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HIGHER ED

2020 Survey of

College and University Presidents

A STUDY BY *INSIDE HIGHER ED* AND GALLUP

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THE 2020 *INSIDE HIGHER ED* SURVEY OF COLLEGE AND UNIVERSITY PRESIDENTS

A study by Gallup and *Inside Higher Ed*



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FOREWORD

Inside Higher Ed's 10th 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.

The study addresses the following questions:

- Are presidents confident their institution will be financially stable over the next five and 10 years?
- How well-equipped do presidents believe their college is to handle an economic downturn?
- Do presidents view their colleges as willing and able to make fundamental changes at their institution when needed?
- To what extent have college leaders had serious discussions about merging or consolidating services with another institution?
- Do presidents anticipate that additional colleges will close or merge in the coming year?
- How do campus chief executives assess race relations at their college and at colleges nationwide?
- How do presidents evaluate issues surrounding affirmative action in light of the recent legal challenges related to the practice?
- What are presidents' views on some of the federal policies that affect higher education?
- Do college presidents believe that Americans have an accurate view of the purpose of higher education?
- What factors do presidents see as causing declines in public support for higher education?
- How do presidents evaluate possible solutions to the high prices of textbooks?

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SNAPSHOT OF FINDINGS

Some specific findings from the 2020 Survey of College and University Presidents include:

- Sixty-nine percent of college presidents are confident their institution will be financially stable over the next five years, a new high in the *Inside Higher Ed* survey. The 57 percent who are confident in their institution's finances over the next 10 years ties last year's percentage as the highest to date.
- Nearly two-thirds of chief executives believe their college is better prepared to handle the next economic downturn than it was in 2008. Nevertheless, a majority says they are worried about the impact the next economic downturn will have on their institution.
- Most presidents, 69 percent, strongly agree or agree their college needs to make fundamental changes to its business model, programming or other operations. Presidents at public and private, two-year and four-year colleges are about equally likely to express this view.
- Presidents believe senior administrators and trustees understand the challenges their institution faces and the need to adapt. But by a 2-1 margin, they disagree rather than agree that faculty members do.
- More presidents (54 percent) think their college has the right mindset to adapt to needed change than think it has the right tools and processes to do so (45 percent). Presidents at four-year public colleges are less likely than those at other types of colleges to think their college has the right mindset, as well as tools and processes, to effect change.
- One in six presidents say their college has had serious internal discussions in the past year about merging with another college. Twenty-nine percent of these presidents believe it is very or somewhat likely their college will merge with another within the next five years.
- Three in 10 presidents say their campus's leaders have had serious discussions about consolidating operations or programs with another college.
- Presidents widely expect additional colleges to close or merge this year, with 72 percent predicting more than five colleges will close, 49 percent thinking more than five private colleges will merge and 19 percent saying more than five public colleges will merge.
- Nine percent of presidents say they could see their own college closing or merging in the next five years. This is down from 14 percent a year ago.
- For the first time in the history of the *Inside Higher Ed* survey of presidents, less than 8 in 10 leaders evaluate race relations on their own campus as either "excellent" (14 percent) or "good" (63 percent). A new low of 19 percent rate race relations on campuses nationwide positively.
- As a lawsuit alleging that Harvard's admissions process discriminates against Asian American students works its way through the courts, 67 percent of campus leaders believe colleges should continue to consider race and ethnicity as a factor in admissions, up from 62 percent a year ago. Thirty-seven percent, down from 42 percent, worry that some Asian American applicants face discrimination when applying to top colleges.
- One in six college presidents strongly agree or agree their college is planning for the possibility that courts will bar consideration of race in college admissions and financial aid.

SNAPSHOT OF FINDINGS (CONT.)

- Forty-six percent of presidents agree and 27 percent disagree it is appropriate for private colleges to consider legacy status in admissions, but a majority (55 percent) disagrees that it is appropriate for public colleges to do so.
- Majorities of college leaders oppose the idea of free public college and canceling student debt. Community college presidents are much more likely to support those proposals than executives of other types of institutions.
- By 40 percent to 33 percent, presidents are more likely to agree than disagree that state and federal regulators should publish information about the financial sustainability of colleges and universities.
- Fifty-two percent of presidents believe the Trump administration's increased scrutiny of foreign scholars results in racial profiling of Chinese faculty members and graduate students.
- Presidents tend to believe Americans do not have an accurate idea of the purpose of higher education, with 50 percent disagreeing and 11 percent agreeing that most Americans understand its purpose.
- Fifty-eight percent of presidents believe that concerns about college affordability and student debt are "very responsible" for declining public support for higher education. Thirty-seven percent believe concern that college does not prepare students well for careers is very responsible. And, although 22 percent see perceptions of liberal political bias in higher education as being very responsible, fewer do so now than in 2019 (28 percent) and 2018 (31 percent).
- Sixty-nine percent of presidents are worried about Republicans' increasing skepticism toward higher education. Thirteen percent agree that Republican doubts about higher education are justified.
- Nearly 9 in 10 presidents believe textbooks and college course materials cost too much. They are increasingly likely to endorse the idea that faculty members and institutions should be open to changing course materials to lower-cost options. A majority of presidents believe that the need to help students save money justifies some loss of faculty control in choosing course materials.
- Presidents' views on textbooks are similar to those of chief academic officers but differ from faculty members, who generally oppose yielding some control in course material selection to help students save money.

METHODOLOGY

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

To achieve this objective, Gallup sent invitations via email to 3,713 presidents, with regular reminders sent throughout the Jan. 7-Feb. 2, 2020, field period. Gallup collected 746 fully or partially completed web surveys, yielding a 20 percent response rate. Respondents represented 401 public institutions, 323 private institutions and 22 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.	Associate	Doctoral/ Master's	Bacc.	Associate*
Total N	746	401	323	22	57	94	229	161	118	6

*Data 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 low sample sizes. Sector groupings are determined based on the 2018 Carnegie Classification for the institution.

Gallup education consultants developed the questionnaire in collaboration with Scott Jaschik and Doug Lederman from *Inside Higher Ed*. Specialty colleges -- namely, Bible colleges and seminaries with a Carnegie Classification of 24 -- and institutions with an enrollment of fewer than 500 students were excluded from the sample.

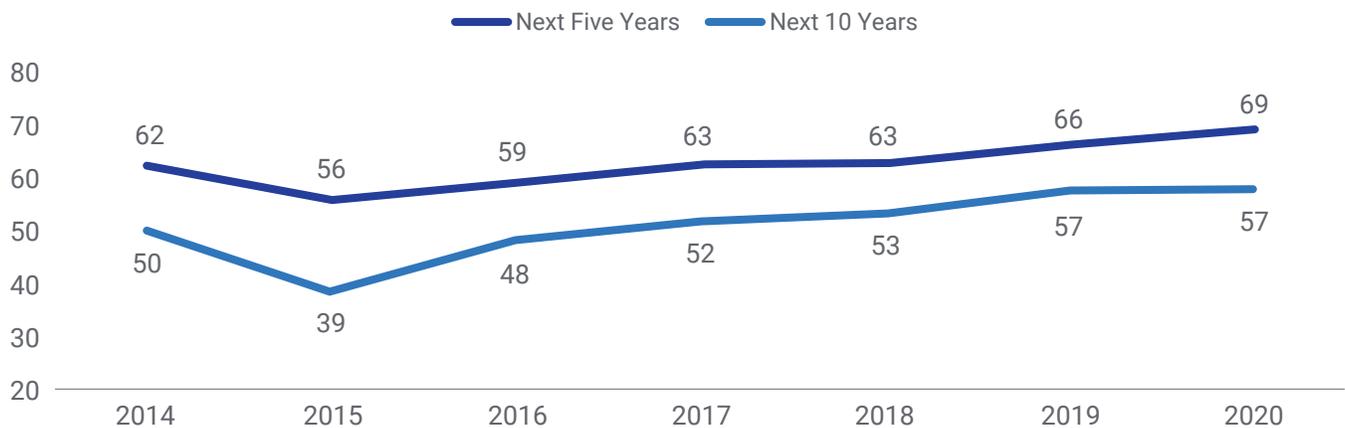
The survey is an attempted census of all presidents using the most comprehensive sample information available. Gallup statistically weighted data to correct for nonresponse, matching the obtained sample to targets for all U.S. colleges and universities from the Integrated Postsecondary Education Data System (IPEDS) 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 percent due to rounding. "Don't know" and "Refused" responses are excluded from the results unless otherwise indicated.

