

May 20, 2026

15 minutes after the adjournment of the Committee on Audit, Risk Management, and Compliance

Via Videoconference and PBS North Carolina Livestream

UNC System Office

223 S. West Street, Board Room (17th Floor)

Raleigh, North Carolina

AGENDA

OPEN SESSION

- A-1. Approval of the Minutes of February 25, 2026Joel Ford
- A-2. Advancing a Healthy Achievement Culture Across the UNC System.....Shun Robertson
- A-3. The Next Phase of *Higher Expectations*.....Shun Robertson
- A-4. North Carolina's Shifting Demographics.....Nathan Dollar
- A-5. Adjourn

DRAFT MINUTES

February 25, 2026, at 2 p.m.
Via Videoconference and PBS North Carolina Livestream
UNC System Office
223 S. West Street, Board Room
Raleigh, North Carolina

This meeting of the Committee on Strategic Initiatives was presided over by Chair Joel Ford. The following committee members, constituting a quorum, were also present in person or by phone: John A. Fraley, Pearl Burris-Floyd, Swadesh Chatterjee, Gene Davis, and Javier Limon.

Chancellors participating were Heather Norris, Franklin Gilliam, and Aswani Volety.

Staff members present included Shun Robertson and others from the UNC System Office.

1. Call to Order and Approval of Open Session Minutes (Item A-1)

The chair called the meeting to order at 2:03 p.m. on Wednesday, February 25, 2026. The open session minutes from the January 28, 2026, meeting were approved by unanimous consent.

2. Project Kitty Hawk Annual Update (Item A-2)

Dr. Andrew Kelly, president and chief executive officer of Project Kitty Hawk, provided an update on the program's progress over the last year. Dr. Kelly stated that Project Kitty Hawk is continuing its efforts to serve its target demographic, adult learners who work full time. The presentation highlighted partner institutions, Appalachian State University, North Carolina Agricultural and Technical State University, North Carolina Central University, and East Carolina University, with Winston-Salem State University being noted as an oncoming partner. Dr. Kelly noted increases in persistence rates and student satisfaction. Additionally, the FASTER initiative was emphasized as it allows for greater administrative efficiency surrounding registration and credit evaluation. Following Dr. Kelly, Katie Hagan, vice president of growth and analytics, provided the fiscal update for Project Kitty Hawk. Ms. Hagan discussed how funds are being expended through programming, digital platforms, and administrative uses. Program projections for the next three years were discussed with the intention of tracking graduates as they move into the workforce.

3. Adjourn (A-3)

There being no further business and without objection, the meeting adjourned at 3 p.m.

Swadesh Chatterjee, Secretary

AGENDA ITEM

A-2. Advancing a Healthy Achievement Culture Across the UNC System Shun Robertson

Situation: The Committee on Strategic Initiatives will hear a summary of this year’s discussions on student access, high-achieving student recruitment, and student well-being. The presentation will include a framework for a healthy achievement culture across the UNC System and outline priorities to guide future System-level action.

Background: Striving for success can provide purpose and motivation; however, excessive pressure and perfectionism can negatively impact student mental health. Research shows that factors such as family expectations, academic competition, and social media-driven comparison increasingly shape the student experience from childhood through college. When left unaddressed, these pressures can produce unintended consequences, including disengagement and underachievement.

Over the last year, the committee looked at how achievement culture starts as early as middle school and how it continues to grow during a student’s college experience. We examined how students put undue pressure on themselves to meet unrealistic expectations of achievement and considered the college-going pathways available to students. Additionally, the committee explored strategies to support mentally healthy habits for students while they are enrolled at our institutions.

Assessment: The System has made meaningful progress in expanding access to higher education and supporting student success, but key challenges remain. Efforts to support potential and enrolled students are often fragmented, while increasing competition — particularly from out-of-state institutions — adds urgency to strengthening the System’s approach. There is an opportunity to align existing efforts around a cohesive vision of a healthy achievement culture, defined by increasing access to our institutions, rigorous academic expectations, and structured support for student success and well-being.

Action: This item is for information only.



ADVANCING A HEALTHY ACHIEVEMENT CULTURE

Committee on Strategic Initiatives
May 20, 2026

What is Achievement Culture?

A societal mindset where success is primarily defined and measured by tangible accomplishments, productivity, and external validation. It emphasizes constant striving for goals, **often prioritizing career milestones, grades, and accolades over well-being and personal growth**. This culture can lead to unrealistic expectations, perfectionism, and a fear of failure, potentially impacting mental and emotional health.



Home > Monitor on Psychology > 2024 > October >

Perfectionism and the high-stakes culture of success: The hidden toll on kids and parents

Young people are facing mounting pressure to succeed, and it's causing mental health problems. But there is a solution: mattering



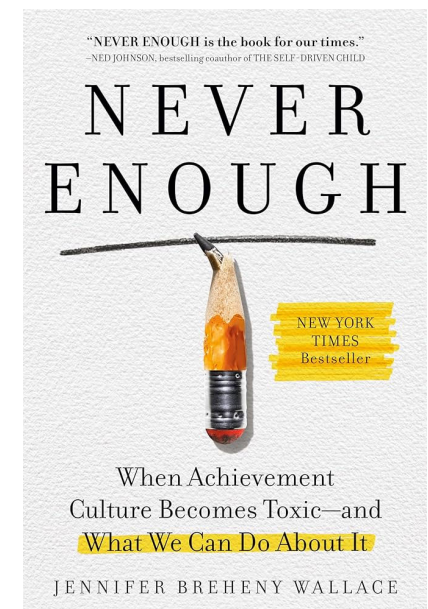
Latest Magazine Topics Podcasts Store Data & Visuals

Personal Strategy And Style

The Perils of an Achievement Culture

by Ania W. Masinter

From the Magazine (November–December 2023)



What We've Learned

1. Access is expanding
2. We compete for high-achieving students
3. Developing a healthy achievement culture must be intentional



A Healthy Achievement Culture Combines:

Expanding **access** to postsecondary opportunities

Rigorous academic expectations

Structured **support** for student success and well-being

KEY CONCERN



The college admissions process is too stressful!
Should I even apply to college? And if I get in,
can I afford to go?

NC College Connect

- Offers North Carolina public high school students with a weighted GPA of 2.8 and above direct admission to select participating colleges and universities
- Phase II of the program included full education sector participation including 11 UNC System institutions
- Over 88,000 forms submitted
- 34% participation (70,130 total eligible students)



Dear [NAME],

Congratulations! We are pleased to inform you that you have been offered **direct admission** to the below UNC System universities, North Carolina independent colleges and universities, and North Carolina community colleges for the **2026–2027** academic year through the NC College Connect program.

• Appalachian State University	• Lees-McRae College	• Shaw University
• Barton College	• Lenoir–Rhyne University*	• University of Mount Olive
• Belmont Abbey College*	• Livingstone College	• University of North Carolina at Asheville
• Bennett College*	• Louisburg College	• University of North Carolina at Charlotte
• Brevard College	• Mars Hill University*	• University of North Carolina at Greensboro
• Campbell University	• Meredith College*	• University of North Carolina at Pembroke
• Catawba College	• Methodist University	• Warren Wilson College
• Chowan University	• Mid-Atlantic Christian University	• Western Carolina University
• East Carolina University	• Montreat College	• William Peace University
• Elizabeth City State University	• North Carolina Central University	• Wingate University*
• Fayetteville State University	• North Carolina Wesleyan University	• Winston-Salem State University
• Gardner–Webb University*	• Pfeiffer University	• [Community College]
• Greensboro College	• Saint Augustine's University	
• Guilford College	• Salem College*	
• Johnson C. Smith University*		

Ready to meet your moment? Since you currently meet the NC College Connect requirements and your weighted GPA is 2.8 or higher**, you are now eligible for admission to select North Carolina colleges and universities—without a traditional application, essay, or recommendation letter. We applaud your hard work and dedication during high school, and now we encourage you to reap the benefits.



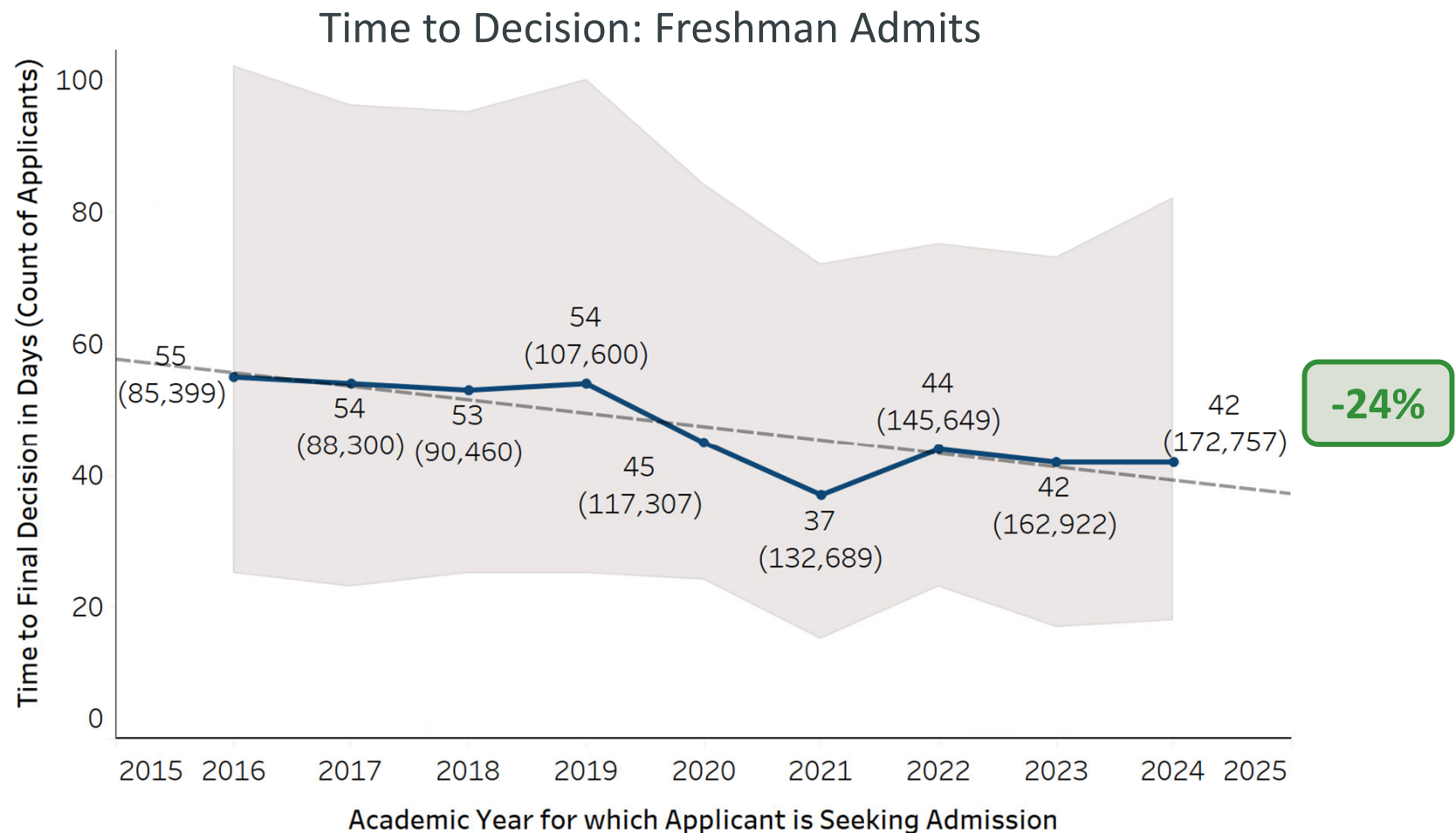



* These colleges and universities have additional requirements for a student to qualify for direct admission. These requirements will be noted in each institution's NC College Connect form.

** All college and university admission is conditional, based on your final high school transcript, GPA, and other graduation and NC College Connect requirements, which can be found on the FAQ page at nccollegeconnect.com. Meeting NC College Connect requirements means meeting course requirements and any additional criteria required by individual institutions, as well as responding to safety questions to show a student meets the institutions' safety requirements. You can access NC College Connect requirements via the QR code on the next page.

Admissions Decision Timeline

Time to decision for **admitted freshman** has decreased by **13 days** over the last 9 years



Next NC Scholarship

- Consolidated existing state grant aid programs and made it easier for prospective students to understand what to expect
- For the 2024-25 academic year
 - \$166M total aid
 - 76K recipients
 - \$2,189 average award



**Know what you're getting.
Know where you're going.**

Financial Aid Award Letter Transparency

SAMPLE UNIVERSITY RESOURCES DEPENDENT STUDENT AID OFFER EXAMPLE

Student Name
Student Address
Student City, State, Zip
Student ID

Estimated Annual Cost of Attendance (COA) 2023-2024 Award Year

Costs Payable to the University		Other Estimated Costs	
Tuition	\$15,915	Books & Supplies	\$820
Activity & Tech Fee	\$1,615	Transportation	\$1,735
Housing	\$6,510	Miscellaneous Expenses	\$921
Meals	\$4,000		
Total Costs	\$28,040	Total Costs	\$3,476
Total Estimated Cost of Attendance		\$31,516	

Scholarships and Grants (refer to renewal eligibility on your student portal)

Aid Type	Fall 2023	Spring 2024	Annual
Federal Pell Grant	\$3,248	\$3,247	\$6,495
Federal Supplemental Educational Opportunity Grant	\$300	\$300	\$600
State Grant	\$450	\$450	\$900
Merit Based Scholarship	\$5,500	\$5,500	\$11,000
Institutional Scholarship	\$1,500	\$1,500	\$3,000
Total Scholarships & Grants	\$10,998	\$10,997	\$21,995

Your estimated net cost (cost of attendance less scholarships and grants):
This is based on your zero (0) Expected Family Contribution (EFC) and
anticipated full-time (12+ credits, preferably 15 credits) enrollment.

\$9,521

Loans & Work-Study (Self-Help Aid)

Aid Type	Fall 2022	Spring 2023	Annual
Federal Work-Study*	\$1,500	\$1,500	\$3,000
Federal Direct Subsidized Loan**	\$1,750	\$1,750	\$3,500
Federal Direct Unsubsidized Loan**	\$1,000	\$1,000	\$2,000
Total Aid Offered	\$4,250	\$4,250	\$8,500

*Federal work-study funds are contingent upon finding employment. Earnings are paid out bi-weekly.

**Federal loans are funds that can be applied toward your cost of attendance and must be repaid. You must accept or decline your loan eligibility by logging into your student portal.

Estimated outstanding costs not covered by scholarships,
grants, loans and work-study:

\$1,021

Other Financing Options

Outside Scholarships
Scholarships are available from many sources including high schools, places of worship, civic groups, and parents' employers. We recommend that you check with your high school guidance counselor, the reference section of your library, and organizations in your hometown. Receipt of outside scholarships could affect your eligibility for certain aid types.

Payment Plan
Sample University offers a 3-Pay tuition payment plan for those students who need to spread their tuition and fees across the semester.

Private Student Loan
Contingent upon application approval from a bank, credit union, non-profit or state-based education finance organizations or online lender.

Federal Parent PLUS Loan
Contingent upon parent application approval. Parent must not have adverse credit history. Must be repaid by parent.

For more information on these additional funding options please visit:
www.financialaid.edu

Next Steps

- Accept or Decline all aid offered in the finances section of your student portal.
- Provide required documents for verification if applicable.
- Check important financial aid deadlines listed on your student portal.

Sample University is committed to helping you navigate the financial aid process. Please contact our helpful, experienced staff in the Office of Student Financial Aid and Scholarships for help understanding your Financial Aid Offer.

We look forward to serving you at Sample University and wish you the best in your academic endeavors. Please visit www.sample.edu/admitted for other important next steps.

A BILL

To establish requirements for financial aid offers made by institutions of higher education, and for other purposes.

1 *Be it enacted by the Senate and House of Representa-*

2 *tives of the United States of America in Congress assembled,*

3 **SECTION 1. SHORT TITLE.**

4 This Act may be cited as the “Improving Financial

5 Aid Offers for Students Act”.

6 **SEC. 2. FINANCIAL AID OFFER REQUIREMENTS.**

7 Section 484 of the Higher Education Opportunity

8 Act (20 U.S.C. 1092 note) is amended to read as follows:



**COLLEGE COST
TRANSPARENCY INITIATIVE™**

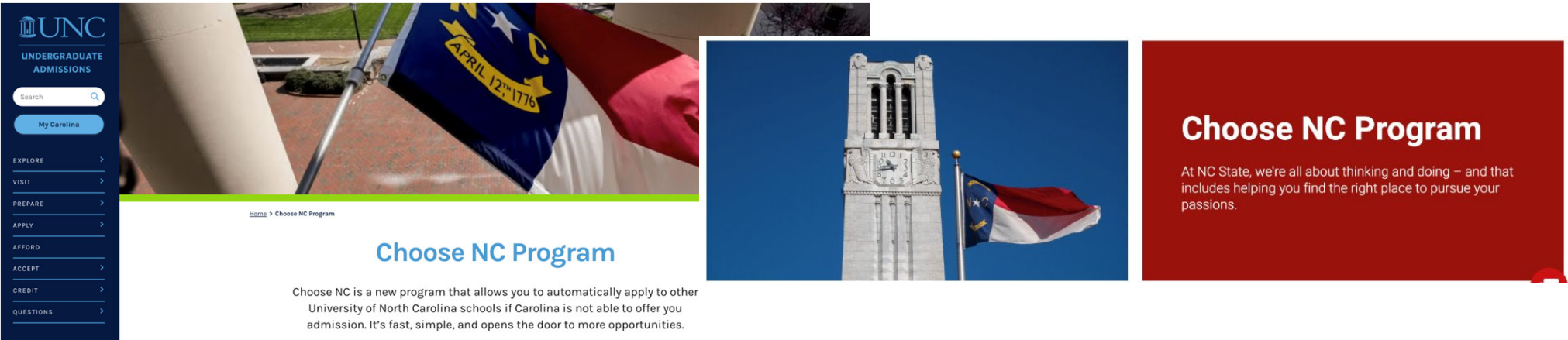
KEY CONCERN



What if I don't get in?

Choose NC

First-year applicants who opt in will have their application automatically redirected to other UNC System institutions they express interest in.



The screenshot shows the UNC Undergraduate Admissions website. On the left is a dark blue navigation menu with the UNC logo and links for 'EXPLORE', 'VISIT', 'PREPARE', 'APPLY', 'AFFORD', 'ACCEPT', 'CREDIT', and 'QUESTIONS'. The main content area has a header image of the UNC flag and a section titled 'Choose NC Program'. Below the title, it states: 'Choose NC is a new program that allows you to automatically apply to other University of North Carolina schools if Carolina is not able to offer you admission. It's fast, simple, and opens the door to more opportunities.'

Choose NC Program

At NC State, we're all about thinking and doing – and that includes helping you find the right place to pursue your passions.

In fall 2025, the first year of the program at UNC-CH, **400 students**, nearly 10% of in-state applicants who opted into the program, **enrolled** at a Choose NC institution.

For the fall 2026 application cycle, over **15,000 applications** were **redirected** from both UNC-CH and NC State through the Choose NC program. We will see where those students land this upcoming fall.

First-Year Spring Admits

- Several UNC System institutions offer **first-time fall applicants deferred spring admission**.
- The UNC System enrolled **1,308 first-year, spring-starters in the 2024-25 academic year**.
 - 75% In-state
 - 41% Pell-eligible
- First-year, fall semester study abroad opportunities:
 - UNC-Chapel Hill: Carolina Global Launch (163 students in Fall 2024)
 - NC State: Prague Connect (49 students in Fall 2024)
 - UNC Wilmington: FYSA in the UK (4 students in Fall 2024)



[Home](#) / [Spring Admission](#)

We're excited to have you join the Appalachian community! We know that receiving a spring admission offer may come with questions—here's everything you need to stay on track and get ready.

Connect with Your Admissions Counselor

Have questions? We're here to help. [Schedule a one-on-one appointment](#) with your admissions counselor to get personalized guidance and support.

Important Dates to Remember

- Accept your spring offer by **September 5** through your [MyMountaineer Portal](#).
- Confirm your enrollment by **October 1** to secure your spot in the spring class.



FIRST-YEAR SPRING ADMITS

[Home](#) / [Academics](#) / [Advising](#) / [Center for Academic Advising](#) / [Student Populations](#) / [First-Year Spring Admits](#)

First-Year Spring Admits

[Courses](#)
[Placement](#)
[Questions](#)
[Steps](#)
[CAA Advising](#)

Congratulations on being admitted to UNCW! We are excited for you to join other FYSAs in January on campus. We look forward to meeting you at orientation and working with you throughout your next few semesters.

KEY CONCERN



I've already taken some college-level courses.
Will I have to retake them?

GPA Honors Weighting Task Force

- **36%** of all North Carolina high school graduates earned college credit through dual enrollment opportunities in their high school years.
- Students who graduated in AY2024-25 enrolled in a total of **279,808** college courses over the course of their high school years (an average of **four** college courses per graduate).

Postsecondary institutions in North Carolina are responsible for determining how college-level, Advanced Placement, and honors courses are weighted in high school GPA calculations.

