

**July 19, 2005**

**Revised Enrollment  
Demand and  
Service Projections  
Through 2012:  
Rising to the Challenge**

***A SCHEV REPORT***



# Revised Enrollment Demand and Service Projections through 2012: Rising to the Challenge

## Executive Summary

When the State Council of Higher Education for Virginia published its enrollment and demand projections in July 2003, it predicted that there could be a shortage of 2,265 in-state undergraduate seats by fall 2007. However, the report also indicated a minor oversupply of graduate slots, and a minor under-supply of first professional slots.

Comparing the actual institutional enrollments to the 2003 projections of enrollment demand, it appears that Virginia’s public institutions have exceeded the expectations set forth in their approved enrollment targets from 2003. Additionally, the institutions should be commended for meeting the projected demand in FY2004-05.

The enrollment targets submitted by the four-year public institutions and Richard Bland College provide sufficient capacity to meet the enrollment demand projected through 2012. However, the Commonwealth’s obligation to base adequacy, capital, and other needs is critical in meeting this demand.

It should be noted that these projections of supply and demand are based on current rates of retention. As institutions work to increase retention as required by the “Restructuring Act,” the projected demand will further increase. These projections are also based on current rates of college participation. If larger numbers of students opt to enroll in Virginia institutions, then these demand projections will continue to increase beyond current projections.

<b>Table 1: In-State Undergraduates, Public Four-year Institutions</b>								
	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Demand</b>	113,120	114,592	116,064	117,541	119,026	120,521	122,027	123,547
<b>Targets</b>	113,120	115,157	117,546	119,925	122,182	124,525	126,990	129,212
<b>Difference</b>		-565	-1,482	-2,384	-3,156	-4,004	-4,963	-5,665
<b>Percentage</b>		-0.5%	-1.3%	-2.0%	-2.6%	-3.2%	-3.9%	-4.4%

Table 1 (above) demonstrates the efforts that the four-year institutions have made toward meeting the projected enrollment demand. As illustrated by the table, the Commonwealth could experience an oversupply of approximately 4.6% in 2011. However, this is contingent upon retention and participation rates remaining relatively constant over time, and adequate resources, particularly with regard to capital needs, are provided to the public institutions. It should also be noted that these differences between demand and supply are relatively insignificant. Moreover, capacity for additional overall enrollment statewide does not imply program-level capacity. Regardless of overall capacity, programs in high-need or high-demand areas (e.g., nursing, education, and engineering) may well be unable to take additional enrollment and may already be over-subscribed.

In looking at the two-year institutions, the picture changes dramatically. While SCHEV and the Virginia Community College System (VCCS) do not produce enrollment targets for the VCCS, SCHEV does project demand. Recent trends in population growth and community college enrollment suggest that demand in this sector may rise from a current enrollment base in fall 2004 of 146,472 to 186,555 in fall 2012, an increase of 27%. This increase, should it occur, is particularly challenging given that only about 40% of the existing deficit in facilities space in the high-growth colleges was being addressed in 2003 when demand was significantly lower. These revised projections of demand create even more urgency in addressing the capital needs of the community college system.

In the private sector, there is capacity to enroll greater numbers of Virginia residents. Based on current surveys of the nonprofit colleges and universities and a report from the Council of Independent Colleges for Virginia (CICV), there continues to be additional enrollment capacity for both first-time freshmen and new transfer students as early as fall 2005. There appears to be at least 11,000 undergraduate spaces available if these institutions receive additional support through strategies such as: increased funding for the Tuition Assistance Grant, state subsidized loans for parents and/or students, and a community college transfer grant.

After evaluating the enrollment data, meeting with the leadership of each public institution, and consulting with the private sector, a number of conclusions can be drawn:

- SCHEV's enrollment projections in 2003 were reasonably accurate, providing for a certain degree of confidence in these most recent forecasts.
- While the public four-year institutions have risen to the challenge of meeting student enrollment demand, their continued ability to address demand is predicated upon the Commonwealth's sustained commitment to adequate base and capital funding.
- Overall enrollment capacity does not signify sufficient available programmatic capacity, particularly in programs of high-need and high-demand.
- As predicted in 2003, most of the growth in the two-year sector is projected to occur in the Northern Virginia and Hampton Roads regions. Of the 40,000 students predicted to seek a seat within this sector, approximately half will seek a seat in a college in one of those regions.
- Significant capacity remains available in the four-year nonprofit sector. These institutions are prepared to enroll up to 11,000 more in-state undergraduate students.
- Current demand projections are based on current rates of participation and retention. Under the Restructuring Act, institutions are required to adhere to goals to increase access, particularly within under-represented populations, and to increase retention. Successful efforts in this arena will further increase enrollment

demand. It should be noted that each year 27,000-30,000 high school graduates do not seek to engage in college and university enrollment within 12 months of graduation, providing tremendous potential for enrollment growth.

