

INSIDE
HIGHER ED

2021 Survey of

College and University Presidents

A STUDY BY *INSIDE HIGHER ED* AND HANOVER RESEARCH

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



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90%
Student
Adoption

Engagement



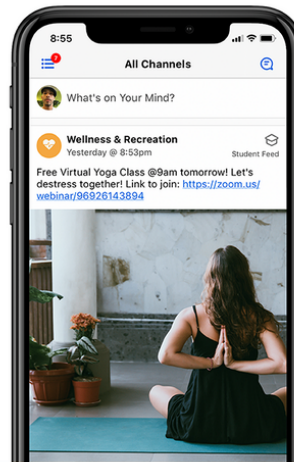
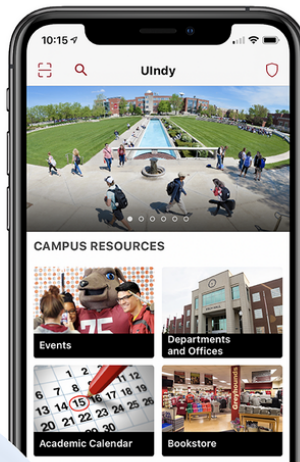
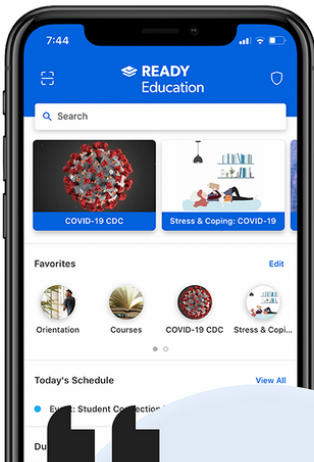
- Mobile-First Community
- Private Campus Social Network
- Peer-to-Peer Messaging

Health & Wellness



- Emergency Announcements
- Mental Health Interventions
- Contact Tracing & Symptom Tracking

400%
Increase in student
engagement



2 to 4%
Increase in student
retention



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Christina Ryan Rodriguez
Dean of Enrollment Services
Golden West College

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INTRODUCTION AND METHODOLOGY

Inside Higher Ed has partnered with Hanover Research to conduct its 11th annual Survey of College and University Presidents. The survey is designed to understand how college and university presidents and chancellors view pressing issues facing higher education this year.

The survey is an attempted census of all presidents using the most comprehensive sample information available to target all eligible U.S. colleges and universities from the Integrated Postsecondary Education Data System (IPEDS) database. The margin-of-error for this survey is 4.43 percent, given a total n-count of 433.

RESPONDENTS

All Institutions, by Sector					Public				Private Nonprofit	
	All	Public	Private Nonprofit	For Profit*	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.	Assoc.*
Total sample size	433	243	177	8	29	66	139	84	90	2

Note: An asterisk () indicates that data is not reported for these groups due to small sample size.*

HIGH-LEVEL KEY FINDINGS

- Presidents report mixed perceptions of their financial stability, particularly in relation to COVID-19. Though most indicate that they have confidence in their institution's financial stability over the next five (82 percent) or 10 (79 percent) years, many are also slightly or moderately concerned (74 percent) about their institution's economic stability while waiting for a vaccine to be widely distributed. Additionally, 65 percent report that they are at least somewhat concerned with their long-term financial viability in relation to COVID-19.
- About three-fourths of presidents believe that the Biden administration's policies will have a positive effect on their institution. They believe that the administration is most likely to pursue reversing immigration policies that affect international student enrollment (98 percent), reinstating DACA (98 percent), increasing aid for historically Black and other minority-serving institutions (96 percent), and reversing Trump administration guidance on campus sexual assault (94 percent).
- Presidents most commonly indicate that increased funding would most benefit their institution. While 79 percent of presidents indicate that doubling Pell Grants would most benefit their institution and its students, fewer believe that it is likely that the Biden administration will pursue the policy (66 percent). Additionally, 77 percent indicate that more stimulus funding for higher education institutions would be beneficial. They are far less interested in seeing the administration enact policies that would increase accountability oversight.
- Many presidents believe that their institutions will respond to the pandemic and economic recession by transforming their institution or resetting for growth. Forty-four percent indicate that their institution will respond to COVID-19 by making difficult but transformative changes to its core structure and operations, while 34 percent say that they will use this period to focus more on what it does best to invest and grow in those areas when the recession ends. Presidents also indicate that COVID-19 has generally created an opportunity for their institution to make other institutional changes they have been wanting to make anyway (82 percent).

HIGH-LEVEL KEY FINDINGS (cont.)

- Perceptions of how the higher education landscape will change due to COVID-19 are mixed, though most agree that prospective students are not interested in paying the same price for in-person as virtual learning. Though 47 percent of respondents believe that COVID-19 will cause more prospective students to favor virtual instruction than before the pandemic, 35 percent do not believe that to be the case. Additionally, while 43 percent agree that COVID-19 will cause a shift from more expensive colleges to more affordable ones, 31 percent do not believe this will be a trend. Still, most agree that fewer prospective students and parents are interested in paying the same price for virtual learning as for in-person learning (83 percent).
- Presidents do not generally believe that the state of race relations on universities or campuses is good or excellent. Though 63 percent report that the state of race relations on their campus is good or excellent, only 19 percent indicate that this is the case for colleges and universities as a whole. Eighty-four percent also report that it has been more important for their institution to address issues around race this academic year as compared to previous years.

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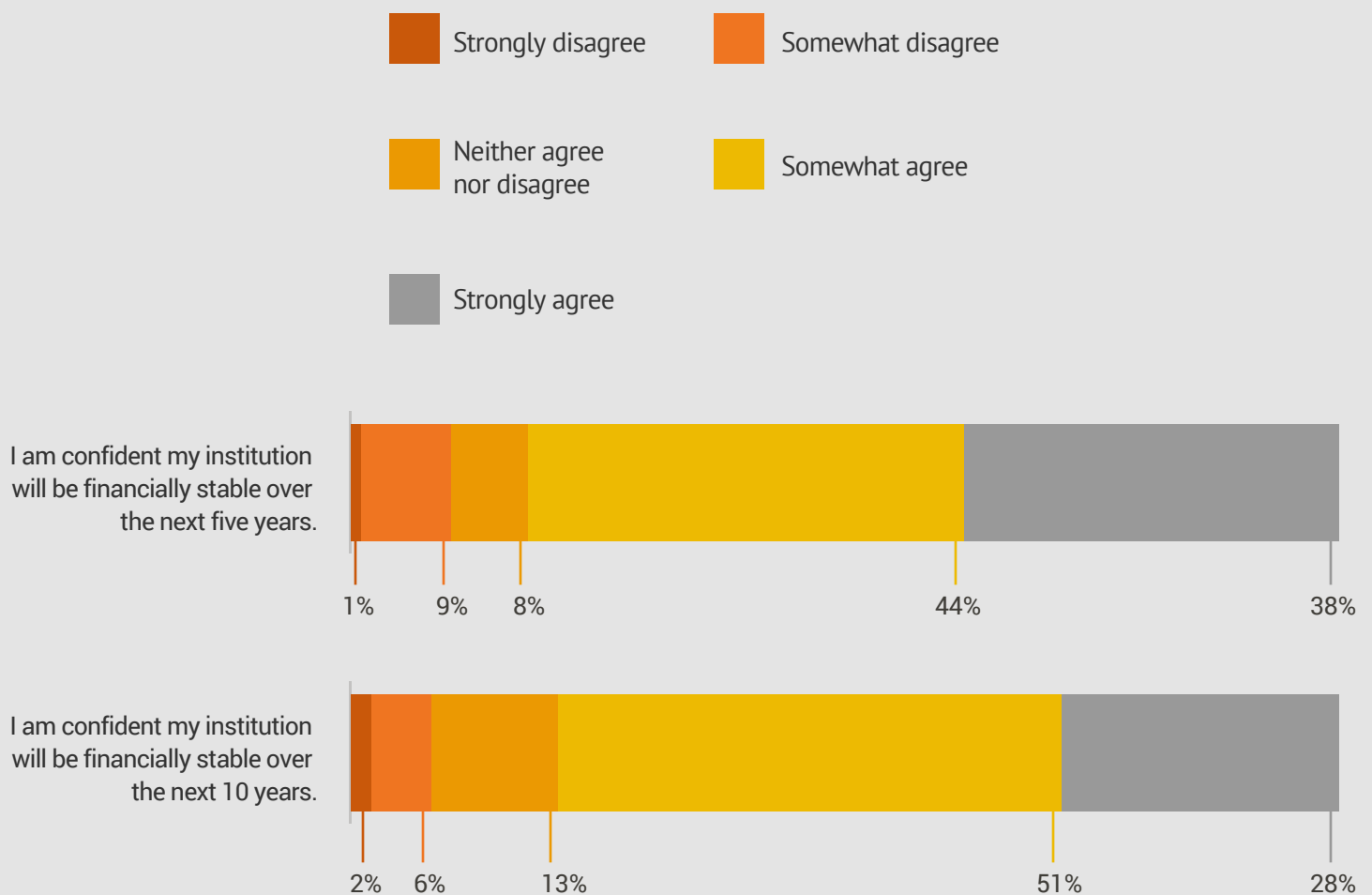
Strategy realized

