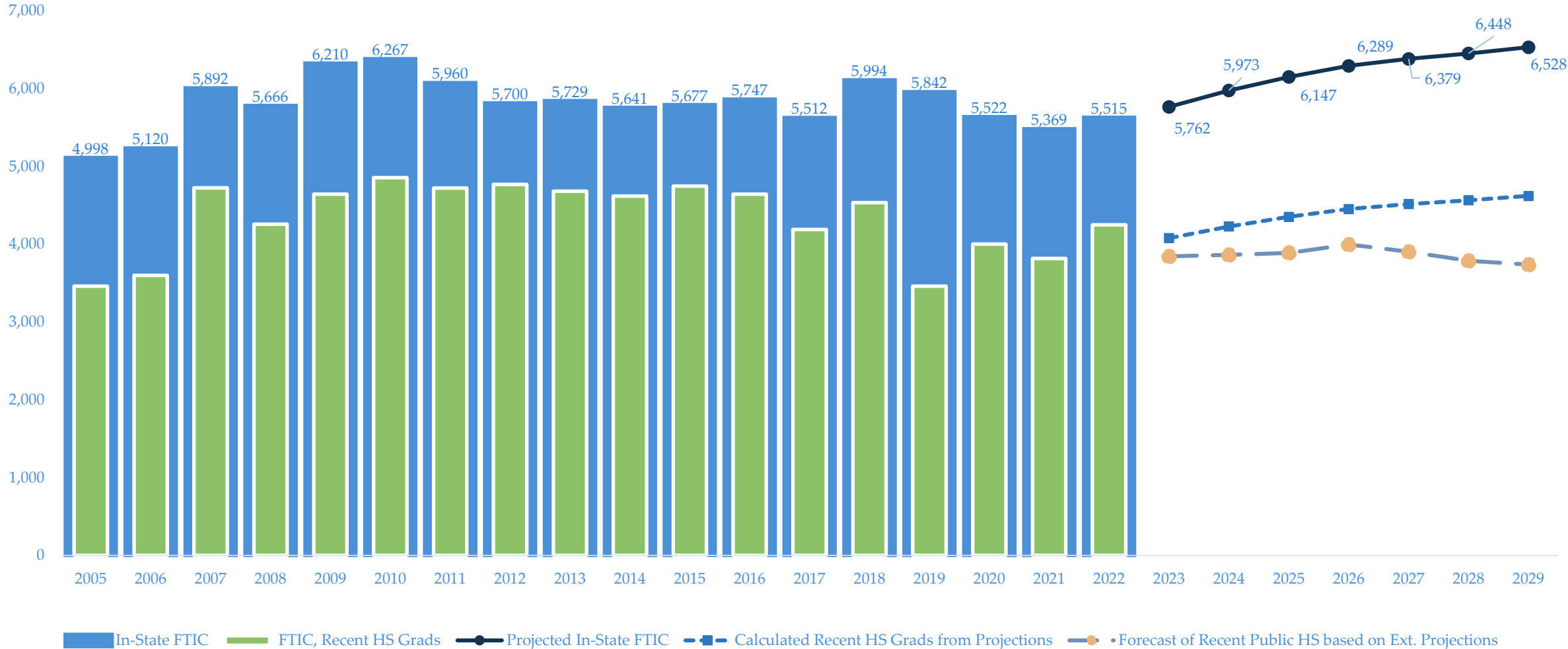
Out-of-State FTIC, Public Four-years

	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Net Change from 2022	
Christopher Newport University	78	114	114	114	117	117	119	119	52.6%	41
George Mason University	1,070	1,165	1,192	1,223	1,257	1,291	1,321	1,345	25.7%	275
James Madison University	1,270	1,235	1,236	1,244	1,244	1,244	1,244	1,245	-2.0%	(25)
Longwood University	92	75	71	69	66	65	65	65	-29.3%	(27)
Norfolk State University	472	474	475	479	486	501	501	518	9.7%	46
Old Dominion University	310	251	269	233	195	159	121	121	-61.0%	(189)
Radford University	136	128	130	132	135	137	140	143	5.1%	7
University of Mary Washington	103	112	121	131	143	156	170	185	79.6%	82
University of Virginia	1,580	1,452	1,452	1,453	1,453	1,453	1,454	1,455	-7.9%	(125)
University of Virginia's College at Wise	59	82	84	87	90	92	95	98	66.1%	39
Virginia Commonwealth University	438	510	514	519	495	471	448	448	2.3%	10
Virginia Military Institute	138	160	178	188	188	194	194	194	40.6%	56
Virginia State University	437	334	341	352	402	402	402	359	-17.8%	(78)
Virginia Tech	2,653	2,971	2,532	2,897	2,707	2,877	2,719	2,841	7.1%	188
William & Mary	665	619	619	619	619	619	619	619	-6.9%	(46)
	9,501	9,682	9,328	9,740	9,597	9,778	9,612	9,755	2.7%	254