The GPA Honors Weighting Task Force will review current data and practices and develop recommendations for consideration by the State Board of Community Colleges and the UNC Board of Governors.

Policies and Programs that Promote Credit Transfer

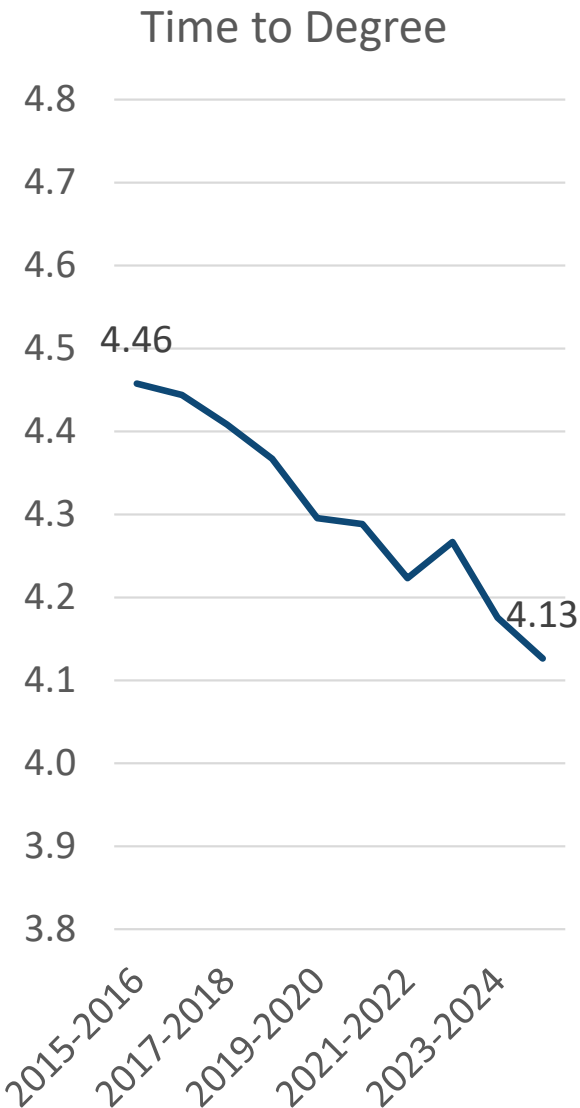
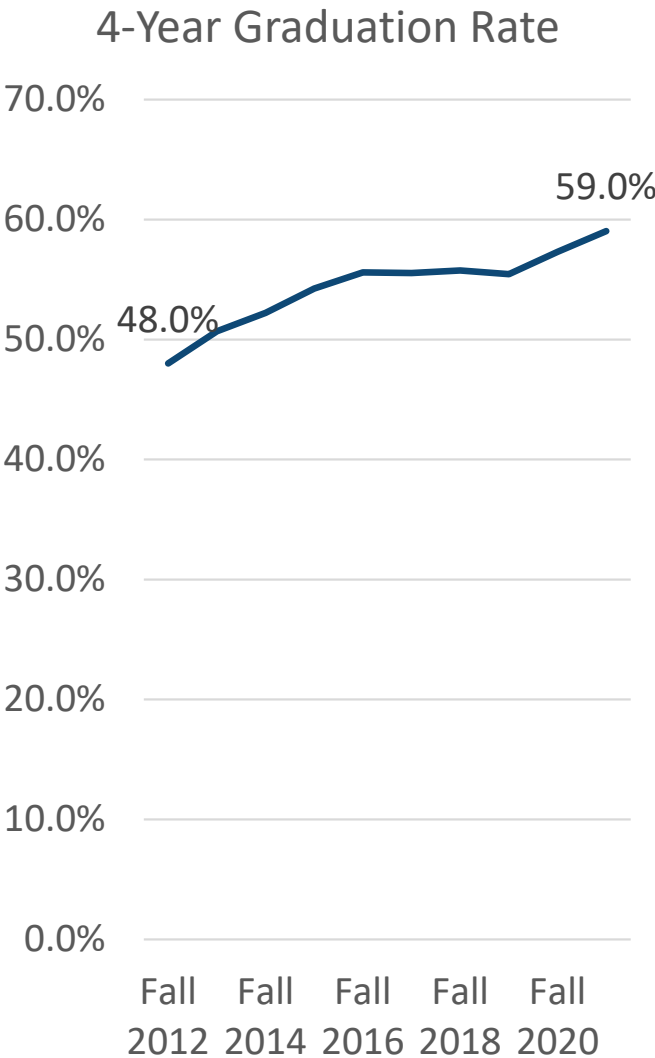
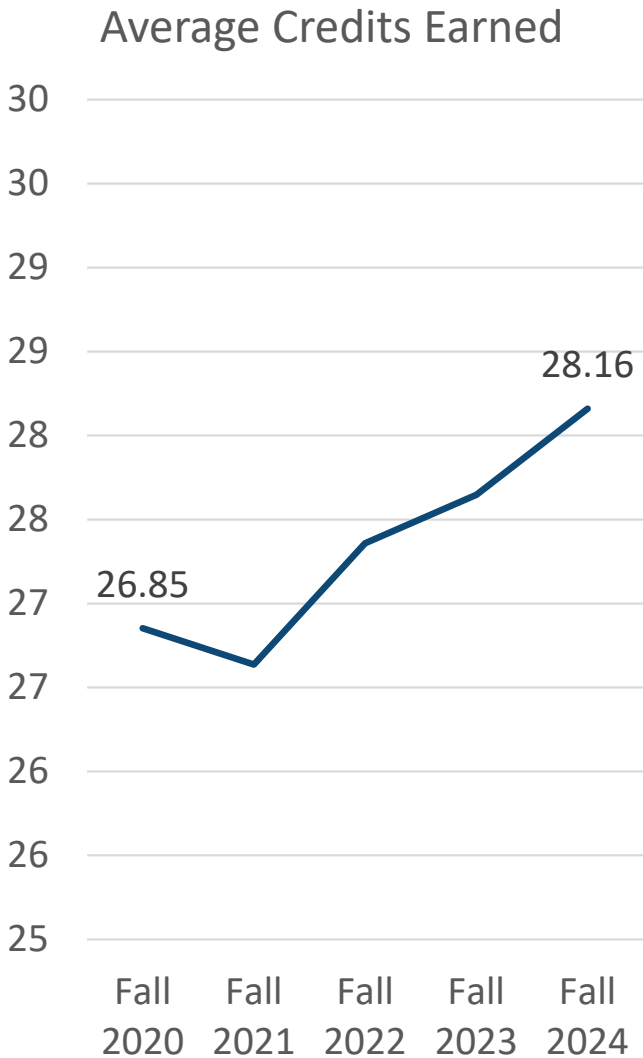
Policies/Programs	North Carolina	
Guaranteed Transfer of Associate's Degree		Comprehensive Articulation Agreement (CAA) guarantees transfer of AA/AS earned at NCCCS to a UNC (and junior standing).
Reverse Transfer		Program that awards associate's degrees to students who transfer prior to completing their AA/AS but earn sufficient credit to qualify for one <i>after</i> transferring.
Common Course Numbering		The common numbering system ensures transferability between lower level, undergraduate courses between UNC System institutions.
Resources for Seamless Transfer		Transfer Guides help students identify pathways and specific NC community college courses that lead to associate degree completion and admission into a major at a UNC System university.
Guaranteed Admissions for Transfer		Several System universities offer guaranteed admission to students who complete an Associate in Arts (AA) or Associate in Science (AS) degree in a list of specific majors at a NC Community College.

KEY CONCERN



I've heard that many students don't finish college for 5 or 6 years. That is a long time when I could be working and making money.

Focus on Key Metrics is Driving Improvement in On-Time Completion



Strengthen Messaging to Students

Study: UNC System graduates reap \$500,000 in median lifetime return on investment

SHARE:   

[Press Release](#)

November 14, 2023

Detailed analysis shows positive return on investment for 94% of undergraduate degree programs; nearly 90% of low-income students who graduate experience upward economic mobility

RALEIGH, N.C. – Degrees from North Carolina's public universities overwhelmingly pay off in future earnings for graduates, according to a [comprehensive study of academic degree programs](#) across the UNC System.



University of North Carolina at
Chapel Hill ranked No. 3 best value
public school by The
Princeton Review

NEW RANKINGS UNDERSCORE A&T'S IMPACT ON AFFORDABILITY, CAREER PREPARATION

By Todd Simmons / 09/26/2024



Newly released rankings from Forbes magazine show that graduates of North Carolina A&T earn more than those of any other public historically Black university in America and that they rank third among all University of North Carolina campuses included in Forbes' "Best Colleges 2024."

KEY CONCERN



I'm feeling overwhelmed. I need help.

Mental Health First Aid Training

MENTAL HEALTH FIRST AID PARTNERSHIPS ACROSS THE UNC SYSTEM

MHFA curriculums teach individuals how to identify, understand, and respond to signs of mental health and substance use challenges among adults and adolescents.

UNC System
NCCCS
NCICU

Adult MHFA

- Designed for ages 18+
- Higher ed and secondary faculty and staff, college students

NC Teaching Fellows
NC Principal Fellows
Education Prep Programs
Lab Schools

Youth MHFA

- Designed for adults who interact with youths aged 12-18.
- Faculty, staff, parents

UNC School of the Arts
NCSSM Durham
NCSSM Morganton
Cooperative Innovative
High Schools

Teen MHFA

- Designed to be delivered to students in grades 9-12



The UNC System will be a JED System

The Jed Foundation

- The JED Campus Program is a nationally recognized framework that helps colleges and universities strengthen their approach to student mental health.
- Institutions complete a structured assessment and a four-year strategic planning process to enhance prevention, crisis response, and systems of care.
- Institutions benchmark progress and implement data-informed strategies that improve student well-being, retention, and overall success, directly supporting the UNC System's strategic priorities.

Systemwide Achievement Strategy

ACCESS

Strategy 1: 
Expand the Pipeline

Strategy 2:
Provide Transparent
Financial Aid Award
Letters

RIGOR

Strategy 3:
Ensure Students Get
Appropriate Credit

Strategy 4: 
Incentivize 30 Credit
Hour Course Loads

SUPPORT

Strategy 5:
Provide Access to
Mental Health
Resources

Strategy 6: 
Continue MHFA Training
and Mental Health
Resource Planning



Thank You

Questions?

AGENDA ITEM

A-3. The Next Phase of *Higher Expectations* Shun Robertson

Situation: The Committee on Strategic Initiatives will begin the next phase of the UNC System Strategic Plan, *Higher Expectations*. The presentation will outline the scope and approach for updating the existing strategic plan, with an emphasis on building upon prior progress while aligning with current and emerging priorities across the System.

Background: The UNC System originally launched *Higher Expectations* as its strategic plan to guide systemwide priorities, institutional performance, and student success outcomes in 2017. Since its adoption, the plan has driven measurable progress in key areas, including access, affordability, and student completion.

As the higher education landscape continues to evolve, including shifts in enrollment trends, workforce demands, and emerging technologies, the need has emerged to refresh and renew the strategic plan. This update is intended to sustain momentum while responding to new challenges and opportunities.

Assessment: The UNC System is well positioned to build on the foundation established under *Higher Expectations*. Institutions have made significant strides, but the environment in which they operate has changed, requiring a forward-looking approach. The refresh of *Higher Expectations* represents an opportunity to align the System's strategy with North Carolina's evolving economic and workforce needs

Action: This item is for information only.



THE NEXT PHASE OF HIGHER EXPECTATIONS

Committee on Strategic Initiatives

May 20, 2026

Where We Are: Current Strategic Plan



	Metric	Met Year 3 Goal	Improvement from Baseline
ACCESS	Adult Learner Enrollment		✓
	Military Affiliated Enrollment	✓	✓
	Underserved County Enrollment		
STUDENT SUCCESS	4-Year Graduation Rate		✓
	Undergraduate Degree Efficiency	✓	✓
	Graduate Degree Efficiency	✓	✓
AFFORDABILITY AND EFFICIENCY	First-Time Student Debt	✓	✓
	Transfer Student Debt	✓	✓
	Education and Related Expenses per Degree		
ECONOMIC IMPACT	STEM and Health Sciences Degrees		✓
	Graduates working in K12 Education in NC	✓	✓
	Research Productivity	✓	✓

Where We're Going: Updated Strategic Plan



May 2026	Formally launch strategic planning process
May 2026-May 2027	Share data, best practices, and recommendations with the Board of Governors
August-December 2026	Meet with System affinity groups to solicit feedback on metrics and ideas for new metrics
January 2027	Survey faculty, staff, students, and community members
February 2027-April 2027	Share community input and next steps with Board of Governors
April 2027	Refine metrics, formalize goals using most recent data
May 2027	Present draft metrics to Board of Governors for final feedback
May 2027	Present final goals to the Board of Governors for approval

Thank You

Questions?

AGENDA ITEM

A-4. North Carolina's Shifting Demographics Nathan Dollar, Carolina Demography

Situation: The committee will hear an overview by Dr. Nathan Dollar, Director of Carolina Demography at the Carolina Population Center, who will discuss the major demographic changes in North Carolina in recent decades. The session will focus on the factors shaping these demographic changes (births, deaths, and migration) and their implications moving forward toward 2030 and beyond.

Background: North Carolina is in the midst of a migration-driven population boom. With over 11.2 million people living in North Carolina as of 2025, the state is the ninth most populous in the nation and has experienced the third largest population gain in the country from 2020 to 2025. This growth trend is projected to continue for the foreseeable future, placing North Carolina on track to become the seventh most populous state by approximately 2030. At the same time, North Carolina's population is aging rapidly. These factors will have implications for the UNC System's enrollment planning and state workforce planning.

Assessment: In this session, the committee will hear an update from Carolina Demography.

Action: This item is for information only.



North Carolina's Shifting Demographics

UNC Board of Governors
Raleigh, North Carolina
May 20th, 2026

Data for the People

Dr. Nathan Dollar, PhD
Executive Director, Carolina Demography

About Carolina Demography

Who we are

Carolina Demography is the applied demography unit of the Carolina Population Center (CPC) at UNC-Chapel Hill. We are a non-partisan team of population scientists working for the people of North Carolina.

Our Mission

We help people understand a changing North Carolina to make informed decisions.

About Carolina Demography: What We Do



Find and Collect Data

We work with you to determine the data you need, and where and how to access that data.



Clean, Analyze, & Interpret Data

We use rigorous methods to translate the data and provide meaningful context.



Communicate data and engage stakeholders

We strengthen the capacity of your organization to communicate data-driven ideas.

About Carolina Demography: Follow Our Work



Read our blog

*We find and surface
datasets that show how
North Carolina is changing.*

carolinademography.cpc.unc.edu



Follow us on LinkedIn, Facebook, & Instagram

*We share the latest news
about population change
in NC. Search for
“**Carolina Demography**”*



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CAROLINA
DEMOGRAPHY

What are the big demographic stories in NC?



Growth

- NC has grown faster than the nation every year since 1970



Urbanization

- The majority of growth is occurring in urban areas, widening the urban/rural continuum



Aging

- Age structure of the state is becoming older



Diversity

- North Carolina continues to become more diverse every decade

11,197,968

2025 North Carolina total population



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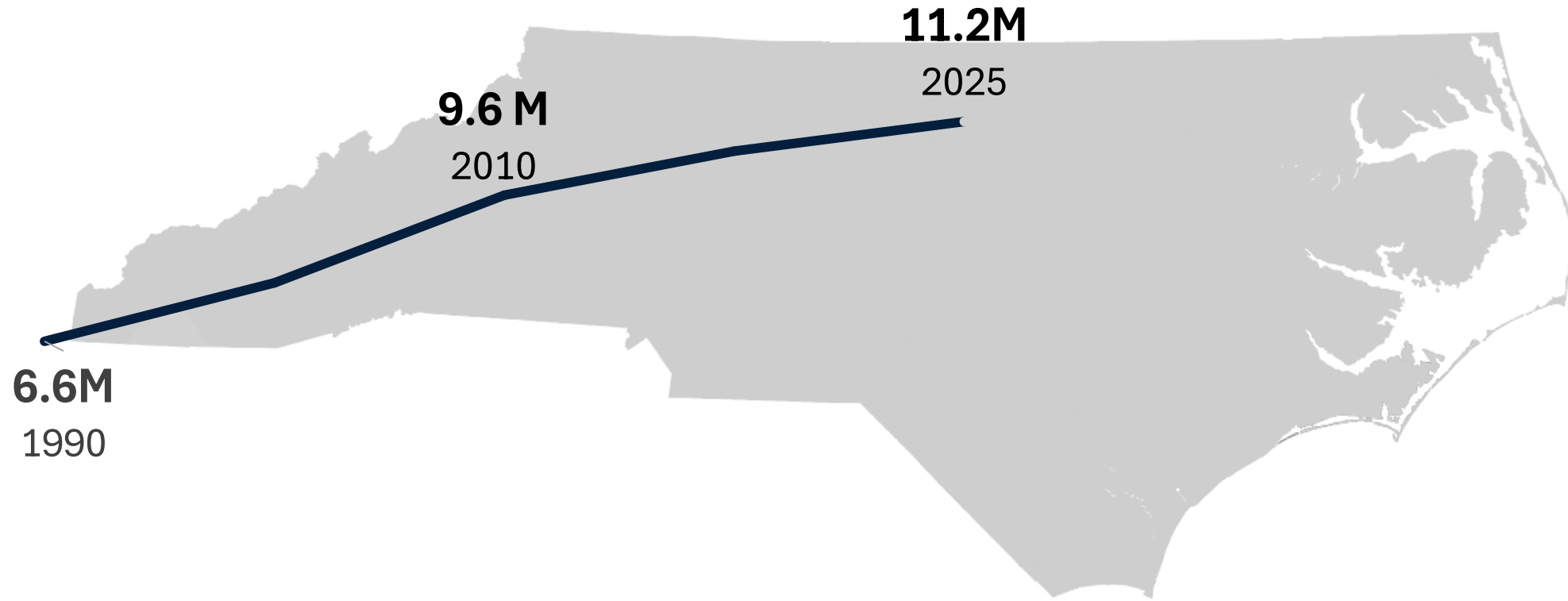
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CAROLINA
DEMOGRAPHY

Source: US Census Bureau, Population Estimates Program, Vintage 2024

Current population

+ 4.6 million new North Carolina residents since 1990



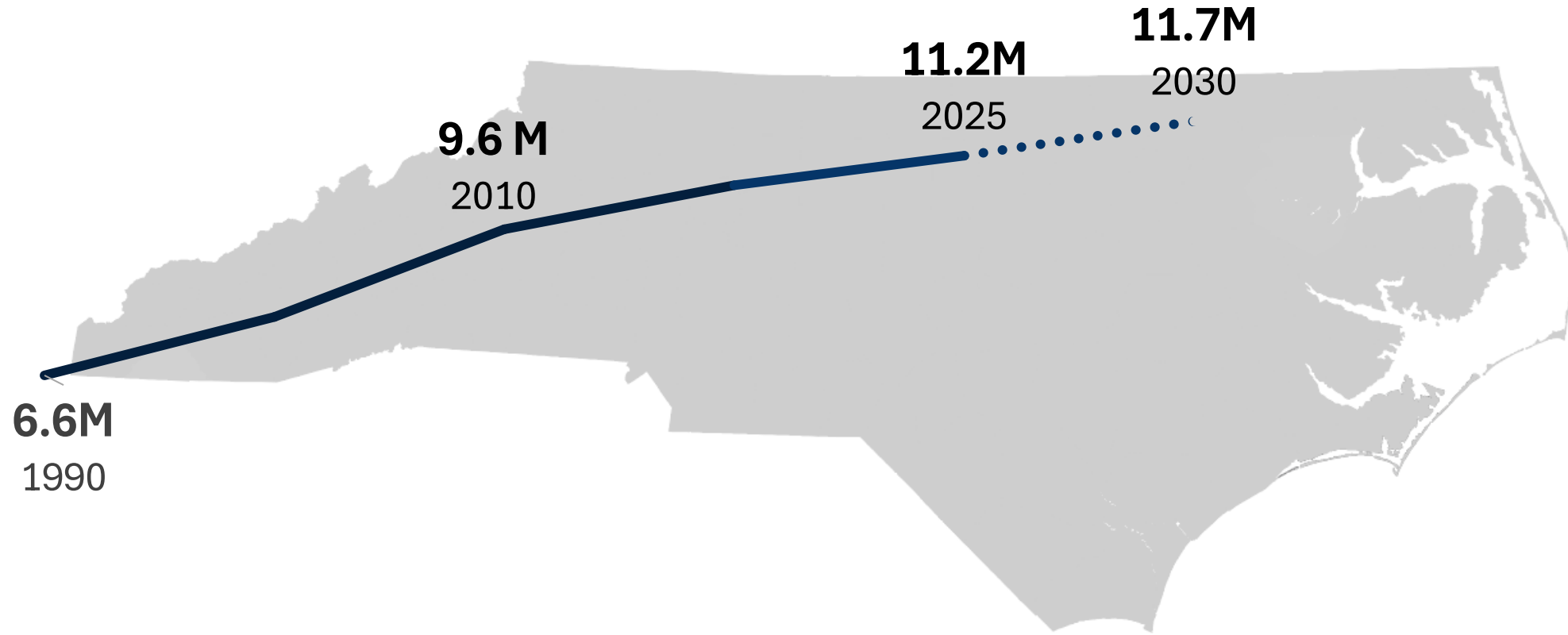
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CAROLINA
DEMOGRAPHY