FINANCIAL HEALTH

A new high of 69 percent of college presidents strongly agree or agree their college will be financially stable over the next five years. In 2015, 56 percent were confident. Presidents are somewhat less confident about their institution's finances over the next 10 years than the next five years, with 57 percent expressing confidence in the longer term, tying last year's mark as the high. The current figure is up 18 percentage points from 2015.

Presidents' Confidence That Their Institution Will Be Financially Stable in the Next Five and 10 Years
Percentage Who Strongly Agree or Agree



As was the case last year, presidents at private nonprofit and public colleges are equally likely (69 percent) to be confident that their institution will be financially stable over five years, but private college presidents (59 percent) are more optimistic about their institution's finances over 10 years than their public college peers (53 percent) are.

Public doctoral university presidents (64 percent) are most confident about their institution's financial stability over the next 10 years, while those at public master's or baccalaureate colleges (46 percent) are least confident.

Whereas public doctoral college and private baccalaureate college presidents are about equally confident in their institution's five- and 10-year financial outlook, presidents at other types of colleges are significantly more positive about their institution's financial outlook in the short term than in the longer term.

FINANCIAL HEALTH (CONT.)

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 Non-Profit	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	28	27	28	28	20	29	27	23
%4	41	42	41	39	42	43	43	38
%3	23	23	24	23	27	20	21	29
%2	7	7	6	6	9	7	6	8
%1 Strongly disagree	2	2	2	4	1	2	3	2
I am confident my institution will be financially stable over the next 10 years.								
%5 Strongly agree	20	16	23	23	12	17	21	26
%4	37	37	36	41	34	37	38	33
%3	32	34	30	30	41	32	26	35
%2	10	11	8	6	12	12	11	4
%1 Strongly disagree	2	2	2	0	1	3	3	2

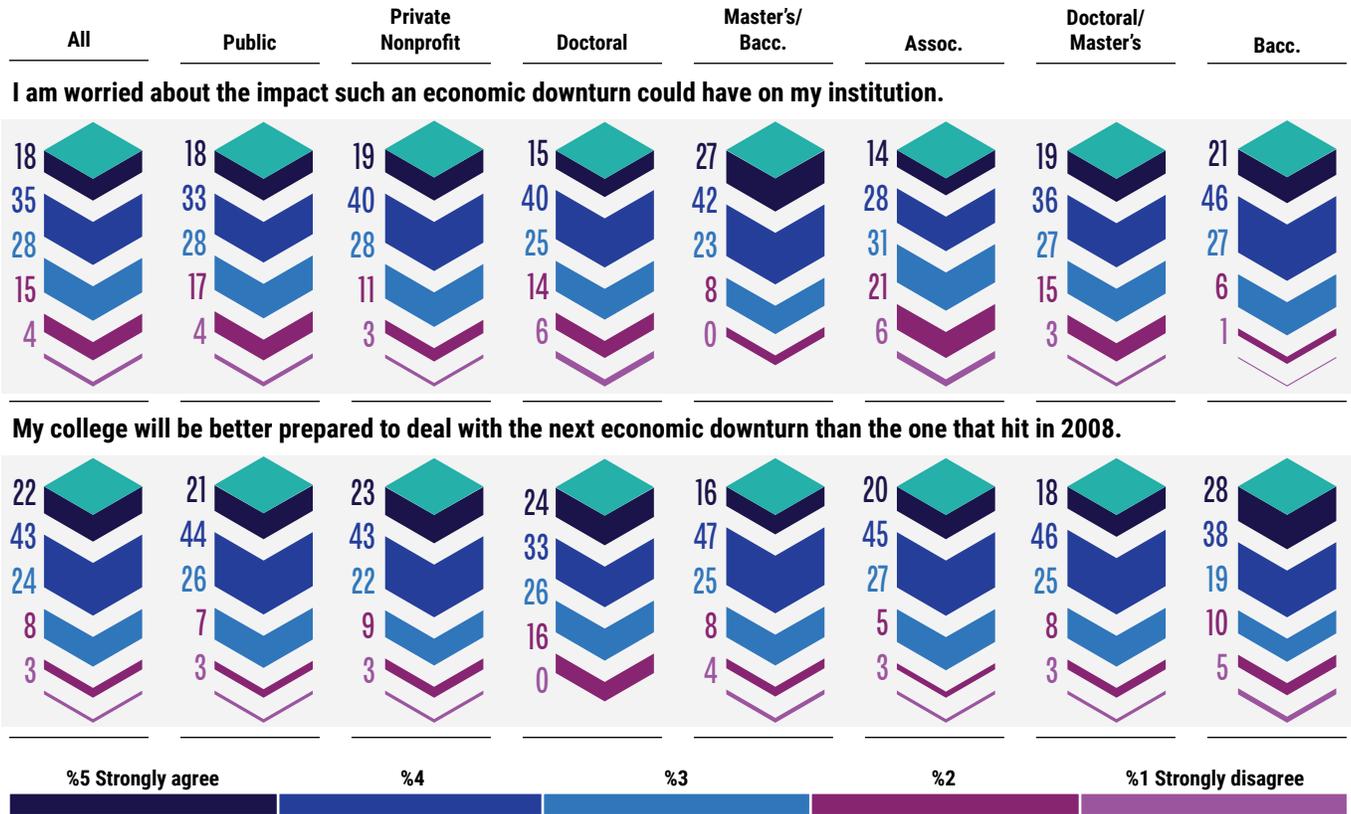
It has been more than a decade since the Great Recession ended, and many colleges still have not fully recovered financially. It is unclear how long the ongoing post-Great Recession economic expansion will last, but college presidents are more inclined to agree (39 percent) than disagree (16 percent) that there will be a significant economic downturn in the next 18 months; 45 percent are neutral.

The majority of campus leaders, 53 percent, strongly agree or agree they are worried about the impact an economic downturn could have on their institution; 19 percent strongly disagree or disagree. Private baccalaureate college and public master's and baccalaureate college presidents are most concerned, with more than two-thirds agreeing they are worried about the effects of an economic downturn.

Nevertheless, most presidents, 65 percent, believe their college is better prepared to deal with the next economic downturn than the one that occurred in 2008. Public and private college presidents are equally likely to feel their college is better prepared.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I expect there will be a significant economic downturn in the U.S. In the next 18 months.								
%5 Strongly agree	9	11	7	6	11	12	6	8
%4	30	29	31	30	36	27	28	32
%3	45	45	45	42	43	47	46	47
%2	14	13	14	17	8	14	16	12
%1 Strongly disagree	2	2	2	4	1	1	3	2