- Regional disparities exist in college participation, most acutely in baccalaureate education. These demand projections do not address improving those rates.
- Finally, only about 75% of Virginia high school freshmen graduate from high school. As part of the Restructuring Act guidelines, institutions are directed to engage in activities to improve student success within the K-12 arena. Success here could further increase demand.
- While SCHEV does not currently project supply and demand in the proprietary sector, there is capacity in this arena, with the likelihood of further growth.

## Introduction, Authority, and Recent History

The State Council of Higher Education for Virginia (SCHEV) collects five years of enrollment projections from the four-year colleges and universities and Richard Bland College during each odd-numbered year. The Council, the Governor's office, and Senate Finance and House Appropriations committees use these projections for planning purposes. With each collection effort, SCHEV follows a similar procedure comprised of three main components: receiving the projections and accompanying narrative report that provides context to those projections; meeting with the leadership of each institution privately in conjunction with representatives from the Office of the Secretary of Education, the Department of Planning and Budget, and staff members from Senate Finance and House Appropriations; and producing separately an updated report on projected enrollment demand. As in 2003, this report is the product of these components.

The requirement and authority for this report comes from the Code of Virginia:

§ 23-9.6:1. 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.*

In July 2003, SCHEV reported newly updated projections on public institution enrollment targets (for the four-year institutions and Richard Bland College) and on projected demand for college and university enrollment. The revised projections indicated that the estimated total increase in demand for college and university enrollment by the end of the current decade was 60,879 students compared to the projected differential of 38,296 from the 2001 projections. This increase of nearly 23,000 students raised questions as to how the projections changed radically in just two years.

The answer is predicated upon retention rates. An analysis of the 2001 model led consultants to conclude that using just the previous annual retention rate is inadequate. Instead, a three-year average of recent retention rates would provide a more accurate, yet still conservative picture of enrollment demand.

The findings of the 2003 SCHEV report, *Revised Enrollment Demand Projections through 2010 and Potential Gaps in Higher Education Services*, are as follows:

- The enrollment base has already increased by 18,000 students, with an additional 33,000 base increase projected.
- As much as half of the undergraduate growth in the four-year institutions might not be served by the end of the decade, affecting 2,265 students.
- Significant demand could further stress the VCCS.

- Northern Virginia Community College and Tidewater Community College, those with largest existing space deficits, are the 2-year colleges most likely to see increased enrollment demand.
- There appears to be insufficient space for transfers at the public four-year institutions.
- There appears to be capacity in the private institutions to address some of the growth.
- With additional resources, many public institutions are willing to grow.

From a base enrollment of 145,257 in-state students (fall 2002, all levels) at the public four-year institutions, enrollment has increased to 148,913 students. This represents an actual enrollment of 227 in-state students above demand. Looking specifically at in-state undergraduates, base enrollment for fall 2002 was 110,693 and 113,120 in fall 2004, representing 186 fewer students than projected. As small as these variations are, it is most likely the differences are “statistical noise,” meaning that we are trying to predict behaviors that do not follow strict rules.

In the two-year sector, the base in-state enrollment for fall 2002 was 142,615 students with an increase in fall 2004 of 5,246 for a total 147,861 students. The projected demand was 148,378, just 483 students more than actually enrolled. Given that these 483 students represent only 0.3% of the total population, it also seems to signify statistical noise.

Overall, it appears the Virginia’s public institutions have managed to respond to the enrollment demand projected in 2003. The in-state enrollment base has increased to 296,774 in-state students at all levels. This represents an increase of 26,904 students since fall 2000 and an increase of 8,902 since fall 2002, leaving approximately 24,000 students left in the 2003 projections of demand through 2010.

