

2018 SURVEY OF COLLEGE AND UNIVERSITY PRESIDENTS

A STUDY BY INSIDE HIGHER ED AND GALLUP

**SCOTT JASCHIK & DOUG LEDERMAN
EDITORS, INSIDE HIGHER ED**

THE 2018 INSIDE HIGHER ED SURVEY OF COLLEGE AND UNIVERSITY PRESIDENTS

A study by *Inside Higher Ed* and Gallup



Inside Higher Ed

1015 18th Street NW, Suite 1100
Washington, DC 20036
t 202.659.9208



Gallup

901 F Street, NW
Washington, DC 20004
t 202.715.3030

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FOREWORD

Inside Higher Ed's eighth annual survey of college and university presidents seeks to understand how these leaders view the opportunities and challenges facing higher education institutions in the U.S.

This study addresses the following questions:

- What effects do presidents perceive the election of Donald Trump had on their campus and on higher education more generally?
- What are presidents' views of some of the federal policies that affect higher education?
- Are presidents confident in the sustainability of their institution's financial model over the next 5 and 10 years?
- Do presidents believe the business models used in various sectors of higher education are sustainable?
- Do presidents anticipate that additional colleges will close or merge in the coming year?
- What are presidents' opinions about tuition resets or tuition freezes?
- What are presidents' biggest concerns about the size and composition of their student body?
- How do presidents assess race relations at their institution and at colleges nationwide?
- Do college presidents believe that Americans have an accurate view of the purposes of higher education?
- What factors do presidents see as causing declines in public support for higher education?
- How vocal have presidents been about political matters?
- How well prepared do presidents think they were for the various tasks of a college presidency when they first became a president?

SNAPSHOT OF FINDINGS

- Forty-nine percent say the Trump administration's handling of federal higher education has been about what they expected. But four times as many college presidents say the Trump administration has been worse (41 percent) rather than better (10 percent) than they expected
- Among recent changes in federal higher education policies, a majority of college presidents favor efforts by the Department of Education to give colleges more flexibility in how they handle sexual assault cases. Presidents widely oppose new taxes on endowment earnings.
- Sixty-nine percent of presidents say President Trump's rhetoric has made it more difficult to recruit international students to their college.
- The majority of presidents, 63 percent, remain confident that their institution is financially sustainable over the next five years. Fewer, 53 percent, agree their institution will remain viable over the next 10 years.
- Presidents believe the business models for elite private colleges, elite private liberal arts colleges and public flagship universities are viable over the next 10 years. They are less likely to think the business model for community colleges is viable, and relatively few think for-profit institutions and other private nonprofit institutions have viable business models.
- Nearly all presidents believe that additional colleges will merge or close this year, with 30 percent predicting that between one and five colleges will close, 40 percent between 6 and 10, and 29 percent more than 10.
- Thirteen percent of presidents say they could see their own college closing or merging in the next five years. That is higher than the 9 percent of chief business officers who answered that way in an *Inside Higher Ed* survey last summer.
- In terms of enrollment, college presidents are most concerned about enrolling their college's target number of undergraduates and about enrolling students who are likely to be retained and graduate on time. Private baccalaureate college presidents are especially concerned about meeting enrollment targets.
- Eight in 10 presidents describe the state of race relations at their own college as either "excellent" (19 percent) or "good" (61 percent). Twenty percent say race relations at U.S. colleges are excellent or good. Both of those numbers show a continuing but modest decline in recent years.
- Most college presidents believe that Americans do not accurately understand the purpose of higher education. They believe attention to affordability, institutional wealth and student amenities has created misperceptions that contribute to the lack of understanding.
- College presidents are concerned about Republicans' increasing skepticism about higher education but generally do not believe Republican concerns are justified. Presidents are divided as to whether college campuses are intolerant of conservative viewpoints.

SNAPSHOT OF FINDINGS (CONT.)

- Compared with a year ago, college presidents are now more likely to believe that anti-intellectual sentiment is growing in the U.S. and that the push to diversify higher education will recede in public attention.
- Majorities of college presidents expect to see an increase in tuition resets at private institutions and tuition freezes at public institutions. They view tuition resets as more of a gimmick than a viable long-term strategy and believe tuition freezes can be damaging to public institutions without additional state funding.
- The vast majority of presidents agree that textbooks cost too much and that colleges should be open to using free educational resources. They are more likely to agree than to disagree that saving students money is a goal worthy enough to justify using lower-quality course materials or taking some control away from faculty in assigning course readings.
- Presidents tend to believe they were prepared to handle the various presidential tasks when they first became president. They are most likely to say they were well prepared for relations with faculty members, academic affairs and financial management. They are least likely to believe they were well prepared for digital learning, government relations and fund-raising.

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METHODOLOGY

This report presents findings from a quantitative research study that Gallup conducted on behalf of *Inside Higher Ed*, designed to examine how college and university presidents view the pressing issues facing higher education.

To achieve this objective, Gallup sent invitations via email to 2,784 presidents and sent regular reminders throughout the Jan. 3-Feb. 1, 2018, field period. Gallup collected 618 completed or partially completed web surveys, yielding a 22 percent response rate. Respondents represented 340 public institutions, 262 private institutions and 16 institutions from the for-profit sector.

Total Participation by Sector

	All Institutions by Sector				Public			Private Nonprofit		
	All	Public	Private Non-profit	For Profit*	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.	Assoc.*
Total N	618	340	262	16	47	95	177	127	107	2

*Data are not reported for these groups due to small sample size.

Note: System offices and specialized institutions are categorized by sector but not by highest degree offering. Consequently, in some tables, percentages for subgroups (e.g., private doctoral/master's and private baccalaureate) may appear inconsistent with the total for the entire group (e.g., all private institutions).

Some sectors do not have data reported due to small sample sizes. Sector groupings are determined based on the 2015 Carnegie Code for the institution.

Gallup education consultants developed the questionnaire in collaboration with Scott Jaschik and Doug Lederman from *Inside Higher Ed*. Bible colleges and seminaries with a Carnegie Code classification of 24 and institutions with enrollments of fewer than 500 students were excluded from the sample. Each institution is represented only once in the results.

The survey was an attempted census of all presidents using the most comprehensive sample information available. Gallup statistically weighted data to correct for nonresponse, matching the obtained sample to targets for all U.S. colleges and universities from the Integrated Postsecondary Education Data System database. Gallup weighted the sample based on institutional control (public or private nonprofit), four-year or two-year degree offerings, student enrollment and geographical region. Therefore, the weighted sample results can be considered representative of the views of presidents at colleges nationwide.

The following sections present the findings of the survey. In some cases, reported frequencies may not add up to 100% due to rounding. "Don't know" and "Refused" responses are excluded from the results.

FINANCIAL HEALTH

The majority of college and university presidents strongly agree or agree (63 percent) they are confident their institution will be financially sustainable over the next five years. Slightly less, 53 percent, are confident in the 10-year financial outlook of their institution. Those figures are virtually unchanged from a year ago and marginally better than what was measured in the 2016 *Inside Higher Ed* presidents' survey (59 percent and 48 percent, respectively).

Over all, presidents of public and private institutions are equally likely to be confident in the financial outlook of their institution over the next five years. But among private institutions, presidents of doctoral or master's level institutions are significantly more confident than those from baccalaureate colleges. Public presidents' confidence is similar regardless of the institution's highest degree offering.