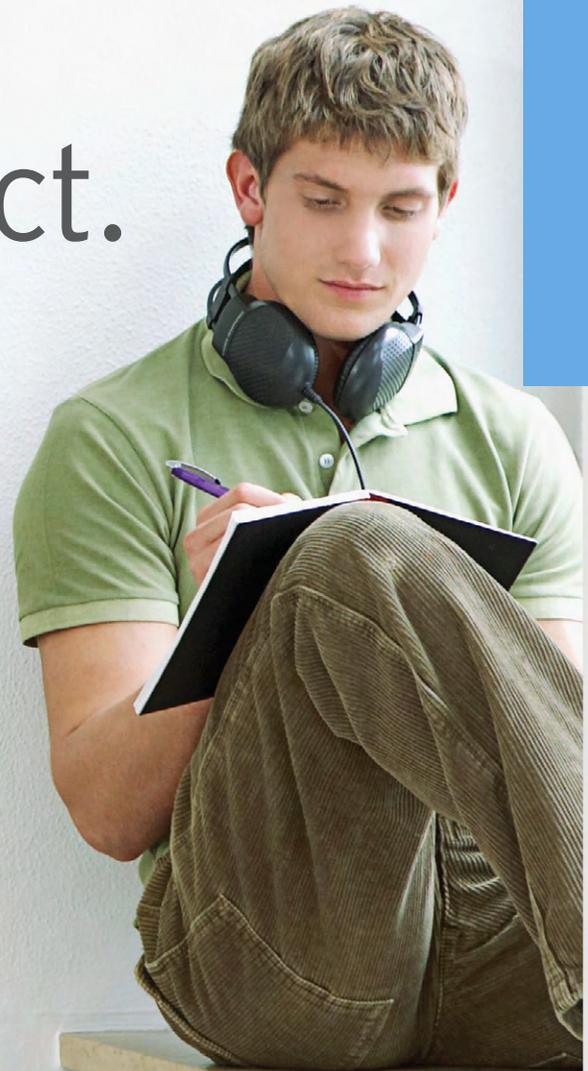
FINANCIAL HEALTH (CONT.)





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CHANGE MANAGEMENT

Changes in society and the economy have called into question whether traditional models of higher education funding and instruction are viable. More than two-thirds of college presidents strongly agree or agree that their institution needs to make fundamental changes in its business models, programming or other operations. This sentiment is shared fairly uniformly by presidents at all types of colleges.

Presidents believe that senior administrators and trustees understand the challenges their institution faces and the need to adapt but are much less inclined to believe faculty members do. Eighty-eight percent of presidents say this about senior administrators, 64 percent about trustees and 23 percent about faculty members.

In fact, twice as many presidents disagree as agree that faculty members understand their institution's challenges and the need to make changes to address them. Majorities of presidents at public four-year colleges disagree that faculty members understand the challenges.

More presidents believe their college has the right mindset to respond quickly to needed changes than believe it has the tools and processes to do so. Whereas 54 percent agree their college has the right mindset, 45 percent agree it has the right tools and processes.

Public four-year college presidents are less likely than those at other types of colleges to believe their college has the proper mindset to enact needed changes quickly. Forty percent of public doctoral college presidents and 38 percent of those at public master's or baccalaureate colleges agree their institution has the proper mindset, compared with majorities of those at private colleges and community colleges.

Additionally, public four-year college presidents are about as likely to disagree as to agree their college has the right tools and processes in place to respond quickly to needed change. Among those at public doctoral colleges, 38 percent agree and 40 percent disagree, and among those at public master's or baccalaureate colleges, 32 percent agree and 36 percent disagree. At other types of colleges, more presidents agree than disagree they have the right tools and processes to respond quickly to needed changes.

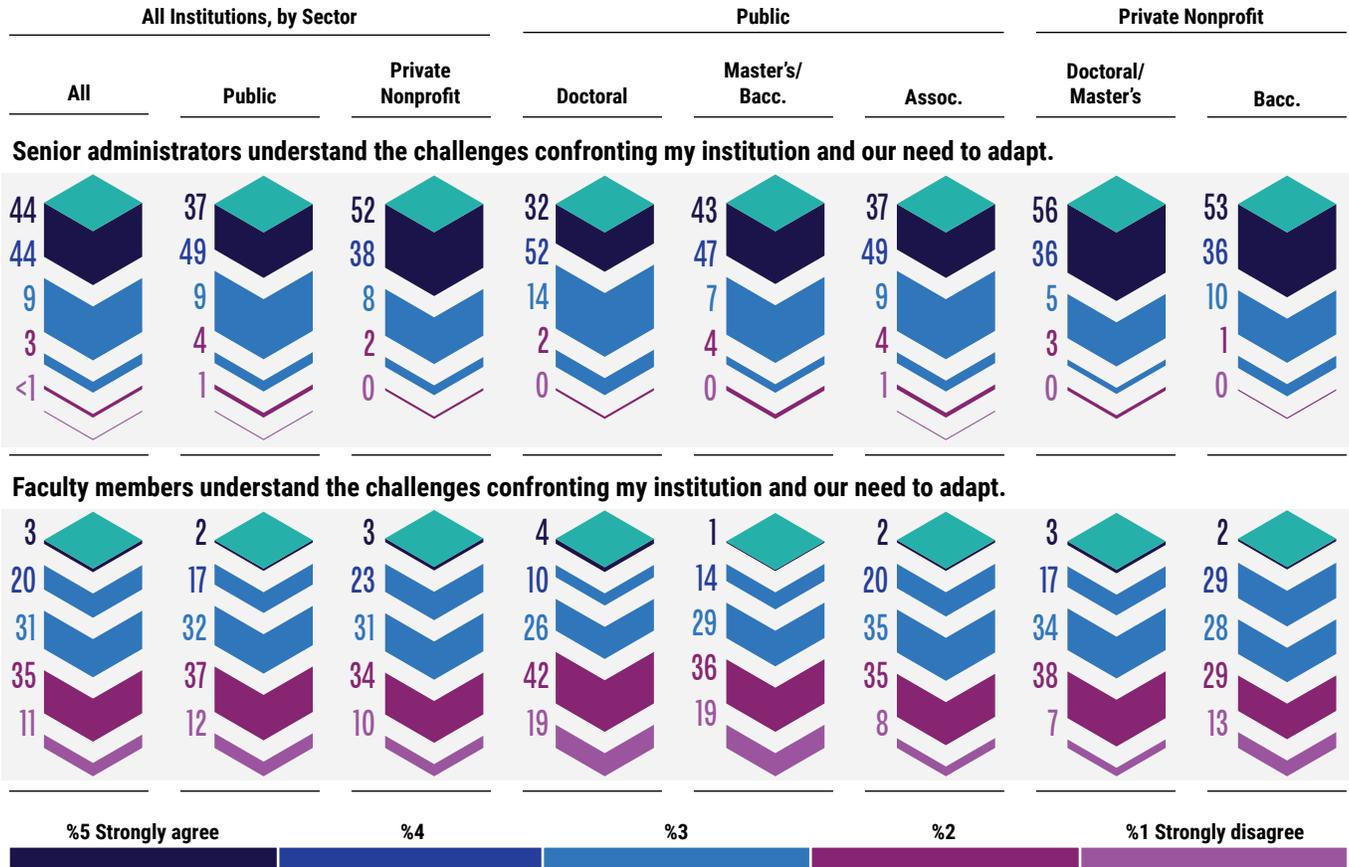
CHANGE MANAGEMENT (CONT.)

The combination of demographic, financial and other pressures is leading many institutions to consider fundamental changes in their business models, programming or other operations.

Please indicate your level of agreement to the following statements.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I believe my institution needs to make fundamental changes in its business models, programming or other operations.								
%5 Strongly agree	30	28	33	31	30	28	34	34
%4	39	40	39	42	42	38	37	41
%3	16	17	15	14	20	16	14	15
%2	10	12	8	8	6	15	8	6
%1 Strongly disagree	4	3	6	4	1	3	7	4
At my college, we have the right mindset to respond quickly to needed changes.								
%5 Strongly agree	17	16	16	8	8	21	16	14
%4	37	34	42	32	30	35	43	37
%3	27	29	25	35	31	28	27	23
%2	15	16	13	17	23	13	12	20
%1 Strongly disagree	4	5	4	9	7	3	3	6
At my college, we have the right tools and processes to respond quickly to needed changes.								
%5 Strongly agree	9	9	9	4	3	12	10	7
%4	36	35	35	34	29	37	34	36
%3	31	30	34	23	32	30	34	28
%2	20	22	19	31	30	17	19	24
%1 Strongly disagree	4	5	3	9	6	4	3	5
Trustees understand the challenges confronting my institution and our need to adapt.								
%5 Strongly agree	24	18	30	11	17	21	30	30
%4	40	38	44	40	35	39	45	41
%3	18	22	12	19	22	22	11	13
%2	13	15	10	20	19	13	11	10
%1 Strongly disagree	5	6	4	11	7	5	3	5

CHANGE MANAGEMENT (CONT.)