By 2030 11.7 million

Projected population growth



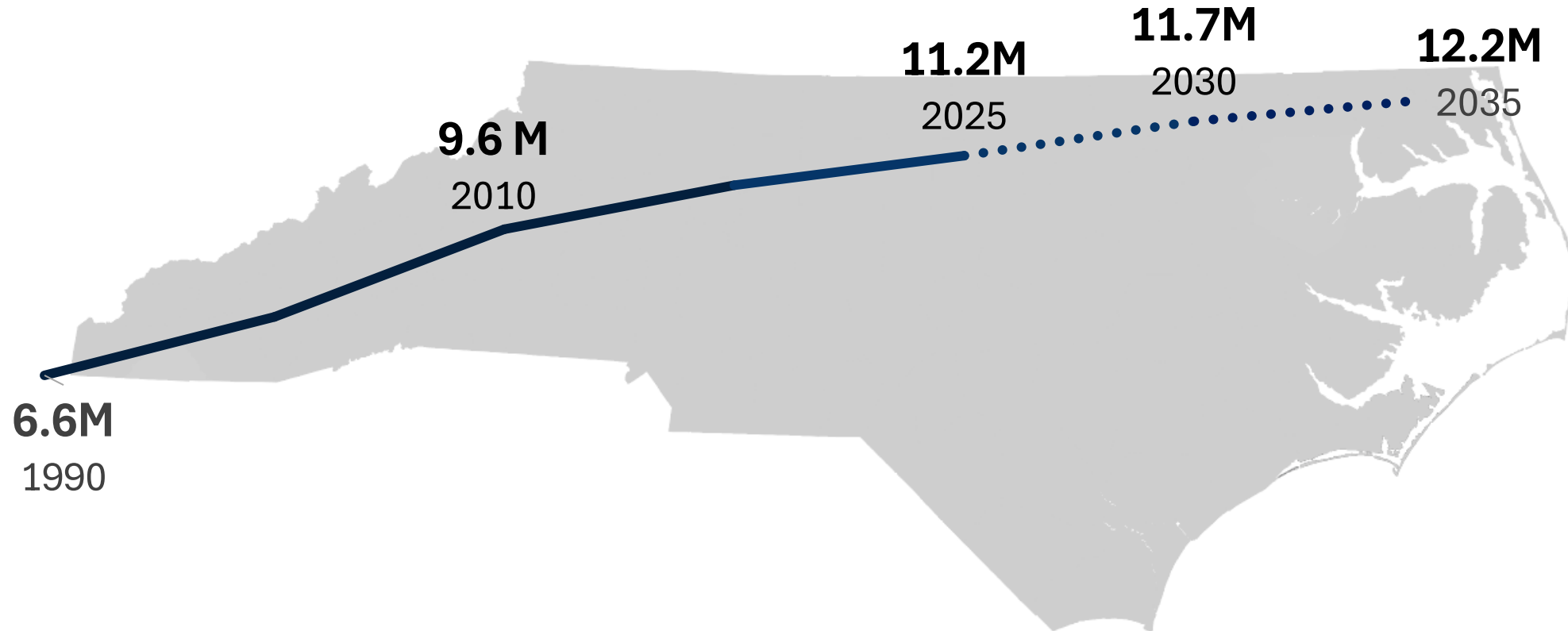
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CAROLINA
DEMOGRAPHY

By 2035 12.2 million

Projected population growth

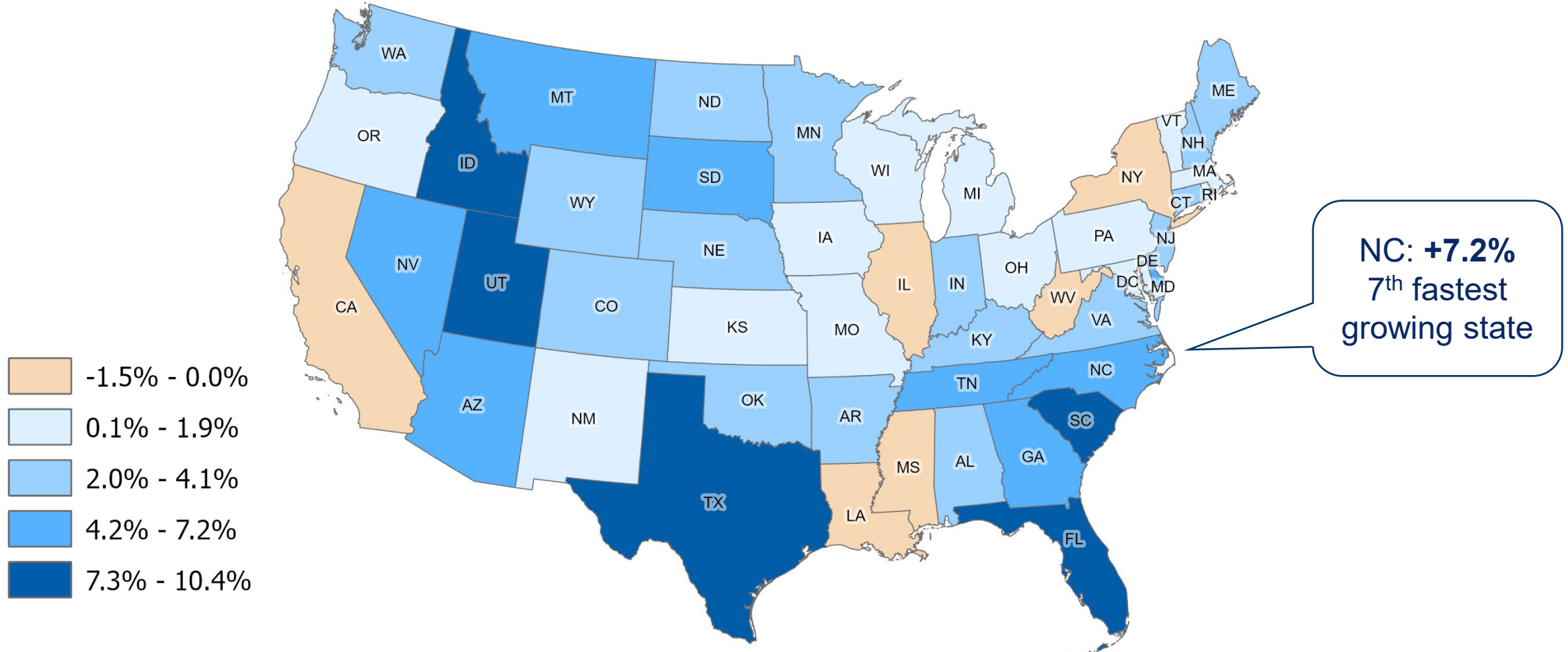


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CAROLINA
DEMOGRAPHY

Percent Change in Population, 2020-2025



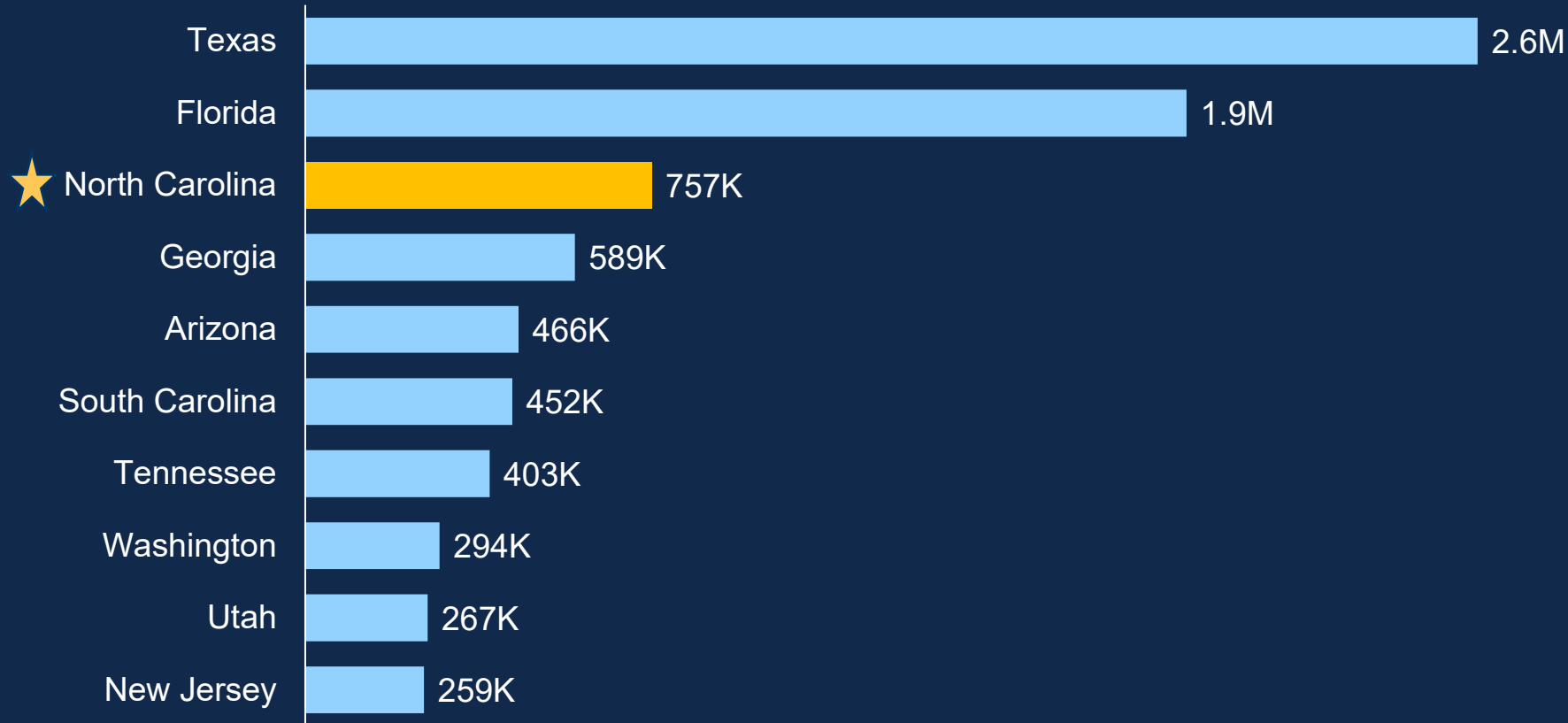
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DEMOGRAPHY

NC growth 3rd largest in the nation

Top ten states with largest numeric change in total population nationwide, 2020-2025



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CAROLINA
DEMOGRAPHY

Source: US Census Bureau

**North Carolina is growing...and it's mostly
in urban areas.**

An aerial photograph of a suburban neighborhood. The image shows a mix of residential areas with houses and streets, interspersed with green spaces, trees, and a golf course. A prominent pond is visible in the upper left quadrant. The overall scene depicts a typical suburban landscape with a blend of built and natural environments.

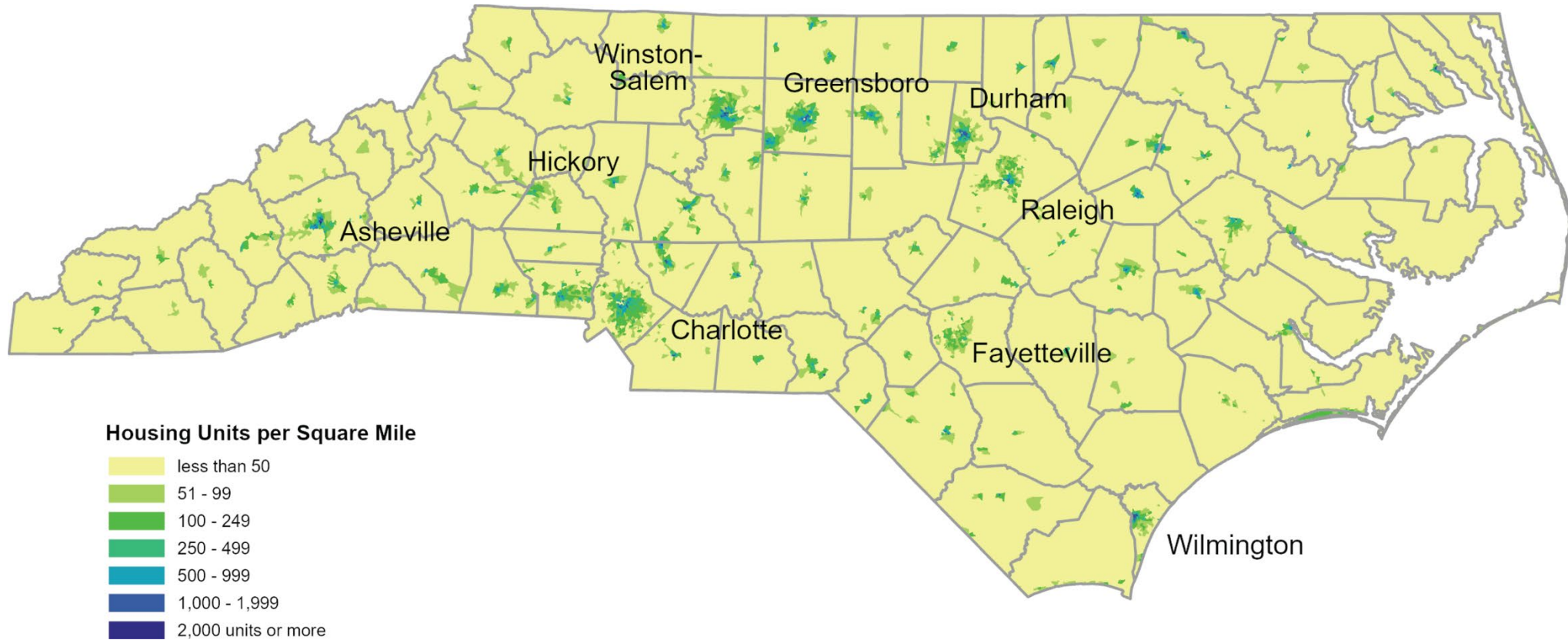
Growth & Urbanization

1940

CAROLINA DEMOGRAPHY



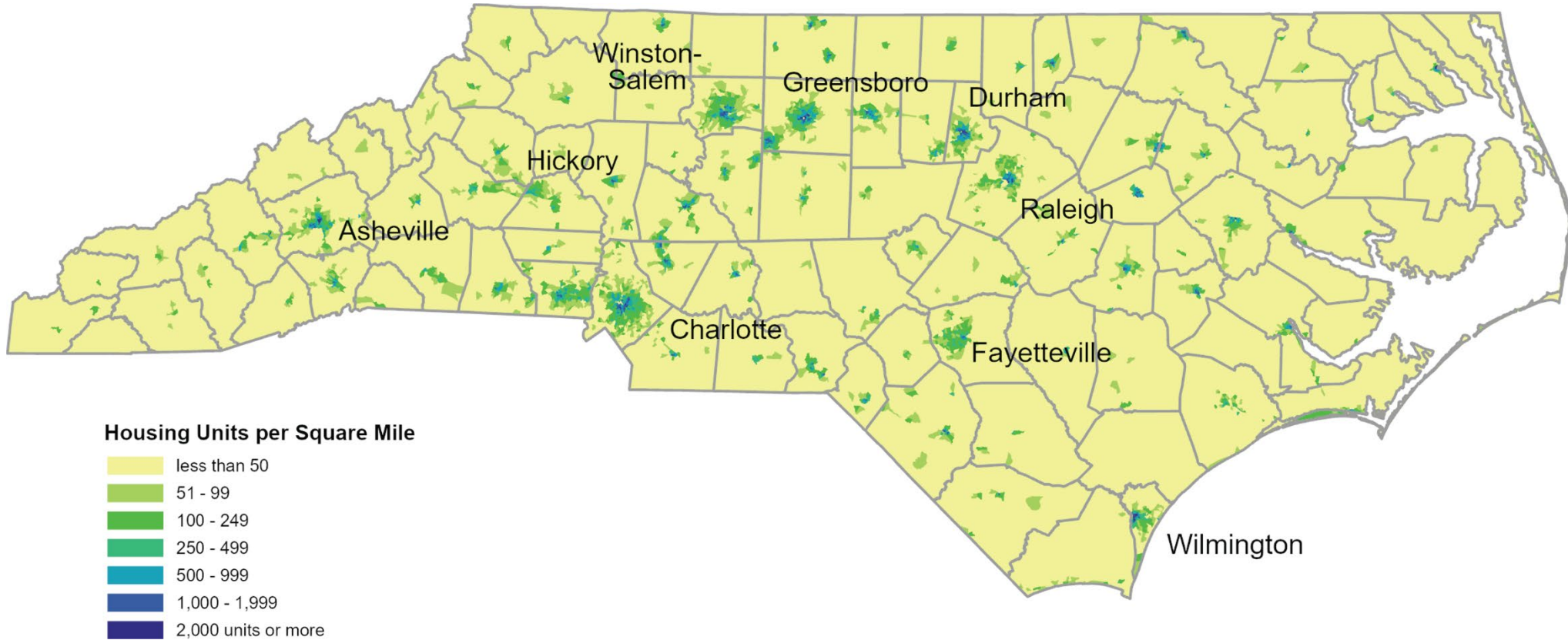
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1950

CAROLINA DEMOGRAPHY

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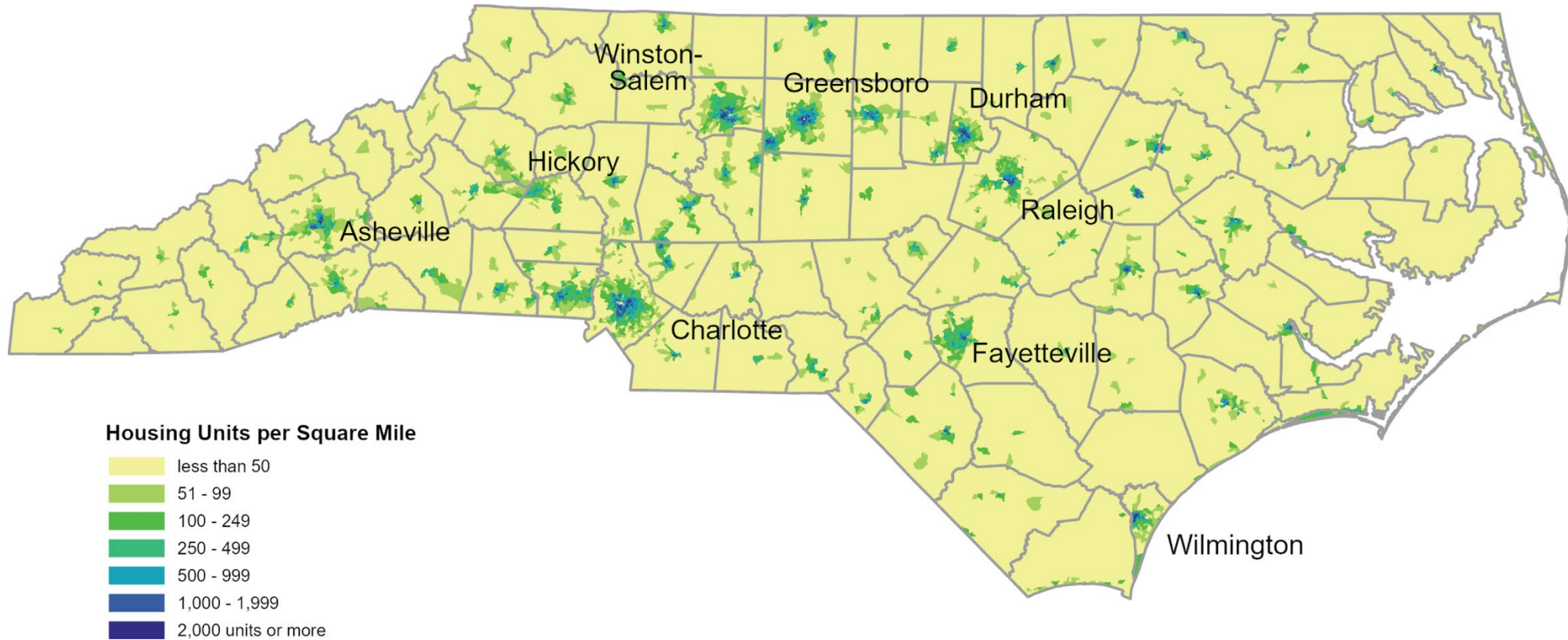