In-State New Transfers, Public

	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Net Change from 2022	
Christopher Newport University	137	119	119	119	119	124	124	129	-5.8%	(8)
George Mason University	2,545	2,509	2,537	2,574	2,604	2,644	2,679	2,739	7.6%	194
James Madison University	711	713	716	719	722	725	728	732	3.0%	21
Longwood University	117	119	115	111	107	103	98	95	-18.8%	(22)
Norfolk State University	238	240	240	252	265	279	279	293	23.1%	55
Old Dominion University	1,586	1,546	1,509	1,471	1,436	1,461	1,483	1,483	-6.5%	(103)
Radford University	499	464	473	477	486	491	495	504	1.0%	5
University of Mary Washington	255	237	249	264	283	310	343	384	50.6%	129
University of Virginia	581	558	558	558	558	558	558	558	-4.0%	(23)
University of Virginia's College at Wise	67	70	74	78	81	85	89	93	38.8%	26
Virginia Commonwealth University	1,353	1,308	1,322	1,336	1,336	1,336	1,336	1,336	-1.3%	(17)
Virginia Military Institute	7	9	10	12	12	13	13	13	85.7%	6
Virginia State University	238	197	206	218	234	245	258	255	7.1%	17
Virginia Tech	890	902	902	902	902	902	902	902	1.3%	12
William & Mary	113	130	130	130	130	130	130	130	15.0%	17
	9,337	9,121	9,160	9,221	9,275	9,406	9,515	9,646	3.3%	309

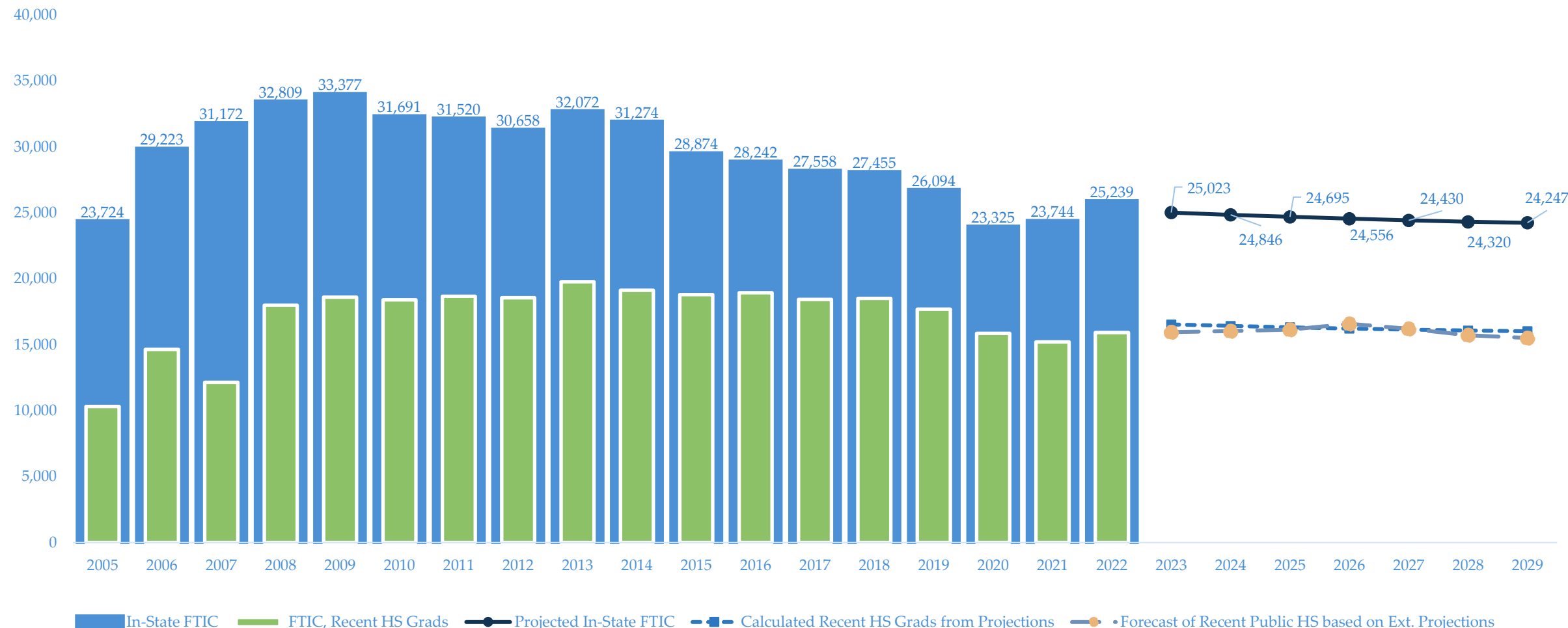
In-State, First-time in College (FTIC), Private Four-year Institutions



