Ad Hoc Committee on Organizational Sustainability and Innovation

February 6, 2020





Enrollment Growth Update

Enrollment Growth is Neither a First Resort nor a Sole Solution

- Tuition increases must be mitigated
- Cost cutting must continue, but it becomes more challenging
- New revenue streams should be pursued

Discussions with Stakeholders

- Faculty Assembly
- City Council
- Neighborhood Leaders

Changes & Challenges Lie Ahead

- The traditional college-going population is shifting
- Flat or declining populations of college-going students will increase competition
- Opportunities may exist beyond the traditional undergraduate population

600 more undergraduates by scaling up to



150 more new students per year over a





Growth over 4 Years in New **Students at Top-50 Universities**

25th-75th Pctl. -----Median



2018

Capacity to Support Greater Enrollment

14



Capacity via Tech-Talent Initiative

- \$1.4 million in state support to W&M
- Capital support for expansion of ISC 4
- Growth from 62 computer science majors per year (2019 baseline) to 121 per year in 10 years



Va. Public University Enrollment Trends

Change in In-State Undergraduate Enrollment, 2013 to 2018



Source: Calculations from State Council of Higher Education, E2: Fall Headcount Enrollment (1992 thru Current Year)

W&M	UMW	VCU	VMI	UVA	JMU	VT	GMU







THE CHRONICLE REVIEW



The Great Enrollment Crash

Students aren't showing up. And it's only going to get worse.

By BILL CONLEY

THE CHRONICLE of Higher Education®

Ine Looming

How colleges are responding to shifting demographics and new student needs

2015





Decline Nationally

Projected U.S. High School Graduates

Source:Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016.







Projected Virginia High School Graduates



Source:Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016.







Source: Author's calculations based on Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016.

Demographic Shifts

Virginia High School Graduates

2000-01 2015-16 2031-32



Source: Author's calculations based on Western Interstate Commission for Higher Education, Knocking at the College Door: Projections of High School Graduates, 2016.

International Growth Flattening

International Enrollment at U.S. 4-yr. Institutions





Near-Term Enrollment Growth Strategies

	2020-2021	2021-2022	2022-2023	2023-202
ADDITIONAL NEW STUDENTS PER YEAR	40	90	135	150



Enhance Marketing and Communications

2020-2021	2021-2022	2022-2023	2023-202
40	90	135	150



Enhance Marketing and Communications

Introduce Modeling for Likelihood of OOS Enrollment

2020-2021	2021-2022	2022-2023	2023-202
10	15	15	15
40	90	135	150



Enhance Marketing and Communications

Introduce Modeling for Likelihood of OOS Enrollment

Expand IS Pell Packaging and Outreach

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Increase and Change Allocations of Aid

2020-2021	2021-2022	2022-2023	2023-202
10	15	15	15
5	10	15	15
15	20	20	20
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Optimize Grant Aid Allocation for Out-of-State Admits





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Expand Search Process for 10th & 11th Graders

2020-2021	2021-2022	2022-2023	2023-202
10	15	15	15
5	10	15	15
15	20	20	20
0	10	15	20
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The Admission Funnel

• 250,000 students receive search communication (50,000 Sr search, 200,000 soph/Jr)

 70,000 students receive prospect mailing (prospects via search + contacts via visits, travel, fairs, web etc)

14,500+ Applicants

• 5,000+

Admits

1,534 Enrolling (Fall 2019)

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Longer-Term Possibilities with Implications for Applicant Pool

- Application fee waivers
- Test-optional admission process
- Restructuring of financial-aid tiers
- Expansion of honors programs (e.g., Monroe Scholars)

- Completion of enrollment modeling by Maguire Associates
- Brand platform and marketing assessment by SimpsonScarborough
- revenue



Strategic investment to optimize marketing function

Refinement of costs and implications for net tuition