MERGERS AND CONSOLIDATIONS

Some colleges that are struggling financially are looking to merge or consolidate functions with other institutions to remain viable. One in six college presidents (16 percent) report that senior administrators at their college have had serious internal discussions in the last year about merging with another college or university.

Roughly the same percentage, 15 percent, believe their college should merge with another college in the next five years. Private college presidents are more likely than public college presidents to say their college leaders have had serious talks about merging (23 percent to 9 percent), and they are twice as likely to believe their college should merge with another institution.

Seven percent of presidents say it is very or somewhat likely their college will merge into or be acquired by another college in the next five years. Twenty-nine percent of those who report having had internal discussions about merging say it is very (7 percent) or somewhat (22 percent) likely their college will merge or be acquired in the next five years.

The views of presidents on mergers roughly match those of chief business officers. According to the 2019 *Inside Higher Ed* survey of chief business officers, 12 percent said their college had serious internal discussions about merging, 18 percent believed their college should merge with another and 6 percent said it was very or somewhat likely their institution would merge into or be acquired by another college or university in the next five years.

While some colleges may be looking to merge with another institution, others may be looking to acquire another college. Sixteen percent of presidents say it is very (3 percent) or somewhat (13 percent) likely their college will acquire another within the next five years. Again, this is similar to the 14 percent of chief business officers who said the same in 2019.

Recently there has been an increase in the number of colleges and universities closing, merging, or consolidating some of their programs or operations with other campuses, or considering doing so.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Have senior administrators at your college had serious internal discussions in the last year about merging with another college or university?								
% Yes	16	9	23	4	13	8	23	17
% No	84	91	77	96	87	92	77	83

MERGERS AND CONSOLIDATIONS (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
How likely is your institution to merge into or be acquired by another college or university in the next five years?								
% Very likely	1	1	1	0	2	0	2	0
% Somewhat likely	6	4	8	2	2	5	6	6
% Not too likely	24	21	27	14	25	20	29	27
% Not likely at all	70	75	64	84	71	75	63	67
Do you think your institution should or should not merge with another college or university in the next five years?								
% Should	15	10	20	10	11	9	20	13
% Should not	85	90	80	90	89	91	80	87
How likely is your institution to acquire another college or university in the next five years?								
% Very likely	3	1	5	0	0	1	5	4
% Somewhat likely	13	8	18	4	12	8	22	11
% Not too likely	29	25	34	41	34	17	35	31
% Not likely at all	55	65	44	55	54	74	38	54

Another option struggling institutions can take to remain viable is to consolidate programs or operations with other colleges. Discussions around consolidation are more common than those around mergers, as 30 percent of college leaders say senior administrators at their institution have had serious internal discussions in the last year about consolidating some of its programs or operations with another college or university.

Majorities of presidents think their college should combine academic programs with those of another college (58 percent) or share administrative functions (55 percent) in the next five years.

Slightly less than half of presidents think either move is likely – 44 percent say it is very (13 percent) or somewhat (31 percent) likely their college will share administrative functions with another college in the next five years, and 46 percent say it is very (10 percent) or somewhat (36 percent) likely their college will combine academic programs.

Among those who have had serious internal discussions about consolidating, 74 percent say it is very (28 percent) or somewhat (46 percent) likely their college will share administrative functions, and 79 percent say it is very (24 percent) or somewhat (55 percent) likely they will combine academic programs.

As with mergers, consolidation discussions are more likely to have occurred at private (35 percent) than public (28 percent) colleges, according to the reports of presidents. And private college presidents are more likely than public college leaders to say their college should share administrative functions or combine academic programs.

Similar proportions of chief business officers (28 percent) and presidents (30 percent) report that their college leaders have had serious discussions about consolidating programs or operations. But chief business officers are more likely than presidents to believe their college should share administrative functions (62 percent vs. 55 percent, respectively) or combine academic programs (66 percent vs. 58 percent).

MERGERS AND CONSOLIDATIONS (CONT.)

Recently there has been an increase in the number of colleges and universities closing, merging, or consolidating some of their programs or operations with other campuses, or considering doing so.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Have senior administrators at your college had serious internal discussions in the last year about consolidating some of its programs or operations with another college or university?								
% Yes	30	28	35	25	25	28	34	35
% No	70	72	65	75	75	72	66	65
How likely is your institution to share administrative functions with another college or university in the next five years?								
% Very likely	13	14	12	14	16	13	10	15
% Somewhat likely	31	26	38	17	34	26	34	41
% Not too likely	28	28	29	30	29	26	33	26
% Not likely at all	27	32	21	39	22	35	22	18
How likely is your institution to combine academic programs with those of another college or university in the next five years?								
% Very likely	10	10	10	10	13	8	10	11
% Somewhat likely	36	32	41	21	36	34	38	43
% Not too likely	29	30	29	24	30	32	30	25
% Not likely at all	25	27	20	45	21	26	21	21
Do you think your institution should or should not share administrative functions with another college or university in the next five years?								
% Should	55	47	66	37	58	42	63	74
% Should not	45	53	34	63	42	58	37	26
Do you think your institution should or should not combine academic programs with those of another college or university in the next five years?								
% Should	58	53	65	45	58	52	63	68
% Should not	42	47	35	55	42	48	37	32

Dozens of colleges have shut down their operations entirely in the past decade, and presidents anticipate that trend will continue this year: 26 percent predict that one to five schools will close down, 36 percent believe six to 10 colleges will, 25 percent estimate that 11 to 20 colleges will shut down and 11 percent think the number will exceed 20.

Presidents also believe there will be mergers at both public and private colleges this year. Close to half, 49 percent, expect there to be six or more mergers of private colleges, while half say the number will be between one and five. Presidents are less likely to think there will be public college mergers, but 19 percent expect six or more to happen, while 64 percent predict between one and five public college mergers will occur.

Perhaps because of greater financial optimism this year, only 9 percent of presidents say they could see their college closing or merging in the next five years, down from 14 percent in 2019 and 13 percent in 2018. Fourteen percent of private college presidents and 5 percent of public college presidents could see their college closing or merging in the near future.

MERGERS AND CONSOLIDATIONS (CONT.)

There has been an uptick in the number of colleges closing or merging with other colleges in the last two years.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
In terms of closures, in 2020 I anticipate that there will be –								
% No additional closures	1	2	1	0	1	1	0	2
% 1 to 5 closures	26	28	23	35	17	33	19	27
% 6 to 10 closures	36	33	40	35	41	30	42	43
% 11 to 20 closures	25	25	25	20	29	24	29	24
% More than 20 closures	11	12	11	9	12	12	11	5
In terms of private college mergers, in 2020 I anticipate that there will be –								
% No additional mergers	1	<1	2	0	0	1	1	2
% 1 to 5 mergers	50	42	58	51	41	43	58	64
% 6 to 10 mergers	35	38	32	37	37	38	33	29
% More than 10 mergers	14	19	8	13	22	19	8	5
In terms of public college mergers, in 2020 I anticipate that there will be –								
% No additional mergers	17	16	17	18	16	16	17	18
% 1 to 5 mergers	64	65	64	80	66	61	63	66
% 6 to 10 mergers	12	11	13	2	7	17	11	13
% More than 10 mergers	7	7	6	0	12	6	9	3
I could see my college closing or merging in the next five years.								
% Yes	9	5	14	2	2	6	12	15
% No	91	95	86	98	98	94	88	85

