Master Plan
Virtual Engagement
Session #3
October 8, 2020

HEADLINES

→ Demographic trends suggest less growth than previously anticipated

→ As a result, future capital investments may need to focus more on qualitative and distribution-related factors than quantitative factors, particularly given Fairfax building conditions

→ Models are only models!

PROJECTIONS
ENROLLMENT

OVERVIEW

→ Virginia Labor Market Demand Analysis

→ Demographic Analysis and High School Graduation Projection

→ Student, Faculty, and Staff Projection

Virginia Labor Market Demand Analysis 2016-2026

FINDINGS

→ 35% of jobs in 2026 will require at least a bachelor's degree, compared to 33% in 2016

→ Human Services, Health Sciences, and Information Technology are expected to experience the fastest growth

→ Business Management & Administration, Information Technology, and Health Sciences are projected to add the most jobs

PROJECTED OCCUPATIONAL EMPLOYMENT GROWTH

for Jobs Requiring a Bachelor's Degree or Higher, Virginia, 2016-2026
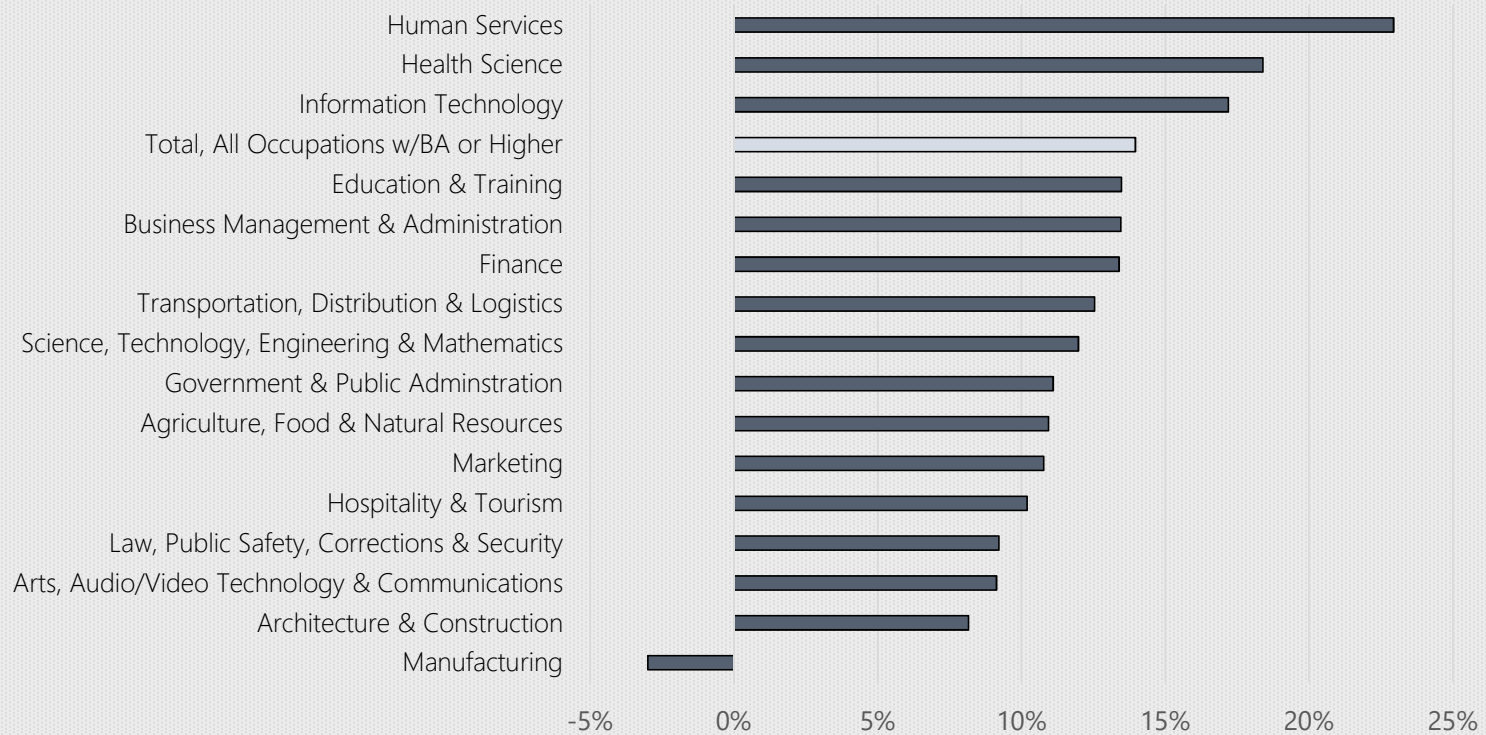
Source: Virginia Employment Commission (VEC), National Center for Education Statistics (NCES)

# Demographic Analysis and High School Graduation Projection

FINDINGS

→ More than half of Mason's freshmen students are from Northern Virginia

→ 96% of community college transfer students to Mason came from three community colleges serving Northern Virginia in 2018

