A Trend We’re All Too Familiar With

Gen Z High School Graduates Won’t Be Enough to Fulfill Growth Goals

High School Graduate Growth Rate Plateaus Before Decline

Number of High School Graduates and Compound Annual Growth Rates

GROWTH (pre-2013) +1.6% growth rate

STAGNATION (2014-2025) 0.2% growth rate

DECLINE (2026-?) -1.1% growth rate

Source: Western Interstate Commission on Higher Education (WICHE), Knocking at the College Door, 2016; EAB analysis.
Diverging Fortunes by Region

Falling Birthrates from 2007 to Present Projected to Hit HEIs Across the US

Projected Percentage Change in the Population of 18-Year-Olds, 2017–2029

Sources: Grawe, Nathan D., Demographics and the Demand for Higher Education, 2017; EAB analysis.
Demographic Change Overview: Ohio

Change in Number of High School Graduates, 2005-2015 Vs. 2016-2031

Data Source: Western Interstate Commission for Higher Education

-4% to -11%

Hispanic, White, and Black Students as a Share of All High School Graduates, 2016 Vs. 2031

Data Source: Western Interstate Commission for Higher Education

White: 75% to 72%
Black: 13% to 15%
Hispanic: 3% to 8%

Affordability Overview: Ohio

Number of East North Central Region\(^1\) Households By Income Segment (Thousands), 2015

<table>
<thead>
<tr>
<th>Income Segment</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0K-$50K</td>
<td>8,524</td>
</tr>
<tr>
<td>$50K-$100K</td>
<td>5,677</td>
</tr>
<tr>
<td>$100K-$200K</td>
<td>3,821</td>
</tr>
<tr>
<td>$200K+</td>
<td>926</td>
</tr>
</tbody>
</table>

Data Source: U.S. Census

Average Ohio University Net Price as a Percent of Ohio Median Household Income\(^2\)

- 28% Public
- 45% Private

Data Source: IPEDS, U.S. Census

Note: Net price calculated for students receiving financial aid (in-state students only for publics).

Ohio Median Household Income, 2014

$49,644

Data Source: U.S. Census

1) East North Central region includes Illinois, Indiana, Michigan, Ohio, and Wisconsin.
2) Net price data from IPEDS variable “Average net price-students awarded grant or scholarship aid, 2014-15”, in state for public institutions and all students for private institutions.

State Appropriations Overview: Ohio

**Educational Appropriations per Student FTE, Ohio**

*Data Source: State Higher Education Executive Officers Association Data*

<table>
<thead>
<tr>
<th>Year</th>
<th>Appropriations per Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$5,102</td>
</tr>
<tr>
<td>2011</td>
<td>$4,905</td>
</tr>
<tr>
<td>2012</td>
<td>$4,265</td>
</tr>
<tr>
<td>2013</td>
<td>$4,526</td>
</tr>
<tr>
<td>2014</td>
<td>$4,591</td>
</tr>
<tr>
<td>2015</td>
<td>$5,213</td>
</tr>
<tr>
<td>2016</td>
<td>$5,458</td>
</tr>
</tbody>
</table>

**Net Tuition as a Percentage of Total Educational Revenues, Ohio**

*Data Source: State Higher Education Executive Officers Association Data*

<table>
<thead>
<tr>
<th>Year</th>
<th>Net Tuition Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>56%</td>
</tr>
<tr>
<td>2011</td>
<td>57%</td>
</tr>
<tr>
<td>2012</td>
<td>62%</td>
</tr>
<tr>
<td>2013</td>
<td>64%</td>
</tr>
<tr>
<td>2014</td>
<td>63%</td>
</tr>
<tr>
<td>2015</td>
<td>60%</td>
</tr>
<tr>
<td>2016</td>
<td>59%</td>
</tr>
</tbody>
</table>

ENROLLMENT STRATEGY

APPLICATION ADMISSION MATRICULATION +

RETENTION PERSISTENCE COMPLETION +

LEARNING PLAN CAREER LIFELONGLearning +

P’S PRIDE/ADVOCATE ALUMNUS APPRECIATIVE GIFTING
ENROLLMENT STRATEGY

2017 Cohort = 2,142 students

- 51 (2%) students withdraw during first term
- 181 (8%) additional students depart
  - 43% in good standing (78)
- 298 (14%) additional students depart
  - 57% in good standing (170)
- 644 (30%) depart
  - ~50.9% in good standing (328)

Spring 2017:
- 51 (2%) students withdraw during first term

Fall 2017:
- 181 (8%) additional students depart
  - 43% in good standing (78)

Spring 2018:
- 298 (14%) additional students depart
  - 57% in good standing (170)

Fall 2018:
- 1,612 students continue = 75%
  - 93% in good standing
  - -11% -22%

Spring 2019:
- 1,498 students continue = 70%
  - 95% in good standing
  - -5% -27%
ENROLLMENT STRATEGY

YSU THREE-YEAR ENROLLMENT CURVE BY ACT COMPOSITE SCORE
ENROLLMENT STRATEGY

First-Year Retention by Population

- Admitted with Restrictions
  - Fall 2015 cohort: 51%
  - Fall 2016 cohort: 56%
  - Fall 2017 cohort: 57%

- Regular
  - Fall 2015 cohort: 76%
  - Fall 2016 cohort: 76%
  - Fall 2017 cohort: 74%

- Honors
  - Fall 2015 cohort: 94%
  - Fall 2016 cohort: 91%
  - Fall 2017 cohort (as of 8/29/18): 91%
Ensure curricula, systems, and practices are in place to increase persistence and steady progress to graduation.

Ensure faculty, staff, practices, and policies make students feel they belong and are valued.

Continually assure students of the value of a YSU degree and the return on investment it will deliver.

Ensure faculty, staff, practices, and policies demonstrate that YSU cares about students and their success.