Actual enrollment in fall 2004 for all in-state students was 290 students below projected demand at all public institutions, a difference of slightly less than one one-hundredth of one percent (0.097%).

In terms of new freshmen and transfer students, in-state first-time freshmen enrollment at the public four-year institutions has increased by 924 students, while out-of-state enrollment has decreased by 184 students from fall 2002 to fall 2004. Overall, the 21,306 first-time freshmen figure was slightly above the high end projection of 20,940 (from the 2003 report) – which is not surprising as the 21,306 figure includes new freshmen that graduated high schools some years previously. New in-state transfer demand was not projected. However, the actual enrollment of 8,326 in-state transfer students in fall 2004 was 150 students shy of the institutional targets of 8,476. These differences are proportionally larger than those in the overall population of students; therefore it is possible that some student demand was unmet. It is also possible that, due to rising tuition, more first-year students sought an out of state institution.

The greatest difference between projected demand and actual enrollments occurs at the graduate student level. Total in-state enrollments in fall 2004 were 32,744, or 643

students above projected demand, and 436 more students than the total institutional enrollment targets of 32,308. However, this still only represents a difference of approximately 2%.

In summary, based on the 2003 projections of enrollment demand, it appears that Virginia’s public institutions have exceeded the expectations set forth in their Council approved enrollment targets from 2003 and have reasonably met projected demand.

## Projections of Demand

As in 2003, SCHEV contracted with Chmura Economics & Analytics (CEA) in 2005 to revise its projections of demand for the public and non-profit sectors. Other than updated inputs, the projection model has not been modified.

Much of the increase in the projected demand for the public four-year institutions can be directly attributed to increased enrollment since 2002. As described previously, the colleges and universities enrolled a substantial number of students beyond their 2003 enrollment targets, thus increasing the enrollment demand base. The enrollment demand base consists of continuing students plus new students. However, it should be noted, as can be seen below in Table 1, that the difference between the 2003 and 2005 demand projections for in-state undergraduates at the public four-year institutions is minor, as is the difference between the 2003 demand projections and actual enrollments for 2003 and 2004.

	Undergrad	Graduate	Professional	Public Four-years	VCCS
2002-Actual	110,693	31,361	3,203	145,257	141,334
2003-Actual	111,714	32,691	3,169	147,574	144,421
2004-Actual	113,120	32,744	3,049	148,913	146,472
2005-Forecast	114,592	33,738	3,003	151,332	154,183
2006-Forecast	116,064	34,513	2,975	153,553	160,743
2007-Forecast	117,541	35,138	2,962	155,641	166,393
2008-Forecast	119,026	35,660	2,959	157,645	171,324
2009-Forecast	120,521	36,112	2,964	159,597	175,690
2010-Forecast	122,027	36,517	2,975	161,519	179,611
2011-Forecast	123,547	36,893	2,990	163,430	183,219
2012-Forecast	125,081	37,250	3,008	165,340	186,555
2004-2012 Growth Rate	11%	14%	-1%	11%	27%
2004-2012 Growth	11,961	4,506	-41	16,427	40,083

Source: SCHEV and CEA Demand Projections

	<b>Demand 2003</b>	<b>Actual</b>	<b>Demand 2005</b>	<b>2003 Demand - Actual</b>	<b>2005 Demand – 2003 Demand</b>
<b>2002</b>	110,693	110,693		-	
<b>2003</b>	112,009	111,778		-231	
<b>2004</b>	113,306	113,120		-186	
<b>2005</b>	114,592		114,592		-
<b>2006</b>	115,873		116,064		191
<b>2007</b>	117,155		117,541		386
<b>2008</b>	118,442		119,026		584
<b>2009</b>	119,736		120,521		785
<b>2010</b>	121,042		122,027		985
<b>2011</b>			123,547		

The number in the lower right cell of Table 1 deserves special attention. Recent enrollment increases in the VCCS drive the demand model further upward, suggesting that an additional 40,083 students may seek enrollment at the VCCS in fall 2012. In comparing the 2003 and 2005 demand projections, it is evident that in 2010, the final year of the 2003 projections, there is an increase of 17,332 student demand projected. SCHEV, using the CEA projections, now predicts an increase of twice the community college demand that it did two years ago. This is of significant concern for a system already experiencing a critical deficit of instructional space.