Public college presidents from different sectors do differ, though, in their longer-range views. Sixty-eight percent of public doctoral college presidents are confident their institution will be financially stable over the next 10 years, compared with 53 percent of public master's or baccalaureate presidents and 44 percent of community college presidents. The lower confidence among two-year-college presidents largely accounts for the lower confidence among public college presidents over all (47 percent) than among private college presidents (57 percent).

Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I am confident my institution will be financially stable over the next five years.								
%5 Strongly agree	25	25	23	30	21	25	27	18
%4	38	37	39	34	39	39	44	34
%3	25	21	29	26	23	19	23	37
%2	10	12	8	8	7	13	5	10
%1 Strongly disagree	2	4	1	3	10	4	2	1
I am confident my institution will be financially stable over the next 10 years.								
%5 Strongly agree	19	16	21	26	14	15	27	18
%4	34	31	36	42	39	29	35	36
%3	35	36	35	26	32	37	29	39
%2	10	13	8	7	7	15	8	7
%1 Strongly disagree	2	4	1	0	9	4	1	1

FINANCIAL HEALTH (CONT.)

The survey asked campus leaders about their perceptions of the viability of business models for various types of higher education institutions. They are most likely to believe that the business models for elite private universities (those with endowments in excess of \$1 billion) are sustainable over the next 10 years (93 percent). Presidents are also positive about the business models for elite private liberal arts colleges (79 percent) and public flagship universities (67 percent).

Presidents are less optimistic about the 10-year outlook for community colleges (44 percent), non-flagship public four-year universities (25 percent), other private four-year institutions (11 percent) and for-profit institutions (8 percent).

Presidents' opinions about these business models have generally been stable over time, both in terms of the rank order of the institutions and the percentages believing the different institution types have viable business models. One exception to the general stability is that perceptions of community colleges have recovered the last two years after a dip in 2015 and 2016. In those years, 34 percent and 37 percent of college chiefs, respectively, agreed that community colleges' business models were viable for the next decade.

Private and public college presidents hold similar views on the financial outlooks for most institution types. Their opinions do diverge with respect to elite private liberal arts colleges and community colleges. Private college presidents (89 percent) are much more likely than public college leaders (68 percent) to strongly agree or agree the business models for elite private liberal arts colleges are sustainable. Private college presidents (50 percent) are also somewhat more positive than public college executives (40 percent) about the financial prospects for community colleges. That difference is largely because presidents at four-year public colleges are pessimistic about the viability of community college business models.

Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.

The business models for the following sectors of higher education are sustainable over the next 10 years:

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Elite private universities (endowments > \$1 billion)								
%5 Strongly agree	70	61	78	65	72	50	77	85
%4	23	30	18	28	24	36	19	13
%3	5	7	2	8	2	11	3	2
%2	1	1	0	0	2	2	0	0
%1 Strongly disagree	1	<1	1	0	0	1	1	0

FINANCIAL HEALTH (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Elite private liberal arts colleges (endowments > \$500 million)								
%5 Strongly agree	37	22	50	16	34	21	46	63
%4	42	46	39	46	47	42	38	33
%3	12	17	8	31	12	19	12	3
%2	7	12	3	8	6	14	4	1
%1 Strongly disagree	1	2	0	0	1	3	0	1
Public flagship universities								
%5 Strongly agree	32	31	33	30	32	25	35	31
%4	35	37	34	41	44	39	38	32
%3	22	22	23	22	14	22	17	26
%2	9	9	8	5	10	12	8	7
%1 Strongly disagree	2	2	2	2	0	2	2	3
Community colleges								
%5 Strongly agree	15	16	15	4	4	17	17	17
%4	29	24	35	16	18	26	26	37
%3	35	37	33	48	53	36	38	31
%2	16	17	14	27	22	13	16	11
%1 Strongly disagree	4	6	3	5	3	7	3	3
Non-flagship public four-year institutions								
%5 Strongly agree	2	2	3	0	3	2	5	1
%4	23	24	23	21	27	22	21	23
%3	42	42	42	39	38	46	44	37
%2	26	26	27	33	21	26	24	31
%1 Strongly disagree	6	6	6	7	10	4	5	7

FINANCIAL HEALTH (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Other private four-year institutions								
%5 Strongly agree	0	0	0	0	0	0	0	0
%4	11	8	13	0	4	9	14	16
%3	42	35	48	32	33	39	51	41
%2	36	43	30	54	48	42	29	31
%1 Strongly disagree	11	14	8	14	15	10	6	12
For-profit institutions								
%5 Strongly agree	<1	0	<1	0	0	0	1	0
%4	8	8	7	13	6	10	6	7
%3	33	31	35	21	23	28	40	35
%2	43	48	39	56	50	48	36	39
%1 Strongly disagree	16	14	18	10	21	14	17	19

MERGERS AND CLOSURES

As many colleges face perilous financial situations, some have decided to shut down, or to merge with other colleges, to ensure their survival.

Presidents predict there will be additional closures in 2018, with 30 percent believing there will be one to five closures this year, while another 40 percent foresee 6 to 10 colleges closing. Twenty-nine percent of presidents think a larger number of colleges will shut down, including 10 percent who think the number will be in excess of 20 colleges.

Most presidents also expect to see private college mergers this year, with 56 percent predicting there will be one to five such mergers and 42 percent believing there will be more than five. Three percent of presidents do not expect any private college mergers.

A higher percentage of presidents, 12 percent, do not think any public colleges will merge, including 21 percent of public doctoral university leaders. However, a majority of presidents, 55 percent, anticipate there will be one to five public college mergers, and 32 percent think there will more than five.

The vast majority of campus CEOs, 87 percent, do not expect their own college to close or merge in the next five years, but 13 percent say they could see either occurring. No public doctoral university president sees a merger or closing in their institution's future, but between 13 percent and 15 percent of leaders at other types of colleges do.

The year 2017 saw an uptick in the number of colleges closing or merging with other colleges.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
In terms of closures, in 2018 I anticipate that there will be –								
% No additional closures	<1	<1	<1	0	0	1	1	0
% One to five closures	30	30	30	41	33	23	27	38
% Six to 10 closures	40	40	41	40	38	45	40	39
% 11 to 20 closures	19	17	21	17	19	17	22	21
% More than 20 closures	10	12	7	2	10	14	11	2
In terms of private college mergers, in 2018 I anticipate that there will be –								
% No additional mergers	3	2	4	3	1	2	1	7
% One to five mergers	56	58	53	63	61	55	56	58
% Six to 10 mergers	29	26	31	28	20	29	30	29
% More than 10 mergers	13	14	12	7	17	14	14	7

MERGERS AND CLOSURES (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
In terms of <i>public college</i> mergers, in 2018 I anticipate that there will be –								
% No additional mergers	12	11	14	21	8	9	12	18
% One to five mergers	55	53	57	61	56	52	58	54
% Six to 10 mergers	23	26	22	17	26	26	24	18
% More than 10 mergers	9	11	7	2	10	13	6	10
I could see my college closing or merging in the next five years.								
% Yes	13	12	13	0	14	15	13	14
% No	87	88	87	100	86	85	87	86

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There's no chance that the iPhone is going to get any significant market share. No chance.