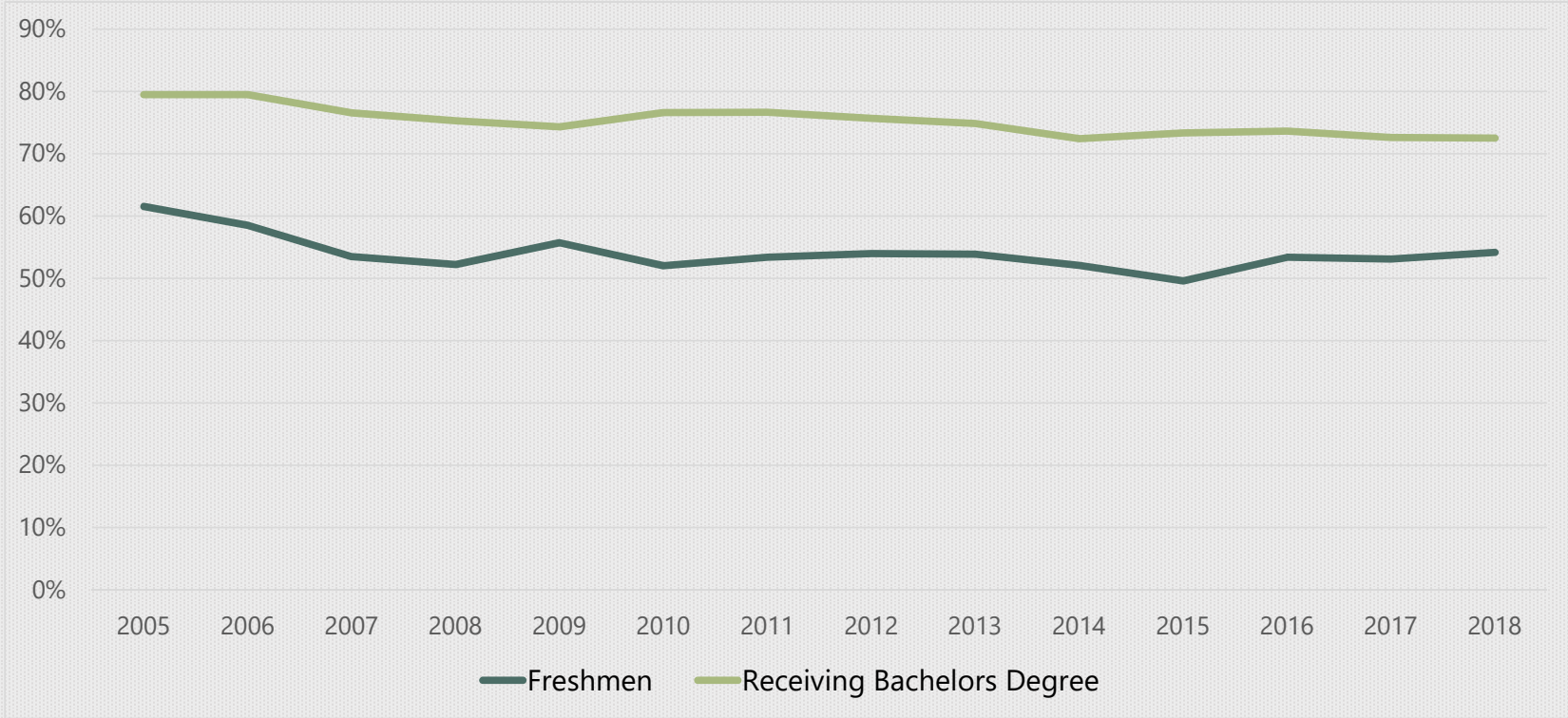→ 72% of Mason graduating class in 2018 were from Northern Virginia