Table 3 (below) provides detail concerning the projected enrollment demand for each of the VCCS colleges. The figures confirm SCHEV’s 2003 findings that most of the growth would occur in the I-95/I-64 crescent. Approximately two-thirds of the increased demand within the community colleges occurs from Hampton Roads through Richmond and into Northern Virginia. In fact, approximately half of the total growth is projected solely at Tidewater Community College (TCC) and Northern Virginia Community College (NVCC). These institutions are already operating at space deficits based on current enrollments.

A comparison of FY2004 enrollment and physical capacity under SCHEV’s guidelines indicates the scope of the problem at NVCC and TCC. NVCC is currently operating under a space deficit equivalent to 4,802 FTE students. Likewise, TCC has a space deficit of 1,816 FTE. In both cases, this is roughly equivalent to 20% of FTE enrollment.

It should also be noted that demand projections for TCC are likely low, perhaps by as many as 1,000 students in 2012. The projections do not take into account that a new Portsmouth campus will open in 2007. This will create additional space and quite likely substantially additional demand. Further, TCC’s Virginia Beach campus carries the bulk of the space deficit with an unmet need of 1,469 FTE – 25% of its total enrollment.

<b>Table 3: Enrollment Demand Projections, Virginia Community Colleges, In-state students only</b>										
	<b>2004</b>									<b>Total Growth</b>
	<b>Actuals</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2004-2012</b>
Blue Ridge	3,847	4,234	4,763	5,083	5,211	5,329	5,434	5,529	5,615	1,768
Central Virginia	4,458	4,673	4,805	4,912	5,042	5,163	5,270	5,367	5,455	997
S. Lancaster	1,378	1,427	1,450	1,465	1,486	1,503	1,516	1,526	1,532	154
Danville	3,968	4,115	4,185	4,232	4,297	4,352	4,395	4,428	4,452	484
Eastern Shore	995	1,035	1,056	1,072	1,092	1,109	1,124	1,136	1,146	151
Germanna	4,777	5,094	5,329	5,541	5,787	6,028	6,260	6,486	6,707	1,930
J. Sargeant Reynolds	11,528	12,084	12,426	12,700	13,036	13,349	13,625	13,876	14,105	2,577
John Tyler	5,912	6,186	6,350	6,479	6,638	6,785	6,914	7,029	7,132	1,220
Lord Fairfax	5,268	5,613	5,866	6,093	6,357	6,616	6,864	7,105	7,340	2,072
Empire	2,798	2,877	2,901	2,909	2,928	2,941	2,945	2,941	2,932	134
River	4,017	4,164	4,234	4,280	4,344	4,399	4,440	4,472	4,495	478
Northern Virginia	35,234	37,409	39,941	42,237	43,762	45,100	46,335	47,499	48,601	13,367
Patrick Henry	3,303	3,466	3,569	3,652	3,753	3,847	3,932	4,009	4,079	776
Paul D Camp	1,448	1,499	1,522	1,536	1,557	1,575	1,587	1,597	1,603	155
Piedmont Virginia	4,263	4,439	4,533	4,761	5,010	5,088	5,152	5,205	5,248	985
Rappahannock	2,679	2,851	2,977	3,089	3,219	3,347	3,469	3,587	3,702	1,023
Southside Virginia	4,652	4,876	5,013	5,122	5,257	5,382	5,493	5,593	5,684	1,032
Southwest Virginia	3,740	3,845	3,877	3,886	3,912	3,929	3,933	3,928	3,915	175
Thomas Nelson	7,729	8,083	8,293	8,456	8,660	8,847	9,010	9,155	9,284	1,555
Tidewater	21,400	22,564	23,337	23,991	24,770	25,512	26,193	26,831	27,431	6,031
Virginia Highland	2,098	2,181	2,225	2,255	2,296	2,332	2,361	2,385	2,405	307
Virginia Western	8,313	8,678	9,231	9,730	9,930	10,110	10,260	10,390	10,501	2,188
Wytheville	2,667	2,788	2,859	2,913	2,982	3,045	3,100	3,148	3,191	524
Grand Total	146,472	154,183	160,743	166,393	171,324	175,690	179,611	183,219	186,555	40,083

Source: CEA Demand Projections

## Projected Supply

SCHEV began its current enrollment projection work this past spring. During this process, SCHEV leadership met with executive staff from each of the public four-year institutions, Richard Bland College, and the Virginia Community College System. The VCCS offers open enrollment and, therefore, does not set enrollment targets. Also present at these meetings was staff from the Office of the Secretary of Education, Department of Planning and Budget, and Senate Finance and House Appropriations committees. During these meetings, the institutional leaders shared their plans and needs for meeting Virginia's enrollment demand.

