

SOUTH DAKOTA BOARD OF REGENTS

Academic and Student Affairs

AGENDA ITEM: 5 – K (1)

DATE: December 4-6, 2018

SUBJECT

Enrollment Trends in the University System – Fall 2018

CONTROLLING STATUTE, RULE, OR POLICY

None

BACKGROUND / DISCUSSION

A more comprehensive analysis that further aggregate Fall Enrollment data for the Regental system has been provided to the Board of Regents during the past three years ([December 2015](#), [December 2016](#), and [October 2017](#) BOR meetings). The updated report provides the most recent data for the Fall 2018 enrollments in the Regental system comparing data for both on- and off-campus courses. In addition to this comprehensive system report, individual campus reports are also prepared and shared with campus leadership. Each of these individual reports can be found at the links reference below for the Fall 2018 term.

- [Black Hills State University](#)
- [Dakota State University](#)
- [Northern State University](#)
- [South Dakota School of Mines & Technology](#)
- [South Dakota State University](#)
- [University of South Dakota](#)

IMPACT AND RECOMMENDATIONS

This report offers an in-depth analysis of university system fall enrollment data from 2008 to 2018. While annual fall enrollment reports already provide summary-level information about student enrollment in the Regental system, this report draws special attention to several key trends observed in system enrollment data in recent years. Findings suggest that enrollment transitions that currently are underway in the university system already have begun to reshape the basic composition of the Regental student body, and consequently may have a significant impact on university programming and resource allocation.

INFORMATIONAL ITEM

Both headcount and FTEs showed slight decreases this year. The headcount for the system fell by 925 students from a year ago, and FTEs decreased by 541 over the same period. Both headcount and FTEs have declined by 1.9 percent since Fall 2010. Based on the data available in the report, a number of considerations for the Board of Regents to consider related to future policy decisions include:

- Only two institutions over the past five years have experienced enrollment growth at their on-campus locations. Despite the decrease in enrollment this past year, only USD saw a decline in off-campus headcount. As a result, the growth in this area of delivery is expected to continue and the Board of Regents should be cautious in policy decisions that require long-term investment at the main campus locations driven by sustainable on-campus enrollments.
- Five campuses experienced a decline in resident enrollments. This came at a time when the system also experienced a dramatic increase in resident enrollments in high school students taking dual credit courses. Non-resident enrollments have increased at all institutions except NSU, and tuition proposals to eliminate tuition differentials for resident and non-resident students should be approached with caution. The increase in non-resident enrollments will need to be significant to result in a revenue neutral model for the system and individual institutions.
- Since 2014 there have been an additional 2,501 high school students infused into the current Regental headcount. When matched against the 925 student declines this year, a total of 3,426 enrollments would have been lost without the advent of this program. As a percentage, this would result in a 9.5% decline in students served by the Regental system over the past five years. The infusion of low priced tuition comes at a cost to the institution, and must be made up through other tuition and fee increases to traditional students being served.

ATTACHMENTS

Attachment I – Special Data Analysis: Enrollment Trends in the University System



*** Special Data Analysis ***

Enrollment Trends in the University System

System-wide fall enrollment totals have remained relatively stable over the last five years. This overall stability, however, has masked significant changes in the type and location of students that make up those totals. This report provides an in-depth look at those enrollments, showing how the system has undergone a series of crucial transitions. These transitions have significant implications from program delivery to system finance.

Analysis

Overall Enrollment

Headcount enrollment and full-time equivalent (FTE) enrollment are the university system's two primary measures of student enrollment.¹ Table 1 displays the university system's official headcount and FTE figures, as reported in SDBOR Fact Book publications, as well as unduplicated headcount. In general, all three enrollment measures appear to reflect considerable stability since 2010.²

Table 1
University System Enrollment

	Headcount	Unduplicated	FTEs
Fall 2008	32,943	30,071	24,926
Fall 2009	33,779	30,449	25,468
Fall 2010	36,440	32,717	26,625
Fall 2011	36,103	32,560	26,719
Fall 2012	36,430	32,681	26,468
Fall 2013	36,365	32,892	26,782
Fall 2014	36,532	33,363	26,736
Fall 2015	36,439	33,390	26,684
Fall 2016	36,531	33,531	26,599
Fall 2017	36,662	33,637	26,634
Fall 2018	35,737	32,890	26,093
Δ Since 2010 (Percent)	-1.9	+0.5	-1.9
Δ Since 2010 (Number)	-703	+173	-532