1960

CAROLINA DEMOGRAPHY



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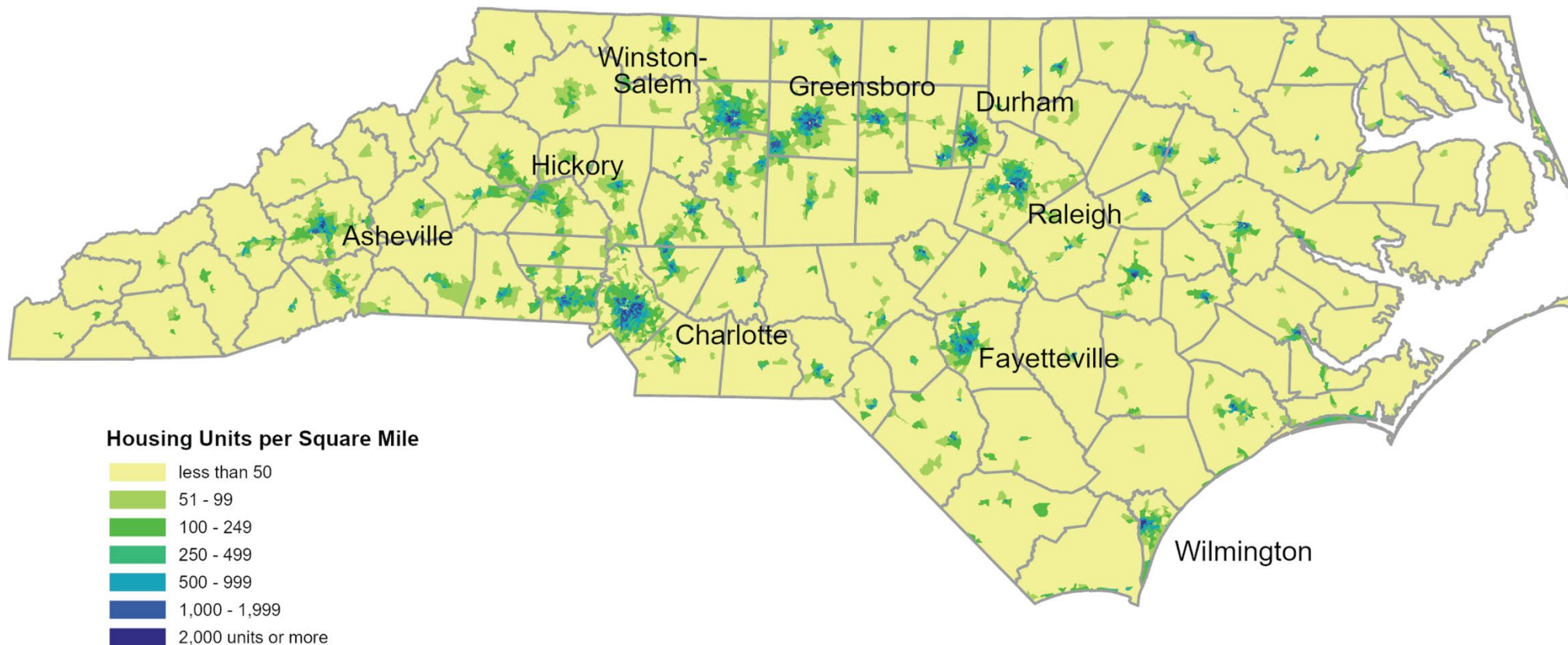


1970

CAROLINA DEMOGRAPHY



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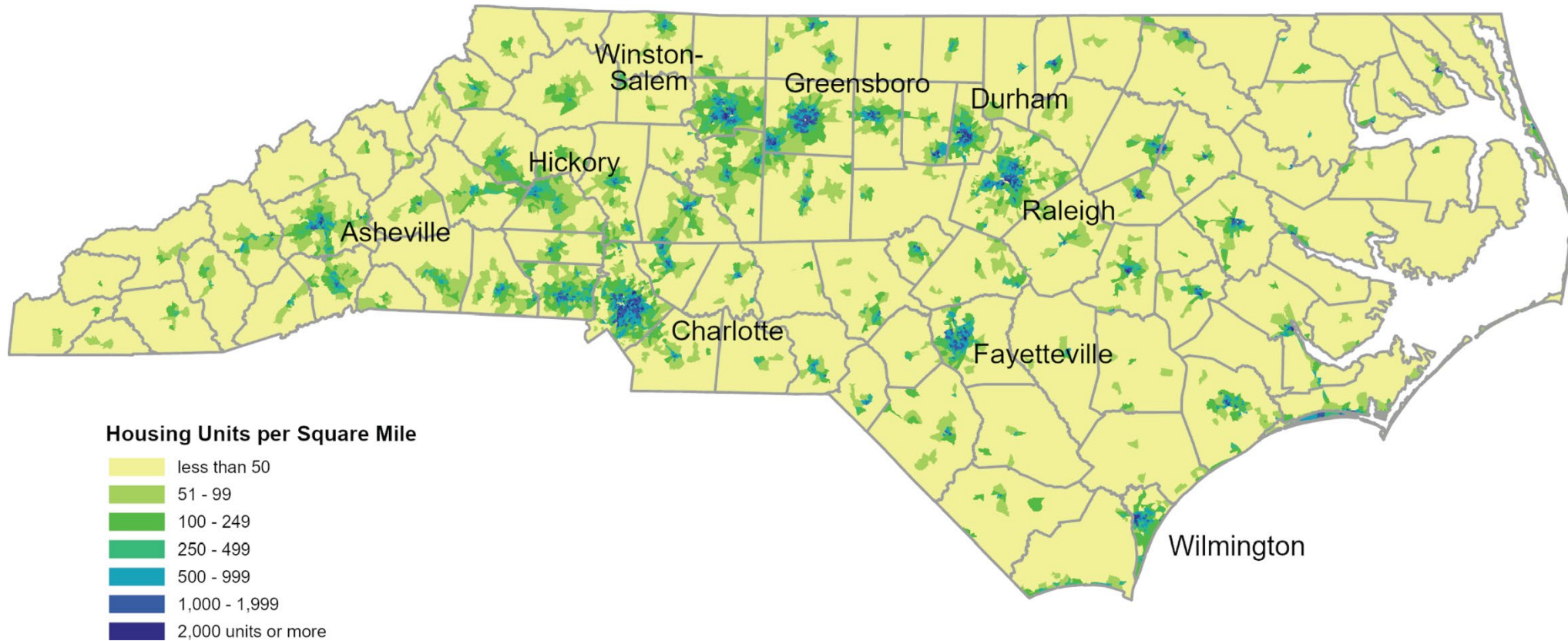


1980

CAROLINA DEMOGRAPHY



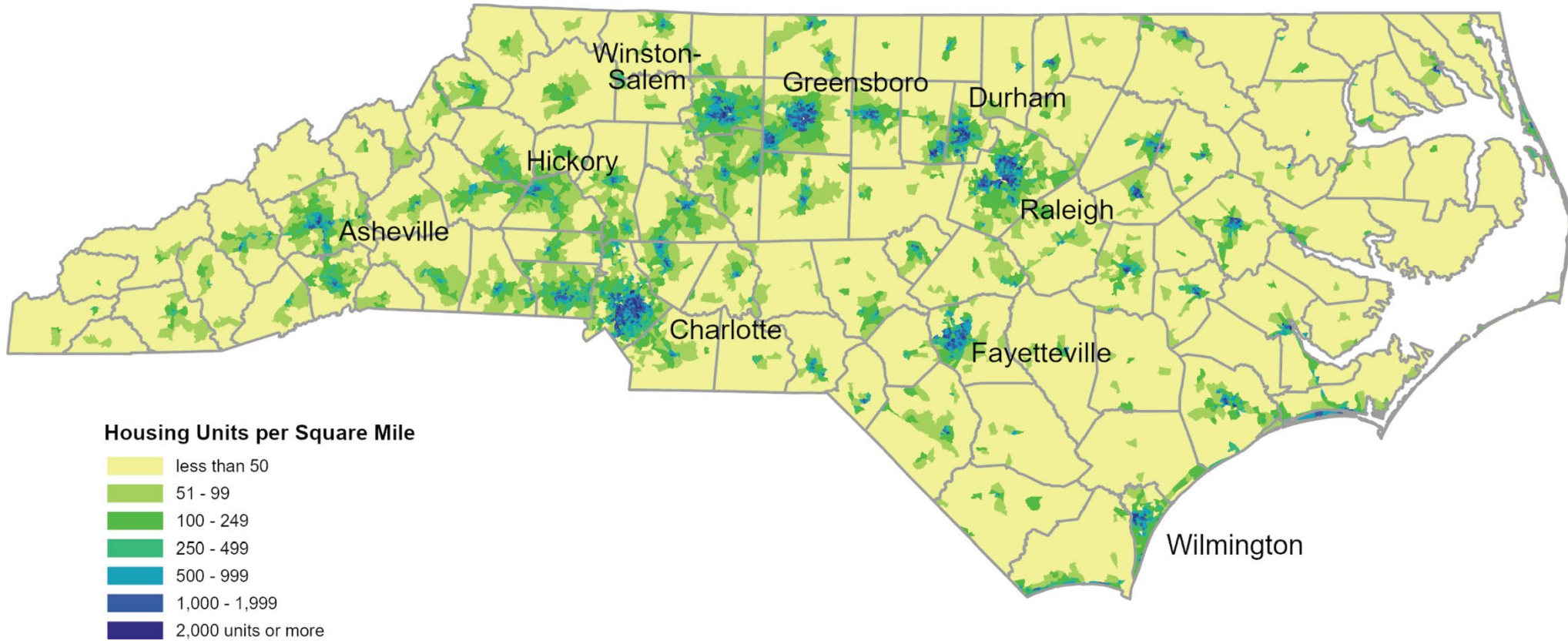
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1990

CAROLINA DEMOGRAPHY

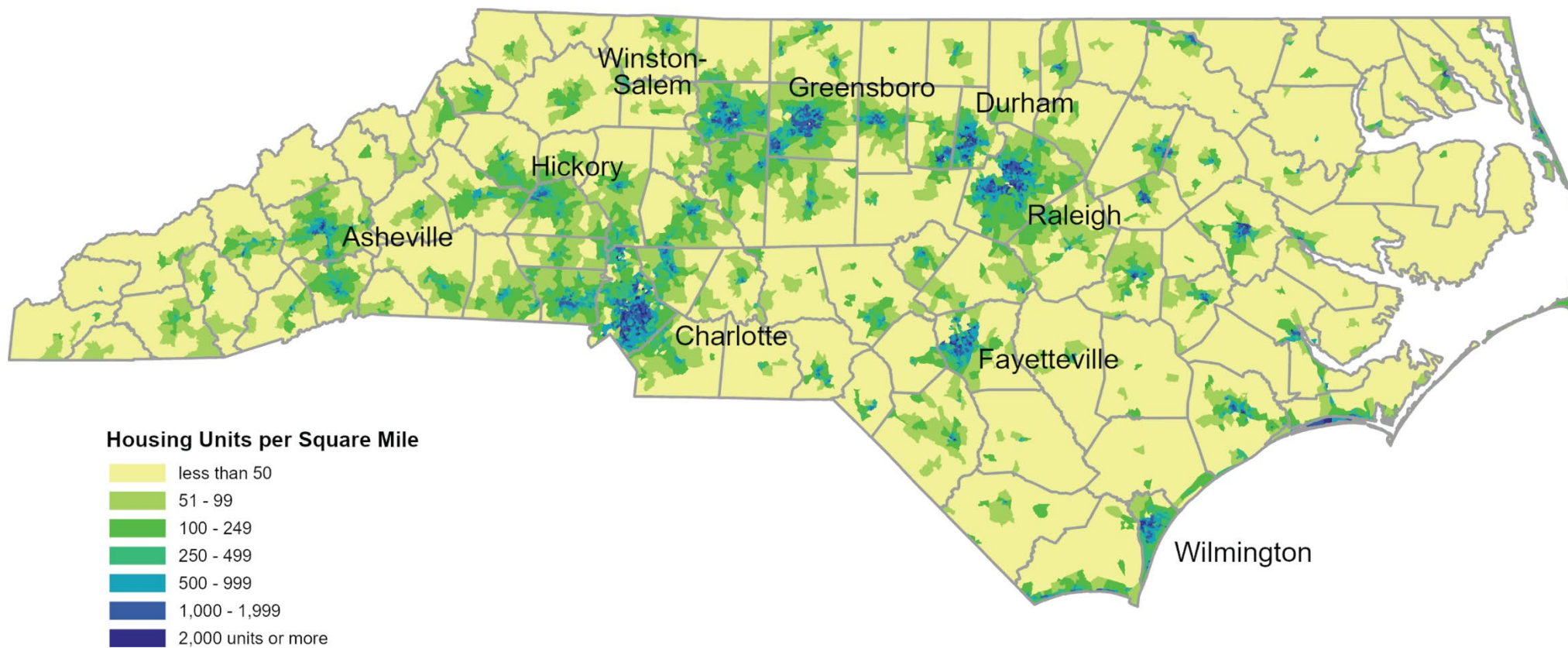
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2000

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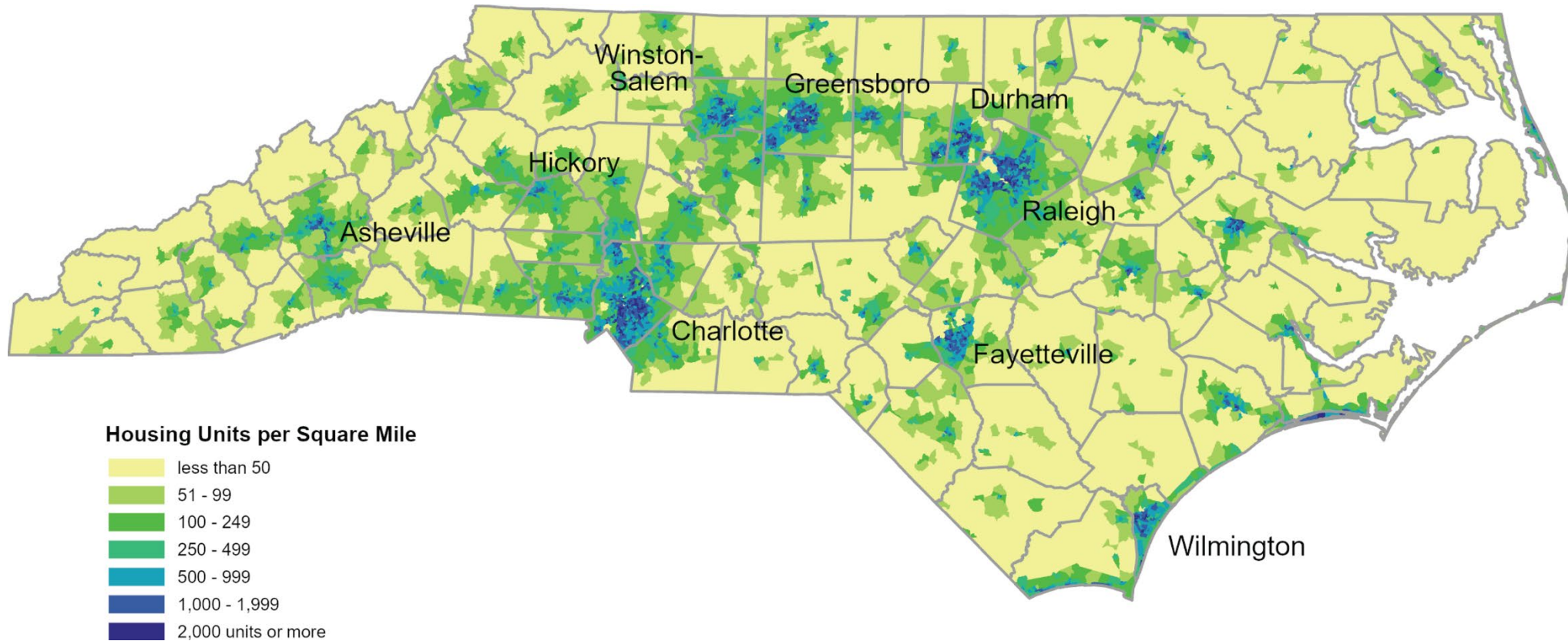


2010

CAROLINA DEMOGRAPHY



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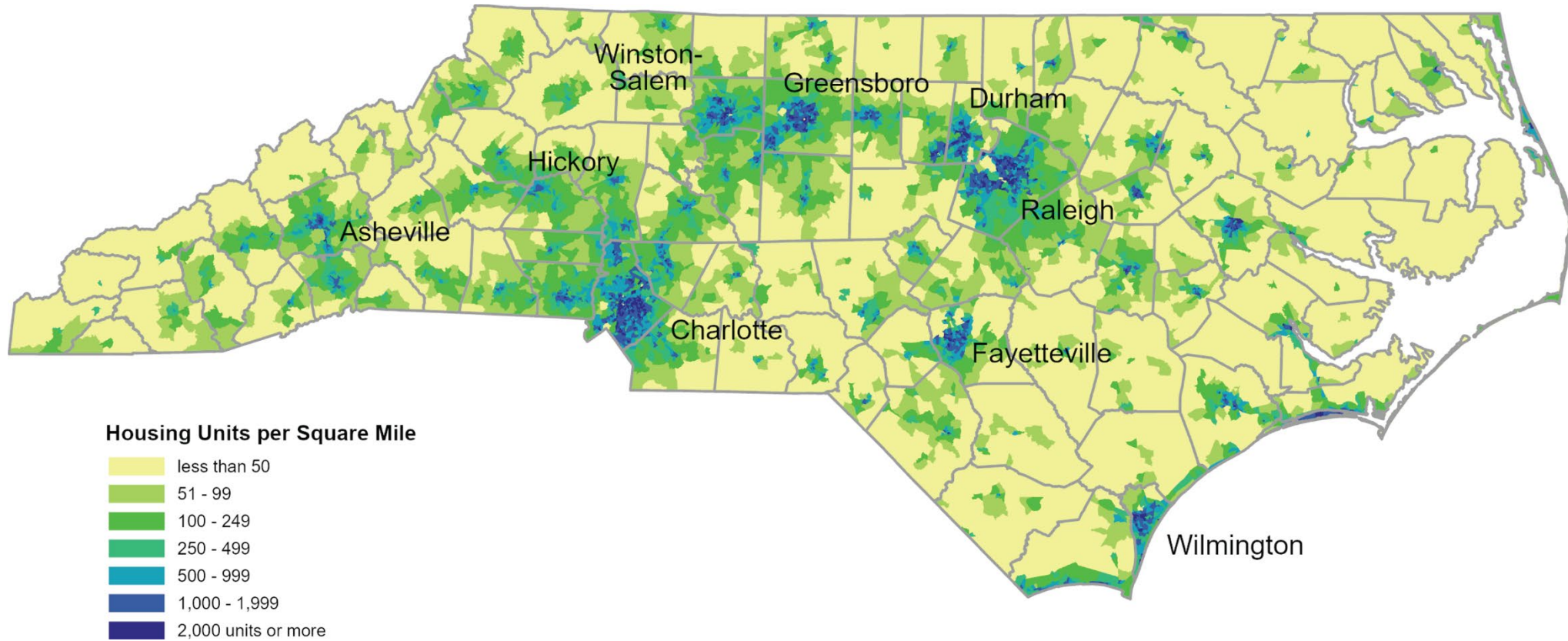


2020

CAROLINA DEMOGRAPHY



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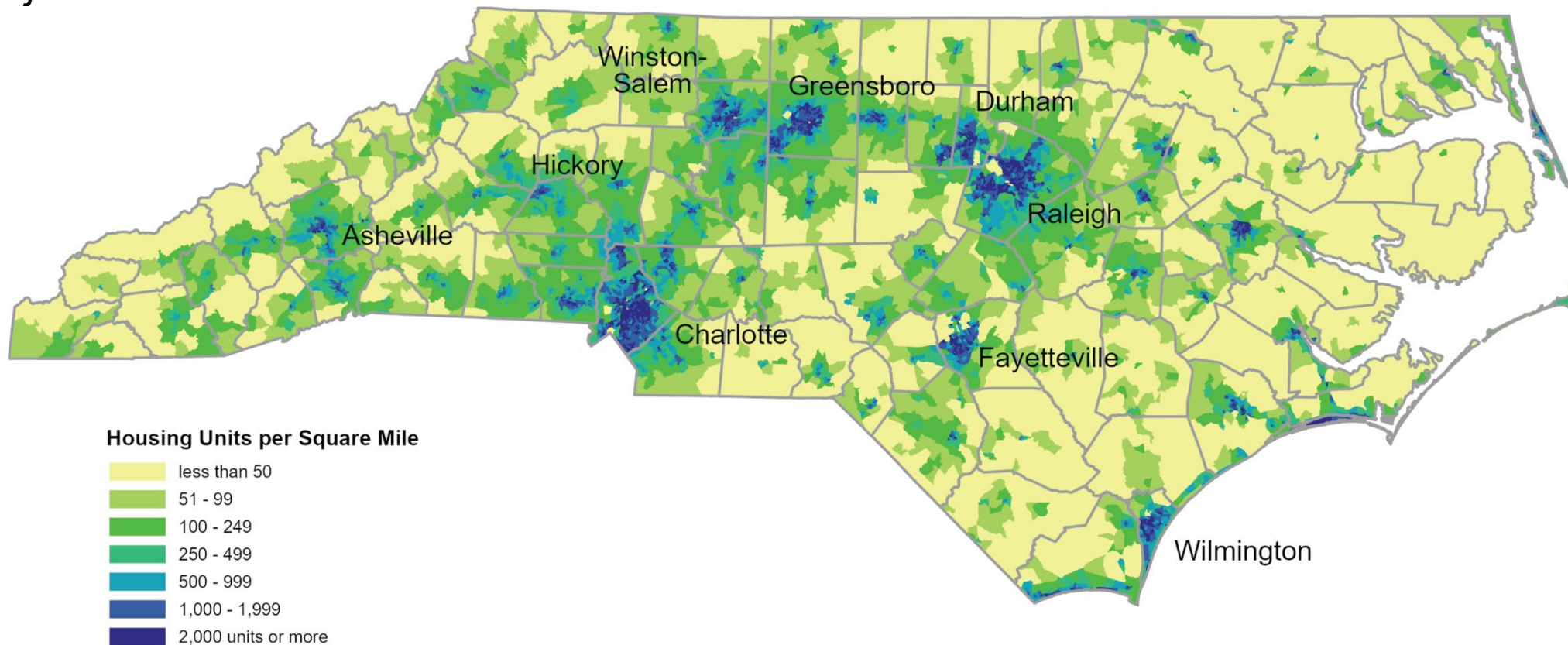
2050