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CONFIDENCE IN INSTITUTION'S FINANCIAL STABILITY

Most respondents report that they are confident in their institution's future financial stability. Eighty-two percent report that they are confident that their institution will be financially stable over the next five years, and 79 percent say the same for the next 10 years.

**Please indicate how much you disagree or agree
with the following statements:
(n=433)**



CONFIDENCE IN INSTITUTION'S FINANCIAL STABILITY (cont.)

Confidence varies by sector. Leaders of public doctoral and private doctoral and master's universities are significantly likelier to strongly agree about their institution's financial stability over a decade than are their peers at public master's and baccalaureate institutions, community colleges, and private baccalaureate institutions.

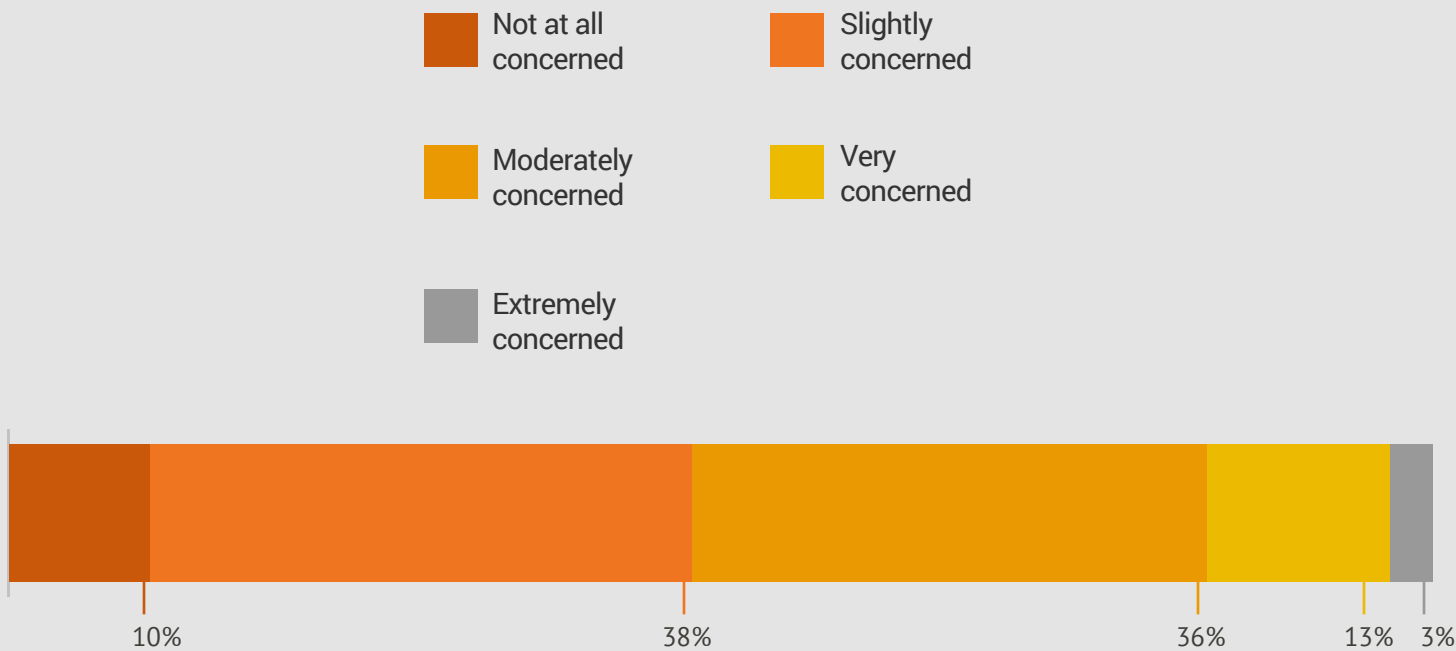
**I am confident my institution will be financially stable
over the next 10 years.**

	Public			Private Nonprofit	
	Doctoral	Master's/Bacc.	Associate	Doctoral/Master's	Bacc.
Strongly disagree	0%	0%	3%	2%	1%
Somewhat disagree	0%	6%	6%	6%	8%
Neither agree nor disagree	7%	18%	17%	10%	7%
Somewhat agree	52%	52%	50%	44%	58%
Strongly agree	41%	24%	24%	38%	27%

ECONOMIC STABILITY WHILE WAITING FOR A VACCINE

A slight majority of presidents express at least moderate concern about their institution’s financial stability while waiting for a COVID-19 vaccine to be widely distributed. Presidents are generally slightly (38 percent) or moderately (36 percent) concerned about their institution’s economic stability while waiting for a vaccine, with few who are very (13 percent) or extremely (3 percent) concerned.

How concerned are you about your institution’s economic stability while waiting for a COVID-19 vaccine to be widely distributed in 2021?
(n=433)



The background is a vibrant red-orange gradient. It is filled with various white line-art icons and diagrams representing AWS services. In the top left, there's a 'SECURITY' diagram showing IAM, S3, and other services. To its right is a 'STORAGE' diagram with S3 and EBS. Further right is a 'COMPUTE' diagram with EC2, Lambda, and ECS. On the far right, there's an 'ML MODEL WORKFLOW' diagram showing steps like TRAIN, EVALUATE, and DEPLOY. In the bottom right, there's a detailed 'Amazon S3 Storage Classes' table. The central text 'STUDENTS TODAY. BUILDERS TOMORROW.' is rendered in large, bold, white 3D block letters with a slight shadow. Faint, illegible code snippets are visible in the background, particularly on the left and bottom edges.