PLACE OF ORIGIN

for in-state George Mason Undergraduate Students in 2019

Legend:
- 5 or fewer
- 6 to 10
- 11 to 25
- 26 to 100
- 101 to 250
- 251 or more
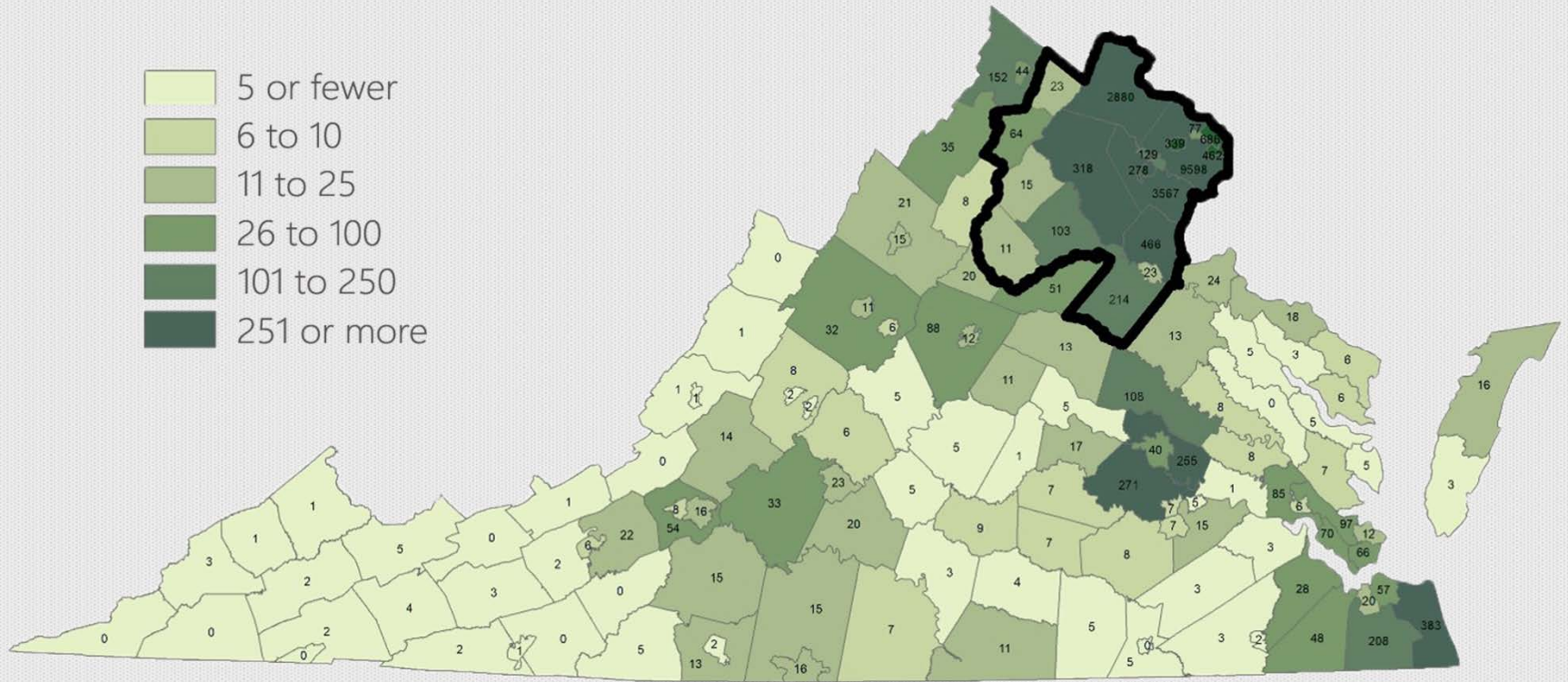
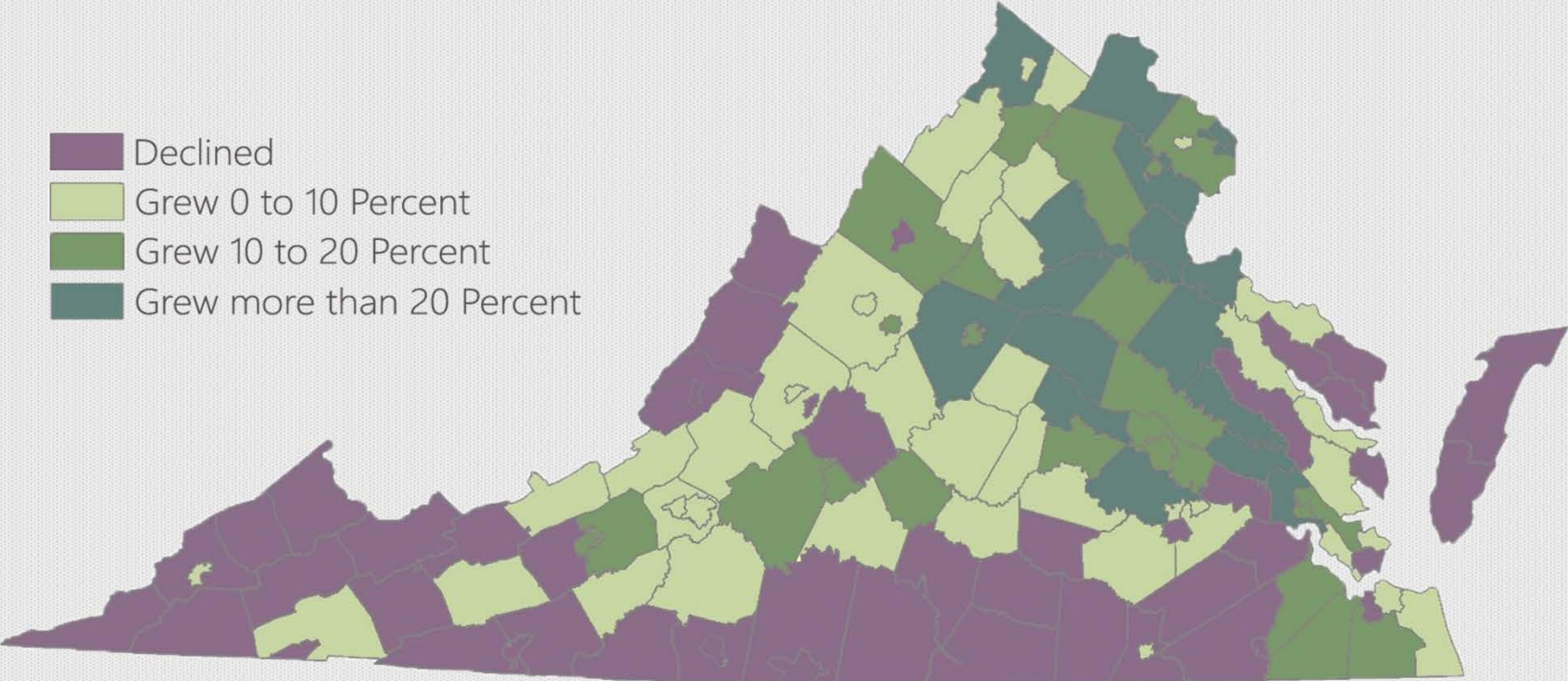Source: State Council of Higher Education for Virginia