In-State FTIC, Private Colleges

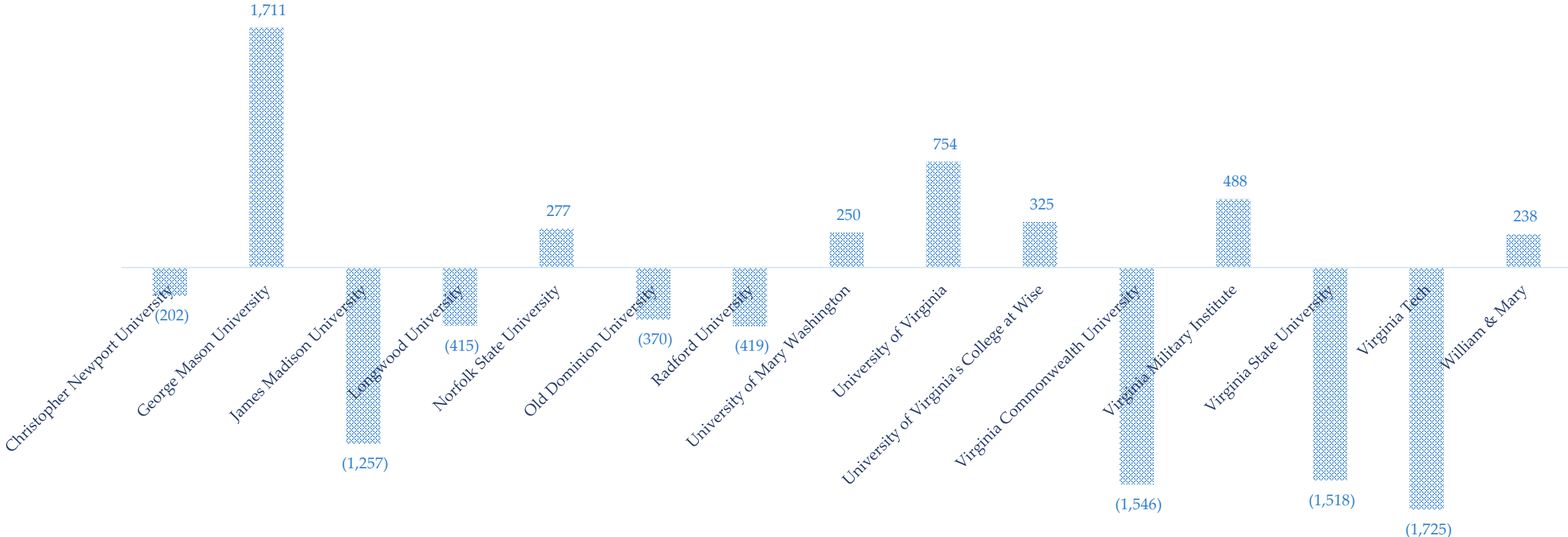
	Fall 2022	Fall 2023	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Net Change from 2022	
Averett University	116	166	186	195	205	214	219	231	99.1%	115
Bridgewater College	310	337	351	366	380	395	410	424	36.8%	114
Christendom College	41	66	66	66	66	66	66	66	61.0%	25
Eastern Mennonite University	129	143	143	150	150	156	156	156	20.9%	27
Emory & Henry College	199	200	198	201	199	200	199	199	0.0%	-
Ferrum College	159	163	193	227	260	260	260	260	63.5%	101
Hampton University	151	103	103	103	103	103	103	103	-31.8%	(48)
Hollins University	83	90	95	98	103	102	103	102	22.9%	19
Liberty University	1,348	1,354	1,382	1,405	1,416	1,425	1,432	1,452	7.7%	104
Mary Baldwin University	308	342	342	342	342	342	342	342	11.0%	34
Marymount University	211	195	194	201	197	197	198	197	-6.6%	(14)
Randolph College	116	131	159	193	220	240	250	252	117.2%	136
Randolph-Macon College	320	331	331	331	331	331	331	331	3.4%	11
Regent University	489	498	516	532	553	576	599	624	27.6%	135
Roanoke College	271	284	284	284	284	284	284	284	4.8%	13
Shenandoah University	275	281	287	292	298	304	310	316	14.9%	41
Southern Virginia University	50	52	53	55	56	58	58	58	16.0%	8
Sweet Briar College	64	61	69	69	69	69	69	69	7.8%	5
University of Lynchburg	305	359	369	384	399	399	399	399	30.8%	94
University of Richmond	126	124	124	124	123	123	123	123	-2.4%	(3)
Virginia Union University	179	181	183	185	187	189	190	192	7.3%	13
Virginia Wesleyan University	205	206	249	249	249	249	249	249	21.5%	44
Washington and Lee University	89	79	79	79	79	79	79	79	-11.2%	(10)
	5,544	5,746	5,956	6,131	6,269	6,361	6,429	6,508	17.4%	964