STUDENTS TODAY. BUILDERS TOMORROW.

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EFFECT OF BIDEN ADMINISTRATION POLICIES

About three-fourths of respondents believe that the Biden administration's policies will have a positive effect on their institution. Only 18 percent indicate that they believe the administration will enact policies with negative effects on their institution.

In general, what effect do you believe the Biden administration's policies will have on your institution?
(n=430)



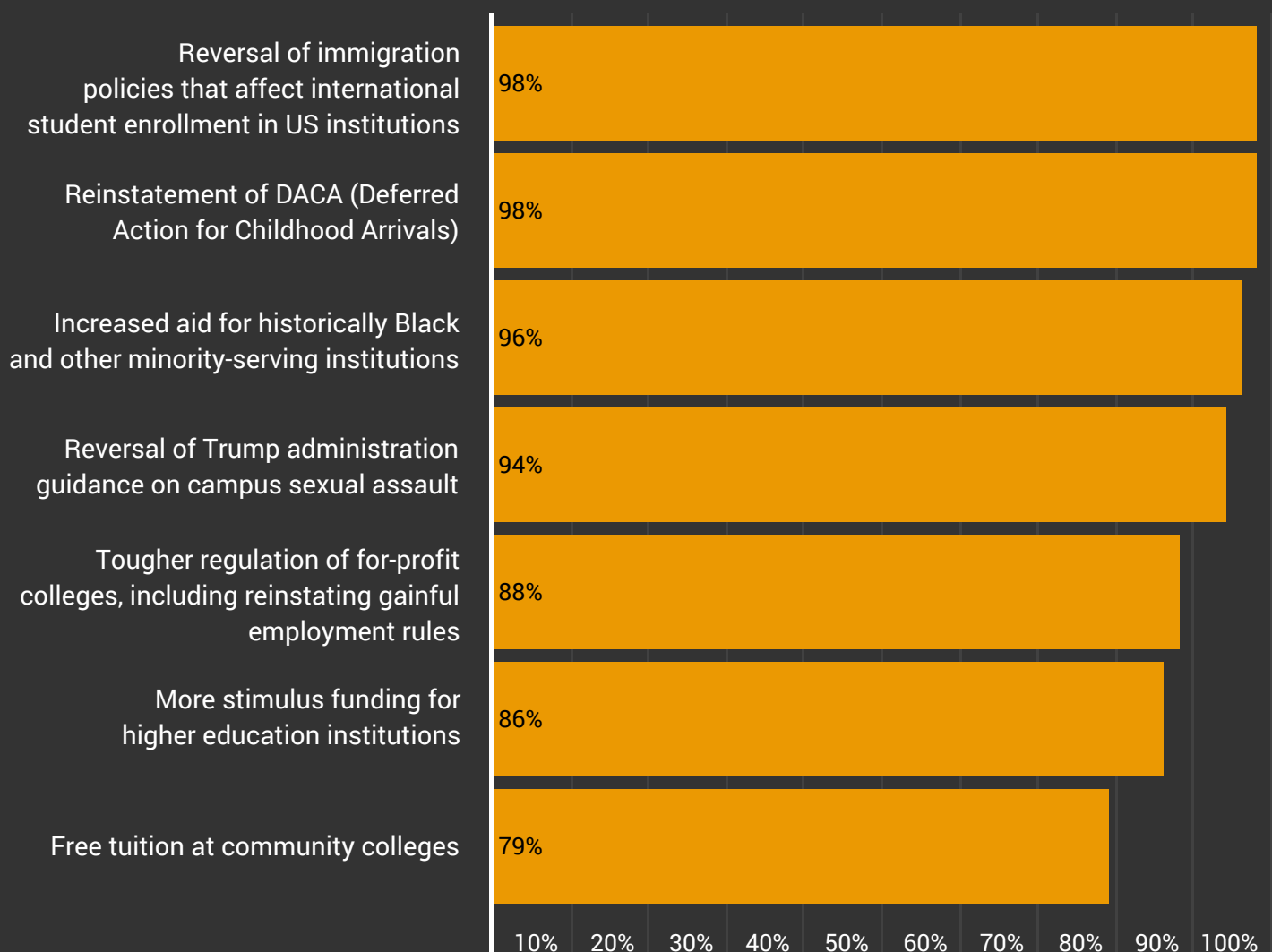
LIKELY BIDEN ADMINISTRATION POLICY APPROACHES

More than 90 percent of presidents believe that the Biden administration is likely to pursue the following: reversal of immigration policies that affect international student enrollment (98 percent), reinstatement of DACA (98 percent), increased aid for historically Black and other minority-serving institutions (96 percent), and reversal of Trump administration guidance on campus sexual assault (94 percent).

Which of the following policy approaches do you believe the Biden administration is likely to pursue?

Top Half

% Very Likely + % Somewhat Likely
(n=383-418)



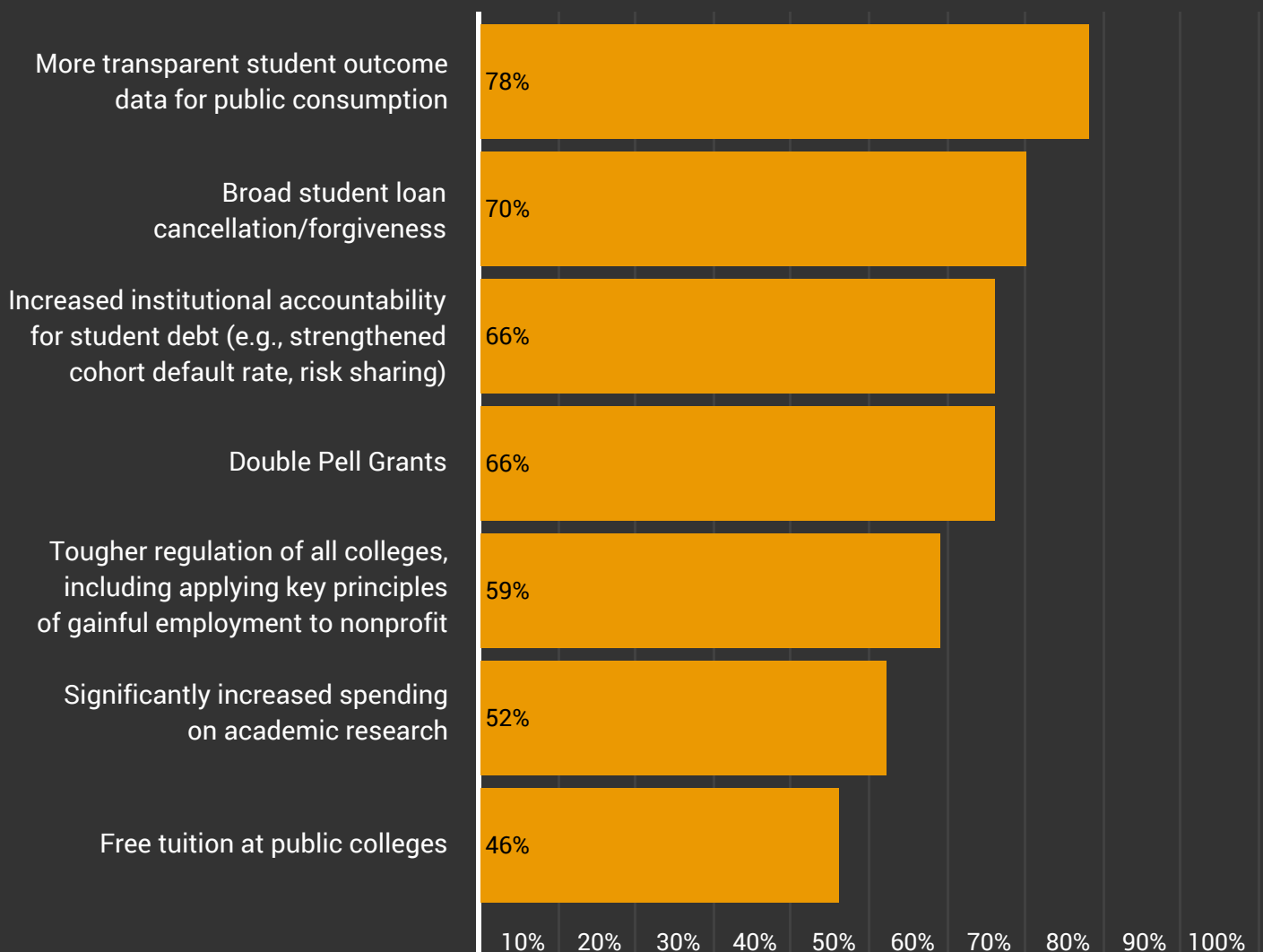
LIKELY BIDEN ADMINISTRATION POLICY APPROACHES (cont.)