Projected

CAROLINA DEMOGRAPHY

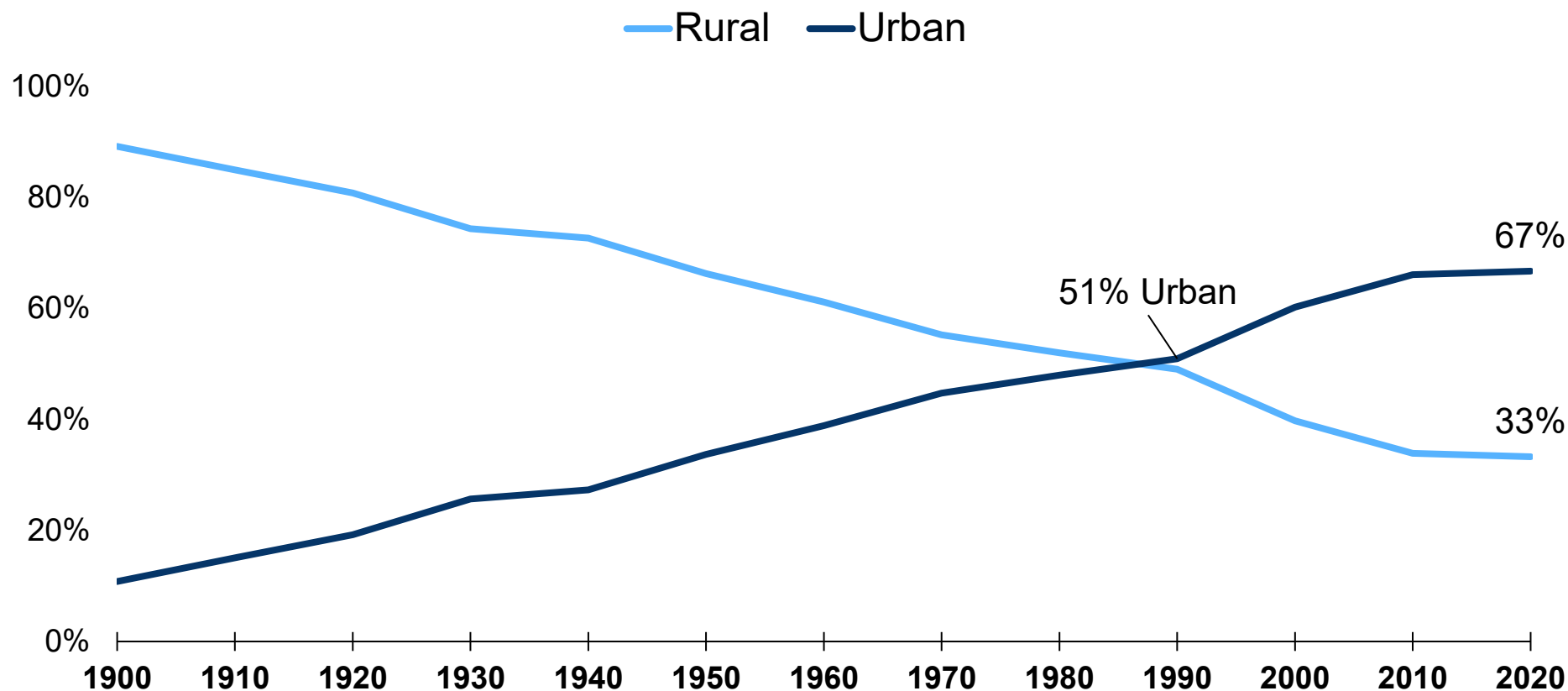


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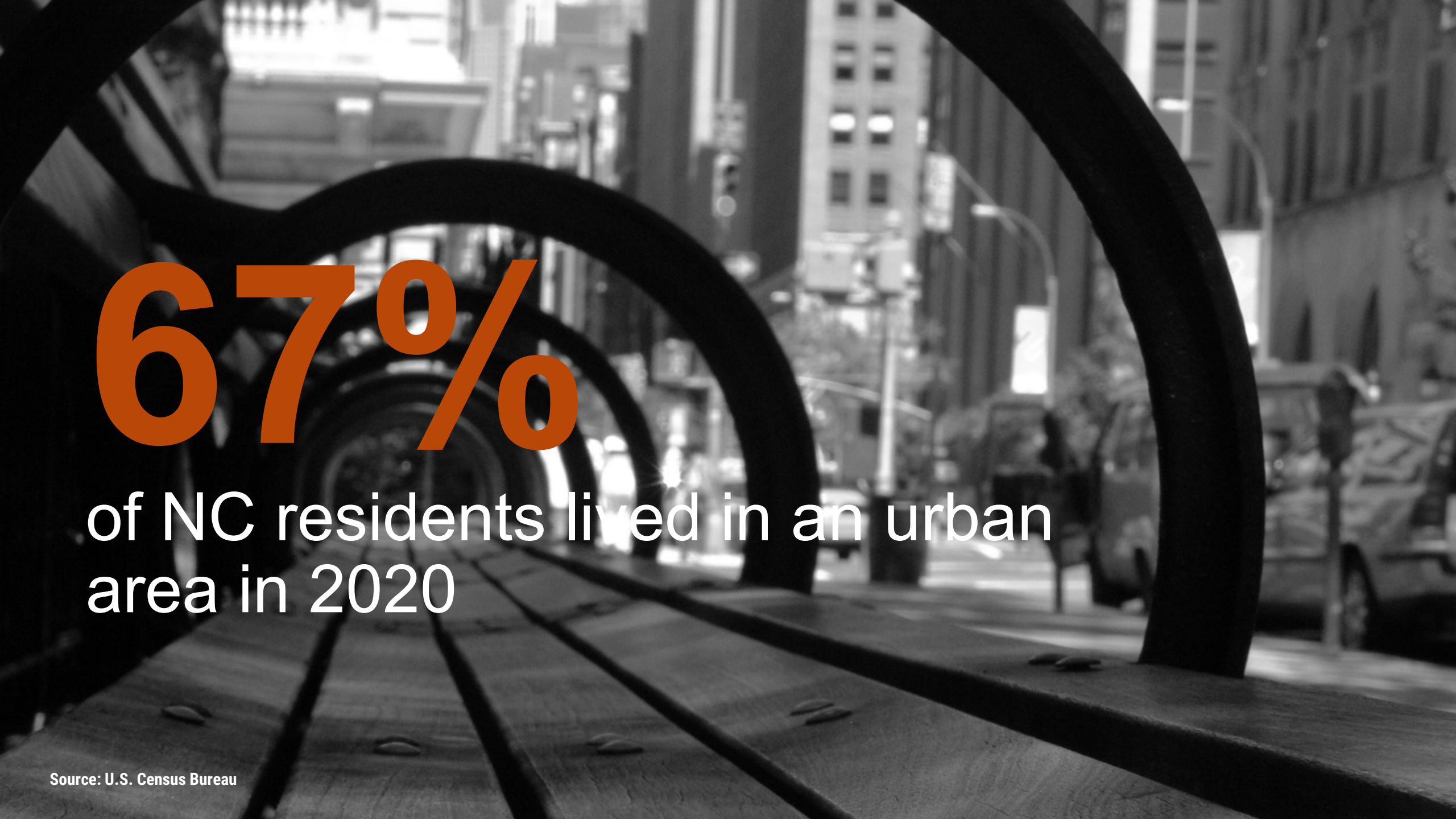


North Carolina became a majority urban state in 1990

Percent of NC's population that was Rural and Urban, 1900 – 2020.



Source: US Census Bureau



67%

of NC residents lived in an urban
area in 2020

How have county populations changed in recent decades?

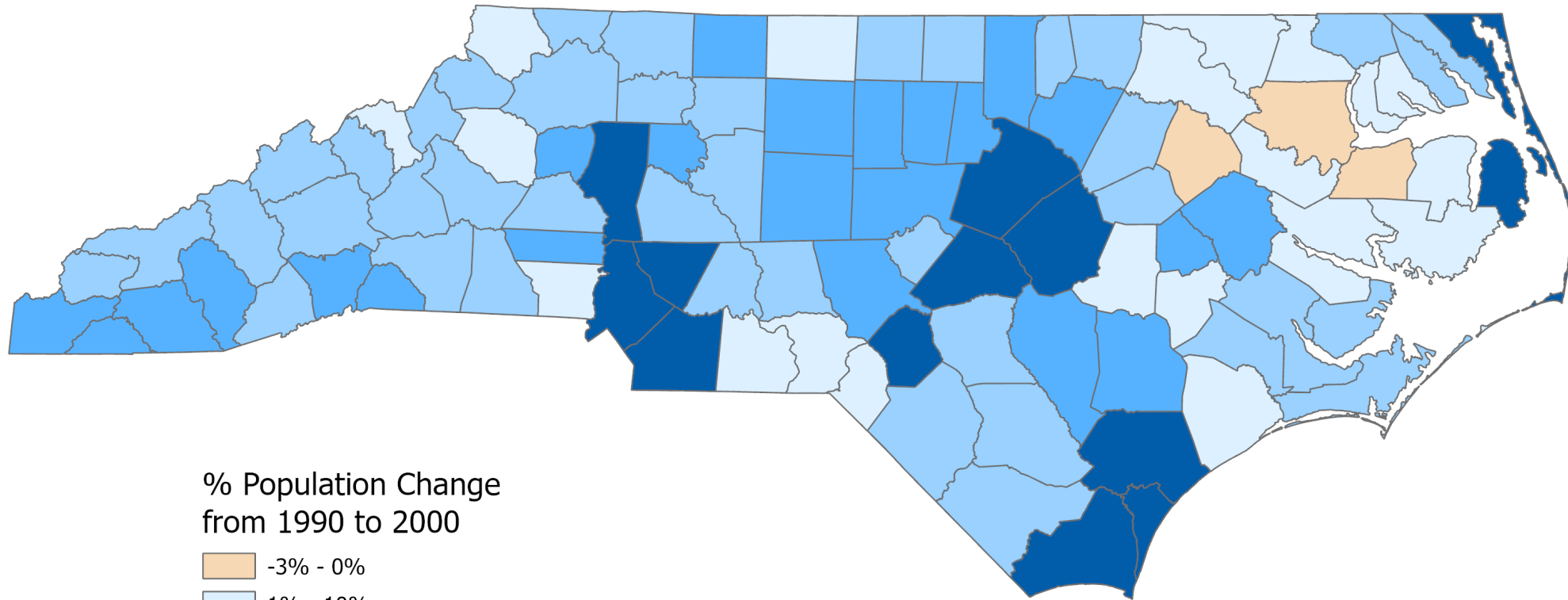
Percent Change in Population

1990-2000

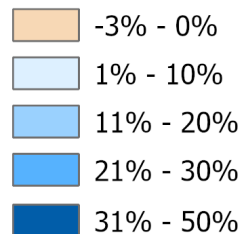
CAROLINA
DEMOGRAPHY



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% Population Change
from 1990 to 2000



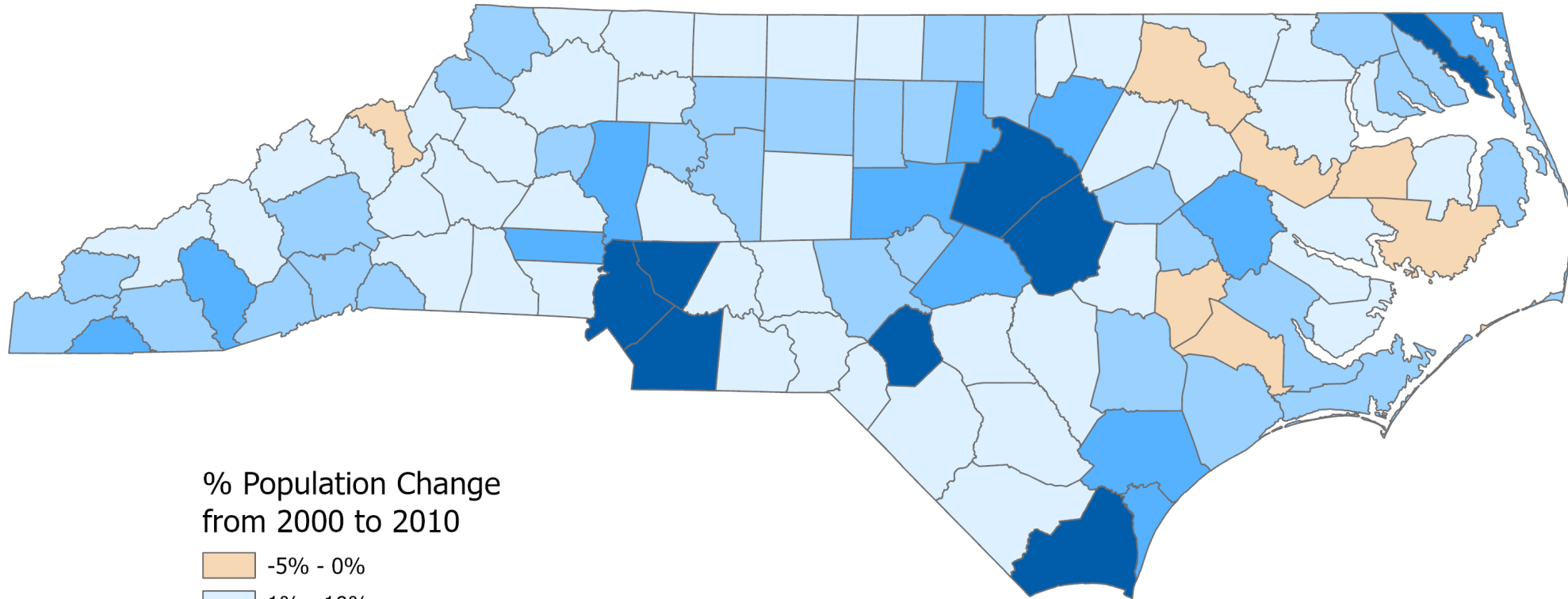
Percent Change in Population

2000-2010

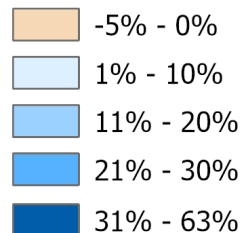
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% Population Change
from 2000 to 2010



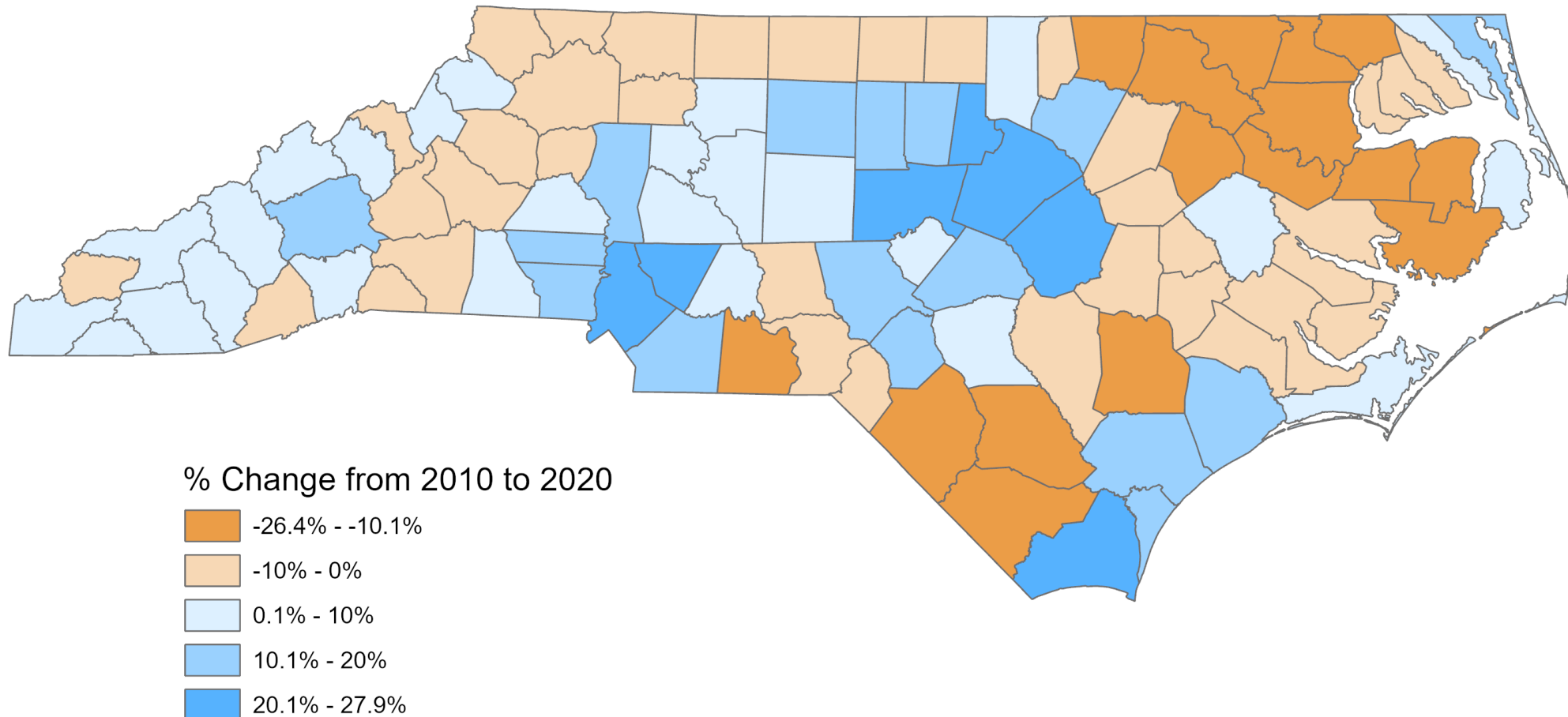
Percent Change in Population

2010-2020

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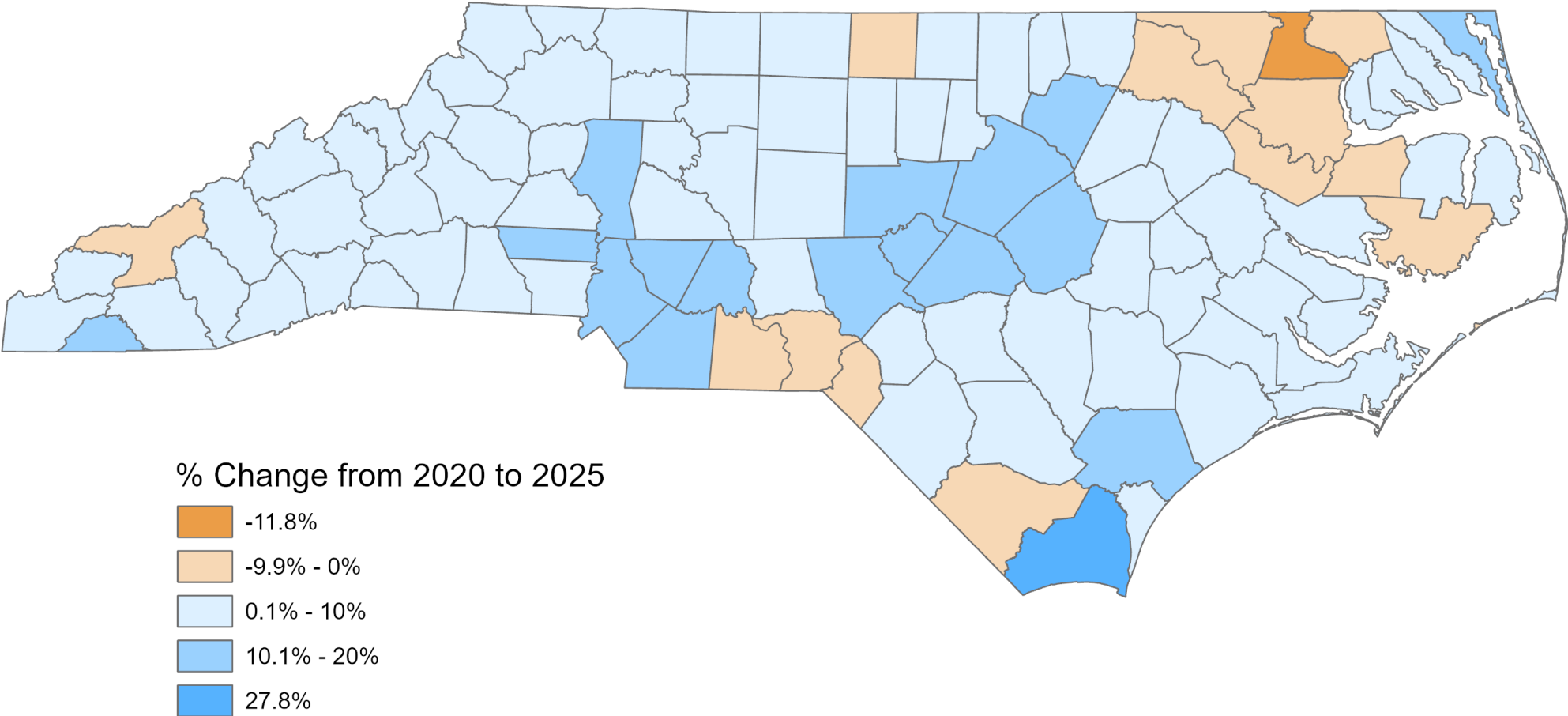