PERCENT OF GEORGE MASON STUDENTS FROM NORTHERN VIRGINIA

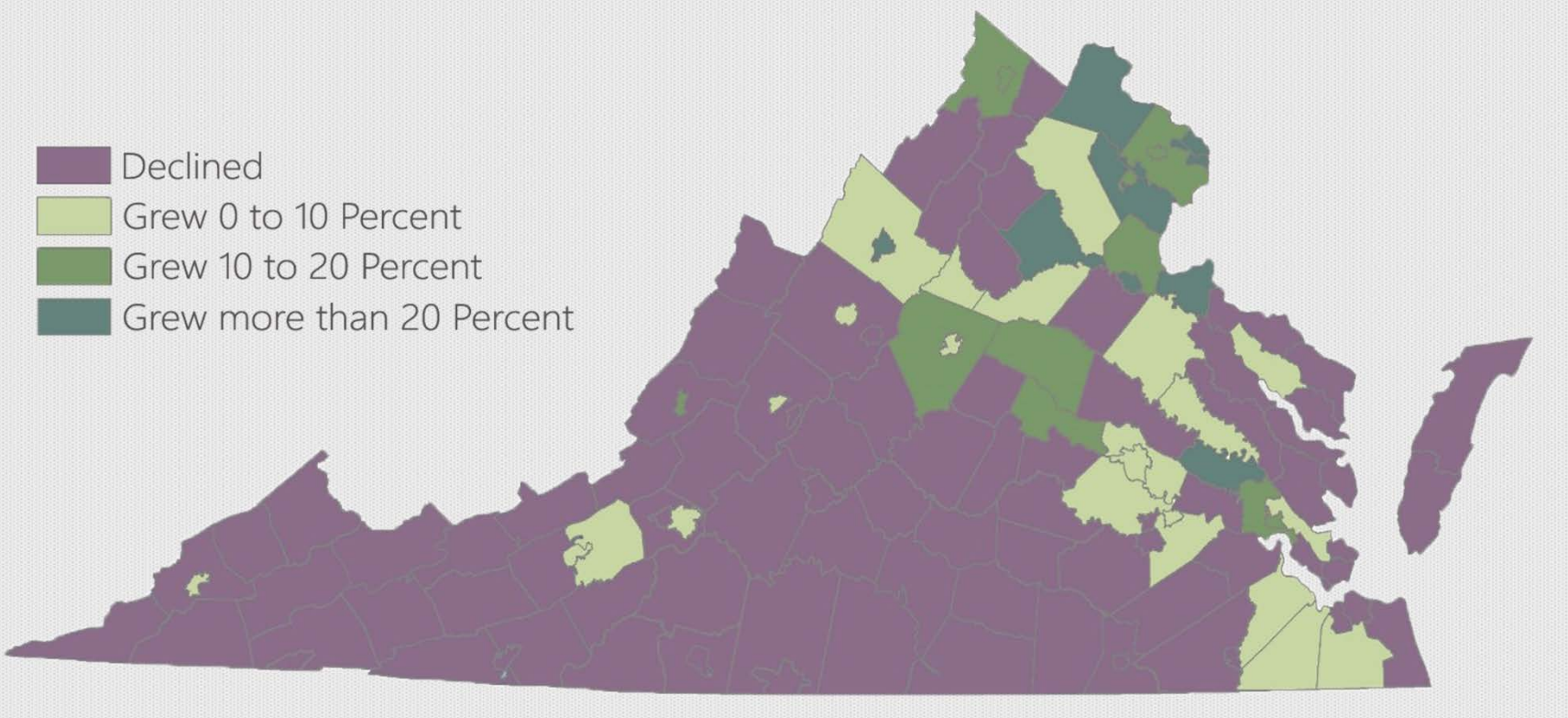Source: State Council of Higher Education for Virginia