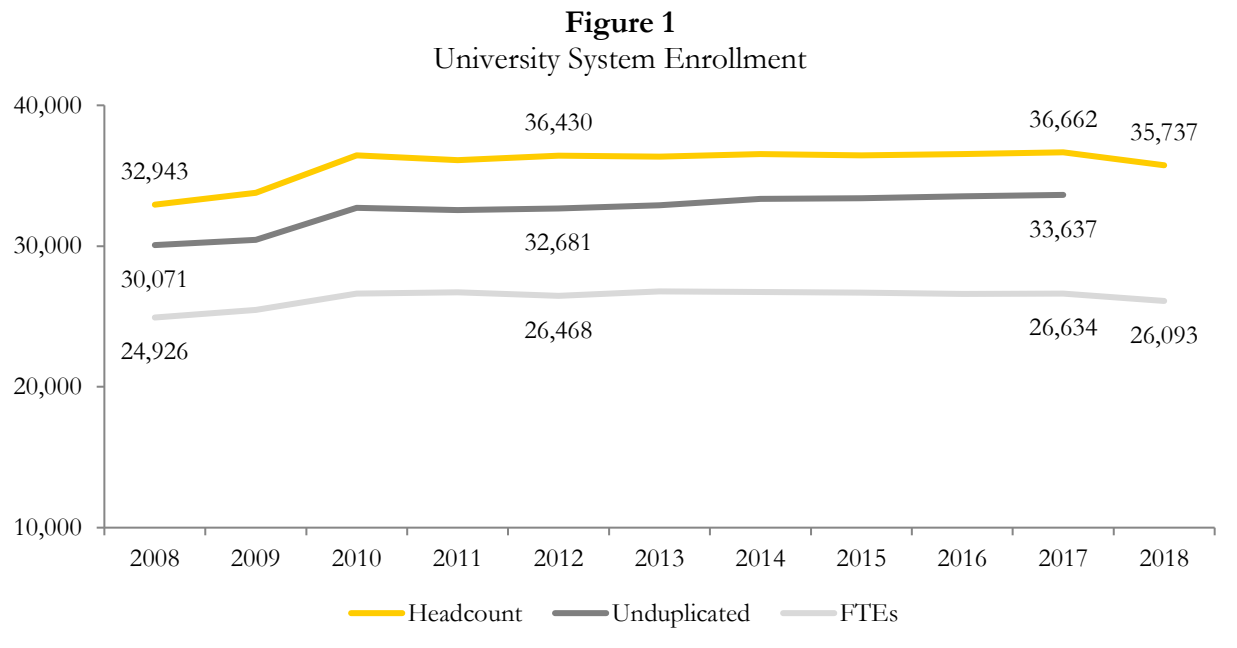
All three enrollment measures displayed in Table 1 and Figure 1 show a similar pattern of moderate escalation during the economic recession, followed by a prolonged plateau from 2010 to 2017, with a slight drop in 2018.³ But while it appears from these figures that system enrollments have been

¹ All data for this analysis are sourced from census date enrollment extracts provided by Regents Information Systems.

² The year 2010 is used for comparison due to its position at the beginning of the university system's recessionary enrollment surge.

³ For the sake of readability, this report will focus mainly on headcount enrollment as a measure of student enrollment. Comparable full-time equivalent enrollment tables are presented in Appendix A.

relatively stable since 2010, this apparent stability owes not to an actual pattern of “holding steady,” but to the counterbalanced, contrary trending of several large student subgroups.