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Percent Change in Population

2020-2025



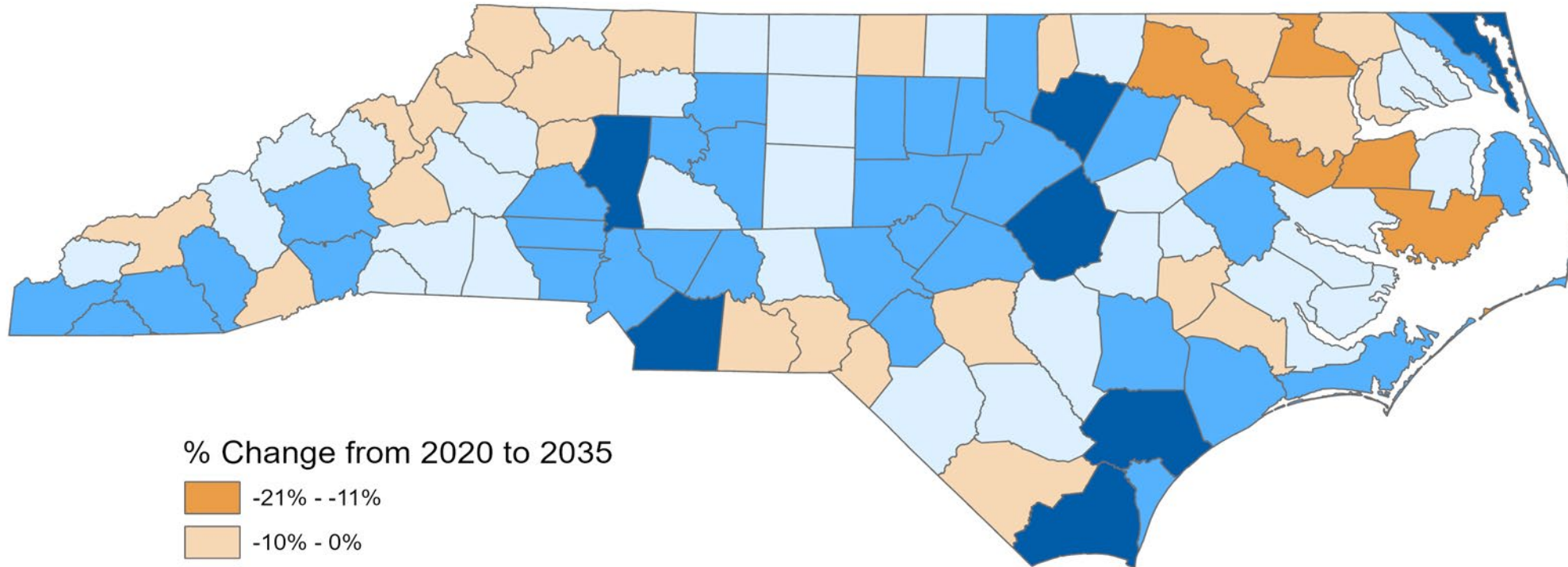
Future population growth will be uneven

NCOSBM Population Forecast, 2020-2035

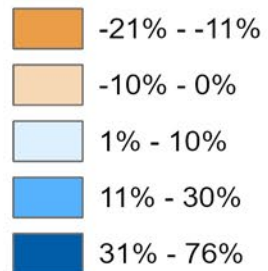
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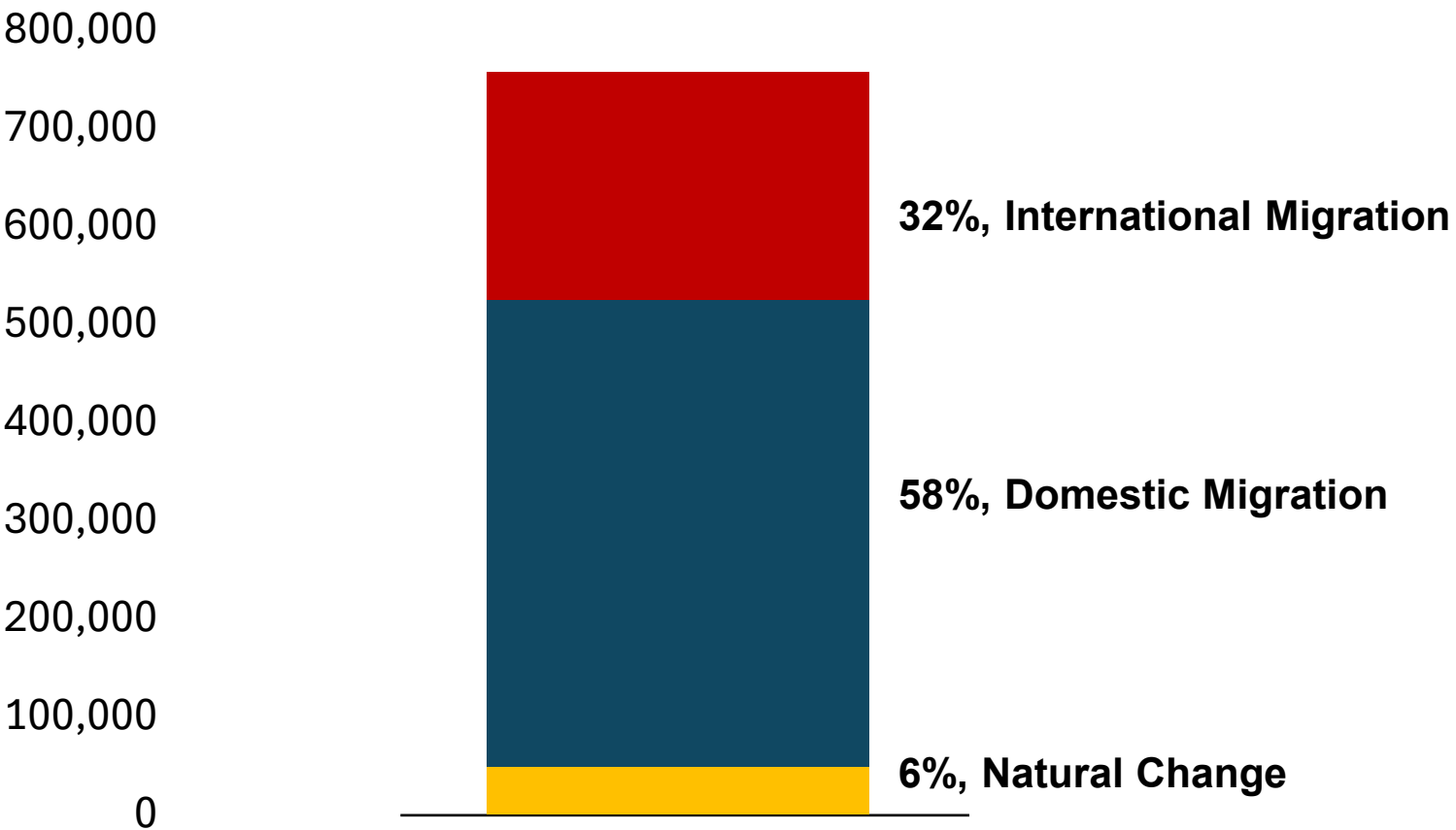
% Change from 2020 to 2035



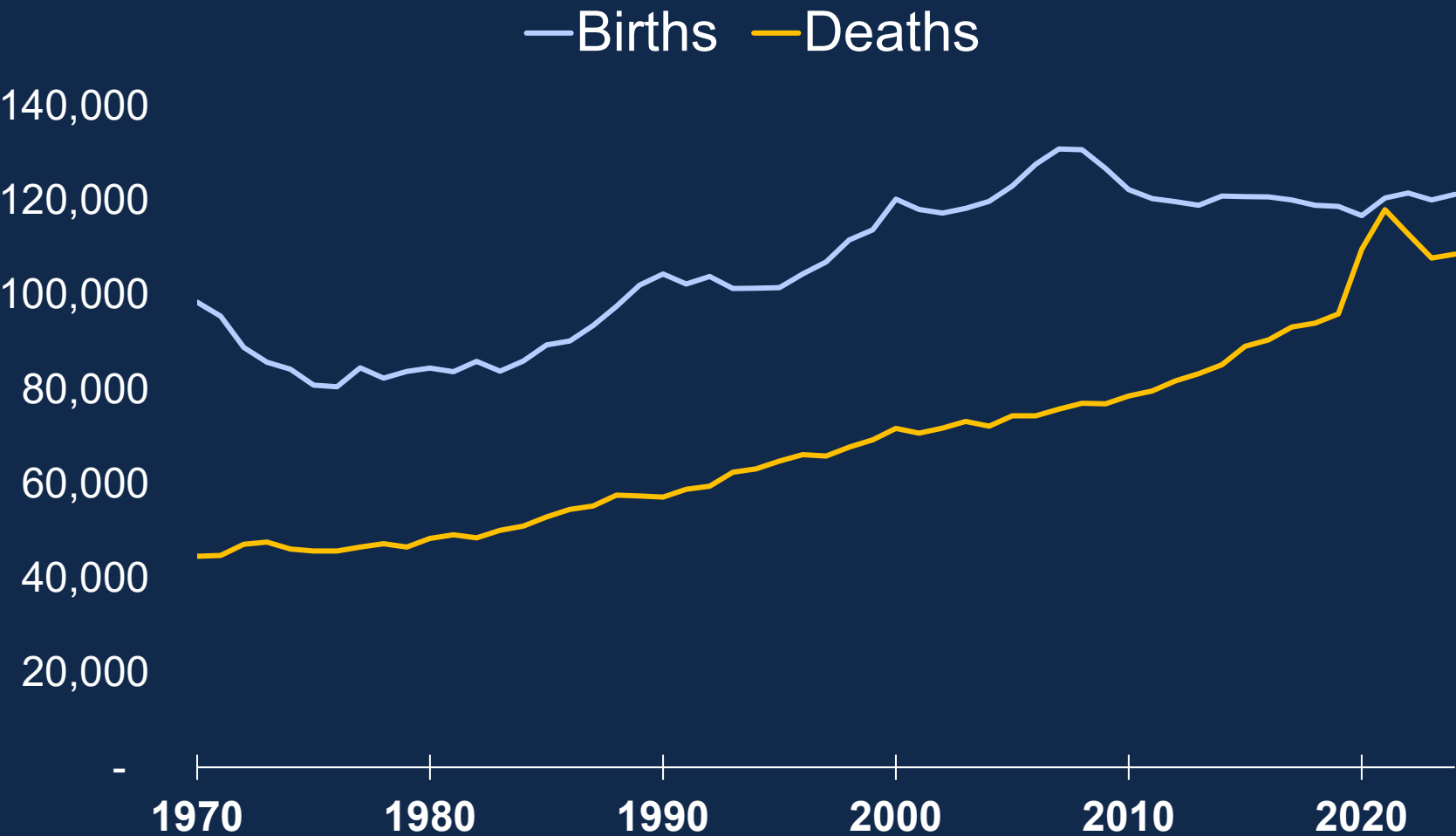
**What's Driving
population growth in
our state?**

Since 2020, 94% of pop. growth has been from net migration from other states and countries

Components of Population Change April 1, 2020 to July 1, 2025



Total Resident Live Births and Deaths in NC, 1970-2023



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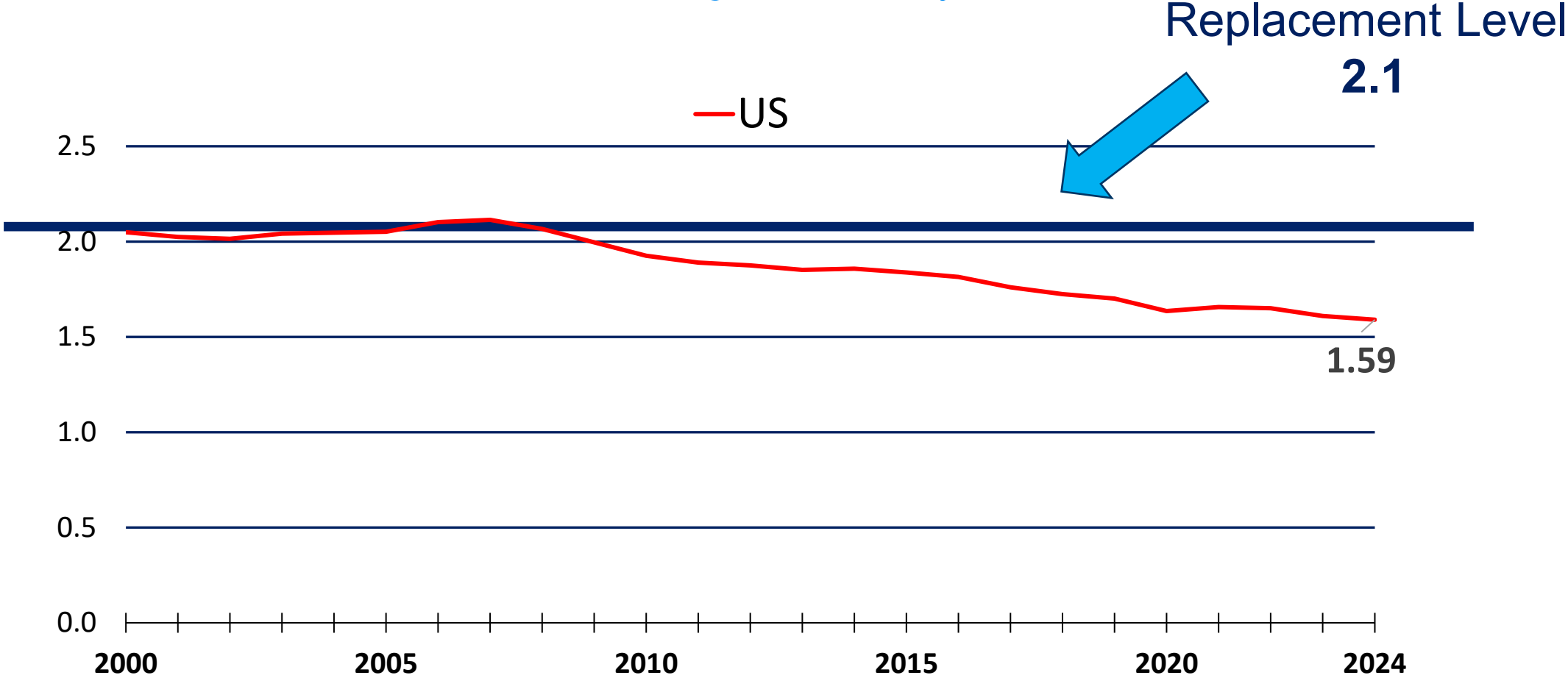
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Source: LINC/NCOSMB

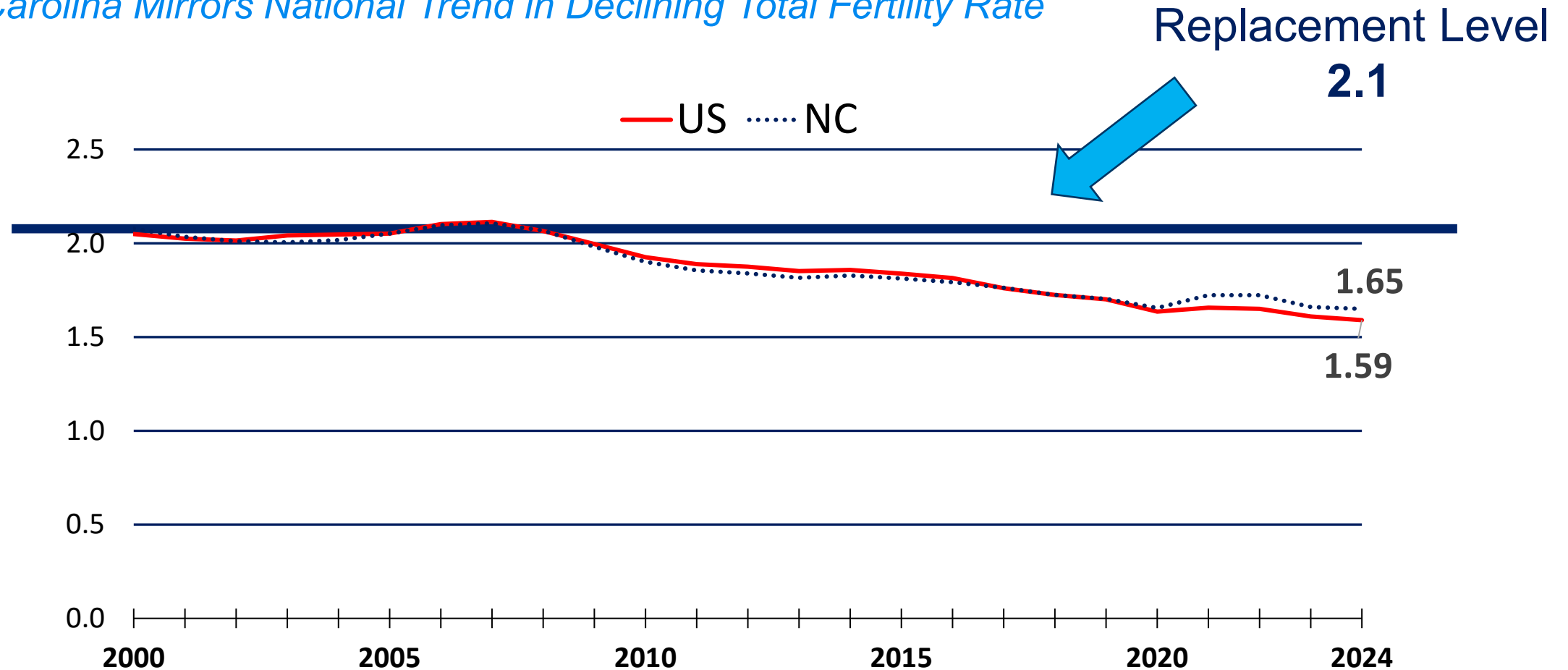
Below Replacement Fertility

North Carolina Mirrors National Trend in Declining Total Fertility Rate



Below Replacement Fertility

North Carolina Mirrors National Trend in Declining Total Fertility Rate



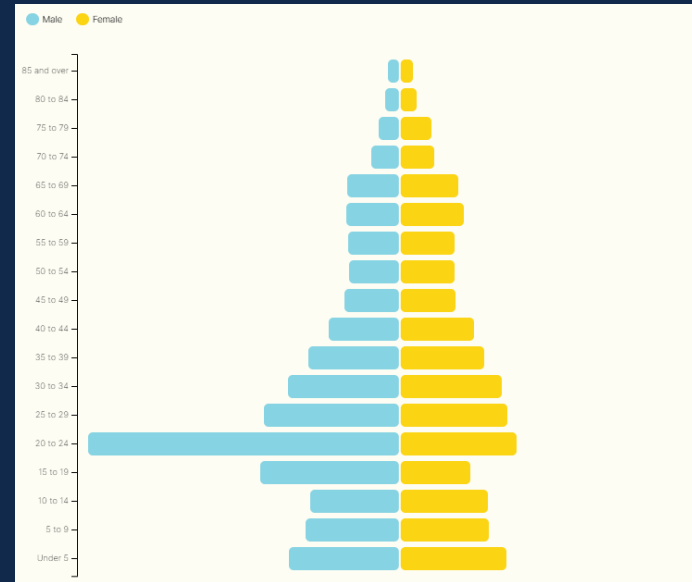
NC Population is Getting Older

County Median Ages Range from:

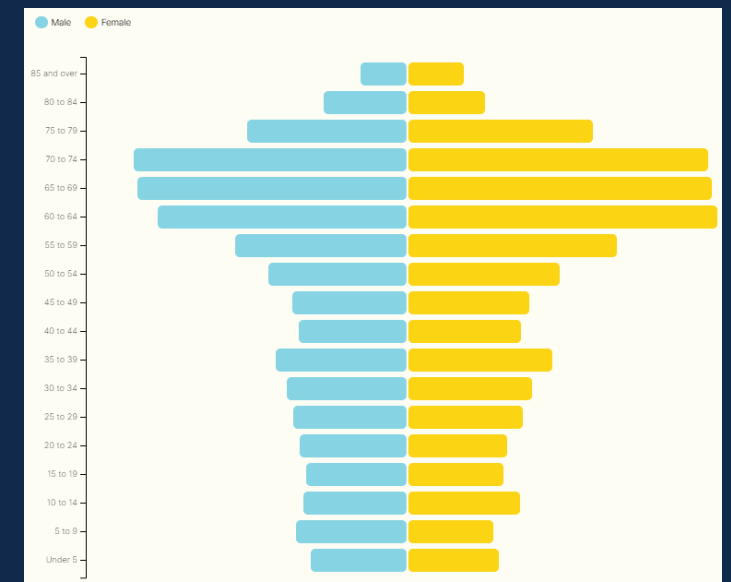
39.2
years

Median Age, 2024

28.3 Years in Onslow County



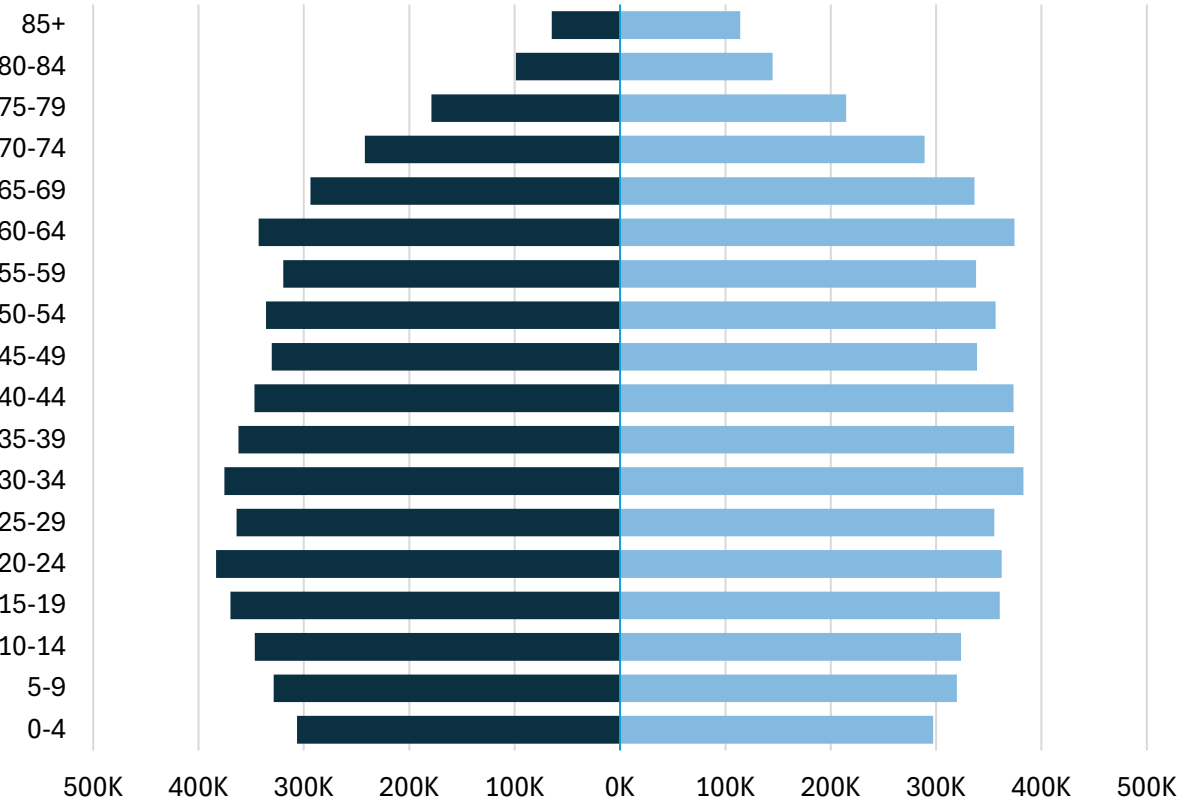
57.0 Years in Brunswick County



We are getting older...

Population age structure by sex, 2024

Male Female



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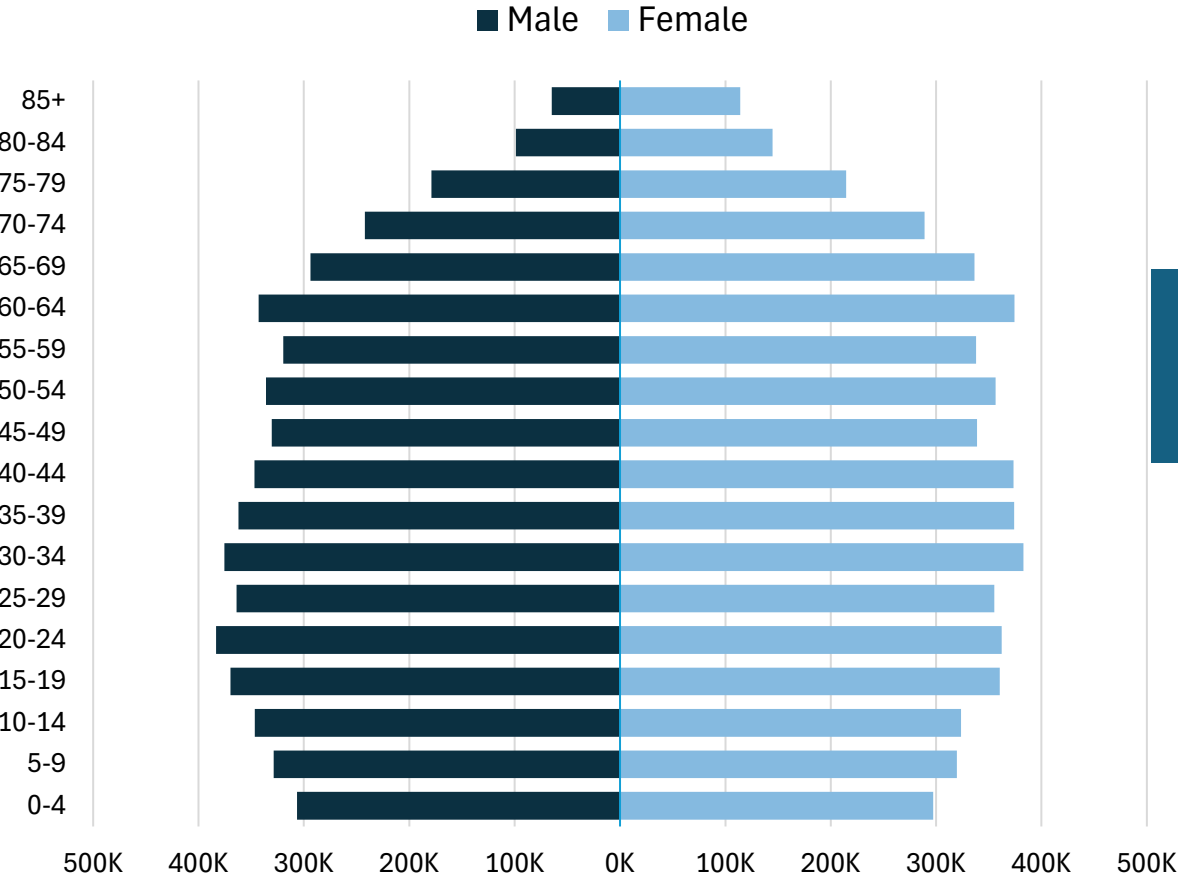
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Source: US Census Bureau 2024 1yr ACS Public use Microdata obtained from IPUMS-USA

We are getting older and more diverse

Population age structure by sex, 2024

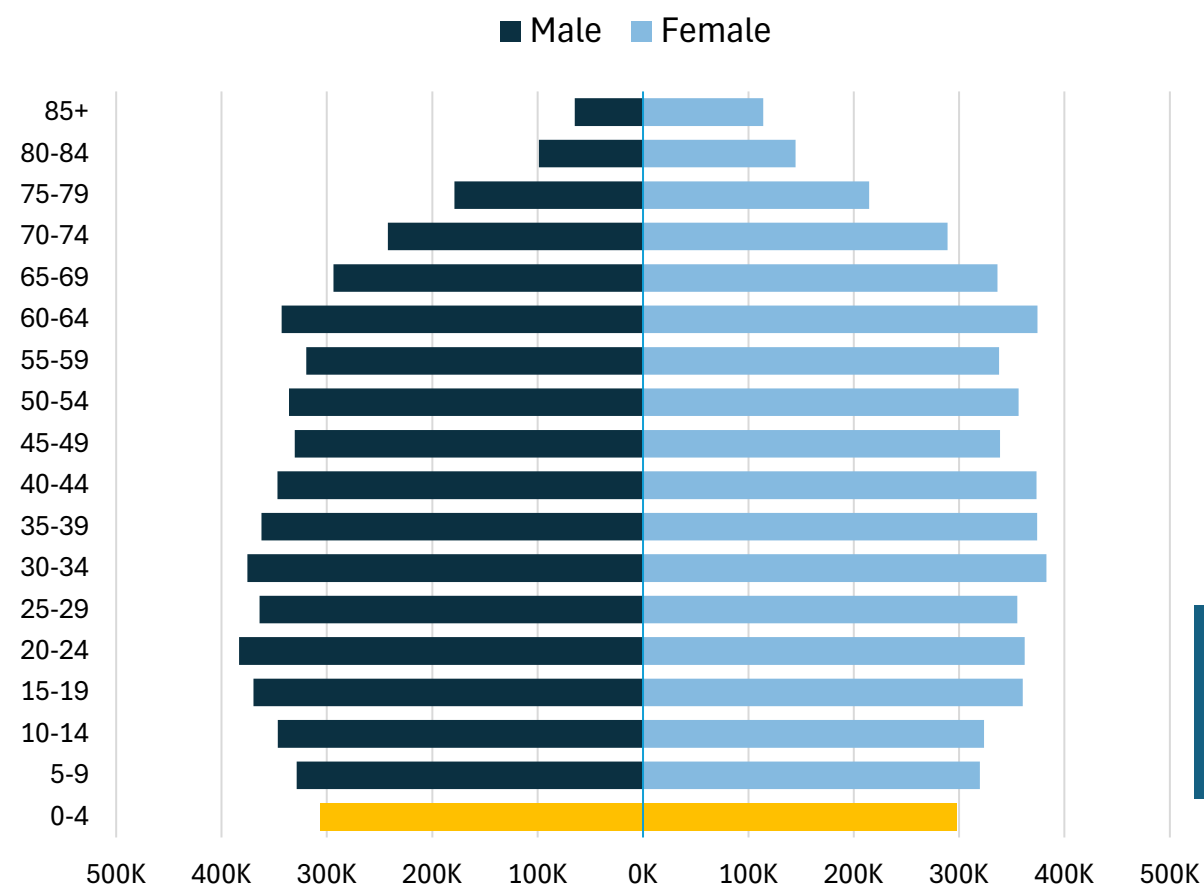


Racial/Ethnic Composition of Overall NC Population, 2024

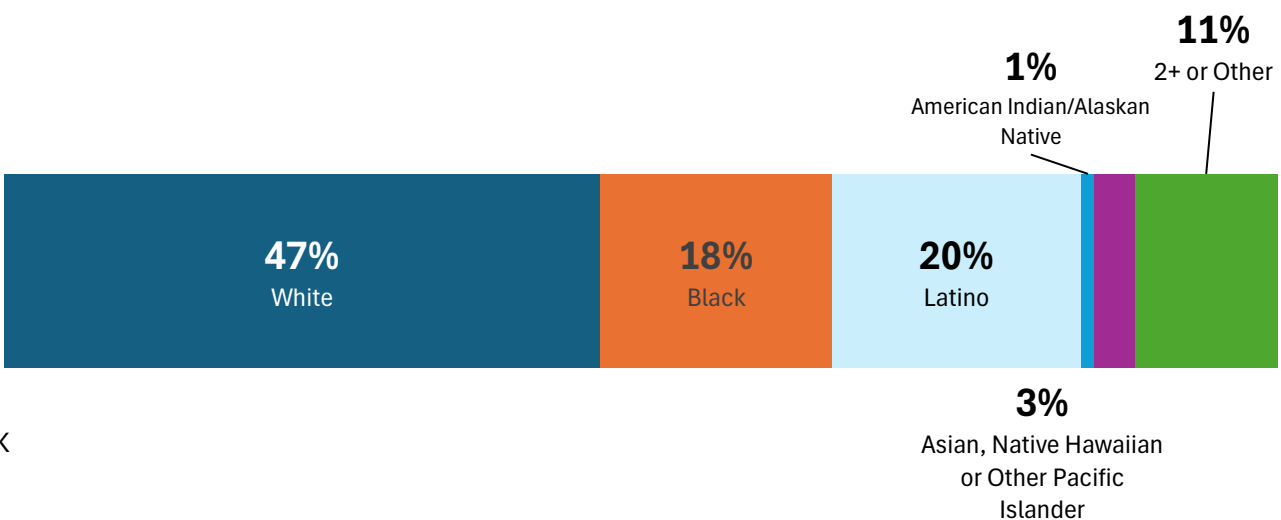


Pre-School Aged Kids are the most diverse

Population age structure by sex, 2024



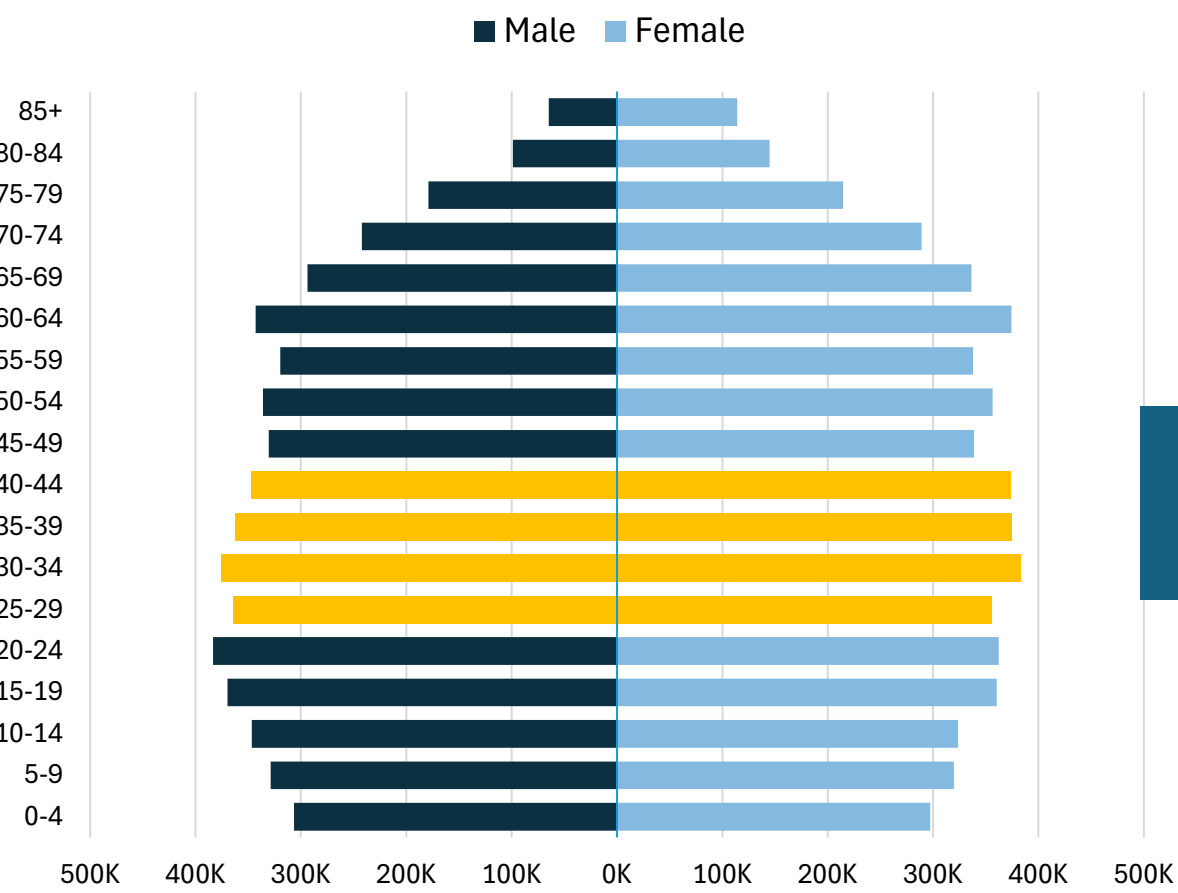
Racial/Ethnic Composition Ages 0-4, 2024



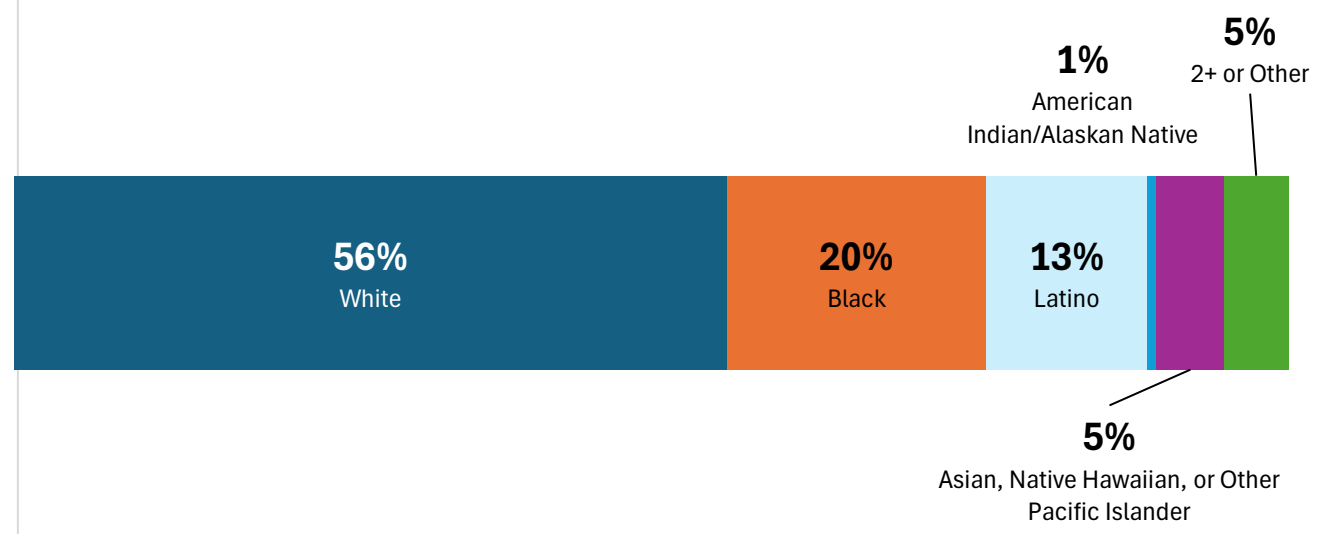
Source: US Census Bureau 2024 1yr ACS Public use Microdata obtained from IPUMS-USA

Prime-Working Age Cohort is becoming more diverse

Population age structure by sex, 2024



Racial/Ethnic Composition Ages 25-44, 2024



Let's look at migration

(The most difficult component of population change to predict!)

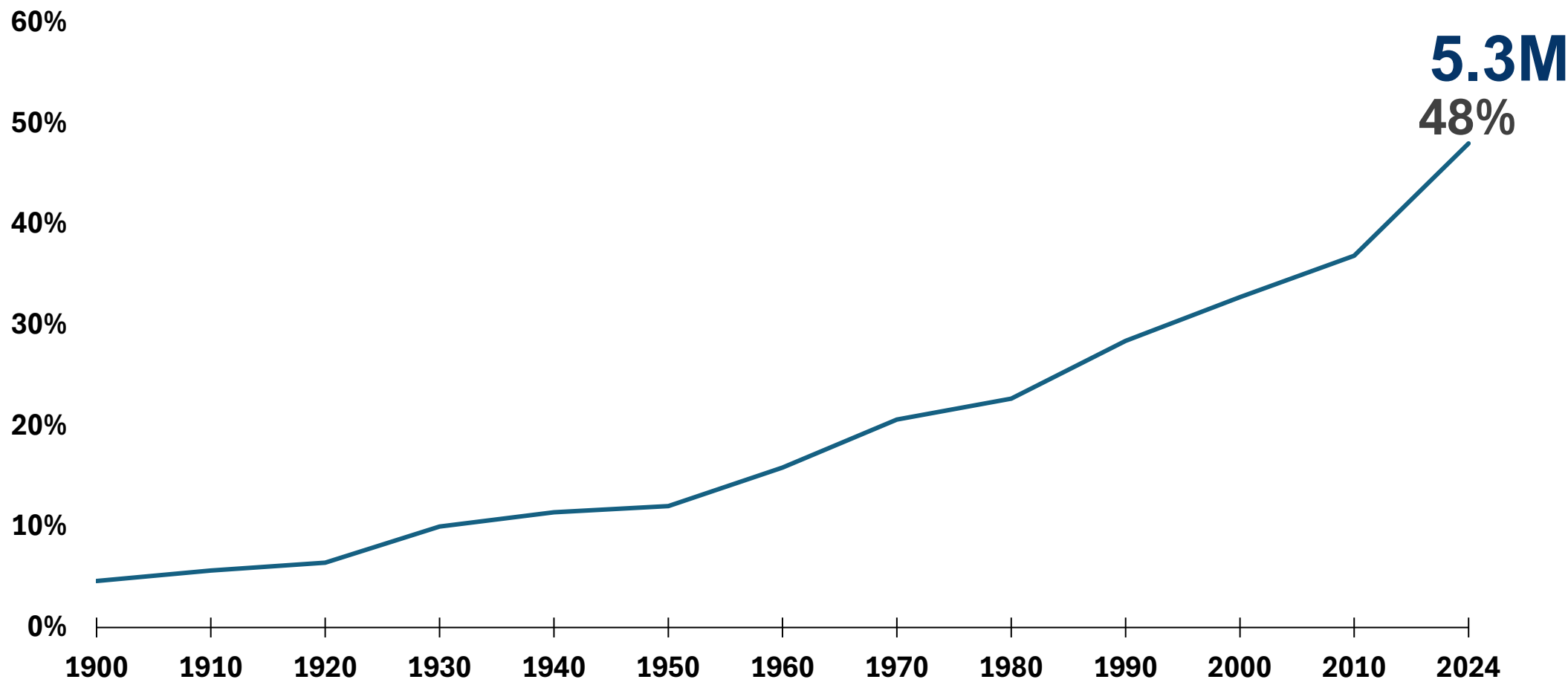
48%

5.3M

of North Carolinians are *not*
NC natives.

