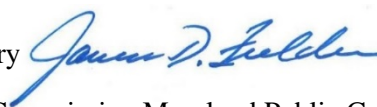Larry Hogan
Governor

Boyd K. Rutherford
Lt. Governor

Andrew R. Smarick
Chair

James D. Fielder, Jr., Ph. D.
Secretary

DATE:　　　March 11, 2021

TO:　　　　Segmental Advisory Council

FROM:　　　Dr. James D. Fielder, Secretary

SUBJECT:　Maryland Higher Education Commission Maryland Public Colleges and Universities Enrollment Projections 2021 to 2030

Please share this memo with appropriate campus leadership.

Each year the Maryland Higher Education Commission (MHEC) prepares 10-year enrollment projections for public institutions. These projections provide perspective to higher education policy discussions at the state level, including facilities planning, tuition and fees issues, articulation, funding priorities, and retention and graduation rates. The Department of Budget and Management and the General Assembly use the Commission's forecasts as the State's official enrollment projections for public higher education.

The materials include headcount projections for each institution, with separate analyses for full- and part-time undergraduates and, as applicable, full- and part-time graduate/professional students. Full-time equivalent (FTE) and full-time day equivalent (FTDE) projections are calculated by applying a mathematical formula to the headcount figures. Projections are also developed for state-funding-eligible FTE noncredit continuing education enrollments at the community colleges. The projections model involves the application of a linear regression analysis to demographic and economic factors.

After careful consideration[1] and a review of the projections model and its data sources, MHEC has decided that the projections reporting for the 2020 report (projecting annual changes to enrollment from 2020 to 2029) will serve as the basis for the 2021 to 2030 Enrollment Projections. These are the key drivers of this decision:

- Fall 2020 undergraduate and graduate student data, which serves as the baseline for the projections model, reflects unprecedented upheaval in Maryland's colleges and universities enrollment due to the Covid-19 pandemic;
- A number of the variables integral to the linear regression model – including Maryland high school graduate projections, per capita income, and population projections – rely on data that has not been updated for the past two to four years. It is felt that these are

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[1] MHEC consulted with key staff from the Department of Budget and Management and the Department of Legislative Services in making this decision.

specious data to use in the model and likely will cause the projections to be an unreliable predictor of future enrollment; and

- The model relies on FTE and FTDE data collected each Fall by MHEC that requires institutions to distinguish distance education students from students taking courses on the campus; this year MHEC issued temporary guidance to institutions to ameliorate colleges' concerns that their data for Fall 2020 under-represented their student enrollments and their subsequent space needs (again, due to various pedagogical accommodations to maintain safe learning environments during the Covid-19 pandemic). Despite this guidance, institutions faced challenges in estimating their in-person versus distance education courses for the near future; using these data in our model would have unintended, and possibly, negative effects on projections.

For reference, a table with additional information regarding specific variables is attached to this memo.

To prepare the upcoming 2021 report for use and in alignment with state statute, the Commission will make one modification to the existing 2020 to 2029 data such that the same values for the 2029 year will be projected to 2030. We will present these data to the Commission in the spring and pass on the approved report to institutions and other agencies for their use.

In the coming year, MHEC will monitor the data collected by the agency and data used for the model in an effort to plan for the 2022 reporting cycle. We will keep you abreast of any relevant findings. Should you have any questions regarding MHEC enrollment projections, please contact Dr. Barbara Schmertz, Director, Office of Research and Policy Analysis (barbara.schmertz@maryland.gov).

Yellow indicates data used in model that precedes COVID

VARIABLE IN MODEL	DATE/YEAR	SOURCE	NOTES
Fall enrollment by age, gender	Fall 2020	MHEC Enrollment Information System	
Population data	latest available	MD Dept. of Planning	
Population projection data	2017 (adjusted 2020)	MD Dept. of Planning	The Maryland Department of Planning reviews its projections annually and adjusts the numbers as needed. The next round of official projections will be published in 2021 with 2020 Census data as baseline and projections from 2025 to 2050. https://planning.maryland.gov/MSDC/Documents/popproj/Overview-Population-Projections-Methodology.pdf
Tuition and fees	2020	Institutions tuition and fee schedules	
WICHE high school projections	2019	WICHE	all projections created pre-COVID; WICHE may update data in 2021 as new data become available
Per capita income	2018	Prepared by the Maryland Department of Planning, Projections and Data Center U.S. Bureau of Economic Analysis, Regional Data, Personal Income and Employment, State Annual: Table SA1, Personal Income, Population, Per Capita Personal Income	Most current data used by Dept. of Planning is from December 2019 (reflecting 2018 data)
Non credit enrollment (FTE)	Fall 2020	MHEC S-6	MHEC issued guidance in 2020 requesting institutions to report enrollments/course delivery methods as they would be without pandemic disruptions.
Credit hours and FTE	Fall 2020	MHEC CC-4; S-6	MHEC issued guidance in 2020 requesting institutions to report enrollments/course delivery methods as they would be without pandemic disruptions.