In-State, First-time in College (FTIC), Public Two-year Colleges



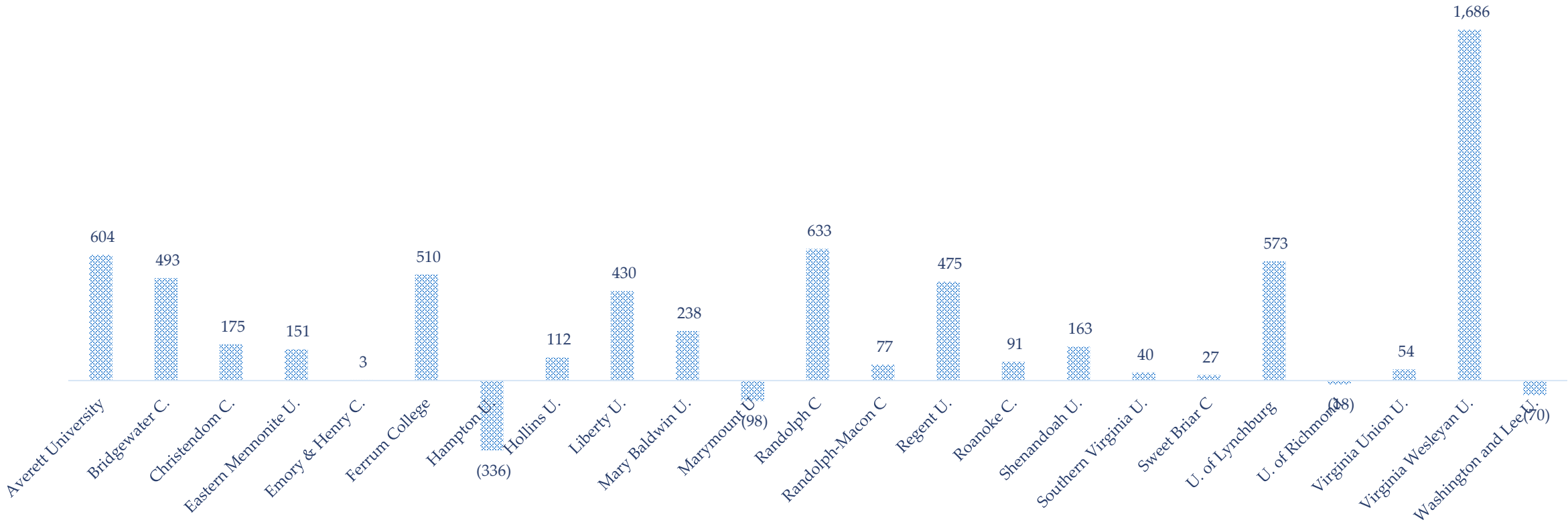
Public Four-year In-State FTIC Growth

In-State First-time in College, Cumulative Changes from Fall 2022 to Fall 2029



Private Institution In-State FTIC Growth

In-State First-time in College, Cumulative Changes from Fall 2022 to Fall 2029



Change, In-State Undergraduates

	First-time in College (In-State)				Undergraduates (In-State)			
	Fall 2022	Fall 2029	Net Change from 2022		Fall 2022	Fall 2029	Net Change from 2022	
George Mason University	3,541	3,890	9.9%	349	23,346	26,610	14%	3,264
University of Virginia	2,505	2,613	4.3%	108	11,655	12,007	3%	352
Norfolk State University	939	1,026	9.3%	87	3,821	4,163	9%	342
University of Mary Washington	648	733	13.1%	85	3,122	3,351	7%	229
Virginia State University	948	765	-19.3%	(183)	3,134	3,346	7%	212
William & Mary	977	1,011	3.5%	34	4,434	4,611	4%	177
Virginia Military Institute	208	291	39.9%	83	964	1,088	13%	124
University of Virginia's College at Wise	192	260	35.4%	68	1,545	1,607	4%	62
Virginia Commonwealth University	3,809	3,311	-13.1%	(498)	19,335	19,386	0%	51
Virginia Tech	4,583	4,254	-7.2%	(329)	20,653	20,697	0%	44
Christopher Newport University	1,083	1,080	-0.3%	(3)	4,186	4,107	-2%	(79)
Radford University	1,097	1,096	-0.1%	(1)	5,488	5,390	-2%	(98)
James Madison University	3,628	3,448	-5.0%	(180)	15,998	15,883	-1%	(115)
Longwood University	757	663	-12.4%	(94)	2,902	2,318	-20%	(584)
Old Dominion University	2,892	2,882	-0.3%	(10)	16,728	15,676	-6%	(1,052)
Total Public Four-Year Institutions	27,807	27,323	-1.7%	(484)	137,311	140,240	2%	2,929