Less than half of presidents believe it is likely that the Biden administration will pursue free tuition at public colleges. Additionally, fewer than three in five believe it is likely that the administration will pursue significantly increased spending on academic research (52 percent) or tougher regulation of all colleges (59 percent).

Which of the following policy approaches do you believe the Biden administration is likely to pursue?

Bottom Half

% Very Likely + % Somewhat Likely
(n=383-418)





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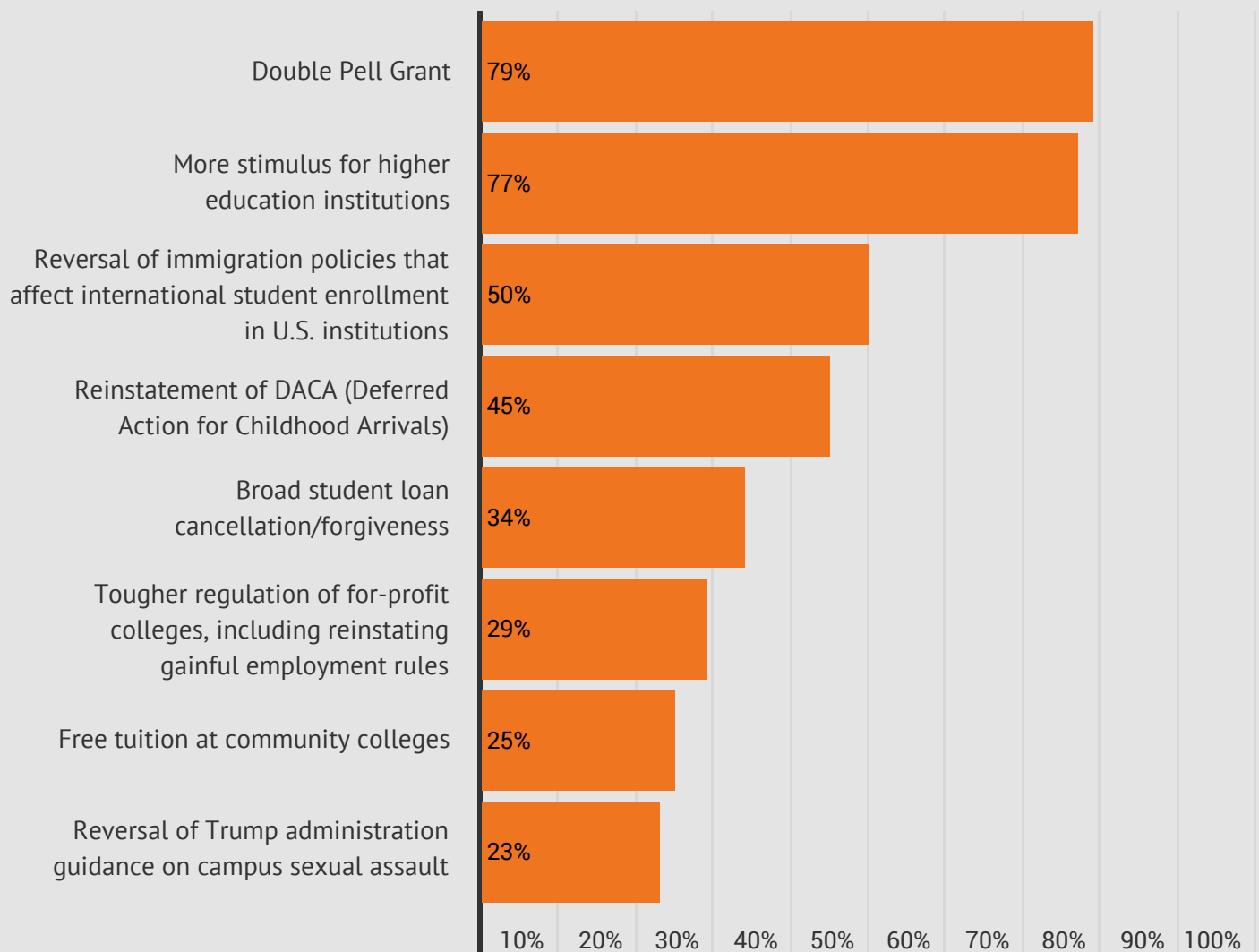
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MOST BENEFICIAL POLICY APPROACHES

Presidents indicate that increased funding would most benefit their institution and its students. They most commonly indicate that a doubling of Pell Grants (79 percent) and more stimulus funding for higher education institutions (77 percent) would be most beneficial for their institution and its students.

Which of the following potential Biden administration policy approaches do you think would most benefit your institution and its students? Please select up to five options.

Top Half
(n=423)