Table 4 (below) provides the total institutional enrollment targets for the public four-year institutions, broken out by student level, for in-state students only. As can be seen, except for the first professional student targets, the institutions expect to increase enrollment by 14% to 16% over the fall headcount enrollment in 2004.

	Undergrad	Graduate	Professional	Total
2004-Actual	113,120	32,744	3,049	148,913
2005-Target	115,157	33,014	3,121	151,292
2006-Target	117,546	33,886	3,108	154,540
2007-Target	119,925	34,655	3,120	157,700
2008-Target	122,182	35,514	3,136	160,832
2009-Target	124,525	36,466	3,136	164,128
2010-Target	126,990	37,310	3,136	167,436
2011-Target	129,212	38,015	3,136	170,363
2004-2011 Growth Rate	14%	16%	3%	14%

Source: Institutional Enrollment Projections

Table 5 (below) compares supply and demand for fall enrollment. Assuming basic demand was met in fall 2004, the difference between supply (enrollment targets) and projected demand is negative. Thus there is greater supply than demand.

	2004	2005	2006	2007	2008	2009	2010	2011
Demand	113,120	114,592	116,064	117,541	119,026	120,521	122,027	123,547
Targets	113,120	115,157	117,546	119,925	122,182	124,525	126,990	129,212
Difference (Demand- Supply)		-565	-1,482	-2,384	-3,156	-4,004	-4,963	-5,665
Percentage		-0.5%	-1.3%	-2.0%	-2.6%	-3.2%	-3.9%	-4.4%

  

	2004	2005	2006	2007	2008	2009	2010	2011
Demand	32,744	33,738	34,513	35,138	35,660	36,112	36,517	36,893
Target	32,744	33,014	33,886	34,655	35,514	36,466	37,310	38,015
Difference (Demand- Supply)		724	627	483	146	-354	-793	-1,122

Percentage		2.2%	1.9%	1.4%	0.4%	-1.0%	-2.1%	-3.0%
<b>In-State First Professional, Public Four-year Institutions</b>								
	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Demand</b>	3,049	3,003	2,975	2,962	2,959	2,964	2,975	2,990
<b>Target</b>	3,049	3,121	3,108	3,120	3,136	3,136	3,136	3,136
<b>Difference (Demand-Supply)</b>		-118	-133	-158	-177	-172	-161	-146
<b>Percentage</b>		-3.8%	-4.3%	-5.1%	-5.6%	-5.5%	-5.1%	-5.7%
<b>In-State Total, Public Four-year Institutions</b>								
	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Demand</b>	148,913	151,332	153,553	155,641	157,645	159,597	161,519	163,430
<b>Target</b>	148,913	151,292	154,540	157,700	160,832	164,128	167,436	170,363
<b>Difference (Demand-Supply)</b>		40	-987	-2,059	-3,187	-4,531	-5,917	-6,933
<b>Percentage</b>		0.0%	-0.6%	-1.3%	-2.0%	-2.8%	-3.5%	-4.1%

Table 6 (below) provides a revision of SCHEV's 2003 projections of Virginia high school graduates and the subset likely to attend college. Rather than predicting a single number of students for each year, this model brackets the projection and produces a high-end (upper bound) and low-end (lower bound) range of likely student demand numbers because of annual variations in graduation rates and college attendance rates. The targets for the four-year public institutions in the table include new freshmen that did not graduate from high school the year immediately prior, as well as somewhat older students. It appears there is more than sufficient capacity to meet the enrollment demand of rising high school graduates.

