



When Everyone Plans to Grow

*Examining Enrollment Goals and Market Capacity in
WICHE States (minus California)*

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Framing Comparison

What do institutions say about future enrollment?	What does demography say?	Is the math possible?
Systematic analysis of enrollment plans	WICHE <i>Knocking at the College Door</i> , 11 th edition, HS graduate projections through 2041 Online enrollment patterns (from Gray DI)	Comparing institutional enrollment goals against projected market capacity and current market share

By the Numbers

39



Public Institutions

13

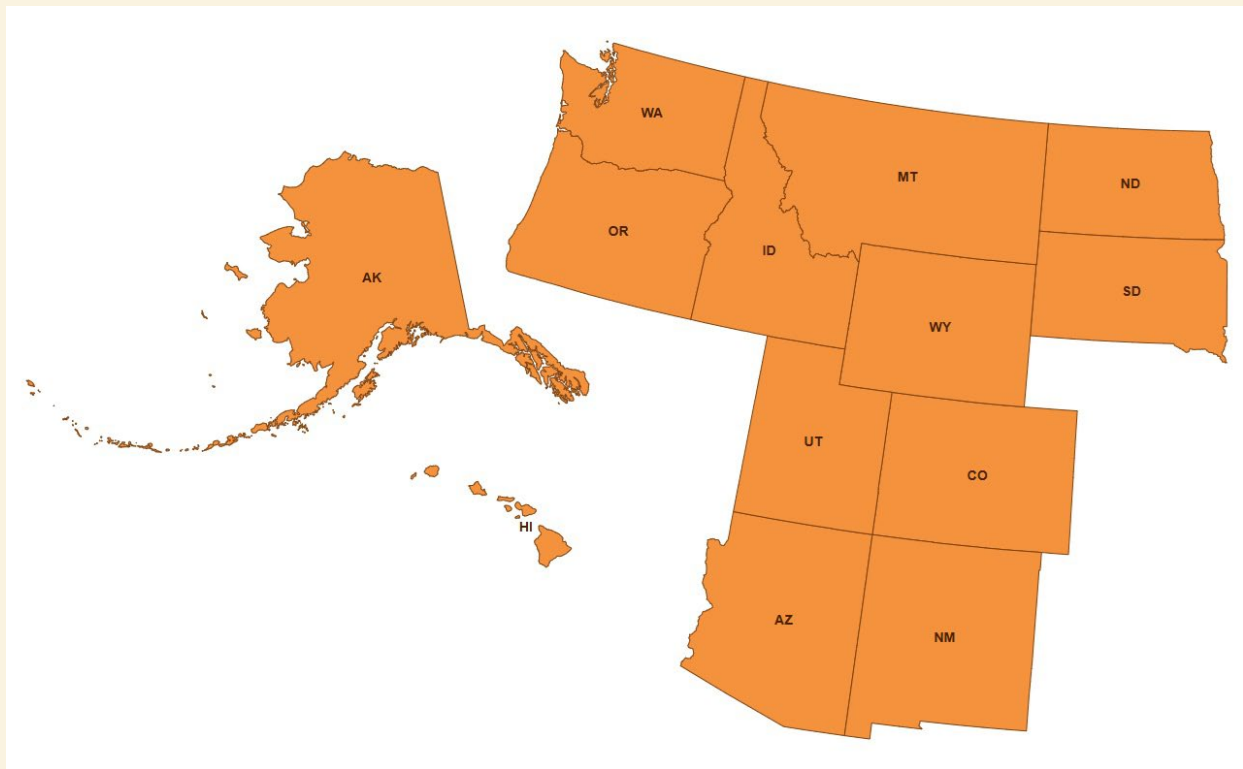


WICHE States

80+



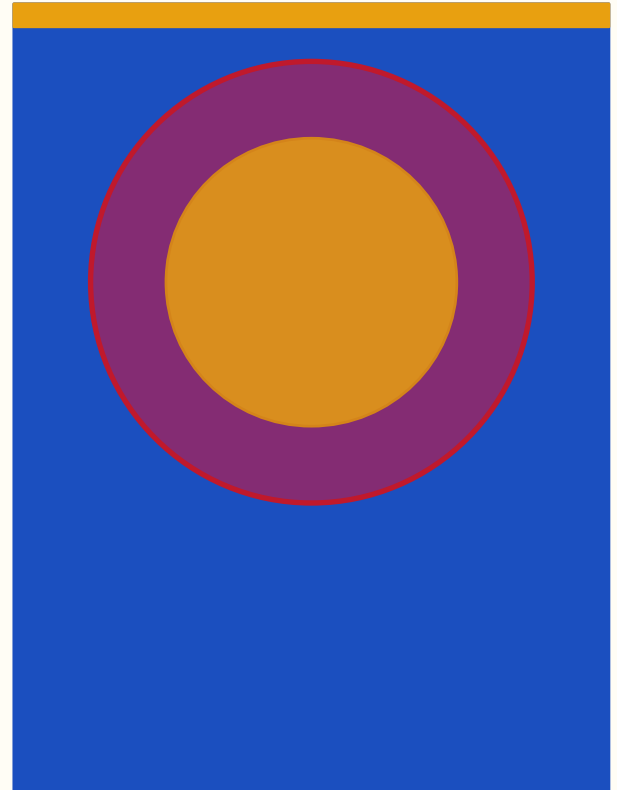
Documents



The States

Coding

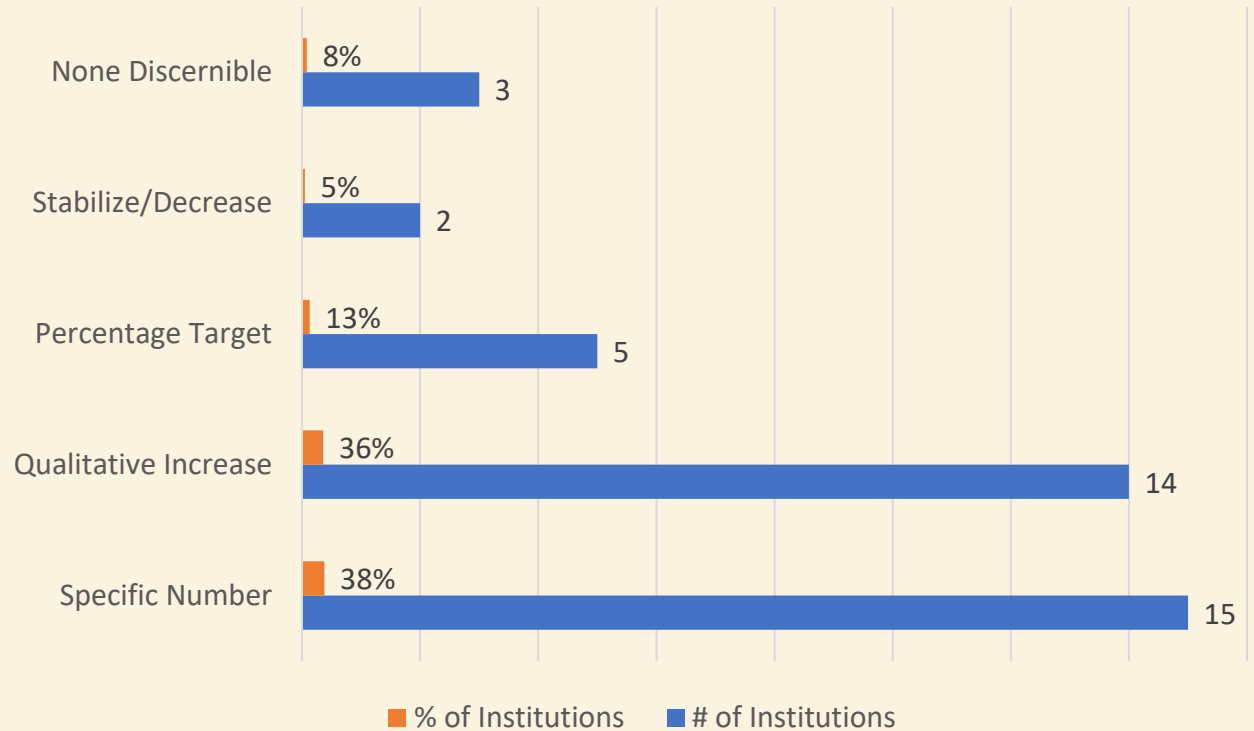
- Goal type (specific number, % target, qualitative increase, stabilize/decrease, none)
- Any specific target & timeline
- Metric (FTE, headcount, total vs. new, etc.)
- Strategies/target groups (transfer, adult learners, out-of-state, online, international, graduate, new programs, dual enrollment, new programs, other)