POPULATION CHANGE 2005 TO 2019

Declined
Grew 0 to 10 Percent
Grew 10 to 20 Percent
Grew more than 20 Percent

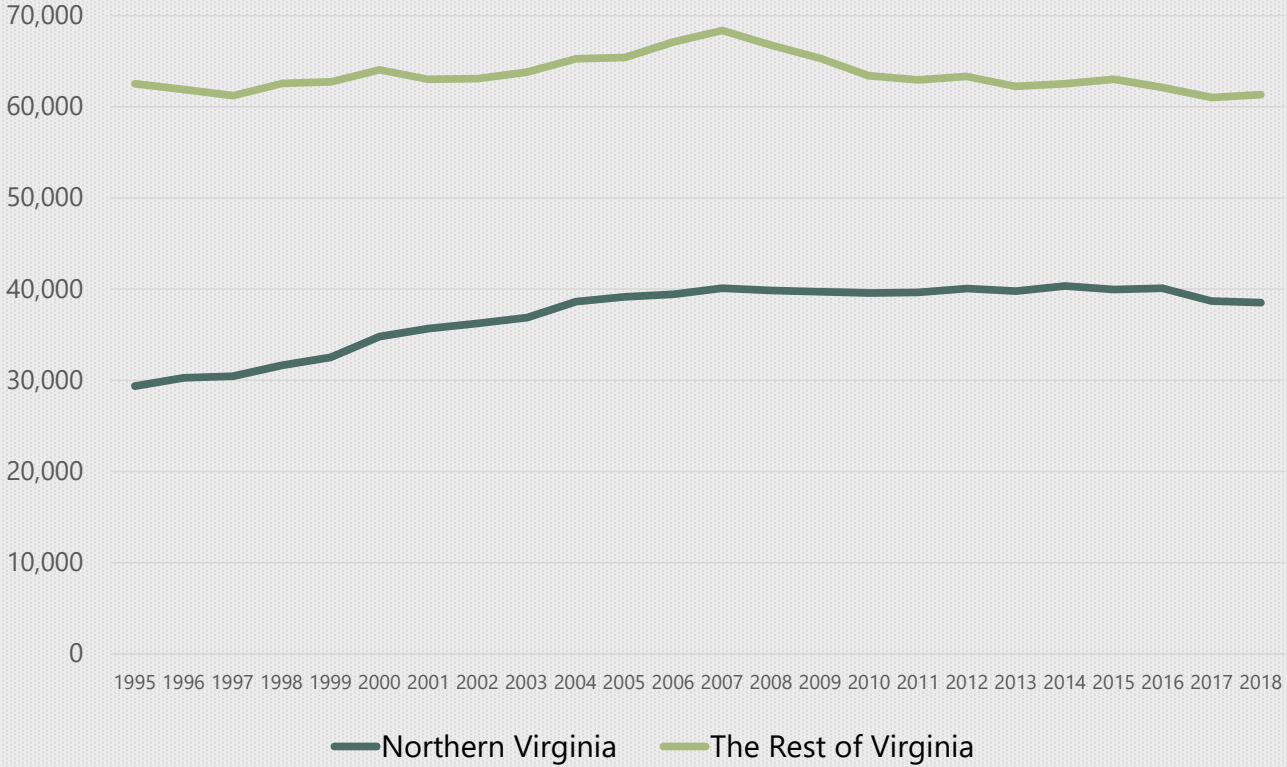*Source: University of Virginia, Weldon Cooper Center, Annual Population Estimates*

K-12 ENROLLMENT CHANGE 2005 TO 2019

Declined
Grew 0 to 10 Percent
Grew 10 to 20 Percent
Grew more than 20 Percent

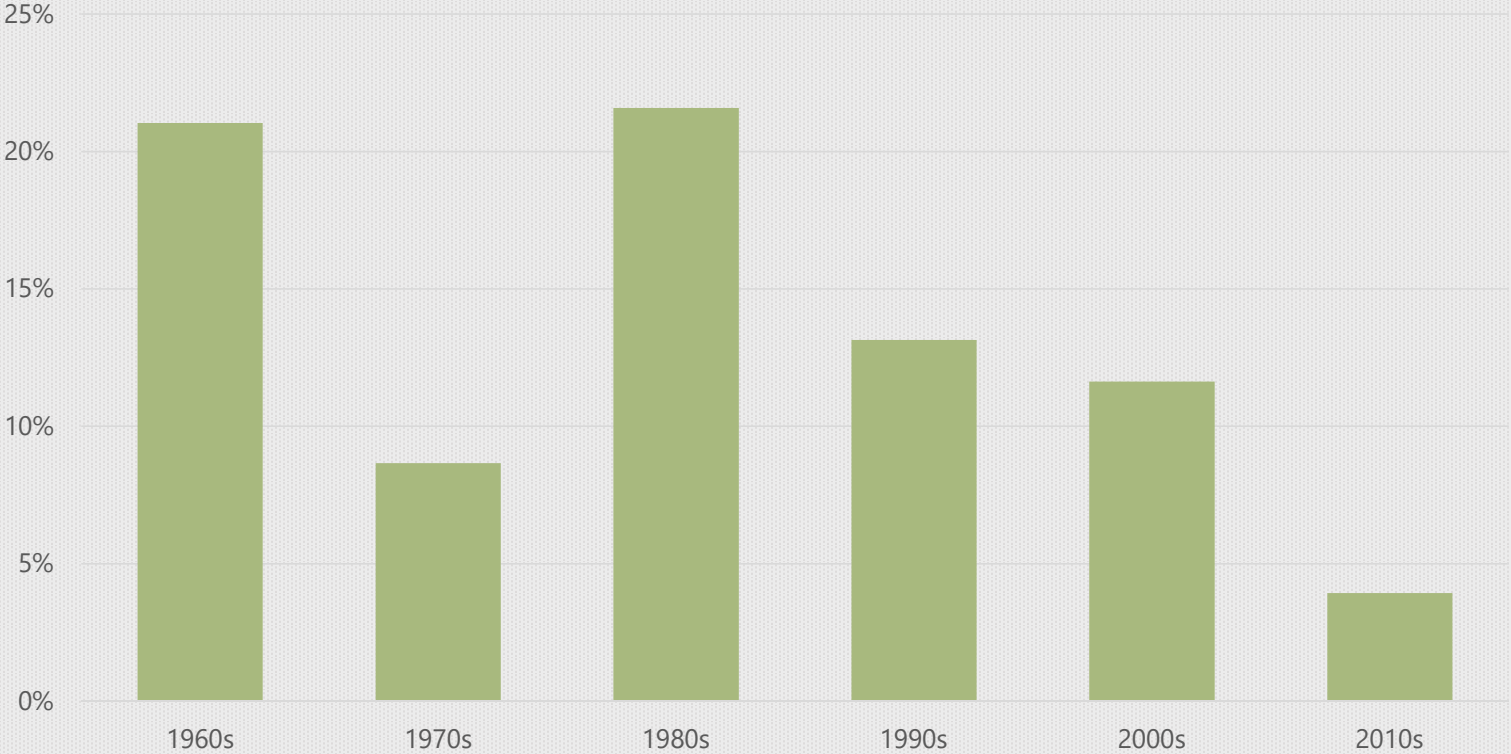*Source: Virginia Department of Education, Fall Membership*