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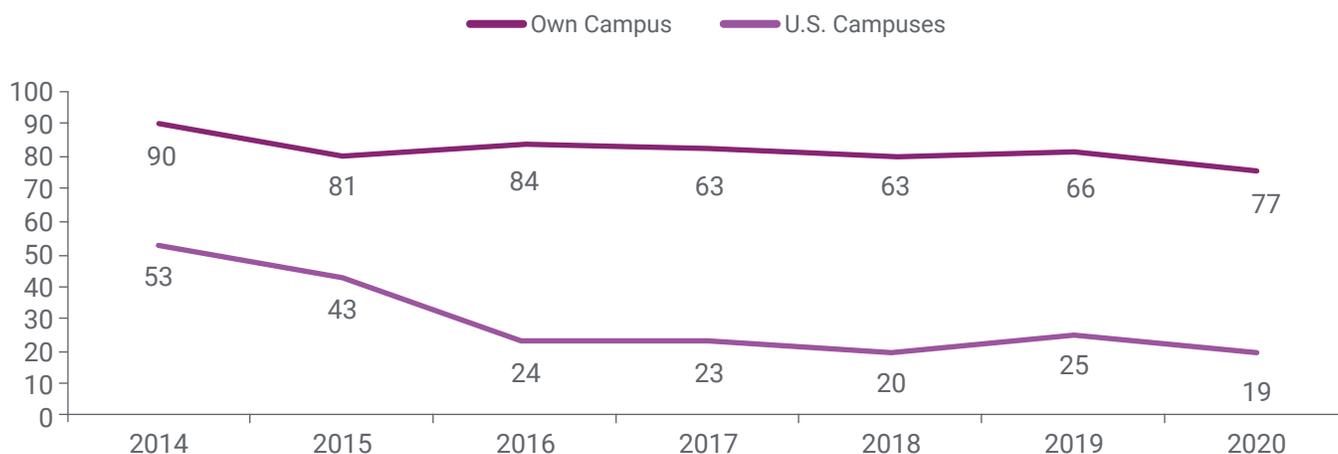
RACE RELATIONS

Presidents' assessments of race relations on U.S. college campuses and on their own campus are the least positive they have been in the seven years *Inside Higher Ed* has been asking about them. Just 19 percent of presidents describe race relations on college campuses as "excellent" or "good," one percentage point below the previous low in 2018. This year's percentage remains sharply lower than ratings from 2014 and 2015, before prominent protests on racial matters took place on many college campuses.

While presidents continue to evaluate race relations on their own campus positively, for the first time less than 80 percent do so. In 2014, 90 percent of presidents believed race relations at their college were either excellent or good.

College Presidents' Assessment of the State of Race Relations, 2014-2020

Percentage Rating Relations as "Excellent" or "Good"

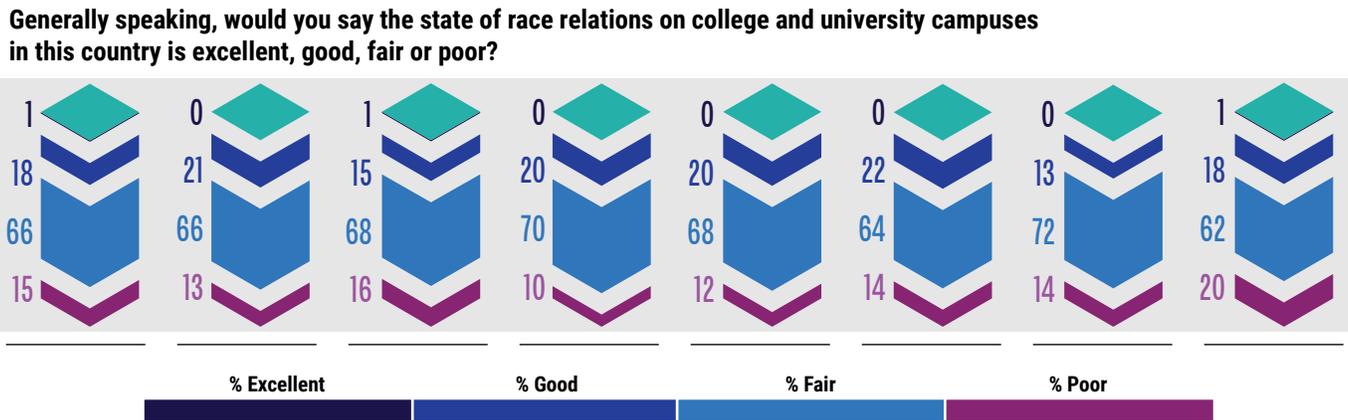
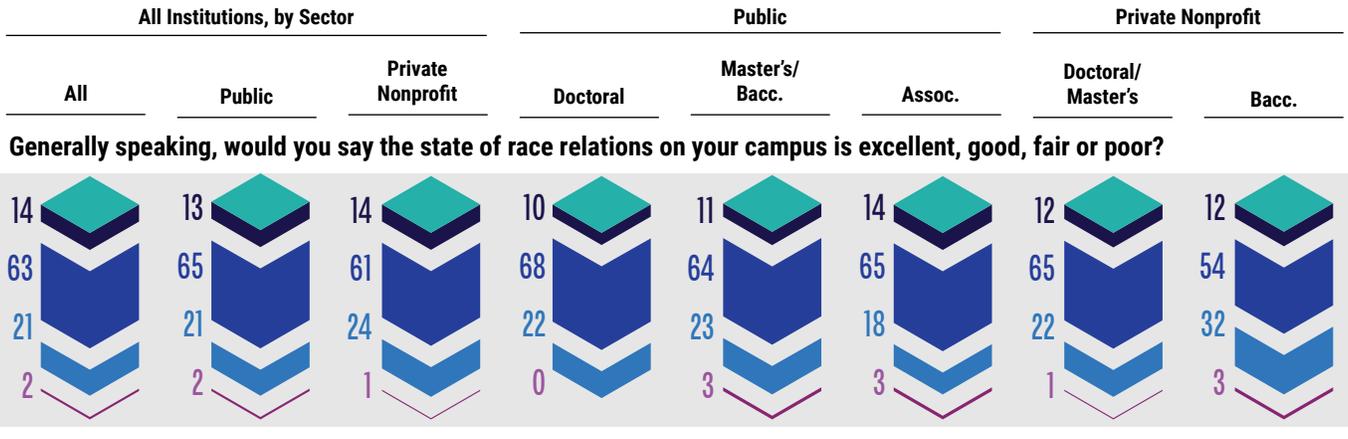


The majority of presidents, 63 percent, describe race relations on their campus as "good," and 14 percent say they are "excellent," 21 percent "fair" and 2 percent "poor." Private baccalaureate college presidents are somewhat less likely than those at other types of colleges to rate campus race relations as either excellent or good.

In terms of race relations on U.S. campuses, 1 percent of presidents describe these as excellent, 18 percent as good, 66 percent as fair and 15 percent as poor. Public college presidents (21 percent) are modestly more likely than private college presidents (16 percent) to evaluate race relations nationwide positively.

RACE RELATIONS (CONT.)

As you may know, there has recently been intense discussion about race on many college and university campuses.





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AFFIRMATIVE ACTION

The past year saw a federal district court rule in favor of Harvard University's admissions process, which plaintiffs alleged discriminated against Asian American applicants. The matter is still unsettled because plaintiffs have appealed the district court ruling.

Sixty-seven percent of college presidents strongly agree (34 percent) or agree (33 percent) that colleges should continue to consider race and ethnicity, among other factors, in admissions decisions, up slightly from 62 percent a year ago. Eighteen percent strongly disagree or disagree.

Presidents are divided as to whether they worry that some Asian American applicants to top colleges face discrimination — 37 percent strongly agree or agree, 33 percent strongly disagree or disagree, and 31 percent are neutral. A year ago, presidents were more inclined to indicate they were worried, with 42 percent strongly agreeing or agreeing and 24 percent strongly disagreeing or disagreeing.

The vast majority of presidents, 84 percent, strongly agree or agree that the public does not understand the concept of holistic admissions — central to Harvard's policy, which determines admissions cases individually rather than by basing decisions primarily on grades and test scores. Last year, 79 percent agreed the public was unclear on holistic admissions.