”

Microsoft CEO Steve Ballmer, 2007

Hindsight is 20/20

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CONCERNS ABOUT STUDENT BODY SIZE AND COMPOSITION

Among various goals colleges may seek to attain when assembling their student populations, presidents tend to be most concerned about basic goals of enrolling their target number of undergraduates and being able to retain and graduate their students. Eight in 10 presidents are very or somewhat concerned about achieving those goals, far more than for any other goal mentioned for their student body.

Slight majorities of campus leaders are concerned about achieving four other goals, including enrolling enough students who do not need institutional student aid (56 percent), enrolling more international students (56 percent), giving out too much aid to students who may not need it (54 percent) and enrolling more students studying online (52 percent).

Presidents are less concerned about enrolling enough racial and ethnic minority students to have a diverse student body, enrolling more out-of-state students, enrolling more first-generation students, enrolling more Pell Grant-eligible students and enrolling talented athletes who can succeed academically – between 41 percent and 45 percent of presidents are concerned with each of those five goals. Presidents are least concerned with enrolling students who will improve their institution's position on college ranking lists – just 31 percent say they are concerned about that goal.

Many colleges are wrestling with issues related to the size and composition of their student bodies. Please indicate how concerned you are about each of the following:								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Enrolling my college's target number of undergraduates								
% Very concerned	42	34	50	10	40	37	45	60
% Somewhat concerned	40	44	35	42	38	48	33	33
% Not too concerned	12	14	9	24	16	11	13	6
% Not concerned at all	7	9	5	24	6	3	9	1
Enrolling students who are likely to be retained and graduate on time								
% Very concerned	39	40	38	17	43	44	33	44
% Somewhat concerned	43	49	37	49	44	51	44	34
% Not too concerned	15	9	21	25	11	4	18	18
% Not concerned at all	3	1	4	10	1	0	5	4

CONCERNS ABOUT STUDENT BODY SIZE AND COMPOSITION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Enrolling enough students who don't need institutional student aid								
% Very concerned	27	9	43	13	15	6	45	48
% Somewhat concerned	29	26	33	38	43	21	33	32
% Not too concerned	29	41	17	32	27	49	14	17
% Not concerned at all	15	25	6	17	14	24	8	3
Enrolling more international students								
% Very concerned	17	15	20	31	27	6	19	23
% Somewhat concerned	39	35	42	47	46	28	46	34
% Not too concerned	27	27	27	15	14	38	26	30
% Not concerned at all	17	23	11	7	12	27	9	13
Giving out too much aid to students who may not need it								
% Very concerned	15	7	22	7	10	5	26	25
% Somewhat concerned	39	31	46	41	46	29	47	48
% Not too concerned	32	39	25	27	30	38	20	23
% Not concerned at all	15	24	7	25	15	27	7	5
Enrolling more students studying online								
% Very concerned	12	10	16	7	14	8	21	13
% Somewhat concerned	40	43	37	29	52	45	31	40
% Not too concerned	33	37	30	54	27	33	36	23
% Not concerned at all	15	10	18	11	6	13	12	24
Enrolling enough racial and ethnic minority students to have a diverse student body								
% Very concerned	16	15	17	21	21	13	22	16
% Somewhat concerned	29	30	29	39	29	33	35	21
% Not too concerned	28	28	28	20	30	30	17	41
% Not concerned at all	27	27	26	20	20	24	26	22

CONCERNS ABOUT STUDENT BODY SIZE AND COMPOSITION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Enrolling more out-of-state students								
% Very concerned	11	9	12	15	23	3	15	11
% Somewhat concerned	34	33	38	56	46	23	44	34
% Not too concerned	34	34	34	16	23	44	30	37
% Not concerned at all	21	24	16	13	9	29	10	18
Enrolling more first-generation students								
% Very concerned	14	16	13	10	13	15	13	17
% Somewhat concerned	28	31	27	49	32	32	34	22
% Not too concerned	35	32	37	27	31	33	30	37
% Not concerned at all	23	21	23	13	24	20	24	24
Enrolling more Pell Grant-eligible students								
% Very concerned	13	13	14	8	9	11	9	18
% Somewhat concerned	29	27	31	55	31	27	36	30
% Not too concerned	39	38	38	26	38	41	39	37
% Not concerned at all	20	22	17	12	22	21	16	15
Enrolling talented athletes who can also succeed academically								
% Very concerned	7	5	9	5	6	6	7	11
% Somewhat concerned	34	31	37	30	40	27	32	41
% Not too concerned	33	36	31	52	34	36	35	29
% Not concerned at all	27	28	24	13	20	32	27	19
Enrolling a class that will improve my institution's position in college ranking lists								
% Very concerned	6	2	9	10	4	1	9	6
% Somewhat concerned	25	18	31	36	34	11	30	38
% Not too concerned	30	27	31	35	32	23	41	26
% Not concerned at all	39	53	28	19	29	65	20	30

CONCERNS ABOUT STUDENT BODY SIZE AND COMPOSITION (CONT.)

In the 2017 survey, presidents were also most concerned with enrolling the target number of undergraduates and in enrolling students likely to be retained and to graduate; they were least concerned with enrolling classes that improve the college's score on college ranking lists. Presidents are somewhat less likely to be concerned with achieving certain goals than they were a year ago, including enrolling enough students who don't need aid (down from 64 percent to 56 percent), enrolling enough racial and ethnic minority students to ensure a diverse student body (down from 55 percent to 45 percent) and enrolling more first-generation students (down from 52 percent to 42 percent). Concern did not increase on any of the items between 2017 and 2018.

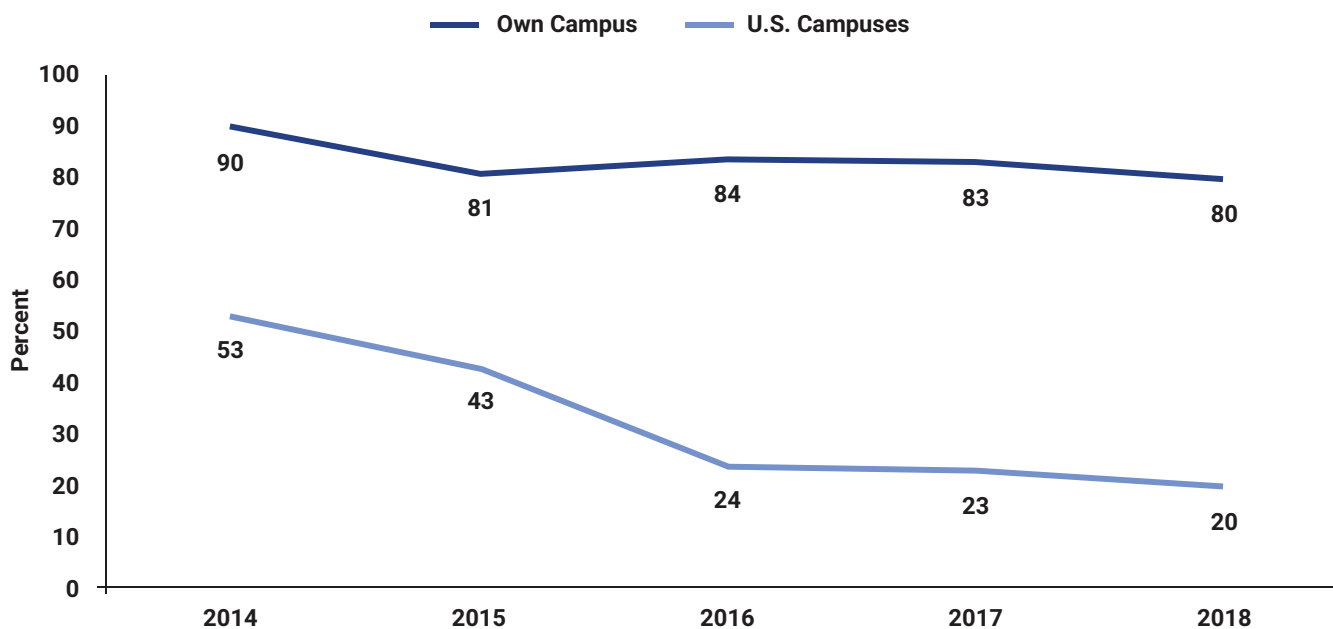
Among the key differences in enrollment concerns by institution type this year:

- Private college presidents (76 percent) remain far more likely than public college presidents (35 percent) to say they are very or somewhat concerned about enrolling enough students who do not need institutional aid. Private college leaders are also far more concerned about giving too much aid to students who do not need it than public college presidents are, 68 percent to 38 percent.
- Public doctoral college presidents (52 percent) are least concerned about enrolling their target number of undergraduates, while private baccalaureate college presidents are most concerned (93 percent).
- Sixty-three percent of public doctoral college presidents are very or somewhat concerned about enrolling more Pell Grant-eligible students. No more than 48 percent of leaders of other types of colleges are concerned.

RACE RELATIONS

Presidents' assessments of race relations on their own campus and on U.S. campuses have not improved in the past year and remain significantly lower than they were prior to the wave of protests on racial matters in the fall of 2015. Presidents continue to be much more positive about race relations on their own campus -- 80 percent describe them as "excellent" or "good," compared with 20 percent who say the same about race relations on U.S. campuses generally. Those figures are the lowest measured to date, though down only slightly from 2017.

College Presidents' Assessment of the State of Race Relations, 2014–2018



Most presidents say race relations at their college are "good," with 61 percent giving this rating. Nineteen percent of college presidents say race relations on their campus are "excellent," including 24 percent of those at private institutions and 14 percent of those at public institutions. Just 1 percent of college presidents believe race relations on their campus are "poor."

The greatest percentage of presidents, 67 percent, describe race relations on U.S. campuses as "fair," with 14 percent describing them as "poor."

RACE RELATIONS (CONT.)

As you may know, there has recently been intense discussion about race on many college and university campuses.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Generally speaking, would you say the state of race relations on your campus is excellent, good, fair or poor?								
% Excellent	19	14	24	11	11	13	21	23
% Good	61	63	60	68	63	68	64	56
% Fair	19	23	16	22	25	19	14	20
% Poor	1	<1	1	0	1	<1	1	1
Generally speaking, would you say the state of race relations on college and university campuses in this country is excellent, good, fair or poor?								
% Excellent	<1	<1	0	0	0	1	0	0
% Good	20	21	18	15	12	25	17	22
% Fair	67	64	70	75	74	62	70	62
% Poor	14	15	13	10	14	12	13	16

IMAGE OF HIGHER EDUCATION

Several recent public opinion surveys have measured declines in Americans' positive ratings of higher education in recent years, particularly among those who identify as Republicans. College presidents acknowledge decreasing public support for higher education but see the changing views as largely grounded in misperceptions or misunderstandings.

Over all, 13 percent of presidents strongly agree or agree, while 56 percent strongly disagree or disagree, that most Americans have an accurate view of the purpose of higher education. The results are essentially the same when the question is asked with respect to the particular sector of each college president's institution – 16 percent of presidents strongly agree or agree and 55 percent strongly disagree or disagree that Americans understand the purpose of the sector of higher education to which their institution belongs.

Majorities of presidents see opinions about higher education being influenced by false, or exaggerated, impressions. For example, 86 percent of presidents strongly agree or agree that attention to student debt has led the public to think college is less affordable than it is. A similar percentage, 84 percent, strongly agree or agree that attention to large college endowments creates a misperception that colleges are wealthier than they are. Nearly as many, 78 percent, strongly agree or agree that some of the amenities colleges offer students create a perception that colleges have misplaced priorities. Fifty-one percent strongly agree or agree that attention to campus racial protests leads people to believe colleges are less welcoming of racial and ethnic minority students than they are in reality.

Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Attention to student debt has led many prospective students and parents to think of college as less affordable than it is, taking into account student aid.								
%5 Strongly agree	42	34	51	30	36	31	45	54
%4	44	49	39	55	56	47	46	37
%3	12	14	10	12	5	17	8	9
%2	2	3	1	2	3	4	1	0
%1 Strongly disagree	<1	<1	0	0	0	<1	0	0
Attention to large endowments at some institutions has created a perception that most colleges are wealthier than they are.								
%5 Strongly agree	42	36	50	44	42	28	56	49
%4	42	45	37	46	45	46	33	38
%3	10	13	8	6	9	19	7	8
%2	5	5	4	2	3	6	4	4
%1 Strongly disagree	1	2	<1	2	1	2	0	<1

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Some of the amenities many colleges have added to entice students to enroll have contributed to the perception that these institutions have misplaced priorities.								
%5 Strongly agree	32	31	34	20	25	36	32	32
%4	46	46	43	51	42	43	47	42
%3	17	17	16	26	18	15	17	15
%2	5	5	6	2	12	5	3	10
%1 Strongly disagree	1	1	<1	0	3	1	1	0
Attention to racial protests has led many prospective students and families to think colleges are less welcoming of diverse populations than is really the case.								
%5 Strongly agree	14	12	16	12	13	7	16	14
%4	37	38	37	50	40	43	36	40
%3	34	37	32	32	35	32	33	30
%2	12	12	11	7	10	16	10	11
%1 Strongly disagree	3	1	4	0	2	1	5	4
Most Americans have an accurate view of the purpose of my sector of higher education.								
%5 Strongly agree	2	1	3	0	0	2	1	3
%4	14	18	11	5	9	20	10	12
%3	29	31	28	35	36	27	29	24
%2	37	37	37	37	35	36	45	37
%1 Strongly disagree	18	13	21	24	20	14	16	23
Most Americans have an accurate view of the purpose of higher education.								
%5 Strongly agree	<1	0	1	0	0	0	1	0
%4	13	11	15	11	3	14	11	17
%3	31	35	26	40	35	34	29	24
%2	42	41	43	26	43	42	45	42
%1 Strongly disagree	14	12	15	23	19	10	13	17

IMAGE OF HIGHER EDUCATION (CONT.)

Asked to evaluate how responsible each of four factors is for fostering less positive images of higher education, college presidents are most likely to point to concerns about affordability and student debt as factors. Ninety-eight percent of presidents say affordability and cost concerns are at least somewhat responsible for declining public support for higher education, including 63 percent who say cost concerns are very responsible.

Thirty-nine percent of presidents believe concerns over whether higher education prepares students for careers are very responsible for declining views of higher education, with another 56 percent saying such concerns are somewhat responsible.