ANNUAL BIRTHS

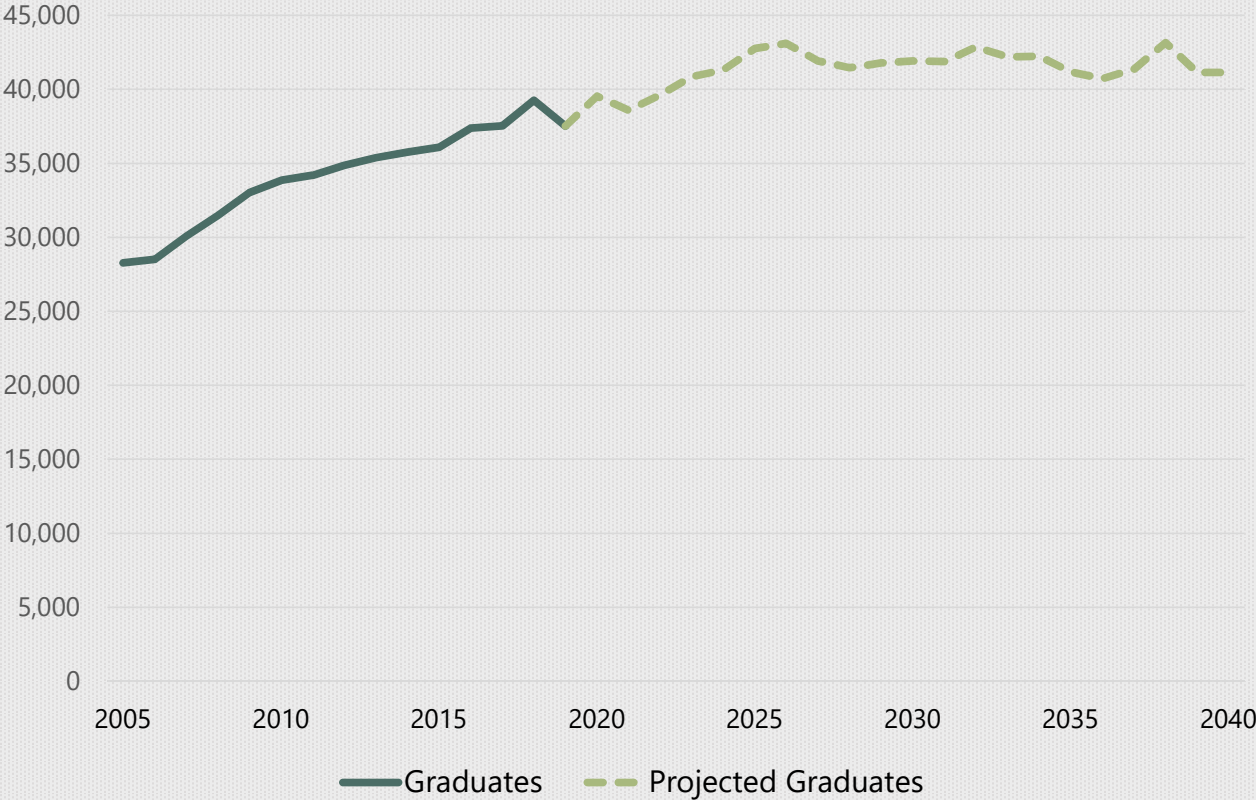Source: Virginia Department of Health, geocoded by the Weldon Cooper Center

POPULATION GROWTH IN NORTHERN VIRGINIA FROM MIGRATION
by Decade

Source: Virginia Department of Education, Weldon Cooper Center, Annual Population Estimates