Most presidents, 55 percent, strongly disagree or disagree their college is planning for the possibility that courts may bar colleges from considering race in admissions decisions; 16 percent strongly agree or agree. Twenty-five percent of public doctoral college presidents indicate their college is planning for a potential court decision that would make the consideration of race illegal.

Colleges may consider other factors in admissions decisions, in addition to race and test scores and grades. One of the more controversial factors colleges take into account is legacy status, having a relative who attended the college.

Presidents are more inclined to view legacy status as an appropriate rather than an inappropriate factor in private college admissions decisions, but they take the opposite view for public colleges. Specifically, 46 percent agree and 27 percent disagree that it is appropriate for private colleges to consider legacy status in admissions. The percentage endorsing legacy status as a factor in private college admissions is down slightly from 52 percent a year ago. For public colleges, 20 percent of presidents agree and 55 percent disagree that it is appropriate to take legacy status into account when considering an admissions application. Last year, the figures were 24 percent and 53 percent, respectively.

Private college presidents are more likely than public college presidents to say legacy status is an appropriate factor in admissions to both private nonprofit (52 percent vs. 42 percent, respectively) and public (24 percent vs. 17 percent) colleges.

Presidents who support the use of legacy status in admissions decisions say the outcome of the Harvard case is unlikely to change their minds on the matter — 18 percent strongly agree or agree their views on legacy status as an admission criterion would change if the courts barred its consideration, while 52 percent strongly disagree or disagree.

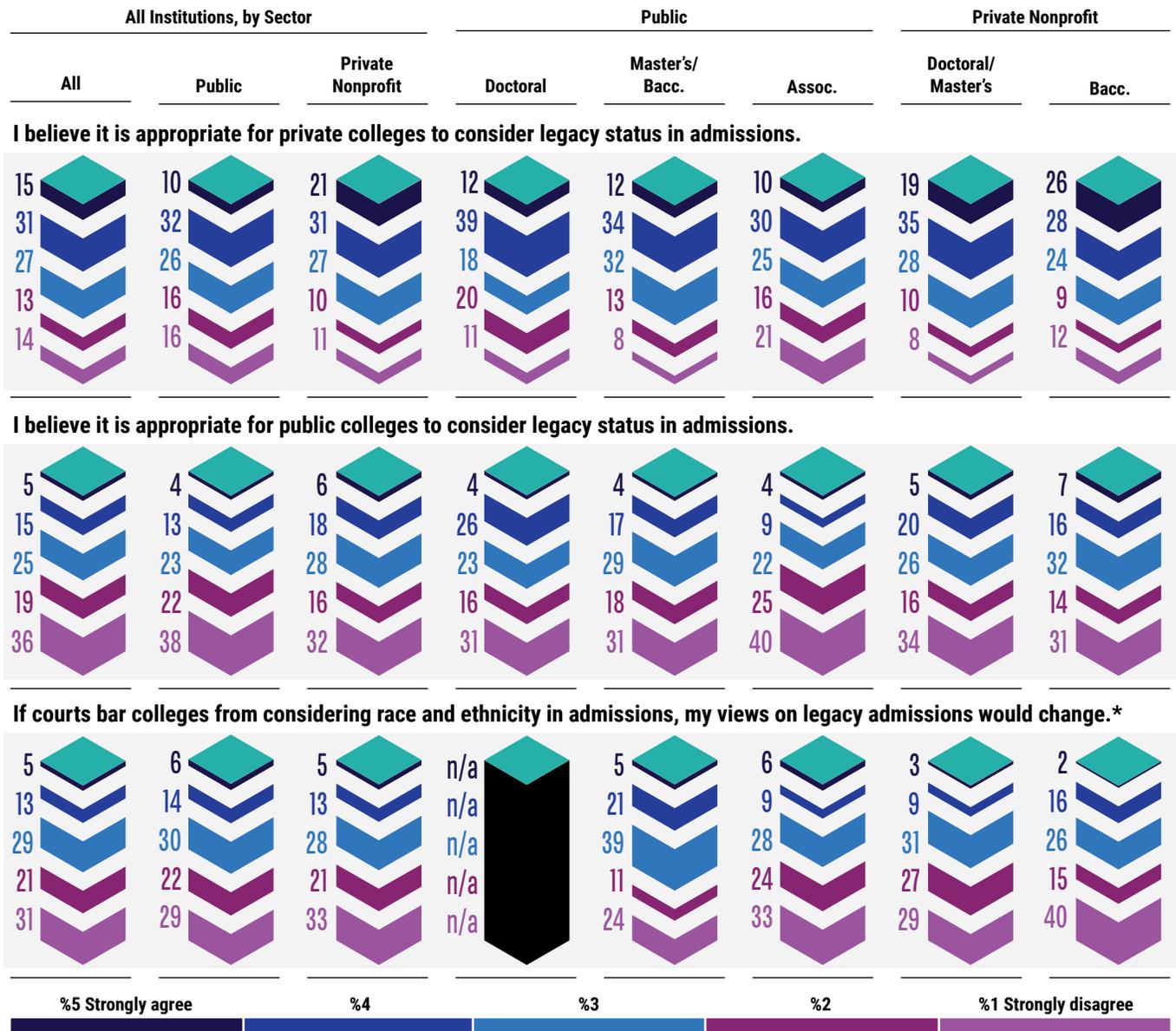
AFFIRMATIVE ACTION (CONT.)

A lawsuit against Harvard University, argued in a federal court in 2018, charged that the university's affirmative action programs discriminate against Asian American applicants. The case resulted in the release of documents showing the strong admissions preferences Harvard, like other elite institutions, gives to athletes and children of alumni, or legacies. Harvard won a ruling at the district court level, but the plaintiffs are appealing. Many legal observers believe the case is likely to land in the U.S. Supreme Court.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Colleges should continue to consider race and ethnicity, among other factors, in admissions decisions.								
%5 Strongly agree	34	34	36	40	36	31	30	42
%4	33	32	34	31	38	30	39	29
%3	15	13	16	15	12	14	19	15
%2	7	8	6	6	5	9	6	6
%1 Strongly disagree	11	13	7	8	9	16	6	8
The public does not understand the concept of holistic admissions (evaluating applications individually rather than using a grid of grades and test scores for admissions).								
%5 Strongly agree	42	41	44	48	49	37	40	53
%4	42	43	40	50	33	45	42	36
%3	14	15	13	2	18	16	15	10
%2	1	1	2	0	0	1	3	2
%1 Strongly disagree	1	1	<1	0	0	1	1	0
My college is planning for the possibility that courts may limit or bar the consideration of race in admissions and financial aid.								
%5 Strongly agree	5	3	7	3	3	2	5	8
%4	11	11	13	22	13	6	11	13
%3	28	27	30	33	28	25	28	31
%2	23	24	22	24	27	20	26	20
%1 Strongly disagree	32	35	28	19	29	47	30	29
I worry some Asian American applicants to top colleges face discrimination.								
%5 Strongly agree	10	9	11	10	7	9	9	12
%4	27	30	23	29	39	26	27	20
%3	31	31	33	25	20	37	33	33
%2	18	16	18	21	17	14	20	16
%1 Strongly disagree	15	15	15	15	17	14	11	20

AFFIRMATIVE ACTION (CONT.)



*Asked of those who strongly agree or agree it is appropriate for private or public colleges to consider legacy status in admissions (n=251)
n/a=Not reported due to small sample size

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FEDERAL HIGHER EDUCATION POLICY

Presidents were asked for their views on several federal higher education policy matters, including some policies being pursued by the Trump administration, as well as proposals made by presidential candidates and other elected officials.