Thirty-one percent of presidents believe perceptions of liberal political bias are very responsible for declining support for higher education, with another 55 percent saying that factor is at least somewhat responsible.

Presidents generally do not believe under-representation of low-income students has contributed significantly to changes in views of higher education – 8 percent believe that is very responsible and 38 percent believe it is somewhat responsible for the declining image of higher education.

Private college presidents are much more likely than public college presidents to see concerns about college affordability as being very responsible for declining support for higher education – 72 percent of private college presidents and 55 percent of public college presidents hold this view. Also, twice as many private college presidents (42 percent) as public college presidents (21 percent) see perception of liberal political bias as a major contributing factor to more negative views of higher education.

How responsible do you think each of the following is for declining public support for higher education?								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Concerns about college affordability and student debt								
% Very responsible	63	55	72	58	54	49	62	80
% Somewhat responsible	35	42	27	40	42	47	36	19
% Not too responsible	2	3	1	2	4	4	2	1
% Not responsible at all	<1	<1	0	0	0	<1	0	0
Concerns over whether higher education prepares students for careers								
% Very responsible	39	37	43	22	27	35	41	42
% Somewhat responsible	56	57	54	70	58	60	54	55
% Not too responsible	4	6	3	8	15	5	4	2
% Not responsible at all	<1	0	1	0	0	0	1	0

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Perception of liberal political bias in higher education								
% Very responsible	31	21	42	29	28	20	37	46
% Somewhat responsible	55	63	47	51	63	57	55	44
% Not too responsible	13	14	10	13	6	21	7	11
% Not responsible at all	1	2	<1	7	3	2	1	0
Under-representation of low-income students								
% Very responsible	8	8	8	9	1	8	2	11
% Somewhat responsible	38	41	35	35	37	49	41	35
% Not too responsible	41	39	42	44	47	31	44	41
% Not responsible at all	13	12	15	12	14	12	13	13

The survey also asked college presidents about the growing Republican-Democratic divide in views of higher education. As seen on the following page, 45 percent of presidents strongly agree and 32 percent agree they are worried about Republicans' increasing skepticism about higher education. About two-thirds strongly agree (21 percent) or agree (44 percent) that perceptions of colleges as places that are intolerant of conservative views is having a major negative impact on attitudes about higher education.

While expressing concerns about Republicans' views, college presidents do not necessarily feel that skepticism is warranted. Seventy-one percent of college presidents disagree, including 44 percent who do so strongly, that Republicans' doubts about higher education are justified.

Presidents are slightly more likely to strongly disagree or disagree (39 percent) than to strongly agree or agree (32 percent) that the perception of colleges as places intolerant of conservative views is accurate. They also see their own campus as being as welcoming of conservative students as they are of liberal students — 62 percent strongly agree or agree and 16 percent strongly disagree or disagree this is the case.

IMAGE OF HIGHER EDUCATION (CONT.)

Several studies in the past year have indicated growing differences between Republicans' and Democrats' views of higher education.

Please indicate your level of agreement with the following statements.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I am worried about Republicans' increasing skepticism about higher education.								
%5 Strongly agree	45	43	47	52	52	43	46	46
%4	32	35	31	35	32	33	33	34
%3	13	14	12	10	10	16	14	11
%2	7	5	6	3	5	5	4	9
%1 Strongly disagree	3	2	3	0	1	3	3	1
The perception of colleges as places that are intolerant of conservative views is having a major negative impact on attitudes about higher education.								
%5 Strongly agree	21	15	26	21	24	15	28	25
%4	44	45	43	55	48	40	43	39
%3	26	30	21	14	22	34	21	24
%2	8	8	7	10	4	9	8	8
%1 Strongly disagree	2	2	2	0	2	2	0	3
Classrooms on my campus are as welcoming to conservative students as they are to liberal students.								
%5 Strongly agree	30	27	33	12	18	28	21	40
%4	32	37	28	50	47	35	30	28
%3	22	20	23	21	21	24	26	16
%2	13	13	14	15	12	9	17	14
%1 Strongly disagree	3	4	3	2	3	4	5	2

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
The perception of colleges as places that are intolerant of conservative views is accurate.								
%5 Strongly agree	7	4	10	9	6	4	10	9
%4	25	24	25	15	19	24	28	22
%3	28	27	28	17	28	33	25	28
%2	23	28	20	39	34	21	23	21
%1 Strongly disagree	16	17	16	20	13	18	14	20
Republican doubts about higher education are justified.								
%5 Strongly agree	2	1	4	5	0	1	3	3
%4	10	9	9	6	10	9	8	8
%3	18	20	14	12	12	19	17	11
%2	27	32	22	27	33	33	24	24
%1 Strongly disagree	44	39	51	50	45	38	47	55

Public college leaders are somewhat less likely than private college presidents to believe the perception that colleges are intolerant of conservative views is having a major negative impact on opinions of higher education. That difference is mainly because community college presidents are less likely to agree that is the case.

Whereas public college presidents tend to reject the notion that colleges are intolerant of conservative views – 45 percent strongly disagree or disagree and 28 percent strongly agree or agree – private college presidents are evenly divided (36 percent strongly disagree or disagree and 35 percent strongly agree or agree). A majority of public doctoral college executives (59 percent), and close to half of public master's or baccalaureate presidents (47 percent), strongly disagree or disagree that colleges are intolerant of conservative views.

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FEDERAL HIGHER EDUCATION POLICY

The change in presidential administration in Washington in 2017 brought about a change in many federal policies that affect higher education. College presidents mostly say the Trump administration in general, and Secretary of Education Betsy DeVos specifically, have performed about as they expected in terms of managing higher education policy during their first year in office. However, more say each has been worse rather than better than expected.

Over all, 49 percent say the Trump administration has done about as they expected in the area of higher education, while 10 percent say it has been better and 41 percent say it has been worse than they expected. Six in 10 presidents say DeVos’s performance in higher education policy has met their expectations, while 8 percent say she has been better and 30 percent worse than they expected.

Evaluations of the Trump administration’s first year are generally similar among private and public college presidents. However, public college presidents are more negative in their evaluation of DeVos’s first year than are private college presidents.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master’s/ Bacc.	Assoc.	Doctoral/ Master’s	Bacc.
From the perspective of higher education policy, has the first year of the Trump administration been – ?								
% Better than I expected	10	6	11	0	7	7	12	11
% About what I expected	49	51	47	48	54	54	49	48
% Worse than I expected	41	43	41	52	40	39	39	42
In her first year as Education Secretary, has Betsy DeVos been – ?								
% Better than I expected	8	3	11	2	6	3	14	11
% About what I expected	62	61	63	71	55	62	58	72
% Worse than I expected	30	36	26	26	40	35	29	17

The survey also asked presidents for their views on some of the policy actions being pursued by the Trump administration and the Republican majority in Congress.

As seen on the next page, a majority of college leaders, 54 percent, strongly favor or favor efforts by the Department of Education to give colleges more flexibility in how they handle allegations of sexual assault. Twenty-eight percent of presidents are opposed to this action. At the same time, presidents are divided on the Trump administration’s decision to revoke guidance the Obama administration gave about how to handle sexual assault cases – 36 percent are in favor and 40 percent are opposed. Public college presidents are generally opposed to this move (30 percent to 46 percent), while private college presidents tilt toward favoring it (42 percent to 37 percent).