NUMBER OF HIGH SCHOOL GRADUATES IN NORTHERN VIRGINIA

Source: Virginia Department of Education, Projections produced by the Weldon Cooper Center

Student, Faculty, and Staff Projection

Headcount and FTE Projections

- 2025
  - Student
    - University
    - College (12)
    - Program (550+)
  - Faculty/Staff
    - University
    - Division (30)
    - Department (227)
- 2040
  - Student
    - University
    - College (12)
  - Faculty/Staff
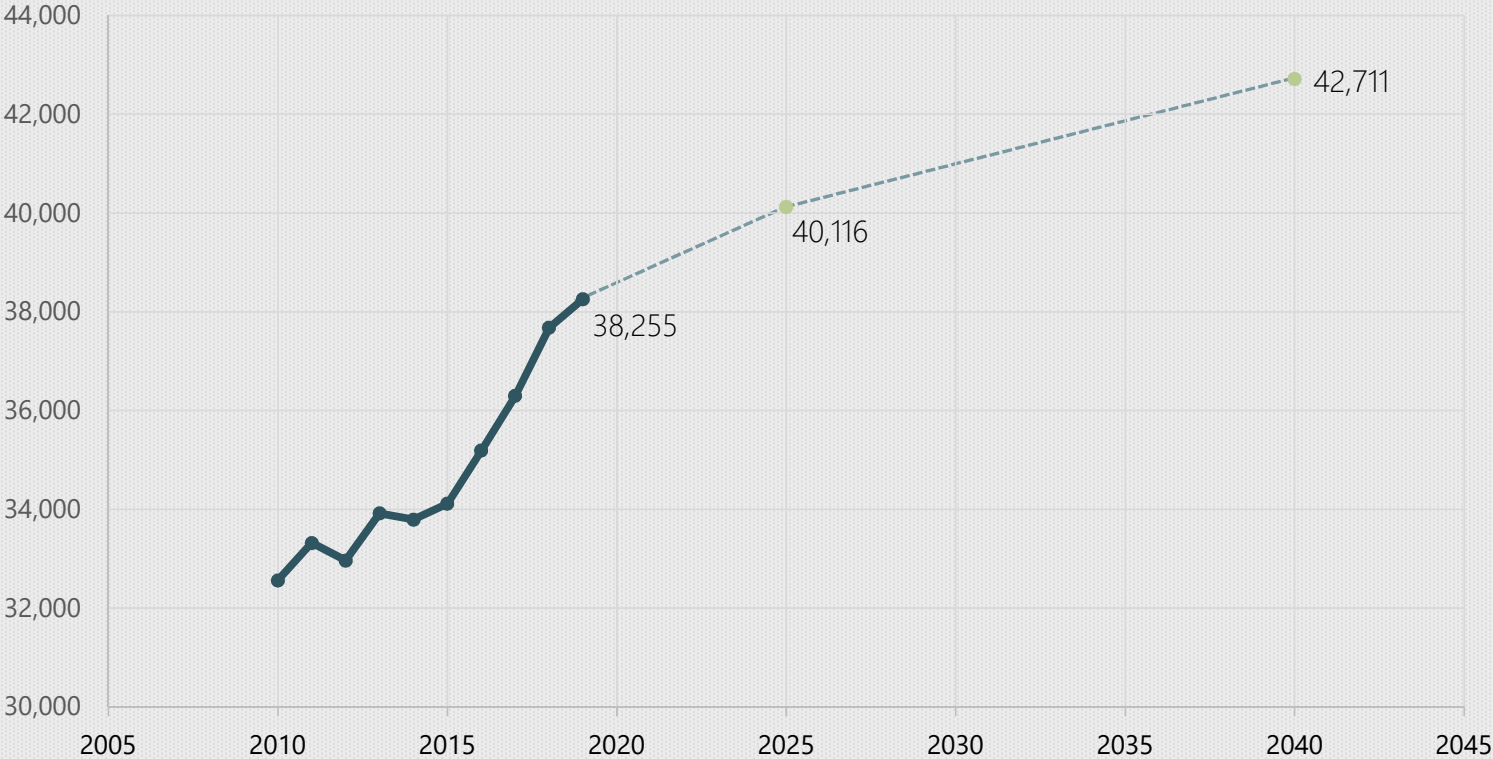   - University
    - Division (30)
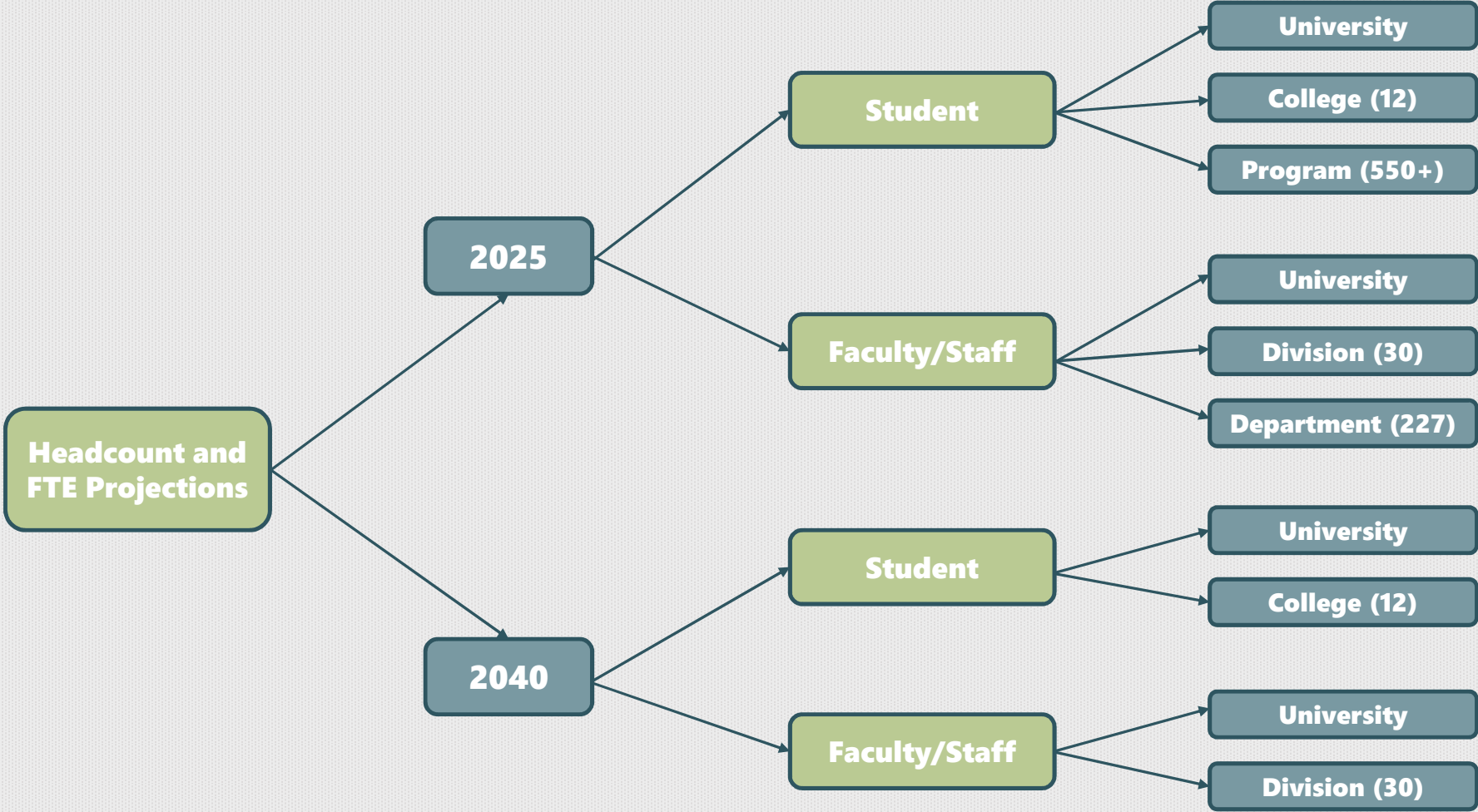
METHODOLOGY