- More presidents disagree (45 percent) than agree (28 percent) with the idea that the Trump administration's increased scrutiny of foreign scholars' involvement in academic research is reasonable given legitimate concerns about national security and intellectual property theft.
- Presidents are sympathetic to the idea that the Trump administration's increased scrutiny of foreign scholars is resulting in racial profiling of Chinese faculty members and graduate students – 52 percent agree, and 24 percent disagree.
- More presidents support (40 percent) than oppose (31 percent) the Department of Education's recent publication of program-level data on student debt levels and students' post-college income.
- Forty percent of presidents agree and 33 percent disagree that state and federal regulators should publish information about the financial sustainability of colleges and universities.
- Presidents do not expect Congress to pass a reauthorized Higher Education Act before the 2020 election – 29 percent agree it will, while 47 percent disagree.
- More than 6 in 10 presidents (62 percent) oppose the idea of free public college, while 22 percent support it. Although 47 percent of community college presidents endorse free public college programs, no more than 15 percent of presidents at other types of institutions do.
- Presidents also mostly oppose the idea of canceling much if not all student debt – 22 percent express support, and 58 percent opposition. Thirty-two percent of public associate college presidents support cancelling student debt, while no more than 20 percent of presidents at other types of colleges do.

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 about federal education policy.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
The Trump administration's increased scrutiny of foreign scholars' involvement in academic research is reasonable given legitimate concerns about theft of intellectual property and national security.								
%5 Strongly agree	8	8	9	10	10	6	9	8
%4	20	22	17	26	18	22	21	12
%3	27	27	27	29	34	25	25	27
%2	25	27	23	28	27	26	25	23
%1 Strongly disagree	20	16	24	6	12	21	21	30
The Trump administration's increased scrutiny of foreign scholars' involvement in academic research is resulting in racial profiling of chinese faculty members and graduate students.								
%5 Strongly agree	17	16	19	16	11	19	18	21
%4	35	39	32	41	43	34	36	28
%3	23	25	23	23	27	25	19	26
%2	13	11	14	9	11	12	13	12
%1 Strongly disagree	11	9	12	11	8	10	13	13

FEDERAL HIGHER EDUCATION POLICY (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I expect Congress will pass a reauthorized Higher Education Act before the 2020 election.								
%5 Strongly agree	6	6	7	0	6	6	6	5
%4	23	23	24	19	18	26	22	27
%3	23	21	27	22	26	19	30	24
%2	27	30	24	41	31	27	25	22
%1 Strongly disagree	20	20	18	18	18	21	18	22
I support the Education Department's recent publication of program-level data on student debt levels and students' post-college income.								
%5 Strongly agree	10	12	6	4	7	16	7	2
%4	30	40	18	48	29	41	20	12
%3	29	31	27	24	45	27	27	29
%2	18	12	25	17	12	10	26	26
%1 Strongly disagree	13	5	23	6	8	5	19	31
State and federal regulators should publish information about the financial sustainability of colleges and universities.								
%5 Strongly agree	13	19	5	17	16	20	6	3
%4	27	36	16	41	30	35	19	12
%3	27	25	31	27	34	21	34	29
%2	17	14	21	11	14	16	16	26
%1 Strongly disagree	16	6	27	4	5	7	25	30
I support the idea of free public college.								
%5 Strongly agree	9	15	3	4	4	22	1	3
%4	13	20	5	6	11	25	3	5
%3	16	22	8	29	20	21	8	8
%2	19	21	17	18	32	17	15	16
%1 Strongly disagree	43	23	67	43	33	15	73	68
I support the idea of canceling much if not all student debt.								
%5 Strongly agree	9	10	7	0	5	15	1	12
%4	13	16	8	18	14	17	7	8
%3	20	22	18	24	26	20	18	19
%2	26	26	26	25	28	24	29	20
%1 Strongly disagree	32	25	41	32	26	24	45	41

IMAGE OF HIGHER EDUCATION

Half of college presidents disagree that most Americans have an accurate view of the purpose of higher education; only 11 percent agree, while 39 percent are neutral. The majority of presidents, 57 percent, also disagree that most Americans have an accurate view of the purpose of their institution's sector of higher education; 16 percent agree. Private college presidents (65 percent) are significantly more likely than public college presidents (51 percent) to think Americans do not accurately understand their sector's purpose.

Beyond these misperceptions about the purpose of higher education, presidents believe Americans have misunderstandings about what is occurring in higher education.

From a financial perspective, 85 percent of presidents agree that attention to student debt has created a perception that college is less affordable than it actually is. Eighty-two percent also agree that confusion about tuition sticker prices and discounting contributes to misperceptions about college affordability. Majorities of private college presidents *strongly* agree that these two factors have contributed to misperceptions about the affordability of a college education.

And, while community college presidents are inclined to agree that student debt reports and confusion about actual tuition costs lead Americans to believe college is less affordable than is the case, they are less inclined than college presidents at other types of institutions to agree strongly.

Seventy-nine percent of presidents agree that attention to large college endowments makes people believe that colleges are wealthier than they are. Again, private college presidents are more likely than public college presidents to strongly agree with this idea.

Presidents are somewhat less likely to agree with two other potential misperceptions about higher education, unrelated to finances. Sixty-nine percent agree that the amenities that certain colleges offer to entice students to enroll make people think that colleges have misplaced priorities. Also, 49 percent of college presidents agree and 19 percent disagree that attention to racial protests on college campuses has led families to believe that colleges are less welcoming to racial and ethnic minorities than is the case. However, 70 percent of public doctoral college presidents agree.

College presidents' opinions on these misperceptions of higher education have been mostly stable in recent years.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Most Americans have an accurate view of the purpose of higher education.								
%5 Strongly agree	<1	0	1	0	0	0	1	2
%4	11	11	12	14	10	10	11	12
%3	39	41	36	38	30	45	35	32
%2	37	39	34	38	47	36	36	37
%1 Strongly disagree	13	9	17	10	12	9	17	18

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Most Americans have an accurate view of the purpose of my sector of higher education.								
%5 Strongly agree	2	2	2	2	1	2	1	1
%4	14	16	12	14	9	18	11	8
%3	27	31	22	30	32	30	25	20
%2	40	36	45	38	35	38	42	50
%1 Strongly disagree	17	15	20	16	23	12	21	21
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	35	52	49	48	28	53	55
%4	43	44	42	37	40	47	39	43
%3	11	15	6	10	10	17	7	2
%2	3	6	<1	4	1	7	1	0
%1 Strongly disagree	<1	1	0	0	0	1	0	0
Confusion about tuition sticker prices and tuition discounting have led many prospective students and parents to think college is less affordable than it really is.								
%5 Strongly agree	38	29	51	42	39	22	53	52
%4	44	49	39	42	44	51	37	39
%3	14	17	9	12	13	20	8	8
%2	3	4	1	2	4	5	1	1
%1 Strongly disagree	1	1	0	2	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	36	29	47	37	35	25	47	49
%4	43	47	39	46	47	48	39	37
%3	15	18	10	4	15	21	10	12
%2	4	6	2	13	3	5	3	1
%1 Strongly disagree	1	1	2	0	0	2	1	1

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	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	23	22	24	20	18	23	26	20
%4	46	46	46	45	45	46	44	46
%3	20	21	20	26	28	17	22	21
%2	9	9	9	8	7	11	8	11
%1 Strongly disagree	2	2	1	0	2	2	1	2
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	10	8	11	15	12	6	9	15
%4	39	40	41	55	43	35	44	39
%3	31	33	28	26	34	33	28	28
%2	16	15	17	4	9	22	15	18
%1 Strongly disagree	3	3	3	0	2	5	4	1

Presidents are most likely to believe that concerns about college affordability and student debt are responsible for declining public support for higher education, compared with four other possible factors. Fifty-eight percent of presidents say affordability and debt concerns are “very responsible,” and another 38 percent say those concerns are “somewhat responsible.”

Presidents also believe that concerns over whether higher education prepares students for careers are responsible for declining public support for higher education; 37 percent of presidents say they are very responsible, and 55 percent believe they are somewhat so.

Fewer presidents believe perceptions of liberal political bias in higher education (22 percent) and low or lagging graduation rates (13 percent) are very responsible for higher education’s image issues, but majorities believe each is somewhat responsible (56 percent and 60 percent, respectively). A slim majority of presidents believe underrepresentation of low-income students is either very (8 percent) or somewhat (43 percent) responsible.