FEDERAL HIGHER EDUCATION POLICY (CONT.)

By 40 percent to 31 percent, presidents favor rather than oppose a Republican plan to require minority-serving institutions receiving dedicated grant money to graduate or transfer at least 25 percent of their students.

Three other proposals engender more opposition than support from presidents. These include efforts by the Department of Education to change “borrower defense” rules that allow some student loan borrowers to discharge their loans (27 percent favor, 46 percent oppose), a plan to reauthorize the Higher Education Act and eliminate certain rules that have been key parts of efforts to regulate for-profit higher education (24 percent favor, 61 percent oppose) and the tax legislation that will tax some earnings on college endowments (14 percent favor, 62 percent oppose).

Opposition to taxing endowments is lower among community college presidents, among whom 54 percent are opposed. Meanwhile, a majority of private baccalaureate presidents strongly oppose the new taxes on endowment earnings.

Please indicate your opinion about each of the following federal policies that affect higher education.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Efforts by the Department of Education to give colleges more flexibility in how they handle allegations of sexual assault								
% Strongly favor	15	8	21	15	9	7	15	24
% Favor	39	40	37	49	41	35	45	33
% Neither favor nor oppose	18	18	17	15	23	22	17	19
% Oppose	23	25	22	18	18	25	18	22
% Strongly oppose	5	8	3	2	9	11	5	2
A Republican plan to require minority-serving institutions that receive \$600 million in annual dedicated grants to graduate or transfer at least 25 percent of students								
% Strongly favor	12	11	12	13	12	7	12	12
% Favor	28	28	26	37	27	31	36	22
% Neither favor nor oppose	30	29	31	24	30	31	27	30
% Oppose	21	20	21	21	20	16	15	26
% Strongly oppose	10	11	9	4	10	14	11	11

FEDERAL HIGHER EDUCATION POLICY (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Efforts by the Department of Education to revoke guidance the Obama administration gave colleges about how to handle sexual assault cases								
% Strongly favor	10	7	13	11	6	8	10	16
% Favor	26	23	29	25	23	17	30	30
% Neither favor nor oppose	23	25	21	21	26	27	21	21
% Oppose	24	29	20	34	29	27	20	21
% Strongly oppose	16	17	17	9	15	20	19	13
Efforts by the Department of Education to change "borrower defense" rules that allow some student loan borrowers to discharge their loans								
% Strongly favor	6	2	8	4	1	2	9	8
% Favor	21	20	20	31	18	23	24	16
% Neither favor nor oppose	27	29	26	19	22	32	24	30
% Oppose	26	29	23	39	33	25	25	26
% Strongly oppose	20	19	23	7	26	19	19	20
A Republican plan to reauthorize the Higher Education Act and eliminate the "gainful employment" rule and the 90-10 rule, which have been key parts of federal efforts to regulate for-profit higher education								
% Strongly favor	7	5	7	2	3	7	6	3
% Favor	17	20	14	2	7	21	9	17
% Neither favor nor oppose	14	13	16	4	16	14	18	18
% Oppose	30	34	28	54	34	32	31	32
% Strongly oppose	31	29	35	37	39	26	36	31
The tax legislation that will tax earnings on some large college and university endowments								
% Strongly favor	6	6	5	0	1	6	5	5
% Favor	8	11	5	9	8	11	7	2
% Neither favor nor oppose	23	27	21	13	21	28	20	18
% Oppose	26	29	23	51	37	30	23	24
% Strongly oppose	36	27	47	27	34	24	45	52

EFFECTS OF THE TRUMP ELECTION AND PRESIDENCY ON HIGHER EDUCATION

The survey re-asked some of the items from the 2017 survey about the implications of Trump’s election for higher education to see what presidents thought on the same topics a year into his presidency.

Presidents are somewhat more likely now (77 percent) than a year ago (69 percent) to strongly agree or agree that anti-intellectual sentiment is growing in the U.S. Campus leaders also maintain the view that the election exposed that academe is disconnected from much of American society – 51 percent strongly agree or agree this is the case now, compared with 54 percent in 2017.

Additionally, slightly more presidents today (61 percent) than a year ago (55 percent) strongly agree or agree that the push to diversify higher education is likely to recede in attention and public policy under the Trump administration. More also strongly agree or agree that Trump does not accept scientific consensus on many issues, such as climate change – 84 percent, up from 76 percent a year ago.

Trump’s comments on immigration and race during the campaign and as president have been controversial. Campus chief executives believe those comments could have implications for the environment on college campuses, in terms of being seen as welcoming of international students and fostering good race relations.

A year ago, 58 percent of college presidents strongly agreed or agreed that international students may be less likely to enroll in U.S. colleges with Trump in the White House. Now, 69 percent of college presidents strongly agree or agree that Trump’s rhetoric has made it more difficult for their college to recruit international students.

In terms of how Trump’s presidency is affecting race relations, college presidents provide a mixed assessment. Thirty-nine percent of college presidents strongly agree or agree, and 35 percent strongly disagree or disagree, that race relations on their campus are worse under President Trump than they were under President Obama.

Donald Trump's surprise victory in the 2016 presidential election has prompted much discussion among college leaders. Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
President Trump does not accept scientific consensus on many issues, such as climate change.								
%5 Strongly agree	62	67	59	68	73	64	68	51
%4	22	19	24	16	16	21	21	28
%3	8	8	8	4	5	10	5	11
%2	4	4	4	8	3	2	2	3
%1 Strongly disagree	4	2	5	3	2	3	4	7

EFFECTS OF THE TRUMP ELECTION AND PRESIDENCY ON HIGHER EDUCATION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Anti-intellectual sentiment is growing in the United States.								
%5 Strongly agree	40	39	43	44	50	33	42	42
%4	37	39	36	49	37	44	41	36
%3	13	13	12	7	9	16	11	12
%2	6	6	6	0	2	5	2	7
%1 Strongly disagree	3	2	3	0	1	2	3	4
President Trump's rhetoric has made it more difficult for my college to recruit international students.								
%5 Strongly agree	41	44	39	45	45	44	45	34
%4	28	30	26	46	34	25	29	22
%3	18	13	20	2	15	17	12	27
%2	7	7	7	5	4	8	5	10
%1 Strongly disagree	7	5	7	2	2	6	9	7
The push to diversify American higher education is likely to recede in public attention and public policy.								
%5 Strongly agree	27	32	24	26	36	33	27	22
%4	34	41	29	40	37	41	32	27
%3	20	12	26	23	15	12	25	26
%2	12	11	13	10	8	9	7	20
%1 Strongly disagree	6	5	8	2	3	5	9	5
The election exposed that academe is disconnected from much of American society.								
%5 Strongly agree	16	16	16	20	16	11	14	17
%4	35	33	37	26	37	37	34	38
%3	26	26	25	31	25	26	27	26
%2	14	18	11	22	16	16	16	9
%1 Strongly disagree	9	7	11	2	7	9	10	10

EFFECTS OF THE TRUMP ELECTION AND PRESIDENCY ON HIGHER EDUCATION (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Race relations on my campus are worse under President Trump than they were under President Obama.								
%5 Strongly agree	20	21	20	30	27	15	16	24
%4	19	23	16	23	21	29	20	12
%3	25	28	23	25	30	24	31	13
%2	14	11	16	18	11	13	19	16
%1 Strongly disagree	21	17	24	3	12	19	13	34

Public and private college presidents are similar in their views of whether anti-intellectual sentiment is growing in the U.S. and whether the 2016 election exposed that academe is disconnected from much of American society. They differ about whether the push to diversify higher education is likely to recede – 73 percent of public college presidents agree it will, compared with 53 percent of private college presidents.