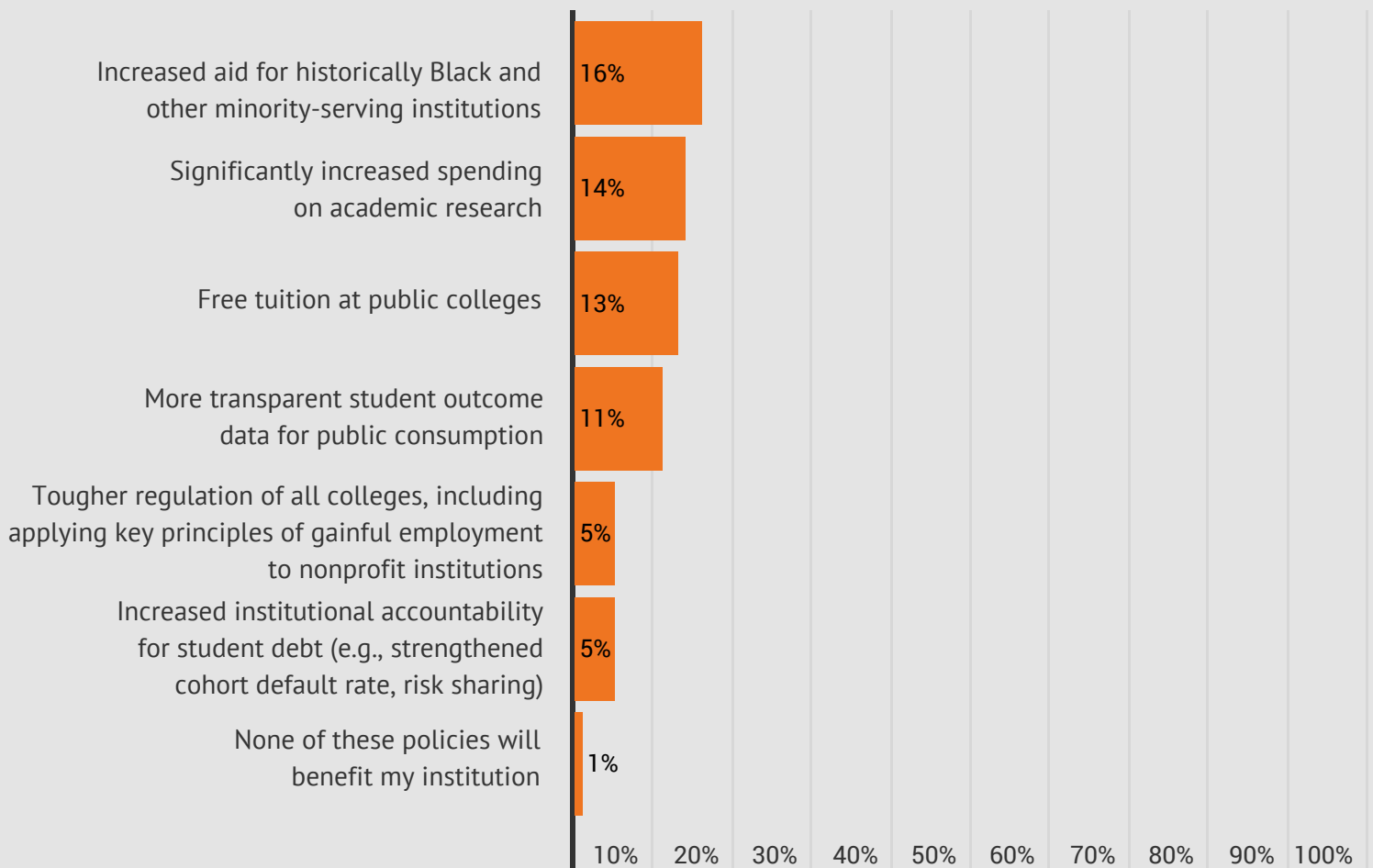


MOST BENEFICIAL POLICY APPROACHES (cont.)

Presidents indicate that the policy approaches least beneficial for their institution and students would be those associated with increased regulation and accountability. The lowest percentages of presidents indicate that policies associated with increase institutional accountability for student debt (5 percent) and tougher regulation of all colleges (5 percent) would benefit their institutions.

Which of the following potential Biden administration policy approaches do you think would most benefit your institution and its students? Please select up to five options.

Bottom Half
(n=423)



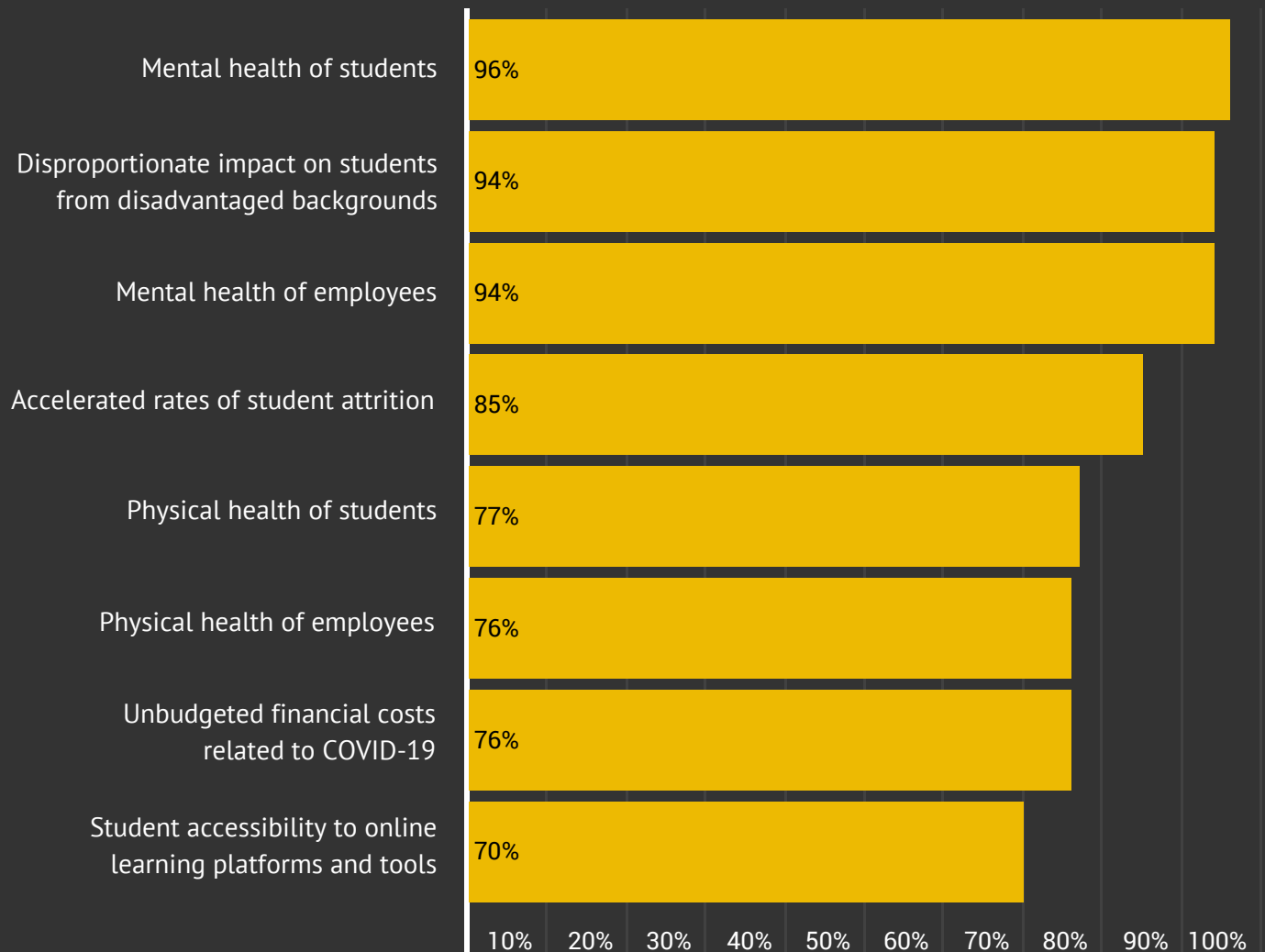
LEVEL OF CONCERN RELATED TO COVID-19

Presidents are most concerned about the negative impacts of COVID-19 on mental health at their institution as well as its disproportionate impact on disadvantaged students. At least three-quarters are also concerned about accelerated rates of student attrition (85 percent) and unbudgeted financial costs related to the pandemic.

How would you rate your current level of concern related to the following issues in regard to COVID-19?