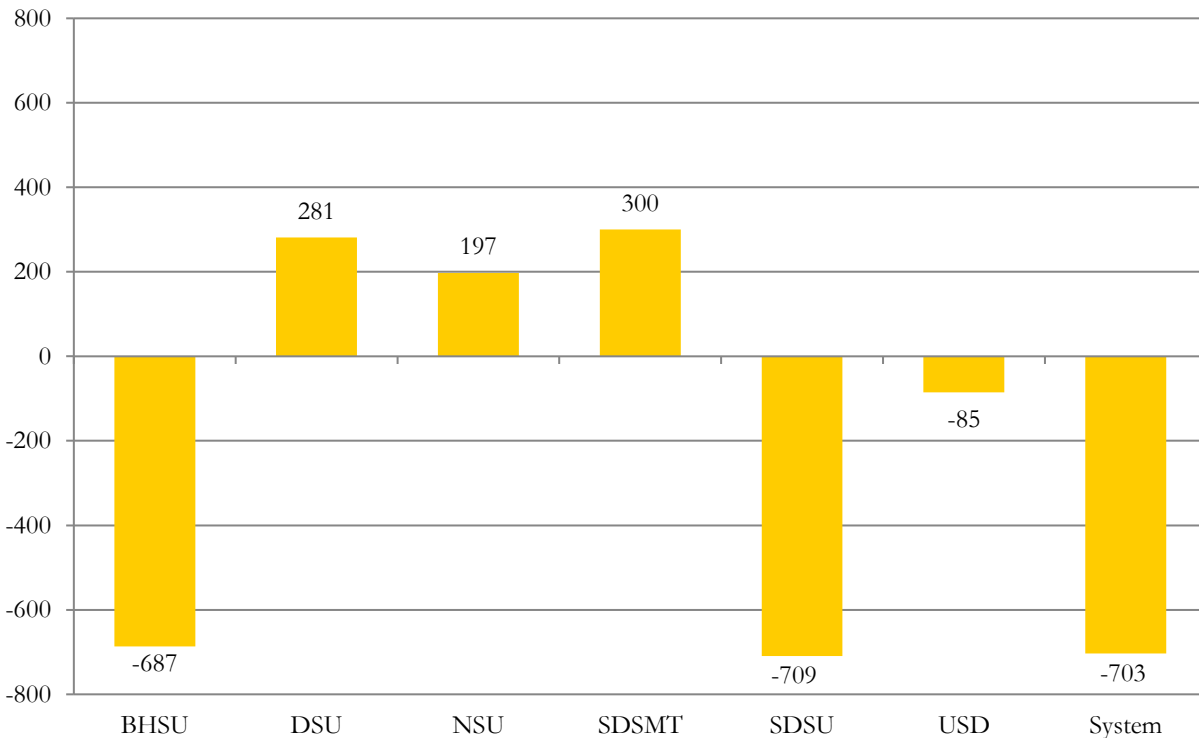
Enrollment by University

When system-wide totals are disaggregated by institution, significant differences in enrollment trends are evident. As shown in Table 2, enrollment patterns have indeed varied considerably by university in recent years. While DSU, NSU, and SDSMT have experienced net gains since 2010, BSHU, SDSU, and USD – the system’s three largest institutions – have lost enrollments over the same period. On the whole, however, system-level enrollments have only declined slightly as a result of these offsetting institutional differences.

Table 2
University Headcount

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	4,722	3,101	3,296	2,354	12,816	10,151	36,440
Fall 2011	4,415	3,102	3,580	2,311	12,725	9,970	36,103
Fall 2012	4,407	3,110	3,622	2,424	12,583	10,284	36,430
Fall 2013	4,464	3,129	3,343	2,640	12,554	10,235	36,365
Fall 2014	4,489	3,047	3,580	2,798	12,557	10,061	36,532
Fall 2015	4,395	3,145	3,496	2,843	12,589	9,971	36,439
Fall 2016	4,244	3,190	3,587	2,859	12,613	10,038	36,531
Fall 2017	4,178	3,307	3,611	2,778	12,527	10,261	36,662
Fall 2018	4,035	3,382	3,493	2,654	12,107	10,066	35,737
Δ Since 2010 (Percent)	-14.5	+9.1	+6.0	+12.7	-5.5	-0.8	-1.9
Δ Since 2010 (Number)	-687	+281	+197	+300	-709	-85	-703

Figure 2
Change in University Headcount, 2010-2018



These data illustrate one way in which system-level totals have appeared to remain stable despite considerable institutional fluctuation. The sections below will address several other forms of offsetting enrollments in the university system, some of which may rightly prompt deeper reflection about university system's broader enrollment trajectory.

Enrollment by Location

Another dimension of enrollment change shows the way students now avail themselves of university system offerings. Tables 3a and 3b display the same headcount figures shown in Table 2, but after disaggregation by enrollment type. In this approach, headcount enrollments are split into two separate categories: (1) on-campus at a given university, and (2) off-campus at a given university.⁴ The "on-campus" category includes all students taking at least one face-to-face course at a given main campus; the "off-campus" category includes all other enrolled students. With respect to growth since 2010, differences between these two categories are immediately evident.

⁴ These categories are mutually exclusive and cumulative; added together, they sum to the same headcount figures presented in SDBOR Fact Book publications. Students are assigned to levels in ascending hierarchical fashion, meaning that a student taking courses both on-campus and off-campus will be counted as an on-campus student.

Table 3a
University Headcount, On-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,681	1,289	2,033	2,324	10,142	6,112	24,581
Fall 2011	2,547	1,300	2,044	2,284	10,001	6,029	24,205
Fall 2012	2,446	1,278	1,913	2,368	9,779	6,116	23,900
Fall 2013	2,398	1,289	1,932	2,586	9,865	6,122	24,192
Fall 2014	2,211	1,241	1,742	2,739	9,900	6,112	23,945
Fall 2015	2,162	1,316	1,620	2,759	9,820	6,180	23,857
Fall 2016	2,073	1,303	1,557	2,748	9,836	6,149	23,666
Fall 2017	2,040	1,342	1,490	2,647	9,735	6,063	23,317
Fall 2018	1,933	1,342	1,475	2,558	9,334	6,036	22,678
Δ Since 2010 (Percent)	-27.9	+4.1	-27.4	+10.1	-8.0	-1.2	-7.7
Δ Since 2010 (Number)	-748	+53	-558	+234	-808	-76	-1,903