→ University total was based on the future demographic trends and close association between Mason's enrollment and Northern Virginia high school graduates

→ The 2025 projections at program/department level were based on the distribution patterns of three-year enrollment average (2017-2019); college/division projections were the sums of program/department

→ The 2040 projections at college/division level were based on average share of five-year enrollment from 2015 to 2019

2025 AND 2040 WELDON COOPER "BASELINE" PROJECTIONS

Student Enrollment Headcount

WELDON COOPER "TECH TALENT" SCENARIO PROJECTIONS

George Mason University	Fall 2025	Fall 2025	Fall 2040	Fall 2040
	Headcount	FTE	Headcount	FTE
Student	43,674	34,467.66	44,538	34,989.97
Faculty and Staff	8,057	5,282.22	8,363	5,506.84

Note: Increased enrollment in VSE's TTIP-related programs may signal slower growth or even decline in other colleges and programs at Mason

Takeaways

CONCLUSION

→ Mason offers comprehensive programs that are well positioned to meet Virginia labor market needs

→ The advantageous location and agile adaptation to market needs fueled Mason's rapid growth in recent decades, but that growth will slow significantly in the next 20 years, due to demographic shifts in NoVa

→ Strategic initiatives and commitments such as TTIP may boost overall enrollment, but they could also compete with other Mason programs for available students

Comparing Projections Weldon Cooper Projections + Mason's internal 6-year SCHEV

Headcount

Student Enrollment Headcount	2019 (FY 2020)	2025 (FY 2026)	2029 (FY 2030)	2040 (FY 2041)
<u>Actual</u> Enrollment	38,255			
<u>Internal</u> SCHEV "6-year" Projection		45,457	49,776	
<u>Consultant</u> "Baseline" Scenario		40,116		42,711
<u>Consultant</u> "Tech Talent" Scenario		43,674		44,538

Notes:
- Internal projections primarily derived using budget model
- Internal projections assume ADVANCE can significantly change Mason's share of college-age population
- Internal projections assume significant increase in out-of-state enrollment
- Internal projections explore potential for growth in non-traditional students