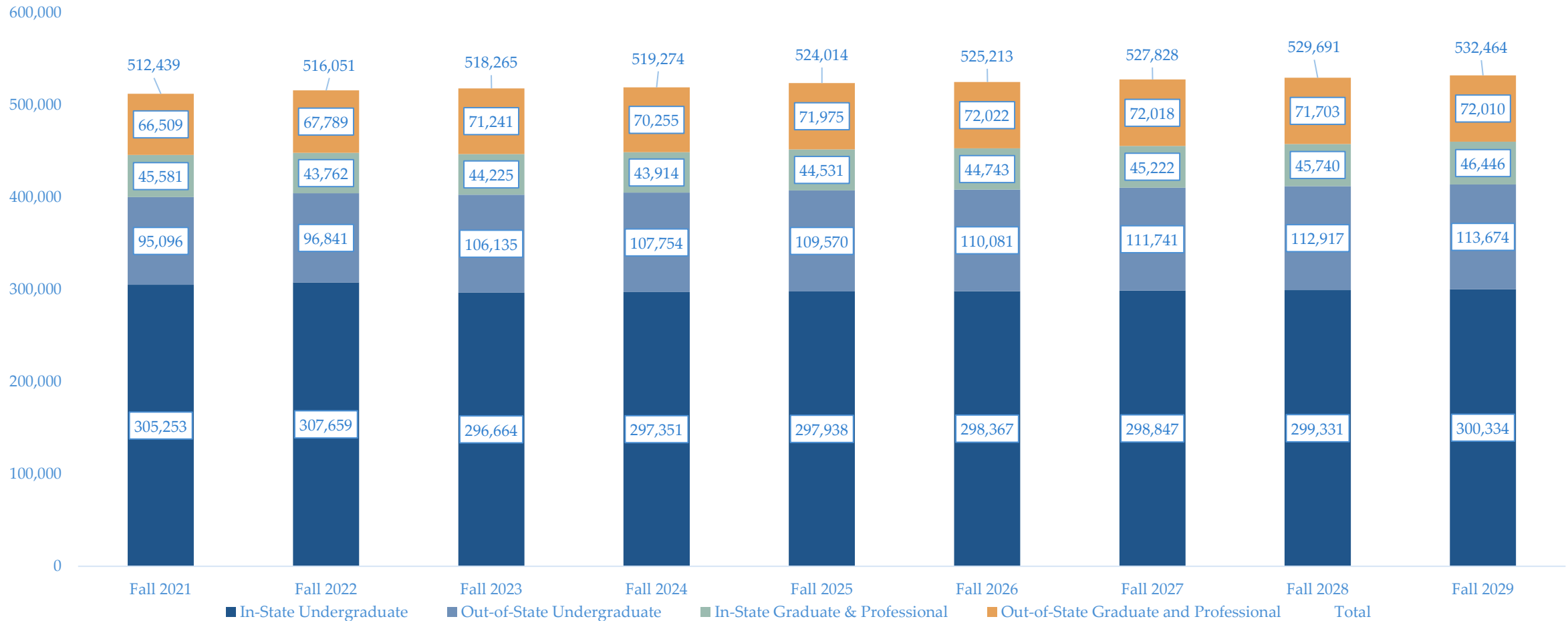
Changes in In-State FTIC

- **Public four-years plan a net decrease of 3,409 students**
 - GMU +1,711, with NSU, UVA, UVA-W, VMI, W&M +2,332 combined
- **Private four-years plan a net increase of 6,020 students with only four colleges planning decreases**
- **Public two-years plan a net decrease of 3,786 students**
- **Growth at GMU and other institutions has the potential to restrict opportunity for other institutions.**
- **Increased recruitment and enrollment of men could address enrollment declines**