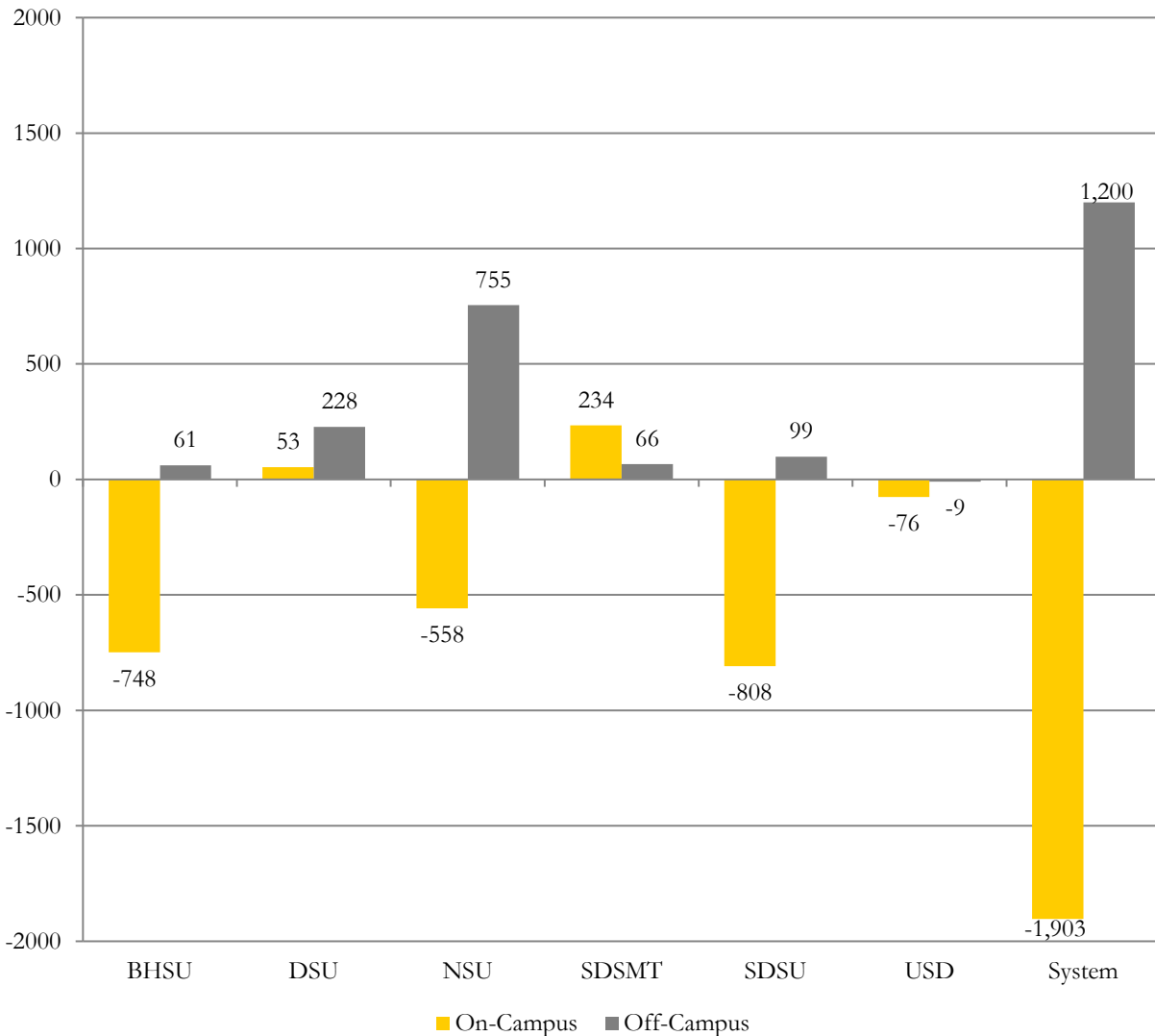
Table 3b
University Headcount, Off-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,041	1,812	1,263	30	2,674	4,039	11,859
Fall 2011	1,868	1,802	1,536	27	2,724	3,941	11,898
Fall 2012	1,961	1,832	1,709	56	2,804	4,168	12,530
Fall 2013	2,066	1,840	1,411	54	2,689	4,113	12,173
Fall 2014	2,278	1,806	1,838	59	2,657	3,949	12,587
Fall 2015	2,233	1,829	1,876	84	2,769	3,791	12,582
Fall 2016	2,171	1,887	2,030	111	2,777	3,889	12,865
Fall 2017	2,138	1,965	2,121	131	2,792	4,198	13,345
Fall 2018	2,102	2,040	2,018	96	2,773	4,030	13,059
Δ Since 2010 (Percent)	+3.0	+12.6	+59.8	+220	+3.7	-0.2	+10.1
Δ Since 2010 (Number)	+61	+228	+755	+66	+99	-9	+1,200

These figures underscore a growing gap between on-campus and off-campus enrollments in the university system, particularly at certain universities. Since 2010, the university system has sustained over a 7 percent percent loss in on-campus headcount while at the same time experiencing an offsetting 10.1 percent gain in off-campus headcount. Overall, these data indicate a slow but steady decline in on-campus students in the public university system. At BHSU and NSU in particular, on-campus headcount enrollments have fallen more than 25 percent since 2010. In Fall 2018, three universities enroll more off-campus students than on-campus students.

Figure 3 provides a visual representation of the numeric changes presented above. It is clear from these data that – despite maintaining roughly unchanged totals – system-level enrollment totals have shifted appreciably toward off-campus offerings. Compounded over time, these changes will profoundly transform the operational demands of the public universities.

Figure 3
Change in University Headcount by Location, 2010-2018



Enrollment by Residency

Stemming in part from state budgetary constraints, a declining pool of high school graduates, new institutional and non-institutional competitors, and an improving economy, postsecondary institutions of all kinds currently face unprecedented pressure to explore and cultivate new student markets. These enrollment pressures have – in South Dakota and elsewhere – resulted in a new emphasis on recruiting students from other states. Consequently, university system enrollment counts have begun to reflect the ever-increasing presence of out-of-state students enrolling the state’s public universities.

In 2010, there were roughly 25,800 South Dakota residents and 10,600 non-residents enrolled in the university system (see Tables 4a and 4b). By 2018, the resident figure had fallen by 12 percent to roughly 22,600 while the non-resident figure had risen by 23.7 percent to over 13,100. In total, it appears that the university system has shed more than 3,224 South Dakota residents since 2010, a loss

of 12.5 percent. This shift has been especially prominent at particular universities. Figure 4 (next page) shows these data graphically, and reinforces the pronounced expansion of out-of-state students in the university system.