Historical Migration Trends

Percent of North Carolina Population Born Out-of-State, 1900-2024



Source: U.S Census Bureau, 1900-2023

Where are recent *domestic* migrants moving from?

Top 3 Sending States to North Carolina of U.S.-born domestic migrants, 2023 to 2024



+31,489



+27,675



+26,106

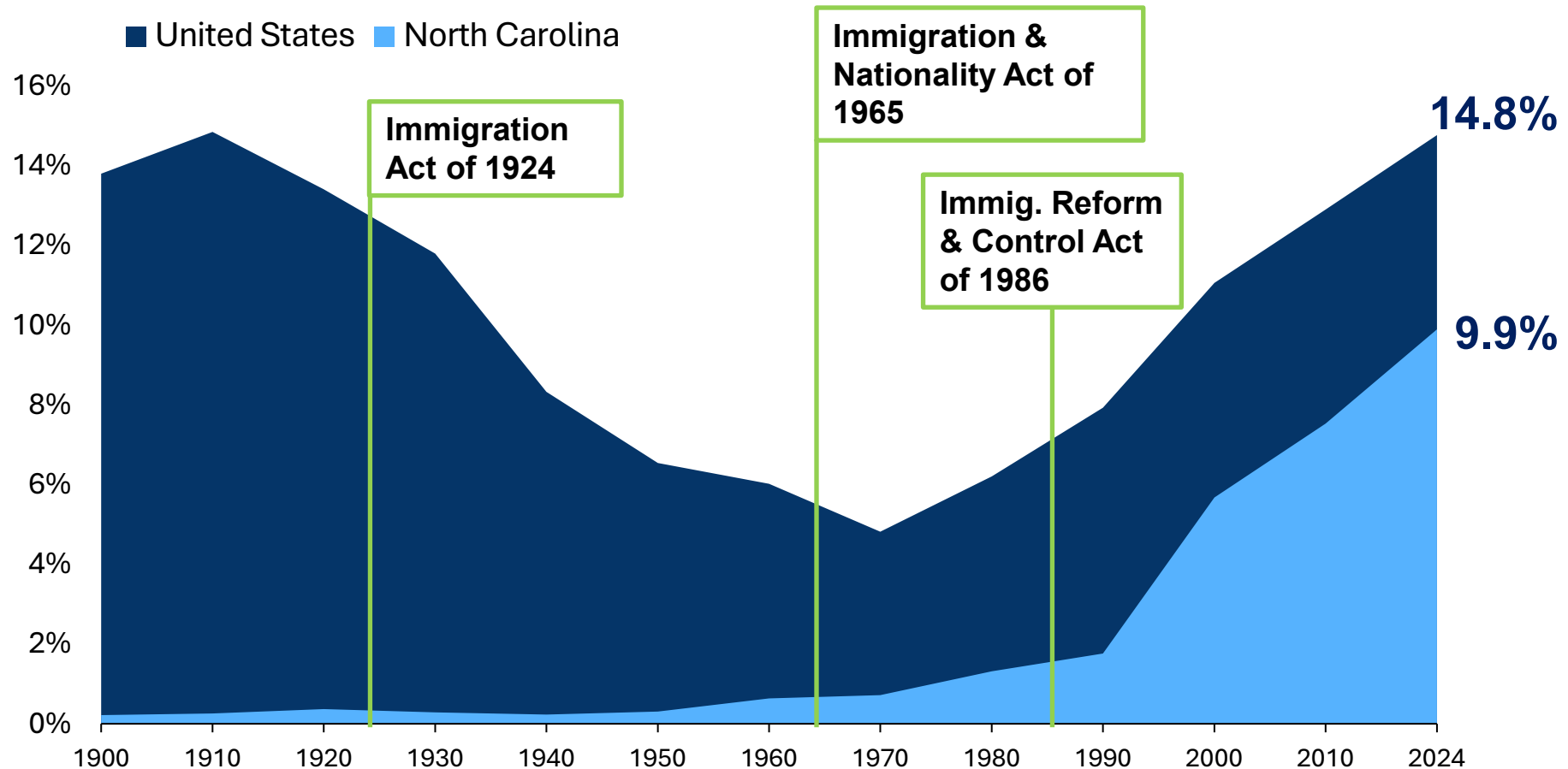
9.9%

1.1M

Of North Carolina's
population is foreign-born

Historical International Migration Patterns

Percent of Population that is Foreign-Born



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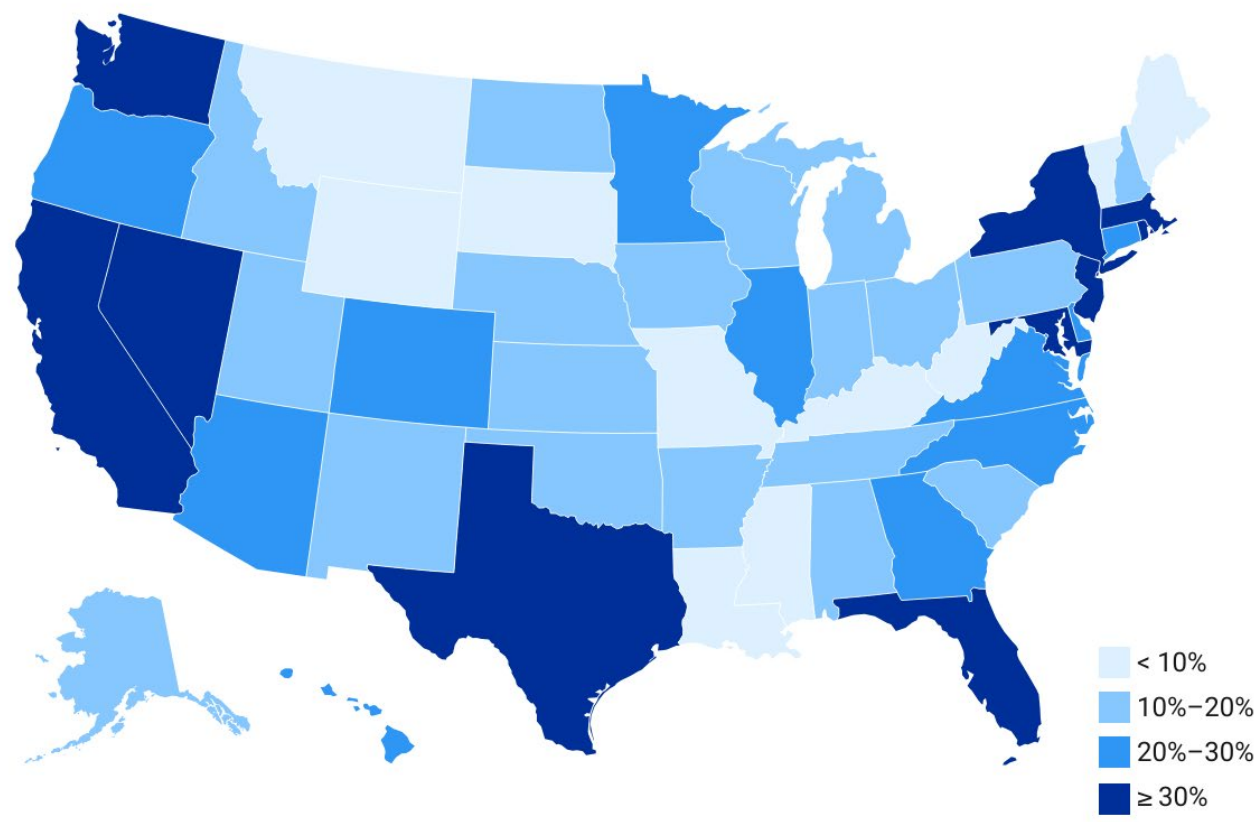
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Source: US Census Bureau Microdata (1900-2000), 1yr ACS (2010-2023) Public Use Microdata obtained from IPUMS-USA, 2024 ACS Table B05012

21.4% of children in NC have at least one foreign-born parent

% of children with at least one foreign-born parent by state



U.S. Overall: 25.9%

503K Children of Immigrants in NC

81.4%

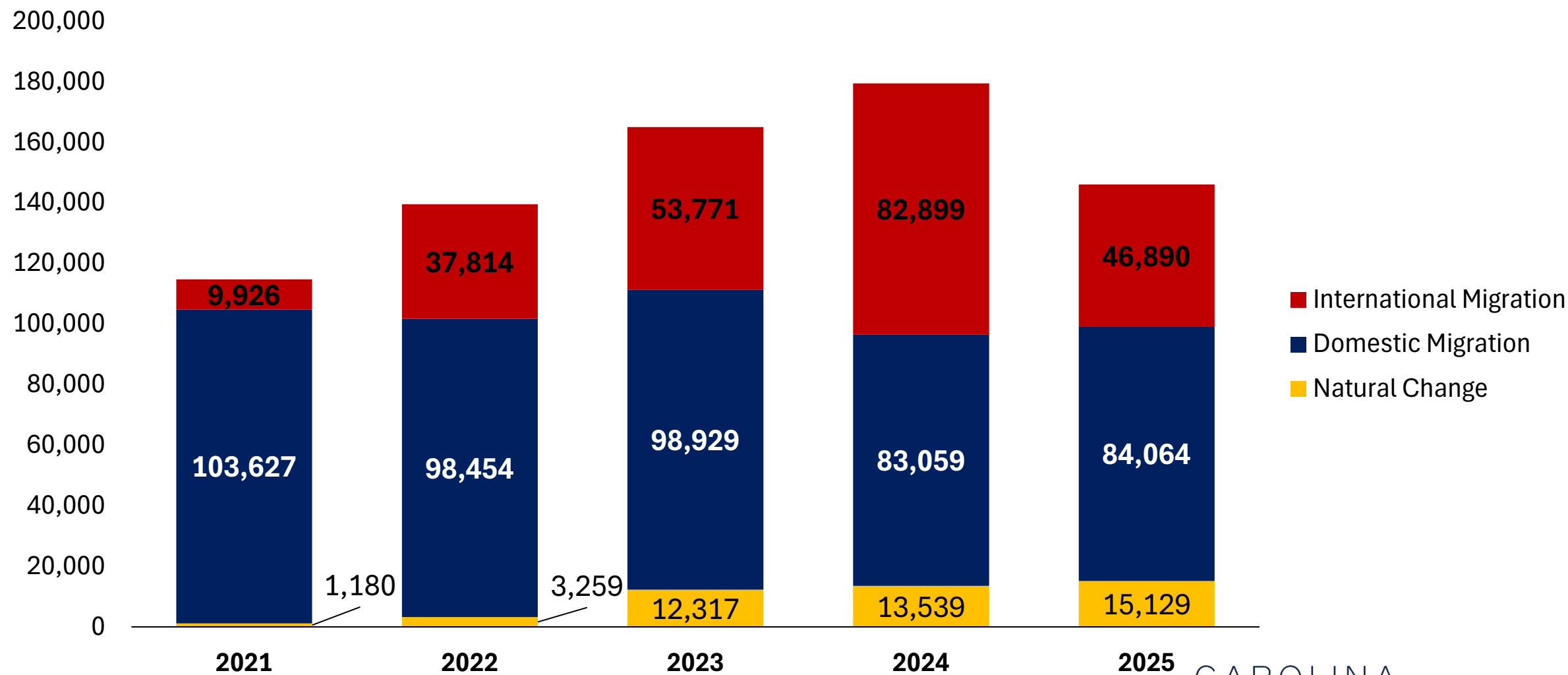
of NC Children of immigrants
are U.S.-born citizens

409K

**Migration appears to be
slowing down**

Migration appears to be declining

Components of Annual Population Change in North Carolina, July 1, 2020 to 2025



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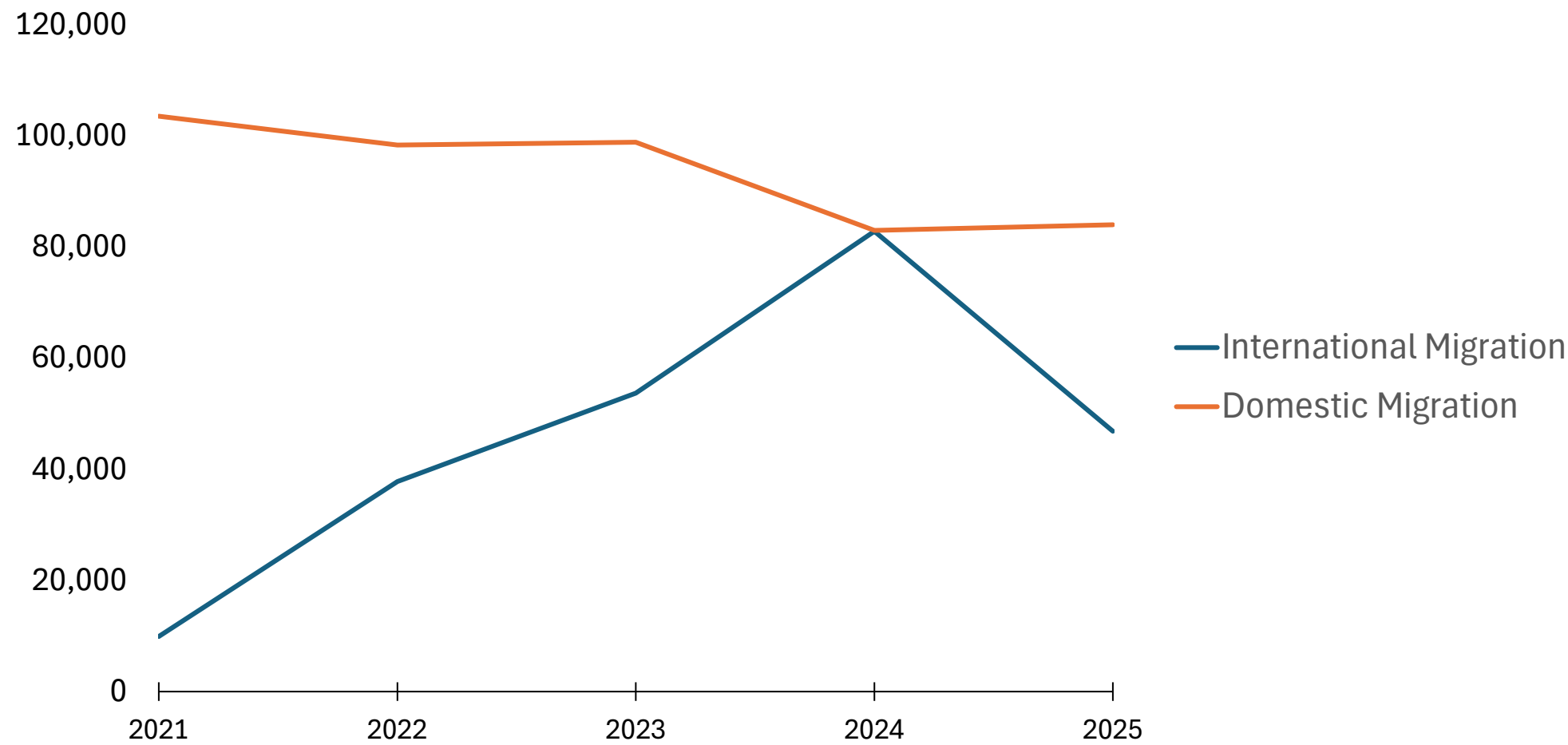
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Source: U.S. Census Bureau's Population Estimates Program, Vintage 2025

Migration appears to be declining

Domestic & International Net Migration in North Carolina, July 1, 2020 to July 1, 2025





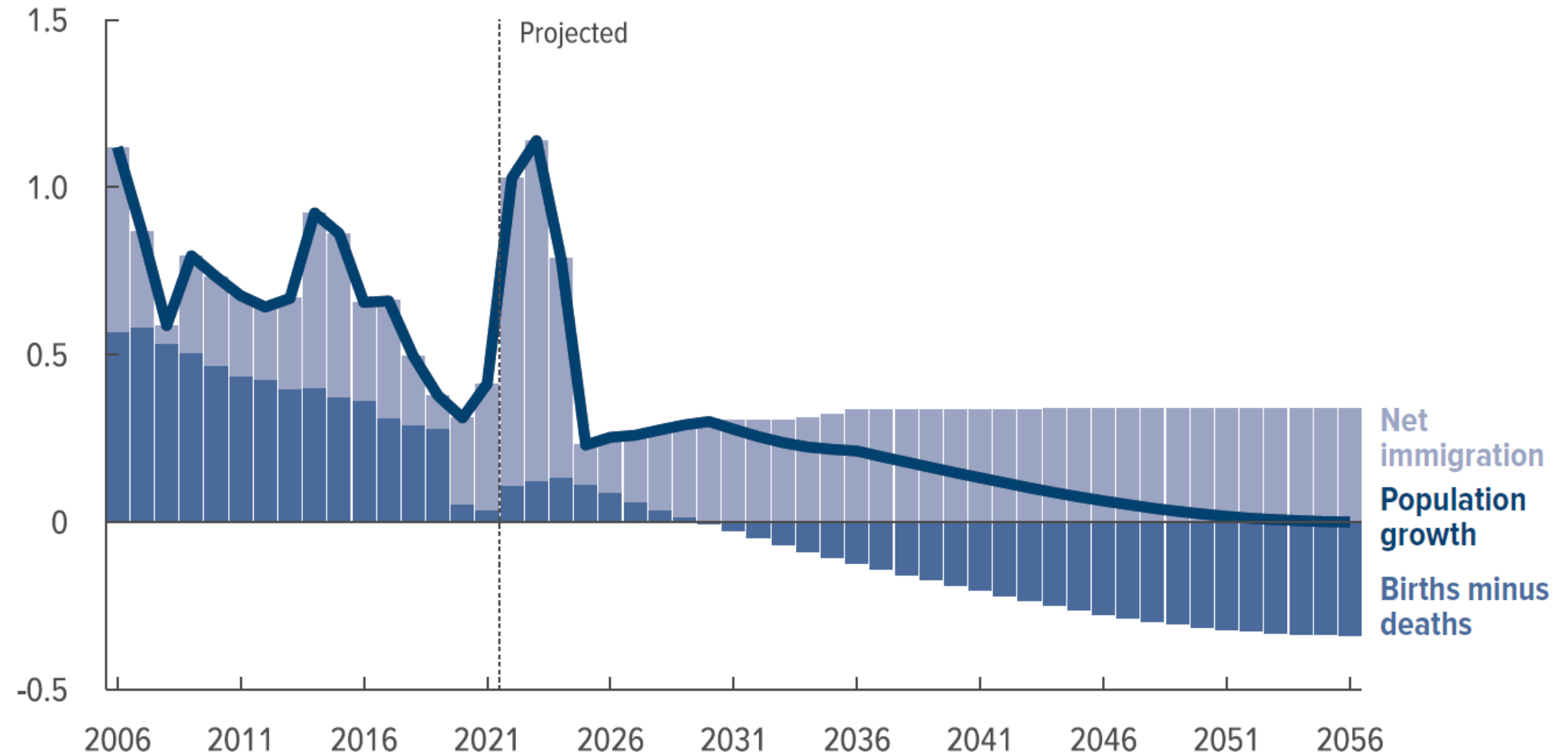
The Demographic Outlook: 2026 to 2056

causing the average age of the population to rise.

- **Population Growth.** On the basis of recent laws, policies, and demographic trends, CBO projects that the rate of population growth will generally slow over the next 30 years, from an average of 0.3 percent a year in the next decade to an average of 0.1 percent a year from 2037 to 2056. The total population is projected to stop growing in 2056 and remain roughly the same size as in the previous year. Thereafter, the population is projected to shrink. Net immigration (the number of people who migrate to the United States minus the number who leave) is projected to become an increasingly important source of population growth in the coming years, as declining fertility rates cause the annual number of deaths to exceed the annual number of births starting in 2030. Without immigration, the population would begin to shrink in 2030.

Population Growth and Contributing Factors

Percent



Source: Congressional Budget Office's Demographic Outlook 2026-2056, January 2026

The Takeaway

- The North Carolina population the UNC System serves in 2035 will look meaningfully different from the one it serves today: **larger, older, more urban, more diverse — and increasingly shaped by who chooses to move here.**
- Migration now drives nearly all of our growth, *and* migration is the most volatile input in any demographic forecast.
- Planning under demographic certainty is straightforward. **Planning under demographic uncertainty — which is where we are — is the harder, more important work ahead.**

Questions

Thank you!

Work With Us

What questions do you have about your community?

What data do you need to make better decisions?

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