Private college presidents (63 percent) are somewhat more likely than public college presidents (54 percent) to say concerns about affordability and debt are very responsible for declining public support for higher education. They are also more inclined to think concerns over career preparation and liberal political bias are major factors.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Concerns about college affordability and student debt								
% Very responsible	58	54	63	52	59	54	64	63
% Somewhat responsible	38	40	34	44	37	40	34	34
% Not too responsible	4	5	2	4	2	6	2	2
% Not at all responsible	1	1	<1	0	1	1	0	1

IMAGE OF HIGHER EDUCATION (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Concerns over whether higher education prepares students for careers								
% Very responsible	37	35	39	31	34	36	37	39
% Somewhat responsible	55	57	56	59	60	56	55	58
% Not too responsible	6	7	5	8	5	7	7	3
% Not at all responsible	1	1	1	2	0	1	1	1
Perception of liberal political bias in higher education								
% Very responsible	22	19	26	16	30	16	30	24
% Somewhat responsible	56	56	58	63	51	56	56	63
% Not too responsible	18	21	14	17	17	24	13	12
% Not at all responsible	3	4	3	4	2	4	2	2
Low or lagging graduation rates								
% Very responsible	13	15	10	6	13	19	8	10
% Somewhat responsible	60	62	59	60	75	57	56	60
% Not too responsible	24	21	28	32	12	22	34	26
% Not at all responsible	2	2	3	2	0	3	2	4
Underrepresentation of low-income students								
% Very responsible	8	8	6	6	5	10	4	9
% Somewhat responsible	43	42	44	47	41	40	38	47
% Not too responsible	40	41	39	45	45	39	43	35
% Not at all responsible	10	9	11	2	9	11	15	9

Over the past three years, presidents have become less likely to believe that liberal political bias is very responsible for declining support for higher education. The percentage currently holding this view (22 percent) is down from 28 percent a year ago and 31 percent in 2018.

Nevertheless, public opinion studies in recent years have shown greater declines in confidence in higher education among those who identify politically as Republicans than among other Americans. Sixty-nine percent of presidents, including more than seven in 10 presidents at four-year public universities, agree they are worried about Republicans' increasing skepticism about higher education. Since 2018, the percentage of presidents who are worried has declined modestly from 77 percent.

Fifty-seven percent of presidents agree that the perception that colleges are intolerant of conservative political views is having a major negative impact on attitudes about higher education, although fewer agree now than in 2018 (65 percent).

But presidents are generally skeptical as to whether Republican concerns about higher education are warranted. In fact, 71 percent disagree and 13 percent agree that Republicans' doubts are justified. Additionally, more presidents disagree (45 percent) than agree (28 percent) that the perception of colleges as places that are intolerant of conservative views is accurate. Reflecting on the situation at their own college, 65 percent of presidents agree that classrooms on their campus are as welcoming to conservative students as to liberal students.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I am worried about Republicans' increasing skepticism about higher education.								
%5 Strongly agree	32	32	33	31	43	28	35	32
%4	37	38	37	43	37	38	34	36
%3	19	20	18	22	13	21	19	22
%2	7	6	6	4	4	8	5	6
%1 Strongly disagree	5	4	5	0	4	6	8	4
Republican doubts about higher education are justified.								
%5 Strongly agree	3	2	5	0	1	3	6	4
%4	10	9	10	8	9	9	7	11
%3	17	18	15	19	17	18	19	11
%2	29	29	30	29	30	29	33	30
%1 Strongly disagree	42	43	41	44	44	42	36	44
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	16	14	21	10	14	15	23	21
%4	41	41	41	43	50	36	42	42
%3	27	28	28	35	25	26	24	28
%2	12	15	7	12	9	19	7	5
%1 Strongly disagree	3	2	4	0	1	3	3	4
The perception of colleges as places that are intolerant of conservative views is accurate.								
%5 Strongly agree	9	6	13	2	8	7	16	8
%4	19	16	23	23	17	14	23	22
%3	27	28	25	26	20	33	25	25
%2	29	33	24	33	36	32	22	29
%1 Strongly disagree	16	16	17	16	20	15	15	17
Classrooms on my campus are as welcoming to conservative students as they are to liberal students.								
%5 Strongly agree	27	25	28	14	20	30	30	24
%4	38	42	34	44	47	40	33	34
%3	21	22	20	26	20	23	19	19
%2	11	8	15	17	12	5	15	18
%1 Strongly disagree	3	2	3	0	2	2	3	5

TEXTBOOKS

College presidents are sympathetic to criticism about the costs of textbooks — 89 percent agree textbooks and course materials cost too much, including 59 percent who agree strongly.

Consistent with those views, presidents are open to different ways to address high textbook costs.

- By 48 percent to 30 percent, presidents agree rather than disagree that faculty members and institutions should be open to changing textbooks or materials, even if the lower-cost options are of lesser quality. The percentage of presidents who agree is up from 39 percent a year ago.
- Eighty-five percent of presidents support using free, open educational resources in college courses.
- An increasing proportion of presidents — 59 percent, up from 51 percent last year — agree that the need to help students save money justifies the loss of some faculty control in choosing course materials.

As in past years, public institution presidents are more likely than those at private institutions to believe textbooks cost too much, and tend to be more supportive of different approaches to save students money.

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 Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Textbooks and course materials cost too much.								
%5 Strongly agree	59	66	51	52	66	69	46	56
%4	30	28	33	32	27	27	37	28
%3	9	5	14	16	6	2	17	12
%2	2	1	2	0	1	2	1	3
%1 Strongly disagree	<1	0	<1	0	0	0	0	1
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	24	27	21	14	29	29	18	26
%4	24	21	27	27	21	20	27	30
%3	23	24	20	36	19	24	20	21
%2	21	20	22	14	21	20	27	16
%1 Strongly disagree	9	8	9	10	10	8	8	6
Colleges should embrace open educational resources, free and openly licensed online educational material.								
%5 Strongly agree	53	62	42	61	68	59	38	44
%4	32	26	39	35	23	26	42	36
%3	12	9	16	4	6	12	17	16
%2	2	2	2	0	4	2	2	4
%1 Strongly disagree	3	2	4	0	1	3	3	4

TEXTBOOKS (CONT.)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Non-Profit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
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	23	25	19	24	19	29	17	19
%4	36	40	30	46	40	38	30	34
%3	20	15	26	17	11	16	24	25
%2	13	11	16	11	15	11	20	13
%1 Strongly disagree	9	8	10	2	14	6	9	10

A comparison of the attitudes about textbooks among presidents, chief academic officers and faculty members, as measured in the most recent *Inside Higher Ed* surveys of those groups, finds presidents more supportive than the other groups about making changes to educational materials.

Presidents are similar to CAOs in being more in favor of than opposed to changing textbooks to save students money and to taking away some faculty member control in course material selection. Faculty members, though, are more likely to oppose both of those ideas, particularly taking away some of their control in choosing course materials.

College Officials' Opinions About Textbooks			
	Presidents	Chief Academic Officers	Faculty Members
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.			
% Strongly agree/Agree	48	43	32
% Strongly disagree/Disagree	30	35	46
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.			
% Strongly agree/Agree	59	47	21
% Strongly disagree/Disagree	22	31	58

INSTITUTION AND PERSONAL DEMOGRAPHICS

What is your age?	Overall %
Younger than 30	0
30 to 39	<1
40 to 49	8
50 to 59	35
60 to 69	46
70 and older	11

What is your gender?	Overall %
Male	67
Female	33

How many years have you served as the president at this institution?	Overall %
Less than six months	1
Six months to less than three years	30
Three years to less than five years	22
Five years to less than 10 years	29
10 or more years	18

How many years have you served as the president at any institution?	Overall %
Less than six months	1
Six months to less than three years	22
Three years to less than five years	18
Five years to less than 10 years	31
10 or more years	28

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