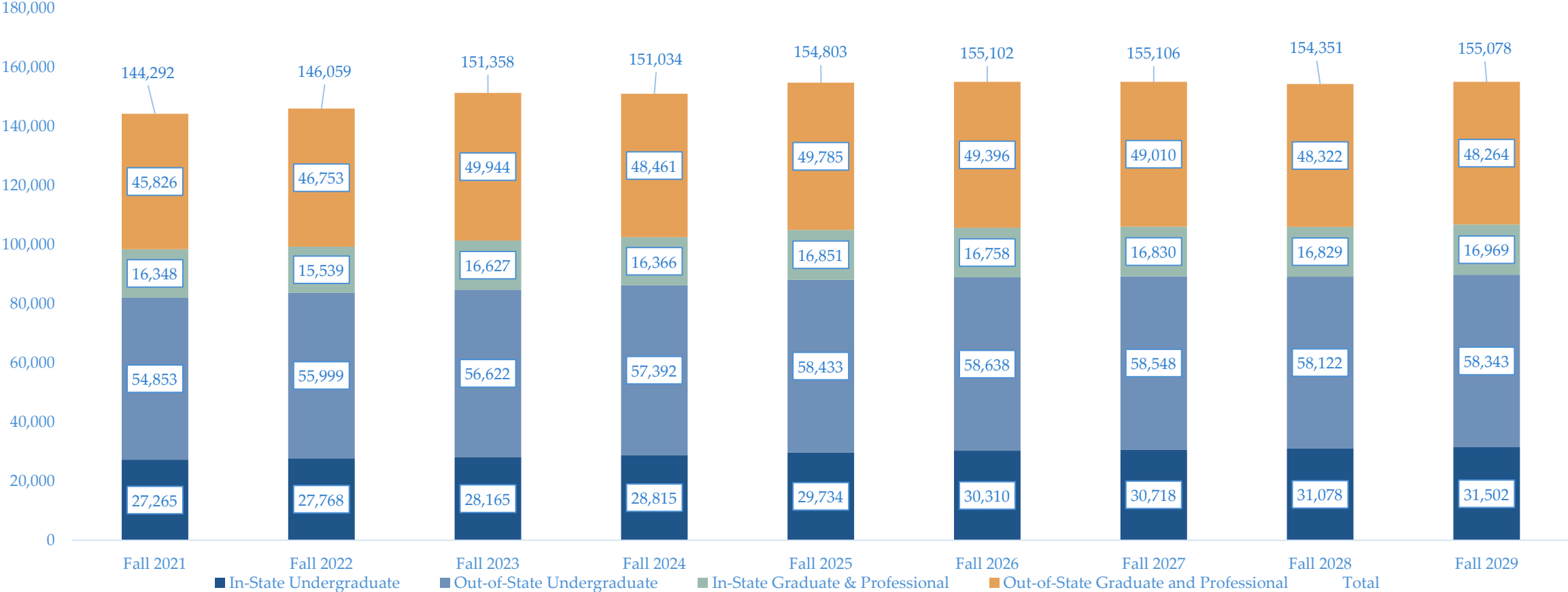
Fall 2023 Early Enrollment Estimates

	First-time in College (total)					In-State Undergraduates				
	Fall 2022	Est 2023	chg from Fall 22	proj. Fall 2023	diff. from proj. FTIC	Fall 2022	Est 2023	chg from 22	projected	Diff from proj.
Christopher Newport University	1,161	1,163	2	1,149	14	4,186	4,102	(84)	3,969	133
George Mason University	4,513	4,462	(51)	4,846	(384)	23,346	23,788	442	24,253	(465)
James Madison University	4,909	4,963	54	4,685	278	15,998	16,031	33	16,150	(119)
Longwood University	852	793	(59)	821	(28)	2,902	2,893	(9)	2,828	65
Norfolk State University	1,308	1,521	213	1,420	101	3,821	4,002	181	3,809	193
Old Dominion University	3,203	2,717	(486)	3,031	(314)	16,728	16,108	(620)	16,577	(469)
Radford University	1,234	1,103	(131)	1,110	(7)	5,488	5,133	(355)	5,129	4
University of Mary Washington	752	770	18	762	8	3,122	3,217	95	3,142	75
University of Virginia	4,201	4,762	561	4,064	698	11,655	11,419	(236)	11,809	(390)
University of Virginia's College at Wise	541	327	(214)	299	28	1,545	1,612	67	1,510	102
Virginia Commonwealth University	4,230	4,610	380	4,264	346	19,335	19,515	180	19,203	312
Virginia Military Institute	347	490	143	400	90	964	985	21	938	47
Virginia State University	1,387	1,474	87	1,048	426	3,134	3,442	308	2,679	763
Virginia Tech	7,242	7,172	(70)	7,220	(48)	20,653	20,462	(191)	20,395	67
William & Mary	1,642	1,619	(23)	1,630	(11)	4,434	4,528	94	4,614	(86)
	37,522	37,946	424	36,749	1,197	137,311	137,237	(74)	137,005	232