Table 4a
University Headcount, Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	3,742	2,429	2,425	1,374	8,537	7,333	25,840
Fall 2011	3,455	2,361	2,500	1,301	8,297	6,823	24,737
Fall 2012	3,405	2,317	2,706	1,282	7,923	6,884	24,517
Fall 2013	3,434	2,277	2,510	1,325	7,613	6,701	23,860
Fall 2014	3,404	2,128	2,786	1,384	7,449	6,609	23,760
Fall 2015	3,317	2,121	2,664	1,378	7,404	6,447	23,331
Fall 2016	3,190	2,107	2,767	1,353	7,141	6,562	23,120
Fall 2017	3,138	2,102	2,834	1,300	7,083	6,795	23,252
Fall 2018	3,003	2,187	2,756	1,250	6,758	6,662	22,616
Δ Since 2010 (Percent)	-19.7	-9.9	+13.6	-9.0	-20.8	-9.2	-12.5
Δ Since 2010 (Number)	-739	-242	+331	-124	-1,779	-671	-3,224

Table 4b
University Headcount, Non-Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	980	672	871	980	4,279	2,818	10,600
Fall 2011	960	741	1,080	1,010	4,428	3,147	11,366
Fall 2012	1,002	793	916	1,142	4,660	3,400	11,913
Fall 2013	1,030	852	833	1,315	4,941	3,534	12,505
Fall 2014	1,085	919	794	1,414	5,108	3,452	12,772
Fall 2015	1,078	1,024	832	1,465	5,185	3,524	13,108
Fall 2016	1,054	1,083	820	1,506	5,472	3,476	13,411
Fall 2017	1,040	1,205	777	1,478	5,444	3,466	13,410
Fall 2018	1,032	1,195	737	1,404	5,349	3,404	13,121
Δ Since 2010 (Percent)	+5.3	+77.8	-15.4	+43.3	+25.0	+20.8	+23.7
Δ Since 2010 (Number)	+52	+523	-134	+424	+1,070	+586	+2,521