87%
plan to grow

...and no, I'm not naming
names

Goal Types





Example
Goals

“

- 32,000 total by Fall 2025
- meet or surpass 800 [FTFT] students each year
- 3,000 total FTE by 2028
- 2,311 new students (first-time + transfer) by 2030
- 50,000 credentials by 2030
- Lives impacted

Reality Check

State	2023 HS Grads	2041 Projection	Change
AK	8,328	7,170	-13.9%
AZ	82,942	81,428	-1.8%
CO	64,096	56,457	-11.9%
HI	14,290	9,582	-32.9%
ID	22,827	25,907	+13.5%
MT	9,980	10,520	+5.4%
ND	7,706	8,690	+12.8%
NM	21,539	17,104	-20.6%
OR	41,203	33,272	-19.2%

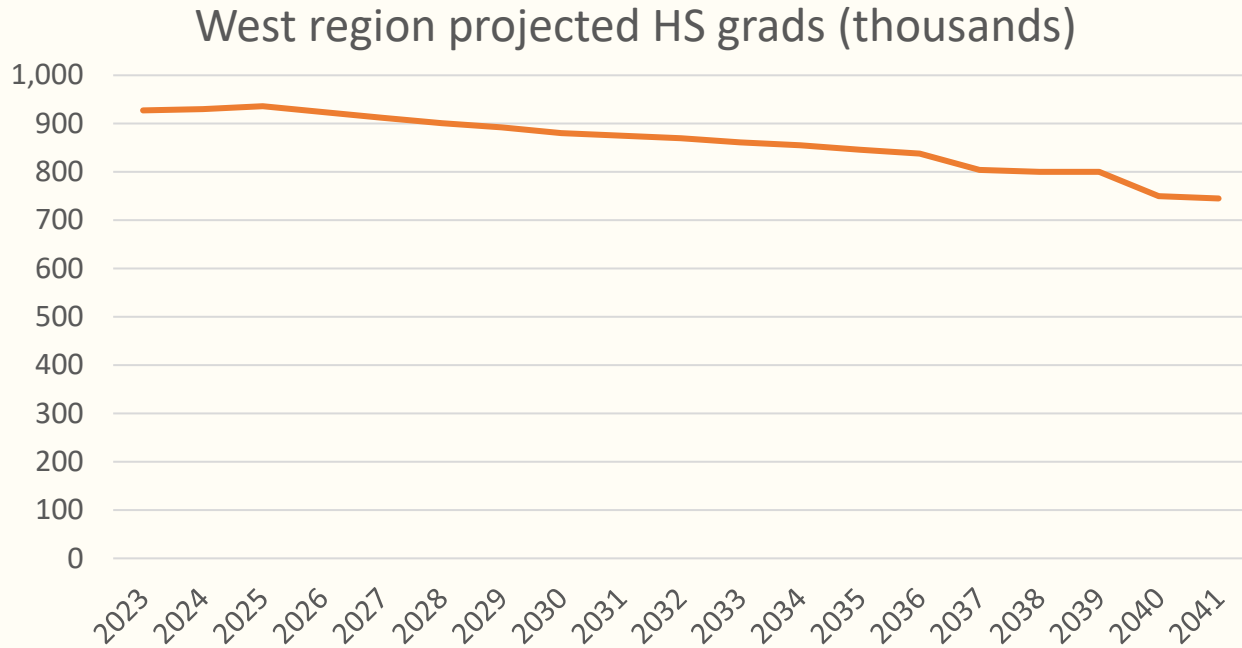
Reality Check, continued

State	2023 HS Grads	2041 Projection	Change
SD	9,705	10,357	+6.7%