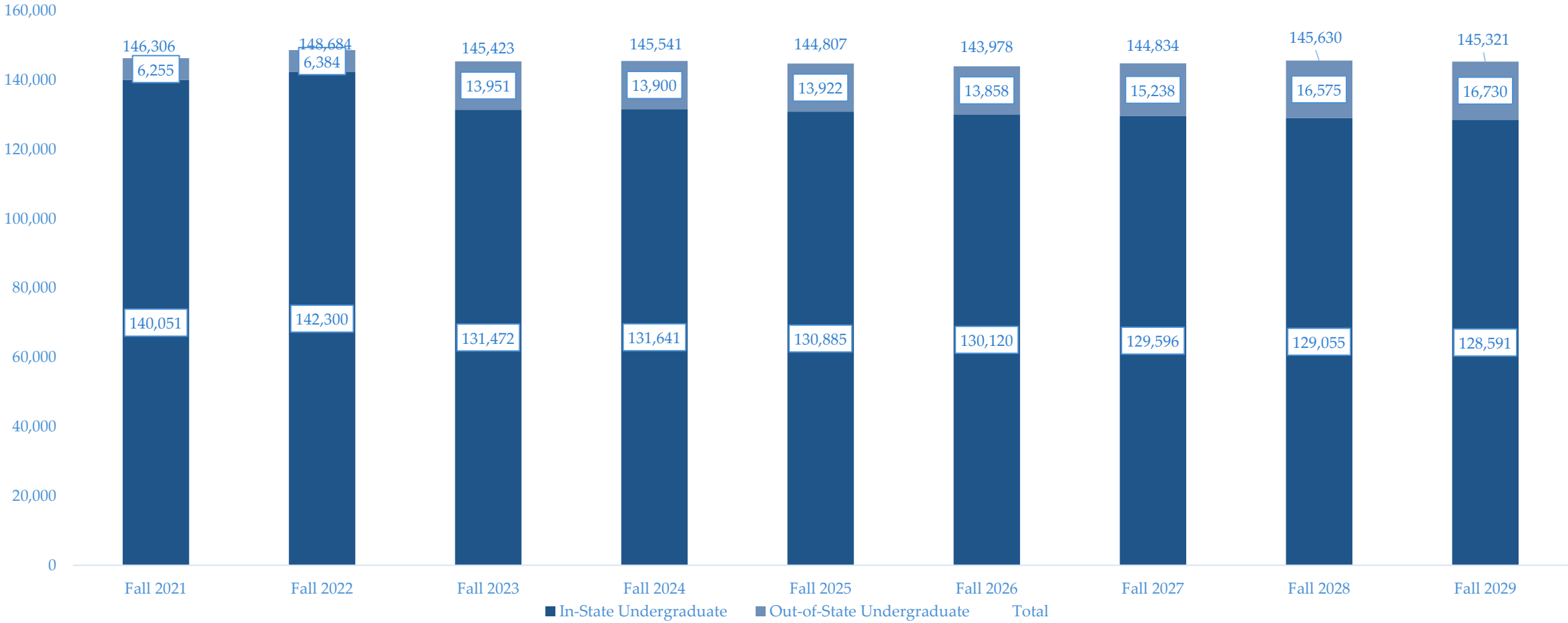
Fall Headcount Projected Enrollments, All Institutions



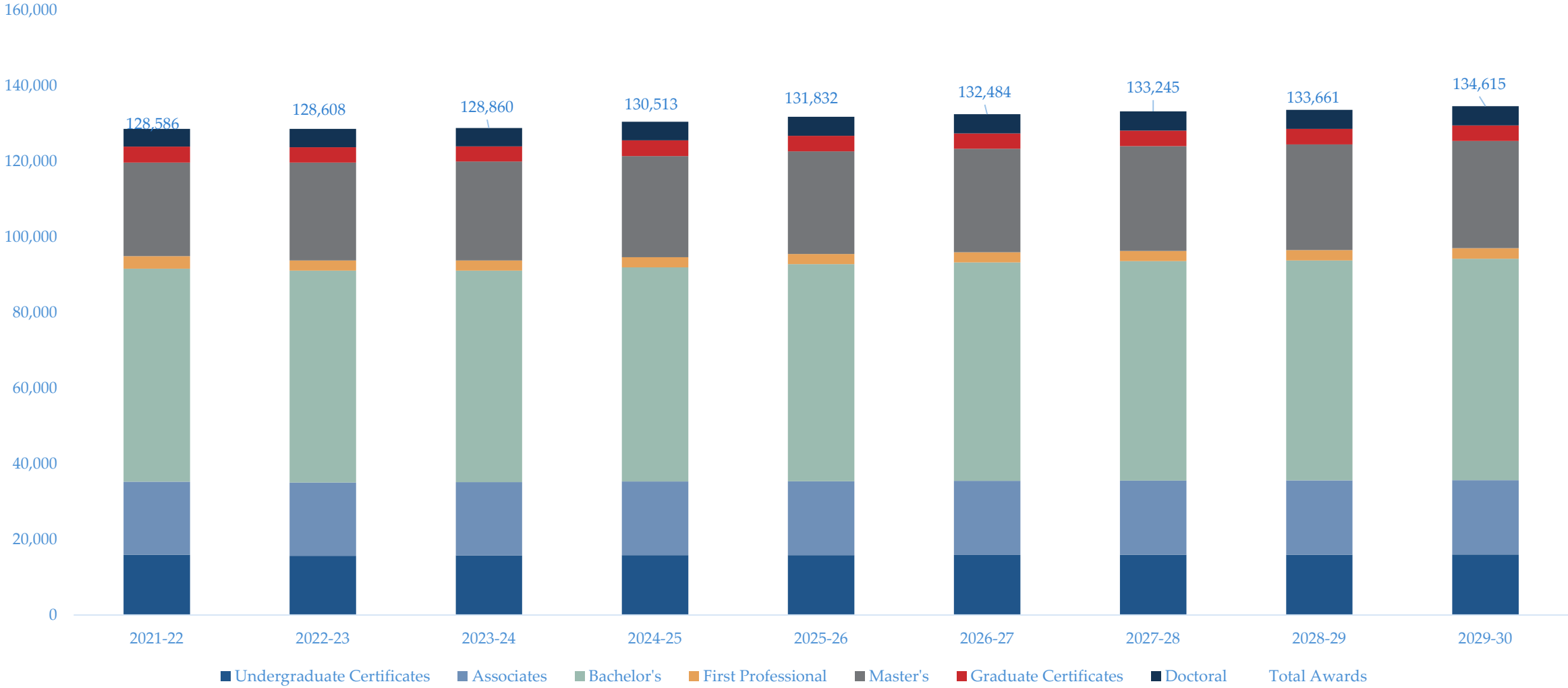
Fall Headcount Projected Enrollments, Private Four-year Institutions