Figure 4
Change in University Headcount by Residency, 2010-2017

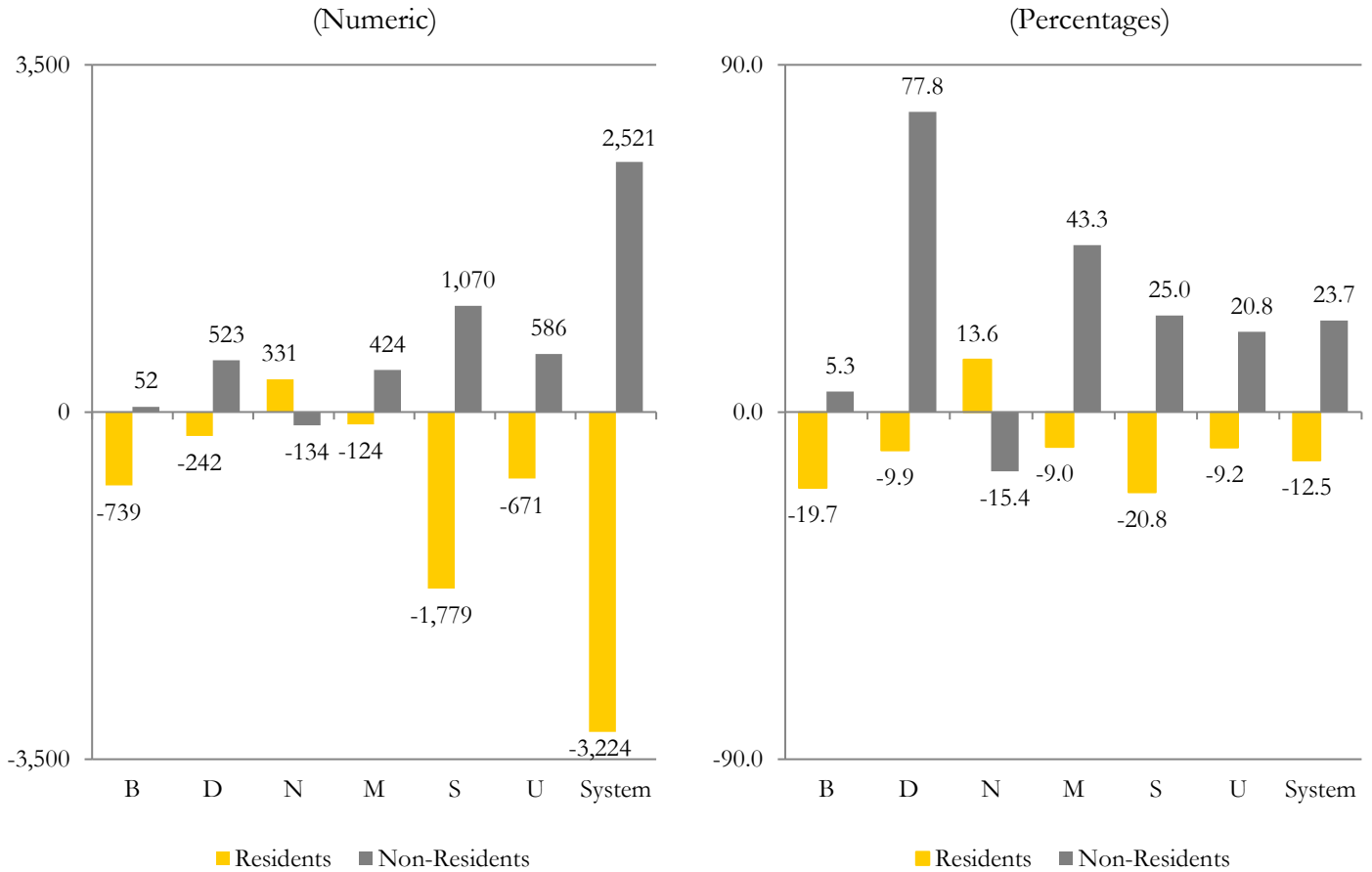


Table 5 shows a comparative summary of these two factors (location and residency) for 2010 and 2018. This cross-tabulation indicates that virtually all of the South Dakota residents lost since 2010 have been students taking at least one on-campus course. Despite this cavernous segmentation of the student population, system totals have only decreased slightly during that time.

Table 5
University System Headcount by Location and Residency, 2010-2018

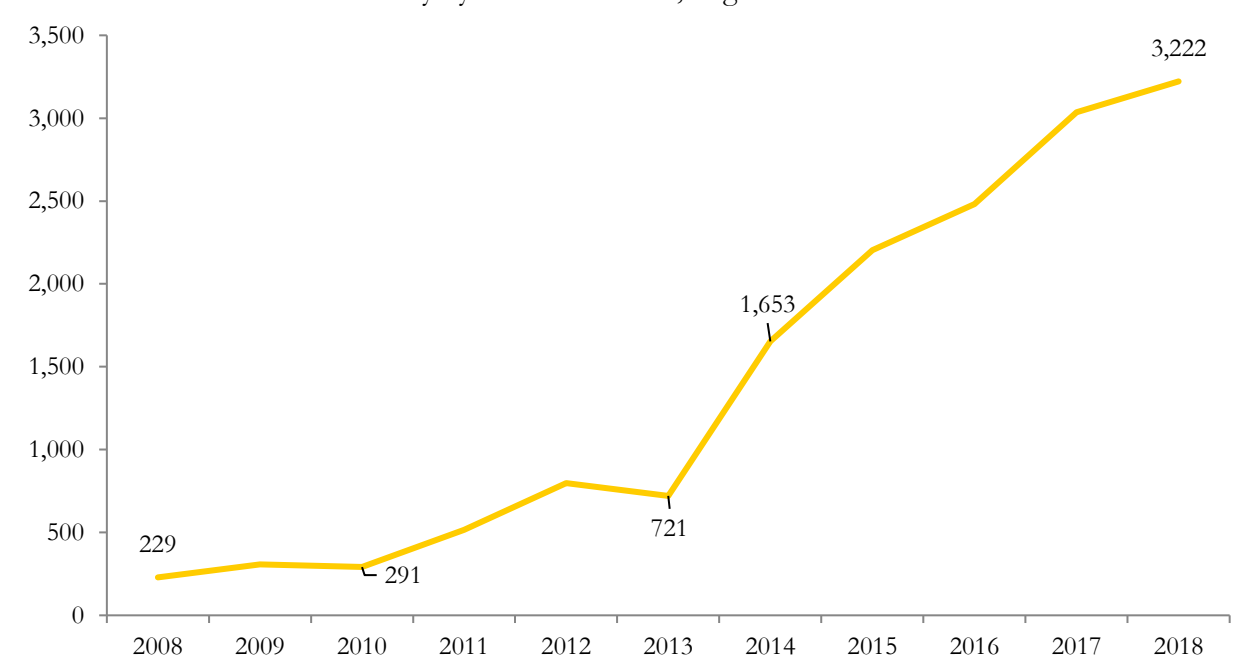
	2010	2018	Gain (n)	Gain (p)
Residents, On-Campus	16,009	12,418	-3,591	-22.4
Residents, Off-Campus	9,831	10,198	+367	+3.7
Non-Residents, On-Campus	8,572	10,260	+1,688	+20.0
Non-Residents, Off-Campus	2,028	2,861	+833	+41.1
Total	36,440	35,737	-703	-1.9

Enrollments by High School Students

A final transition occurring in university enrollments relates to high school students. Whether through concurrent enrollment, dual credit enrollment, or by other means, high school students in South Dakota may enroll in credit-bearing university courses at any Regental university. Fueled mainly by new legislative funding for dual credit offerings beginning in 2014, the university system has experienced a meteoric rise in enrollments by high school students.

Figure 5 illustrates university system enrollments by high school students over the course of the last decade. Since 2010 alone, high school enrollments in the university system have grown by over 1,000 percent, a net gain of over 2,900 students. Even since the start of the high school dual credit program in 2014, high school enrollments have grown by nearly 1,600 students, an increase of 95 percent.