	<b>2005-06</b>	<b>2006-07</b>	<b>2007-08</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>	<b>2011-12</b>
Upper Bound	75,649	79,002	82,101	79,974	77,152	77,278	80,082
Lower Bound	73,560	76,821	79,834	77,766	75,022	75,144	77,871
Projected number of students likely to attend college in the US	46,969	49,051	50,975	49,655	47,902	47,980	49,721
Upper Bound	47,626	49,738	51,688	50,350	48,573	48,652	50,417
Lower Bound	46,311	48,364	50,261	48,959	47,232	47,309	49,025
Projected number of students likely to attend college in Virginia	33,817	35,317	36,702	35,751	34,490	34,546	35,799
Upper Bound	34,291	35,811	37,216	36,252	34,973	35,029	36,300
Lower Bound	33,344	34,822	36,188	35,251	34,007	34,062	35,298
Projected number of students likely to attend college in at VA 4-year publics	20,629	21,543	22,388	21,808	21,039	21,073	21,838
Upper Bound	20,917	21,845	22,702	22,114	21,333	21,368	22,143
Lower Bound	20,340	21,242	22,075	21,503	20,744	20,778	21,532

Public Four-Year Institutions, Numbers of New First-time Freshmen, In-State							
Enrollment Targets	21,759	22,066	22,383	22,625	23,169	23,474	24,058

## Institutional Needs

When SCHEV submitted its 2003 enrollment report, the shortfall in adequate base funding to the institutions was \$300-400 million. Even with the generous support of the legislature and the governor over this biennium, base adequacy funding is still well under the guidelines.

The need for additional base adequacy funding was a recurring theme during our meetings with the institutions. Christopher Newport University, for example, stated that it will need “full funding of the base adequacy model, the completion of all appropriated capital projects, and the construction of a new academic building and a new residence hall” in order to reach an optimal enrollment of 5,000 FTE.

George Mason University has indicated that it could grow by another 5,000 students beyond its current plans “if additional Educational & General facilities were funded consistent with the University’s 6-Year Capital Plan Program Proposal to be submitted in May 2005, and if base adequacy were more fully funded.”

Longwood University stated, “In order to meet our 2010 anticipated and projected head count of 5,089 students, we will need an infusion of faculty, facilities and operational funding.”

Norfolk State University indicated that a number of renovation and maintenance projects are currently funded and underway and, when complete, will provide the capacity for NSU to support its target enrollment of 8,000 students.

After growing by 200 students headcount enrollment and nearly 200 student FTE over the past two years, the University of Virginia’s College at Wise has expressed the need for “classified staff, faculty and budgets to support the enrollment growth,” especially once it reaches an enrollment of 2,000 students – which it expects to do by 2007.

In setting its enrollment targets, Virginia Commonwealth University states that its fall 2011 enrollment of 33,818 students assumes “that the base adequacy model will be fully funded in making these predictions. If this proves not to be the case, the projections will be modified downwards.”

Virginia Military Institute has received funding to plan the renovation of the Barracks, which if renovation is completed in 2010, will permit their enrollment to increase to 1500 by 2014.

A significant concern of Virginia State University in meeting its targets is the need for funding to provide greater financial aid to students, as well as funding support for the renovation and upgrade of facilities.

Virginia Tech’s enrollment targets reflect a commitment to increase in-state undergraduate enrollment by accommodating more transfer students, but “only if accompanying resources are appropriated for capital projects to meet instructional classroom deficiencies.”

Further enrollment growth at Richard Bland College requires support for additional faculty and staff.

## Private College Growth and Capacity

The CEA report provides projections of demand in the private, nonprofit sector. The revised projections point to an overall increase of 10% in in-state enrollment from a base of 20,867 to 22,863 for undergraduate students. In-state enrollment in this sector accounts for approximately half of the total undergraduate enrollment. Thus, as the CICV states in a proposal to SCHEV, there is additional capacity for Virginia students readily available now.

Further, based on a SCHEV survey of the private institutions, there is additional immediate capacity to grow. An additional 7,000 undergraduate students could be enrolled in fall 2005. Moreover, this number could potentially increase to over 11,000 students within just a few years. However, clearly the tuition differential between the public and private institutions is a critical factor for students and without additional funding for the Tuition Assistance Grant, this extra capacity may go unused.

## Projections of Degree Awards

In 2005, SCHEV is tasked with including projections of degrees awarded as part of its official enrollment projections. While this is a new requirement, it is not a particularly new process as the development of enrollment targets requires the projection of the numbers of students by level anticipated to successfully complete their degree programs. Table 7 (below) provides a look at these data.