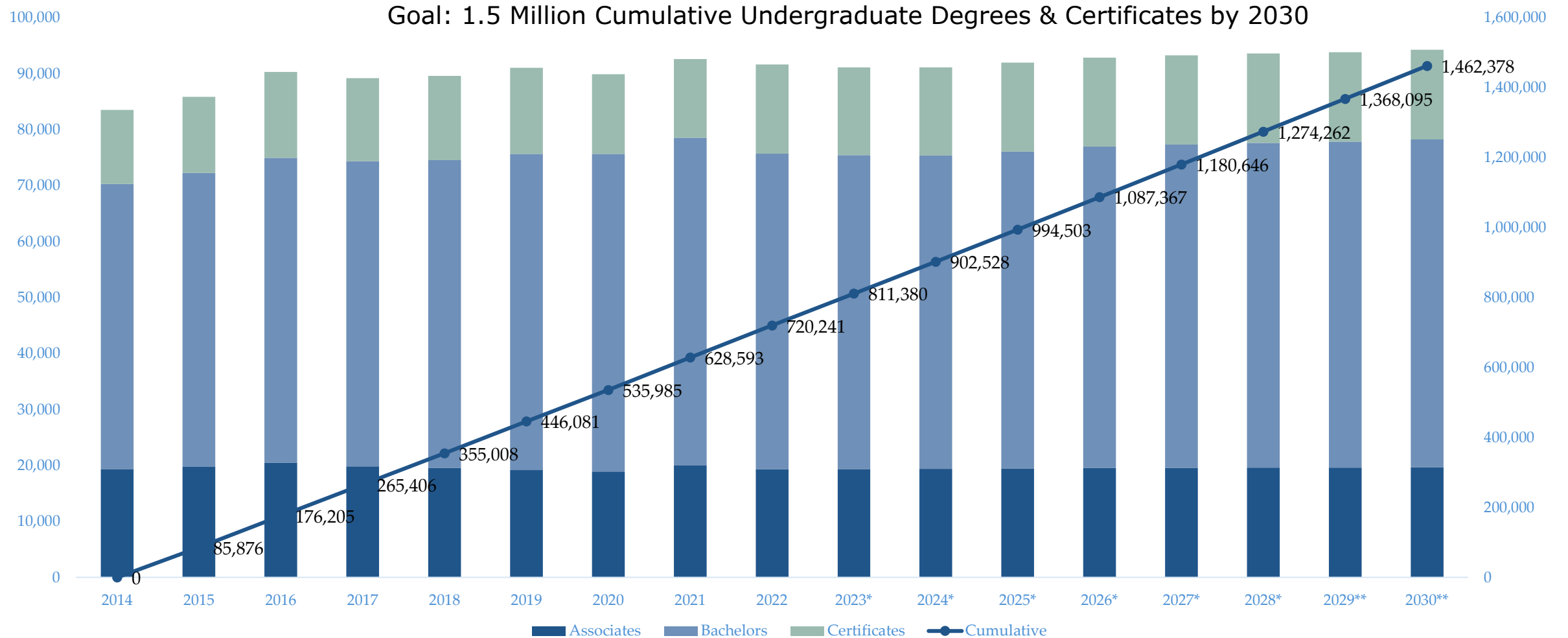
Fall Headcount Projected Enrollments, Public Two-year Colleges



Degree Estimates - All Institutions



“Best State for Education by 2030”



Conclusions

- **The 2023 enrollment projections are not dramatically different from prior years.**
- **Growth areas are on in-state FTIC enrollments at the independents and master's level enrollments (both sectors).**
- **In-state FTIC continues to vary widely, with modest increases in new transfers.**
- **We remain on track to 1.5 million undergraduate awards by 2030**