UT	47,592	44,908	-5.6%
WA	80,405	73,935	-8.0%
WY	6,137	4,709	-23.3%

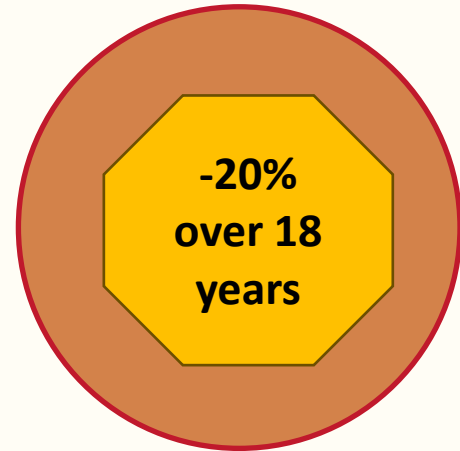
Case Study: New Mexico

- Projected 20.6% decrease in HS grads
- 3 institutions in the study
 - How many want to grow?

It's a Slope, Not a Cliff



Makes it harder to respond, not easier



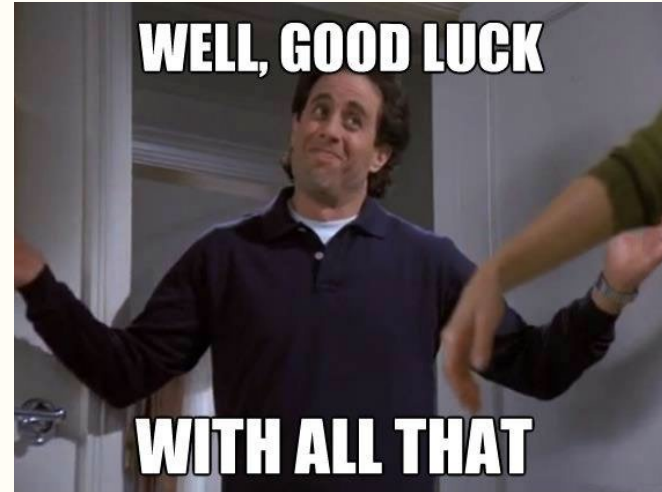


One-size-fits-all planning

- Most institutions in declining-pool states plan to grow
- Most institutions in growing-pool states *also* plan to grow
- Often, they plan to grow by stealing from each other...
 - Ex: One plan targets students in AK & HI, which have large projected decreases *and* in-state institutions that want to grow