Figure 5
University System Headcount, High School Students



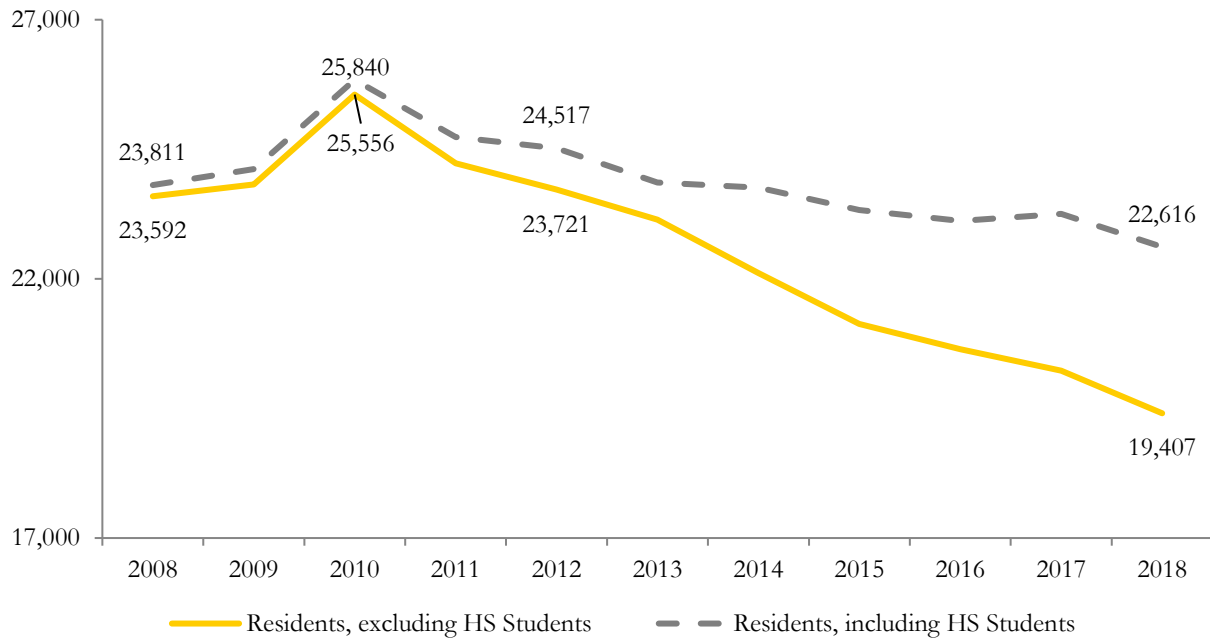
This rise in high school student enrollments has sustained university system headcounts that otherwise would have fallen significantly since 2010. Table 6 displays headcount trends for high school students, non-high school students, and all students. While high school enrollments rose by 1,007 percent over this period, all other enrollments fell by 10 percent. Again, in spite of this crucial shift, overall enrollment counts show only a slight downward trend.

Table 6
University System Headcount, High School Students

	High School Students	All Other Students	Total Students
Fall 2010	291	36,149	36,440
Fall 2011	515	35,588	36,103
Fall 2012	798	35,632	36,430
Fall 2013	721	35,644	36,365
Fall 2014	1,653	34,879	36,532
Fall 2015	2,204	34,235	36,439
Fall 2016	2,482	34,049	36,531
Fall 2017	3,035	33,627	36,662
Fall 2018	3,222	32,515	35,737
Δ Since 2010 (Percent)	+1,007.2	-10.1	-1.9
Δ Since 2010 (Number)	+2,931	-3,634	-703

One final graphic shows the combined effect of this rise in high school enrollments and the aforementioned decline in South Dakota resident enrollments. More specifically, Figure 6 displays historical trends for resident enrollments after excluding high school students. These data indicate that – sans high school students – university system resident headcounts have fallen by over 6,100 students since 2010 alone, a drop of 24.1 percent, or over 750 students per year. These trends imply a dramatic reconstitution of the Regental student body, and have clear implications for the university system’s capacity to affect macro-level change in the South Dakota labor force.

Figure 6
University System Headcount, Residents



Appendix A Supplementary FTE Tables

The above report focuses on headcount enrollment – which measures enrollment *coverage* – as its primary measure of interest. However, full-time equivalent enrollment – which measures enrollment *intensity* – is another important indicator of student participation in the university system. Accordingly, each table presented in the main report (except Table 1) is reproduced below with full-time equivalent enrollment data.

Table A1
University System Enrollment
(*Not shown; same as main report*)

Table A2
University FTE

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	3,241	1,708	2,097	1,997	10,512	7,069	26,625
Fall 2011	3,135	1,746	2,202	1,982	10,421	7,234	26,719
Fall 2012	3,036	1,728	2,157	2,070	10,153	7,325	26,468
Fall 2013	3,062	1,741	2,128	2,235	10,220	7,396	26,782
Fall 2014	2,920	1,740	2,144	2,391	10,180	7,362	26,736
Fall 2015	2,882	1,859	1,995	2,405	10,141	7,401	26,684
Fall 2016	2,825	1,897	1,953	2,394	10,130	7,400	26,599
Fall 2017	2,806	1,989	1,930	2,327	10,108	7,473	26,634
Fall 2018	2,646	2,037	1,913	2,197	9,802	7,496	26,093
Δ Since 2010 (Percent)	-18.4	+19.5	-8.8	+10.0	-6.8	+6.0	-2.0
Δ Since 2010 (Number)	-595	+329	-184	+200	-710	+427	-532