In addition, 74 percent of public college presidents versus 65 percent of private college leaders indicate that Trump’s rhetoric has made it more difficult to recruit international students. More than 9 in 10 public doctoral presidents say this is the case at their college.

Forty-four percent of public college presidents strongly agree or agree, and 28 percent strongly disagree or disagree, that race relations on their campus have gotten worse under Trump than they were under Obama.

Opposition to Trump and his policies exists on many campuses among students, faculty members and officials. Many college presidents have themselves issued statements of opposition to the president and the Republican Congress.

Asked about their own actions in the past year, 55 percent of college presidents say they personally spoke out more on political issues during 2017 than they typically do. This includes 67 percent of public doctoral university leaders and 71 percent of private doctoral or master’s college presidents.

A similar percentage of all presidents, 54 percent, say they are speaking out, or intend to speak out, more on issues beyond those directly affecting their college. Private doctoral or master’s college presidents are most likely to say this (68 percent).

EFFECTS OF THE TRUMP ELECTION AND PRESIDENCY ON HIGHER EDUCATION (CONT.)

During the first year of the Trump administration, many college presidents have issued statements – some more strongly worded than statements made under previous administrations – that have criticized proposed policies of President Trump and Republicans in Congress.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Thinking about your own situation, did you, personally, speak out more on political issues during 2017 than you typically do?								
% Yes	55	51	58	67	51	46	71	47
% No	45	49	42	33	49	54	29	53
Are you now, or do you intend to, speak out more about issues beyond those that directly affect your college?								
% Yes	54	52	57	48	44	54	68	45
% No	46	48	43	52	56	46	32	55

TUITION RESETS AND FREEZES

Some colleges have taken steps to address concerns about the high cost of attending college by dropping their tuition or by not increasing it. College presidents expect to see an increase in tuition resets and freezes in the coming year. Sixty-seven percent strongly agree or agree they expect to see more tuition resets at private institutions, including 58 percent of private college leaders and 81 percent of public college presidents.

Similarly, 62 percent of presidents expect to see more tuition freezes at public institutions in the next year, including 65 percent of public college presidents and 59 percent of private college leaders. Community college presidents are less likely than presidents at four-year public institutions to believe there will be an increase in tuition freezes at public institutions.

Most presidents do not view tuition resets as a solution for the long-term – 68 percent strongly agree or agree that tuition resets are more of a gimmick than a viable long-term strategy. Seventy percent of public university chief executives and 66 percent of private college presidents hold this view. Presidents at private baccalaureate colleges are somewhat less inclined than presidents at other types of colleges to see tuition resets as a gimmick.

Presidents also express concerns about the effects of tuition freezes on public institutions. Seventy-nine percent strongly agree or agree that such freezes can be damaging to public institutions without additional state appropriations. Nearly nine in 10 public college presidents (89 percent) agree with the statement, as do 73 percent of private college chief executives. Eighty-one percent of public doctoral college presidents *strongly* agree that tuition freezes not coupled with increased state appropriations can damage public institutions.

Many private colleges have substantially dropped their tuition in the past year, while some public institutions have announced tuition freezes.

Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I expect to see more tuition resets at private institutions in the next year.								
%5 Strongly agree	17	19	16	13	16	19	15	19
%4	50	62	42	48	64	58	44	41
%3	25	18	30	35	16	22	28	24
%2	6	2	10	4	4	1	10	13
%1 Strongly disagree	1	0	2	0	0	0	3	2

TUITION RESETS AND FREEZES (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I expect to see more tuition freezes at public institutions in the next year.								
%5 Strongly agree	16	15	18	15	21	15	21	16
%4	46	50	41	61	54	46	44	37
%3	25	24	27	18	14	32	27	25
%2	10	9	10	7	9	6	6	14
%1 Strongly disagree	3	1	4	0	1	2	2	8
Tuition resets are more of a gimmick than a viable long-term strategy.								
%5 Strongly agree	33	30	36	35	32	32	38	40
%4	35	40	30	38	40	39	38	25
%3	18	18	18	16	15	20	13	17
%2	9	7	10	8	10	6	5	11
%1 Strongly disagree	5	4	5	3	3	3	5	7
Tuition freezes, absent more state appropriations, can damage public institutions.								
%5 Strongly agree	45	55	38	81	55	53	42	33
%4	34	34	35	17	39	33	37	35
%3	10	6	13	0	5	9	13	13
%2	6	3	9	2	1	3	5	14
%1 Strongly disagree	4	2	5	0	0	2	3	5

TEXTBOOKS AND COURSE MATERIALS

In addition to tuition, textbooks and other course materials often contribute to the high price of a college education. College presidents share the concerns of many students and parents, with 91 percent agreeing that textbooks and course materials cost too much, including 61 percent who strongly agree.

Consistent with those views, 85 percent of presidents agree that colleges should embrace open educational resources, or free and openly licensed online educational material. This includes 90 percent of public college presidents and 79 percent of private college presidents.

In contemplating some of the issues with using lower-cost materials, presidents still largely endorse such a strategy, but not by overwhelming margins. By 44 percent to 34 percent, presidents are more likely to agree than to disagree that faculty members should be open to changing textbooks or course materials to save students money, even if the lower-cost options are of lesser quality.

By 50 percent to 29 percent, presidents say that saving students money justifies some loss of faculty member control over selection of materials for the courses they teach. Private college presidents are divided as to whether saving students money justifies using lower-quality materials or taking control away from faculty members, whereas majorities of public college presidents are comfortable with those trade-offs.

Many students, parents and politicians complain about textbook costs. Some colleges are experimenting with new ways to minimize those costs.								
Using a five-point scale, where 5 means strongly agree and 1 means strongly disagree, please indicate your level of agreement with the following statements.								
	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Textbooks and course materials cost too much.								
%5 Strongly agree	61	70	52	52	57	69	51	58
%4	30	24	36	39	31	26	38	28
%3	8	6	9	9	11	5	8	8
%2	1	0	2	0	1	0	2	2
%1 Strongly disagree	1	0	2	0	0	0	0	4
Colleges should embrace open educational resources, free and openly licensed online educational material.								
%5 Strongly agree	52	58	45	49	61	52	40	53
%4	33	32	34	38	31	36	35	29
%3	13	9	17	13	8	11	19	16
%2	2	1	2	0	0	2	3	2
%1 Strongly disagree	1	0	1	0	0	0	2	1

TEXTBOOKS AND COURSE MATERIALS (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Faculty members and institutions should be open to changing textbooks or other materials to save students money, even if the lower cost options are of lesser quality.								
%5 Strongly agree	17	17	18	20	17	16	15	21
%4	27	34	21	24	24	29	26	19
%3	22	21	23	19	23	23	16	31
%2	23	20	25	30	25	21	27	21
%1 Strongly disagree	11	9	13	7	11	11	16	8
The need to help students save money on textbooks justifies some loss of faculty member control over selection of materials for the courses they teach.								
%5 Strongly agree	20	23	17	15	13	20	10	24
%4	30	36	22	40	36	38	26	18
%3	21	19	24	19	25	19	28	22
%2	18	15	22	22	16	16	24	20
%1 Strongly disagree	11	7	15	4	10	6	13	16

PREPARATION FOR THE ROLE OF COLLEGE PRESIDENT

College leaders generally feel that when they first became a president, they were prepared for the various tasks the role requires. They are most likely to say they were well prepared for working with faculty members, academic affairs and financial management. They are least likely to say they were well prepared for digital learning, government relations and fund raising.