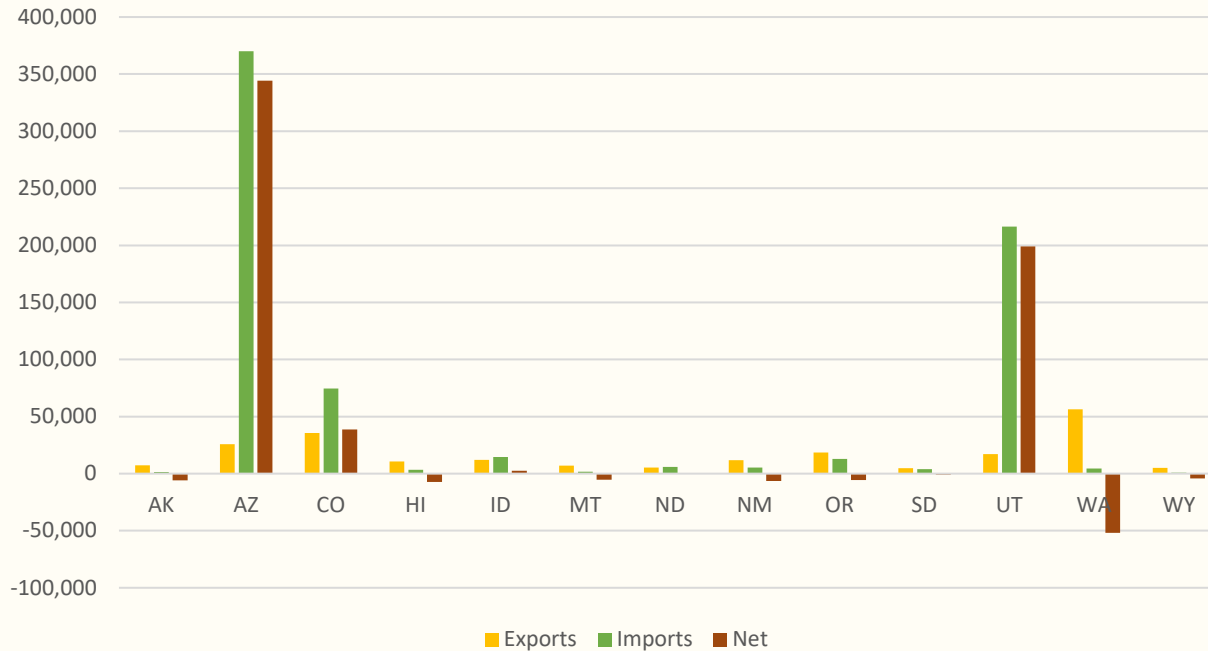
Ok, But There Are Other Options...

- Increase market share
 - Typical pattern: would have to increase market share by 2.5-3x...while trend has been a decline
- Many institutions counted on international students...



Then We'll Get More Online Students!

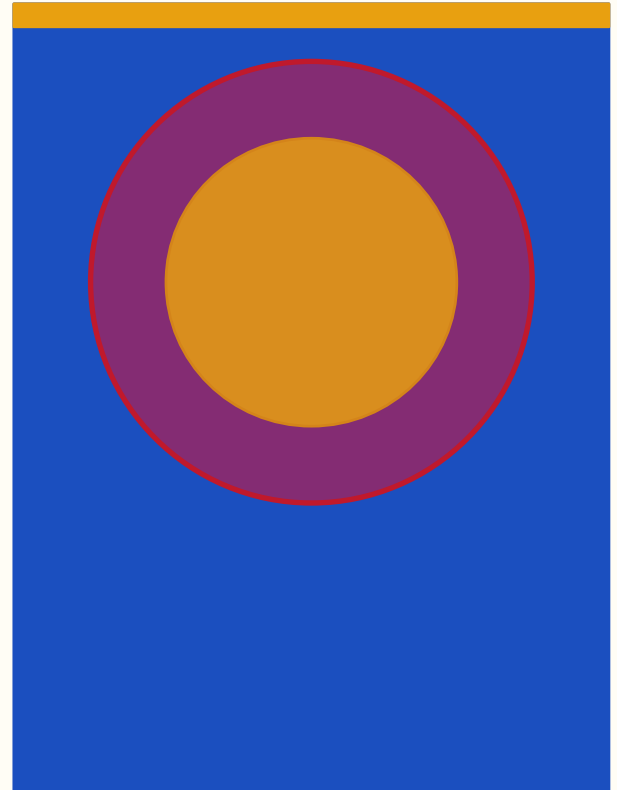
Online Student Exports & Imports by State