Top Half

% Very Concerned + % Somewhat Concerned
(n=421)



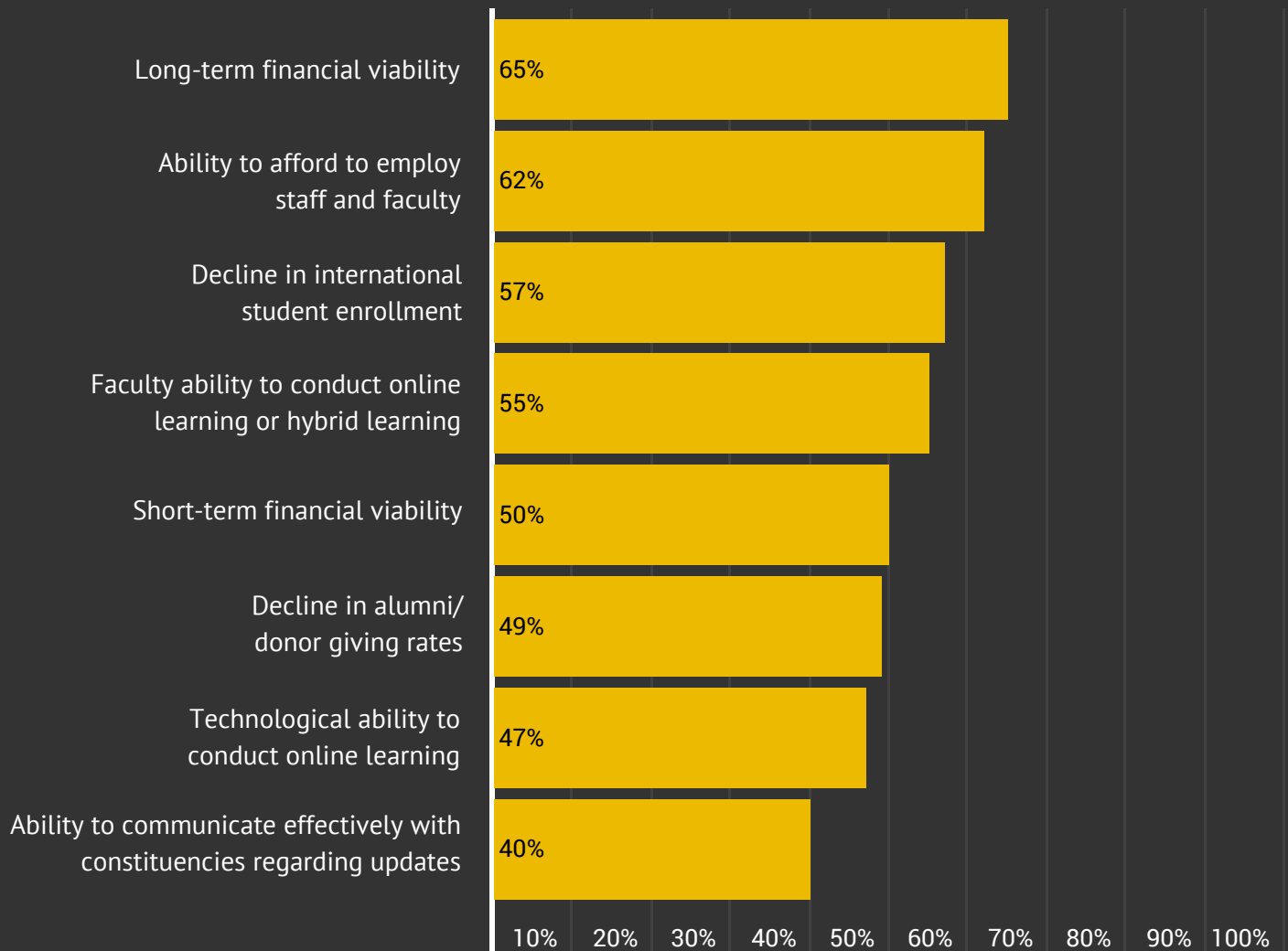
LEVEL OF CONCERN RELATED TO COVID-19 (cont.)

Less than half of respondents are concerned about logistical capabilities and giving rates. Fewer presidents report that they are at least somewhat concerned about their ability to communicate effectively with constituencies regarding updates (40 percent), their technological ability to conduct online learning (47 percent), or decline in alumni/donor giving rates (49 percent).

How would you rate your current level of concern related to the following issues in regard to COVID-19?

Bottom Half

% Very Concerned + % Somewhat Concerned
(n=421)



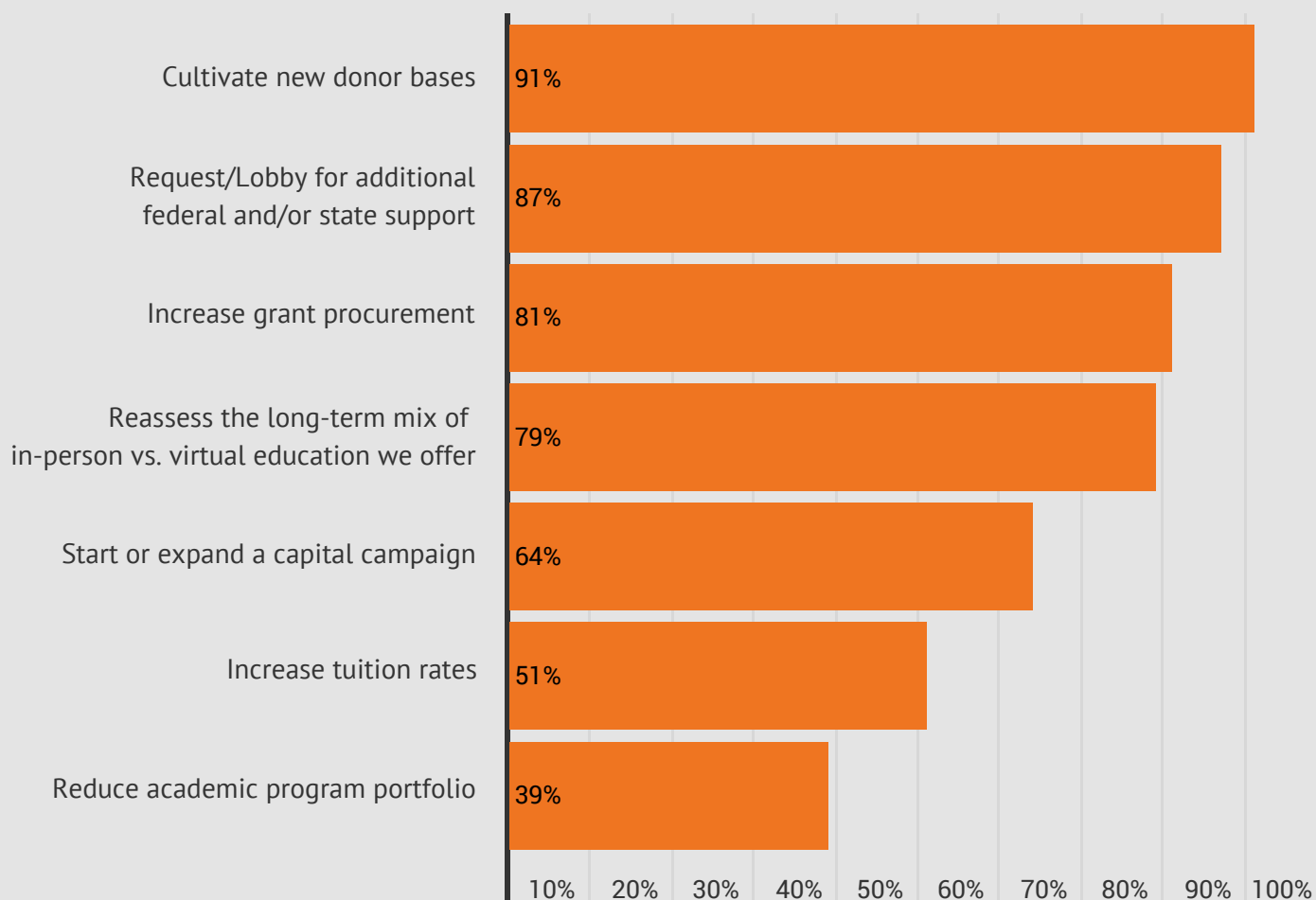
ACTIONS TO INCREASE REVENUE OR CUT COSTS