Table A3a
University FTE, On-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,265	1,098	1,740	1,971	8,957	5,360	21,391
Fall 2011	2,116	1,072	1,769	1,956	8,652	5,348	20,912
Fall 2012	1,949	1,048	1,625	2,028	8,254	5,290	20,193
Fall 2013	1,904	1,034	1,607	2,189	8,281	5,296	20,311
Fall 2014	1,734	1,010	1,473	2,335	8,310	5,283	20,144
Fall 2015	1,683	1,046	1,374	2,340	8,125	5,328	19,897
Fall 2016	1,630	1,053	1,287	2,317	8,095	5,224	19,606
Fall 2017	1,577	1,089	1,231	2,248	8,051	5,153	19,349
Fall 2018	1,494	1,067	1,221	2,131	7,756	5,179	18,848
Δ Since 2010 (Percent)	-34.0	+2.8	-29.8	+8.1	-13.4	-3.4	-11.9
Δ Since 2010 (Number)	-771	+31	-519	+160	-1,201	-181	-2,543

Table A3b
University FTE, Off-Campus

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	976	610	352	25	1,555	1,708	5,226
Fall 2011	1,019	674	415	26	1,768	1,884	5,786
Fall 2012	1,088	680	524	43	1,898	2,034	6,266
Fall 2013	1,158	706	520	46	1,938	2,100	6,469
Fall 2014	1,186	730	671	56	1,869	2,079	6,590
Fall 2015	1,199	812	621	65	2,016	2,072	6,786
Fall 2016	1,195	844	666	77	2,034	2,176	6,991
Fall 2017	1,229	900	700	79	2,057	2,320	7,284
Fall 2018	1,152	970	691	66	2,046	2,316	7,241
Δ Since 2010 (Percent)	+18.0	+59.0	+96.0	+164.0	+31.6	+35.6	+38.6
Δ Since 2010 (Number)	+176	+360	+339	+41	+491	+608	+2,015

Table A4a
University FTE, Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	2,477	1,295	1,425	1,104	6,809	4,870	17,980
Fall 2011	2,399	1,278	1,487	1,062	6,624	4,788	17,639
Fall 2012	2,266	1,227	1,470	1,045	6,155	4,716	16,879
Fall 2013	2,266	1,206	1,468	1,071	6,012	4,732	16,754
Fall 2014	2,114	1,159	1,505	1,135	5,835	4,706	16,455
Fall 2015	2,069	1,207	1,356	1,107	5,747	4,657	16,143
Fall 2016	2,010	1,223	1,354	1,083	5,488	4,700	15,859
Fall 2017	2,000	1,215	1,354	1,049	5,449	4,781	15,849
Fall 2018	1,865	1,258	1,370	986	5,197	4,779	15,455
Δ Since 2010 (Percent)	-24.7	-2.9	-3.9	-10.7	-23.7	-1.9	-14.0
Δ Since 2010 (Number)	-612	-37	-55	-118	-1,612	-91	-2,525

Table A4b
University FTE, Non-Residents

	BHSU	DSU	NSU	SDSMT	SDSU	USD	System
Fall 2010	765	413	672	892	3,704	2,199	8,645
Fall 2011	736	468	715	920	3,797	2,445	9,081
Fall 2012	770	500	686	1,025	3,998	2,609	9,589
Fall 2013	796	535	661	1,164	4,209	2,664	10,028
Fall 2014	806	580	639	1,256	4,345	2,656	10,282
Fall 2015	814	652	639	1,298	4,394	2,744	10,541
Fall 2016	815	674	600	1,311	4,642	2,700	10,741
Fall 2017	806	774	577	1,277	4,659	2,692	10,784
Fall 2018	781	780	543	1,212	4,605	2,717	10,638
Δ Since 2010 (Percent)	+2.1	+88.9	-19.2	+35.9	+24.3	+23.6	+23.1
Δ Since 2010 (Number)	+16	+367	-129	+320	+901	+518	+1,993

Table A5
University System FTE by Location and Residency, 2010-2018

	2010	2018	Gain (n)	Gain (p)
Residents, On-Campus	13,799	10,216	-3,583	-26.0
Residents, Off-Campus	4,175	5,236	+1,061	25.4
Non-Residents, On-Campus	7,593	8,632	+1,039	+13.7
Non-Residents, Off-Campus	1,051	2,005	+954	+90.8
Total	26,618	26,089	-529	-2.0

Table A6
University System FTE, High School Students

	High School Students	All Other Students	Total Students
Fall 2010	75	26,550	26,625
Fall 2011	140	26,579	26,719
Fall 2012	223	26,245	26,468
Fall 2013	207	26,575	26,782
Fall 2014	447	26,289	26,736
Fall 2015	595	26,089	26,684
Fall 2016	695	25,904	26,599
Fall 2017	862	25,772	26,634
Fall 2018	895	25,198	26,093
Δ Since 2010 (Percent)	+1,093.3	-5.1	-2.0
Δ Since 2010 (Number)	+820	-1,352	-532