More than 8 in 10 presidents say they were well prepared for working with faculty members (86 percent) and for academic affairs issues (84 percent). A slim majority, 51 percent, say they were “very well prepared” for handling academic affairs.

At least two-thirds of presidents believe they were well prepared for financial management (71 percent), admissions and enrollment management (67 percent), and working with trustees (66 percent). Majorities also feel they were well prepared for public and media relations (61 percent) and race relations (54 percent), and half say the same about athletics and hot-button student affairs issues, such as sexual assault, drinking and Greek life.

Less than half felt they were adequately prepared for fund raising (49 percent), government relations (47 percent) and digital learning (45 percent).

No more than 20 percent of presidents say they were not very prepared or not prepared at all for any of the 12 tasks measured in the survey.

The job of college president has always been a mix of duties, and individual presidents have more preparation for some of those duties than others.

Please indicate how prepared you were for each of the following presidential duties when you first became a college president.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Working with faculty members								
% Very well prepared	46	48	46	53	59	45	40	48
% Well prepared	40	40	38	37	29	45	41	35
% Somewhat prepared	12	11	13	10	12	9	14	14
% Not very prepared	2	2	3	0	0	1	4	3
% Not prepared at all	0	0	1	0	0	0	2	0

PREPARATION FOR THE ROLE OF COLLEGE PRESIDENT (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Academic affairs								
% Very well prepared	51	58	45	57	67	58	45	49
% Well prepared	33	28	38	29	21	29	36	34
% Somewhat prepared	14	13	14	14	10	12	16	15
% Not very prepared	1	1	2	0	2	1	2	1
% Not prepared at all	<1	0	1	0	0	0	2	0
Financial management								
% Very well prepared	28	28	26	27	37	27	37	20
% Well prepared	43	46	41	57	39	46	32	43
% Somewhat prepared	25	23	26	11	22	24	26	28
% Not very prepared	5	3	8	4	2	3	5	9
% Not prepared at all	0	0	0	0	0	0	0	0
Admissions/Enrollment management								
% Very well prepared	24	21	26	24	20	24	27	27
% Well prepared	43	43	42	47	45	45	30	47
% Somewhat prepared	27	31	24	26	30	28	32	17
% Not very prepared	5	2	7	3	4	2	10	6
% Not prepared at all	2	2	1	0	0	1	1	2
Working with trustees								
% Very well prepared	23	17	27	27	23	13	34	29
% Well prepared	43	45	43	45	48	43	35	44
% Somewhat prepared	26	30	23	18	21	36	20	24
% Not very prepared	6	6	6	9	8	5	10	3
% Not prepared at all	1	2	0	0	0	3	1	0

PREPARATION FOR THE ROLE OF COLLEGE PRESIDENT (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Public and media relations								
% Very well prepared	17	21	14	22	28	17	12	16
% Well prepared	44	45	44	51	47	43	44	44
% Somewhat prepared	32	28	36	27	23	32	41	30
% Not very prepared	5	5	4	0	2	6	2	7
% Not prepared at all	1	1	1	0	0	1	0	3
Race relations								
% Very well prepared	17	13	21	12	23	9	11	33
% Well prepared	37	40	35	40	39	41	42	29
% Somewhat prepared	37	39	34	38	33	39	39	27
% Not very prepared	8	8	8	8	5	11	7	8
% Not prepared at all	1	<1	2	2	0	0	1	4
Athletics								
% Very well prepared	16	12	20	12	24	11	25	16
% Well prepared	34	32	36	33	24	25	25	44
% Somewhat prepared	37	40	33	42	39	46	39	29
% Not very prepared	11	13	9	13	12	15	9	10
% Not prepared at all	2	2	1	0	1	2	2	1
Hot-button student affairs issues (sexual assault, drinking, Greek life)								
% Very well prepared	14	10	19	11	15	11	14	25
% Well prepared	36	37	36	33	40	35	31	36
% Somewhat prepared	39	43	35	52	35	46	42	30
% Not very prepared	10	11	8	4	10	9	11	6
% Not prepared at all	1	0	2	0	0	0	1	3

PREPARATION FOR THE ROLE OF COLLEGE PRESIDENT (CONT.)

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Fundraising								
% Very well prepared	15	13	19	29	21	6	26	18
% Well prepared	34	27	39	36	39	27	39	42
% Somewhat prepared	34	40	29	35	34	44	26	30
% Not very prepared	14	16	11	0	5	18	7	8
% Not prepared at all	3	4	2	0	0	5	2	3
Government relations								
% Very well prepared	17	20	13	35	23	14	10	17
% Well prepared	30	30	30	43	31	28	33	28
% Somewhat prepared	40	40	40	17	39	48	41	34
% Not very prepared	11	8	14	5	7	9	14	16
% Not prepared at all	2	2	3	0	0	1	1	5
Digital learning								
% Very well prepared	15	18	11	9	17	21	15	8
% Well prepared	30	34	28	39	30	36	24	31
% Somewhat prepared	35	35	36	28	41	35	34	36
% Not very prepared	17	13	20	24	11	8	20	19
% Not prepared at all	3	<1	5	0	1	0	7	6

PREPARATION FOR THE ROLE OF COLLEGE PRESIDENT (CONT.)

Significantly more public college presidents (52 percent) than private college leaders (39 percent) say they were well prepared to handle digital learning. More private college presidents than public college presidents feel they were well prepared for the tasks of fund raising (58 percent to 40 percent) and athletics (56 percent to 44 percent). These latter differences are mainly due to lower percentages of community college presidents saying they were prepared.

Among the other notable differences by institution type:

- Two-thirds of public master's or baccalaureate presidents say they were "very well prepared" for academic affairs, higher than for any other subgroup of presidents in that measure.
- Public doctoral presidents are much more likely than those at other types of institutions to say they were very well prepared or well prepared for financial management (84 percent) and government relations (78 percent).
- More than 7 in 10 public doctoral and public master's or baccalaureate presidents felt they were well prepared for media and public relations, compared with no more than 6 in 10 community college or private college presidents.

INSTITUTION AND PERSONAL DEMOGRAPHICS

What is your age?	Overall %
Under 30	0
30 to 39	<1
40 to 49	10
50 to 59	30
60 to 69	50
70 and older	10

What is your gender?	Overall %
Male	70
Female	30

How many years have you served as the president at this institution?	Overall %
Less than 6 months	1
6 months to less than 3 years	35
3 years to less than 5 years	19
5 years to less than 10 years	24
10 or more years	21

How many years have you served as the president at any institution?	Overall %
Less than 6 months	2
6 months to less than 3 years	23
3 years to less than 5 years	17
5 years to less than 10 years	25
10 or more years	33

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