Most states are net exporters of online students

The Outliers

- CSU Pueblo
 - Current enrollment = ~4,800
 - Target = stabilize at 4,000 (17% reduction)
- University of Colorado Colorado Springs
 - Plan calls for flat enrollment or slight decline (-1%) by 2026 without major interventions
 - Explicitly documents enrollment headwinds





Some Conclusions

What I *can* say:

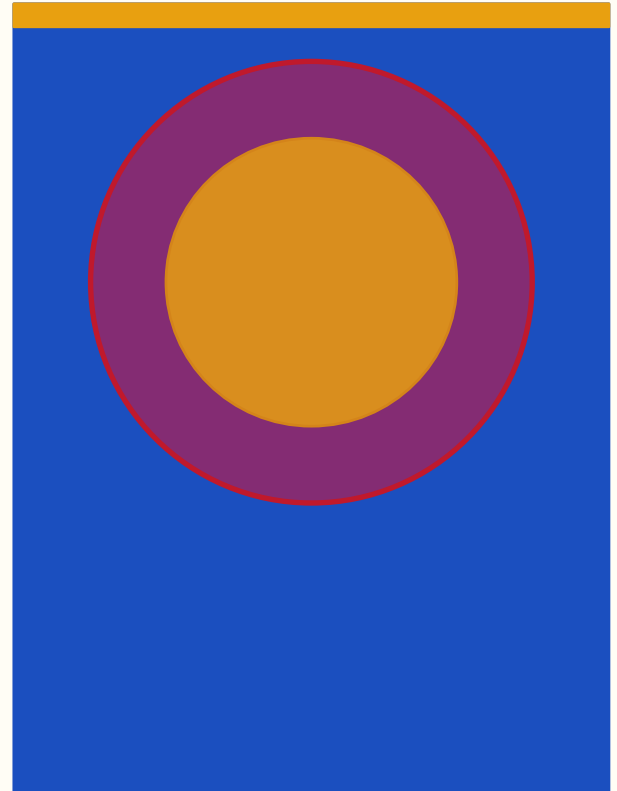
- Growth aspirations are near-universal
- Demographic trends are real and documented
- Most institutions don't acknowledge the tension

What I *can't* say:

- That any institution's plan is wrong (particularly *yours*)
- That an institution's strategies won't work

“Demography Need Not be Destiny”

- From *Knocking at the College Door*:
 - To offset a 10% HS grad decline, college matriculation must increase from 61% to ~68%
 - This is achievable – with deliberate, explicit effort



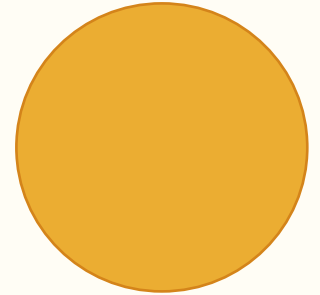


**Discussion
Time**

- Break into small groups (4-6)
 - Pick someone to note key points/ideas from your discussion
 - Identify 1 point you'd like to share with the larger group

Methodological Challenges

- 1) Document type and availability varies (strategic plan, SEM plan, System/Regents strategic plan, KPI reporting dashboard) – Which takes precedence? What if they conflict?
- 2) Metric incomparability (total headcount, sub-population targets, new FTFT, degree-seeking FTE, etc.)
- 3) Market share calculations most valid for analyzing in-state HS student pipeline



References & Acknowledgements

- WICHE, *Knocking at the College Door: Projections of High School Graduates*, 11th edition (2024)
- IPEDS Enrollment Data for Fall 2024
- Gray DI Interactive Online Student Migration Map (2026), <https://www.graydi.us/online-student-retention>
- Institutional plans, dashboards, progress reports, etc.

Thank you to Colleen Falkenstern at WICHE for her assistance.



THANK YOU

Questions?

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