In order to increase revenue or cut costs, presidents indicate that in the future their institution is likely to: cultivate new donor bases (91 percent), request/lobby for additional federal and/or state support (87 percent), increase grant procurement (81 percent), and reassess the long-term mix of in-person vs. virtual education they offer (79 percent).

How likely is your institution to take the following actions in the future to increase revenue or cut costs?

Top Half

% Very Likely + % Somewhat Likely
(n=370-418)



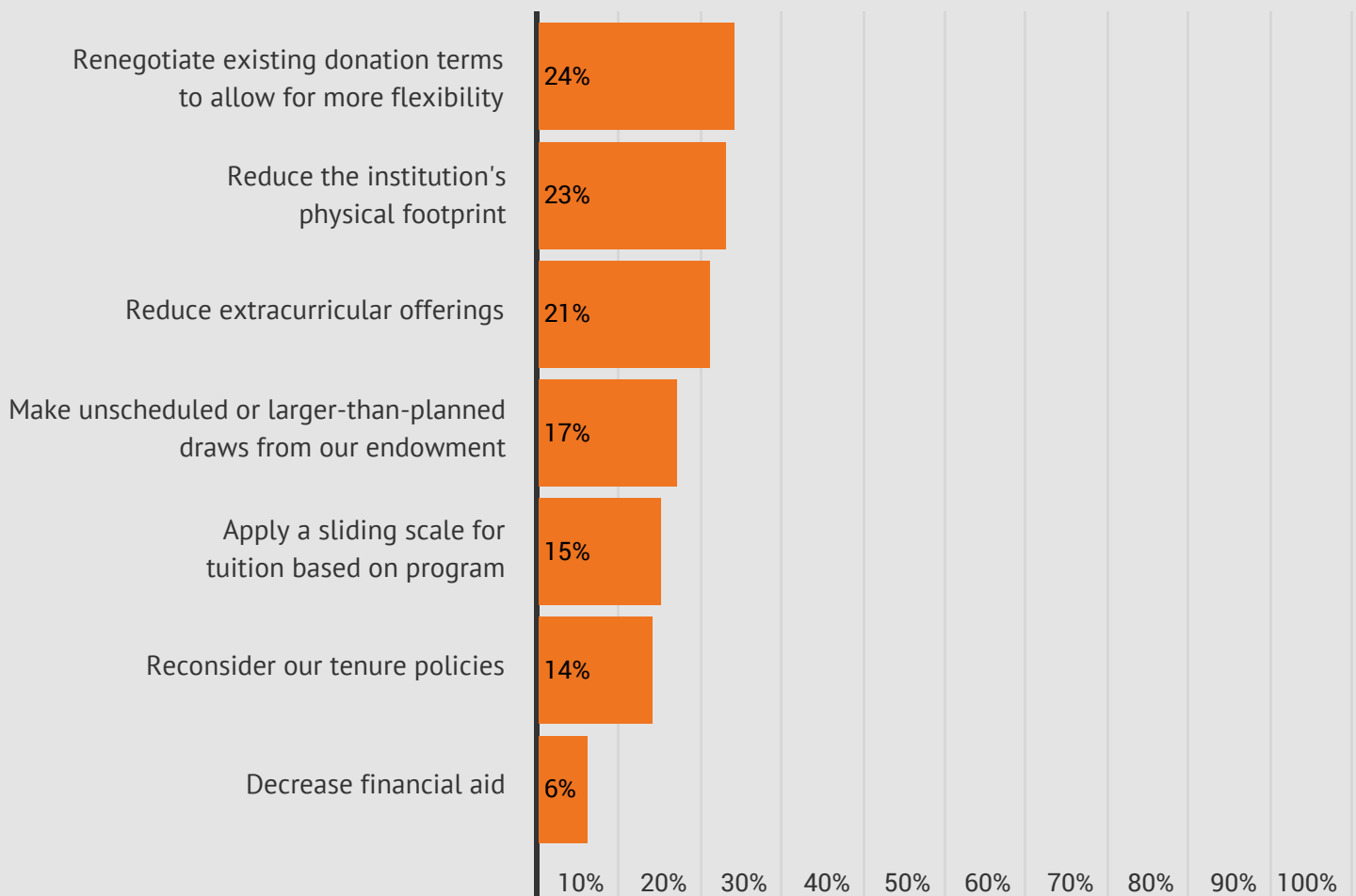
ACTIONS TO INCREASE REVENUE OR CUT COSTS (cont.)

In order to increase revenue or cut costs, fewer presidents indicate that in the future their institution is likely to: decrease financial aid (6 percent), reconsider tenure policies (14 percent), apply a sliding scale for tuition based on program (15 percent), or make unscheduled or larger-than-planned draws from their endowment (17 percent).

How likely is your institution to take the following actions in the future to increase revenue or cut costs?