	2005	2006	2007	2008	2009	2010	2011	2012
Awards <1 year	5	5	7	6	8	9	9	10
Associate Degrees	107	101	101	101	105	111	115	117
Awards >=2 Yrs & <4 Yrs	2	2	2	2	2	2	2	2
Bachelor's Degree	27,894	28,204	28,730	29,388	30,201	30,903	31,132	31,615
Post-Bachelor's Certificates	401	399	396	394	391	390	390	396
First Professional Degrees	1,289	1,323	1,350	1,348	1,352	1,351	1,351	1,352
Master's Degrees	9,218	9,696	10,236	10,475	10,851	11,252	11,348	11,641
Post-Master's Certificates	177	163	166	168	170	173	163	164
Doctorates	1,128	1,189	1,241	1,285	1,332	1,380	1,398	1,425
Total Awards	40,221	41,082	42,229	43,167	44,412	45,571	45,908	46,722
<b>Total Degrees</b>	<b>39,529</b>	<b>40,412</b>	<b>41,557</b>	<b>42,496</b>	<b>43,736</b>	<b>44,886</b>	<b>45,229</b>	<b>46,033</b>

In academic year 2003-04, VCCS awarded 10,566 associate degrees. If the VCCS continues to increase the number of degrees awarded, as it has since 1997, by 300-400 associate

degrees per year, it seems likely that VCCS will award approximately 13,000 degrees in 2011-12.

## Conclusions

The enrollment projections of 2005 and subsequent gap analysis between demand and the institutional enrollment targets lead SCHEV to a number of conclusions:

- Revised demand projections suggest that between fall 2004 and fall 2012, in-state student enrollment at the public colleges and universities will increase by 56,510 students.
- Most of the growth (some 40,000 students) is directed toward the community colleges, with half of this growth anticipated at Northern Virginia Community College and Tidewater Community College.
- A demand increase of almost 16,500 students is expected at the public four-year institutions.
- While the public four-year institutions have risen to the challenge of meeting student enrollment demand, their continued ability to address demand is predicated upon the Commonwealth's sustained commitment to adequate base and capital funding
- Demand for in-state undergraduate enrollment from the 2005 projections is only slightly higher than that of the 2003 projections – 985 students in 2010 (0.8%). At the graduate level, there is a more substantial difference in the projections of 2,224 students, but that is because the institutions enrolled significantly more students than projected in 2003 and 2004. The first professional demand for 2010 has reduced significantly from what was projected in 2003, from 3,502 students to 2,975.
- For in-state undergraduates, the base enrollment for fall 2002 was 110,693 and the fall 2004 enrollment was 113,120, representing 186 fewer students than projected.
- In the two-year sector, the base in-state enrollment for fall 2002 was 142,615 with an increase in fall 2004 of 5,246 students for a total 147,861. The projected demand was 148,378, or 483 students short of projected demand.
- Overall, it appears that Virginia's public institutions have managed to respond to the enrollment demand projected in 2003. The in-state enrollment base has increased to 296,774 in-state students at all levels representing an increase of 26,904 students since fall 2000, and an increase of 8,902 since fall 2002, leaving approximately 24,000 students left in the 2003 projections of demand through 2010.
- Ultimately, actual enrollment in fall 2004, for all in-state students was 290 students below projected demand at all public institutions, a difference of slightly less than one one-hundredth of one percent (0.097%).

There are, however, a number of caveats to these projections. They are only as accurate as our knowledge of student behavior and choice in the recent past – they do not and cannot account for changes that may further increase the projections:

- These demand projections do not account for potential efforts to increase statewide and regional participation rates – they assume recent trends will remain the same.
- These demand projections do not account for potential efforts to improve student retention and progress toward completion.
- These demand projections do not account for potential efforts to improve student success in K-12 schools. Given that only three out of four ninth-graders graduate from high school, that potential number of new students seeking postsecondary education may climb, even while the population of that age cohort shrinks.
- 2005 is the first year for projections of degree awards. It is only the second year for collecting the targeted numbers of new students.

It is evident in this report that significant progress has been made in meeting the projected demand increase of 51,246 students predicted in SCHEV's 2003 enrollment report. The demand increase in four-year institutions is modest. The two-year enrollment demand is more significant, but reflects the significant enrollment increases of the past two years. For many Virginians, postsecondary education at a local community college is the most direct path to economic viability and personal success.



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