Bottom Half

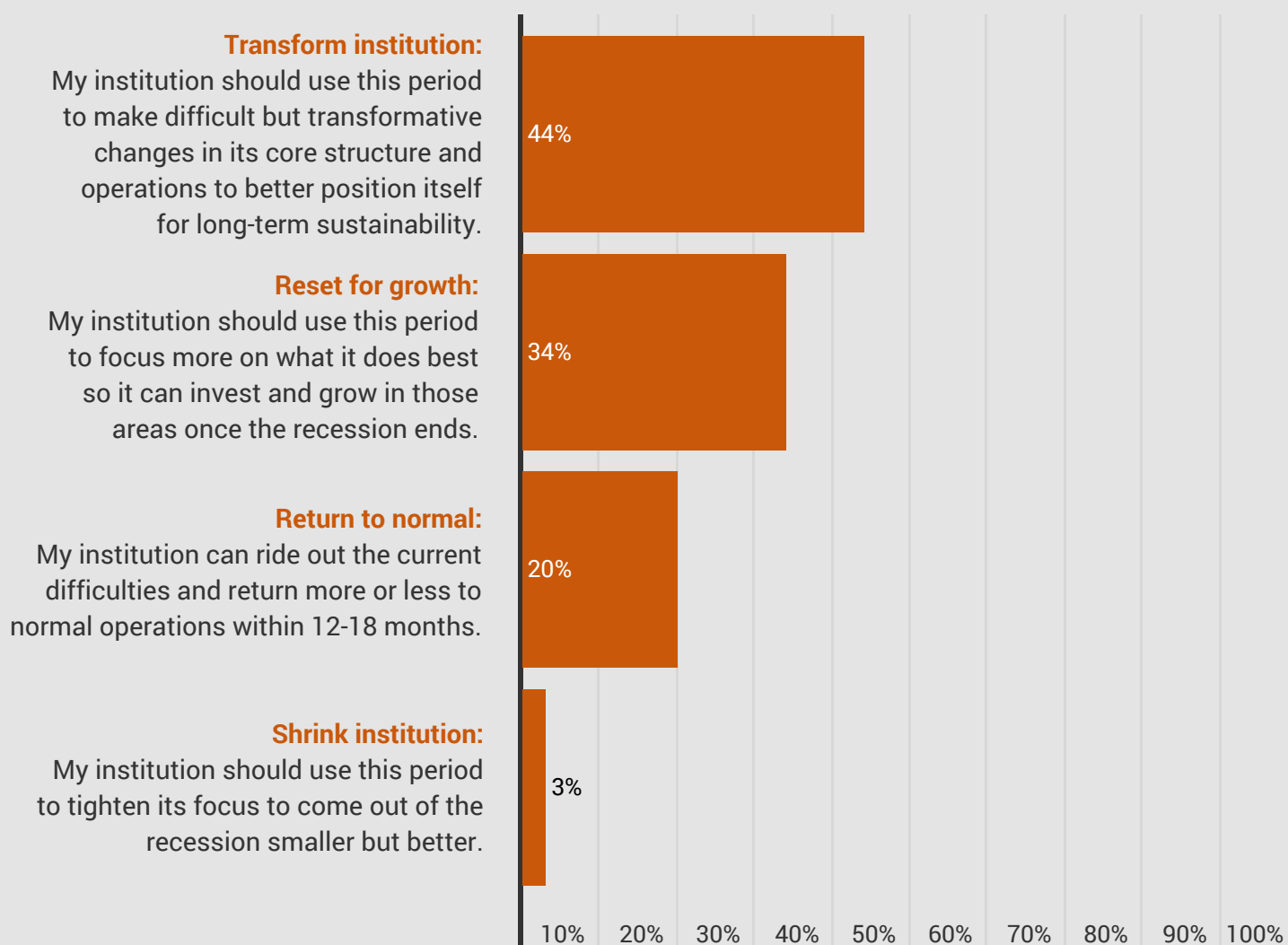
% Very Likely + % Somewhat Likely
(n=370-418)



HOW INSTITUTIONS PLAN ON RESPONDING TO COVID-19 AND THE RECESSION

Most presidents report that their institutions will respond to COVID-19 by transforming their institution or resetting for growth. Only a fifth indicate that they will return to normal operations within 12-18 months.

Which of the following outcomes most closely reflect your view of how your institution will respond to the COVID-19 pandemic and economic recession?
(n=418)

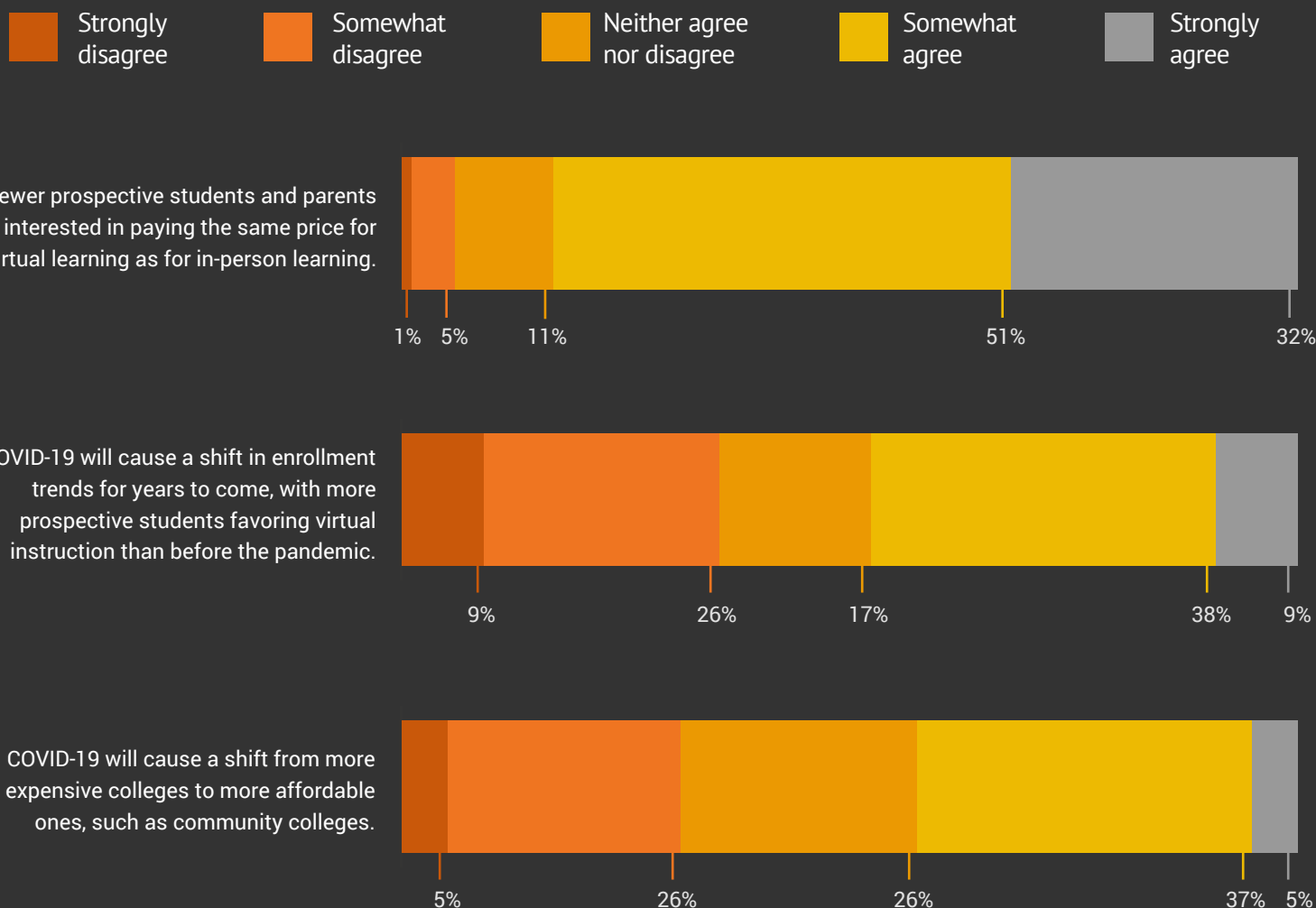


Note: Please consult the Appendix for a figure with the full list.

HOW COVID-19 HAS CHANGED HIGHER ED LANDSCAPE

While many agree that prospective students are less interested in paying the same price for virtual learning as in-person learning, there are mixed responses when it comes to perceptions of larger shifts in the higher education landscape. Forty-seven percent believe that COVID-19 will cause a shift in enrollment trends for years to come, with more prospective students favoring virtual instruction than before the pandemic, but 35 percent do not believe that to be the case. Similarly, though 43 percent agree that COVID-19 will cause a shift from more expensive colleges to more affordable ones, 31 percent do not believe that will be a trend.

To what extent do you agree or disagree with the following statements about how COVID-19 has changed the higher education landscape?
(n=415)

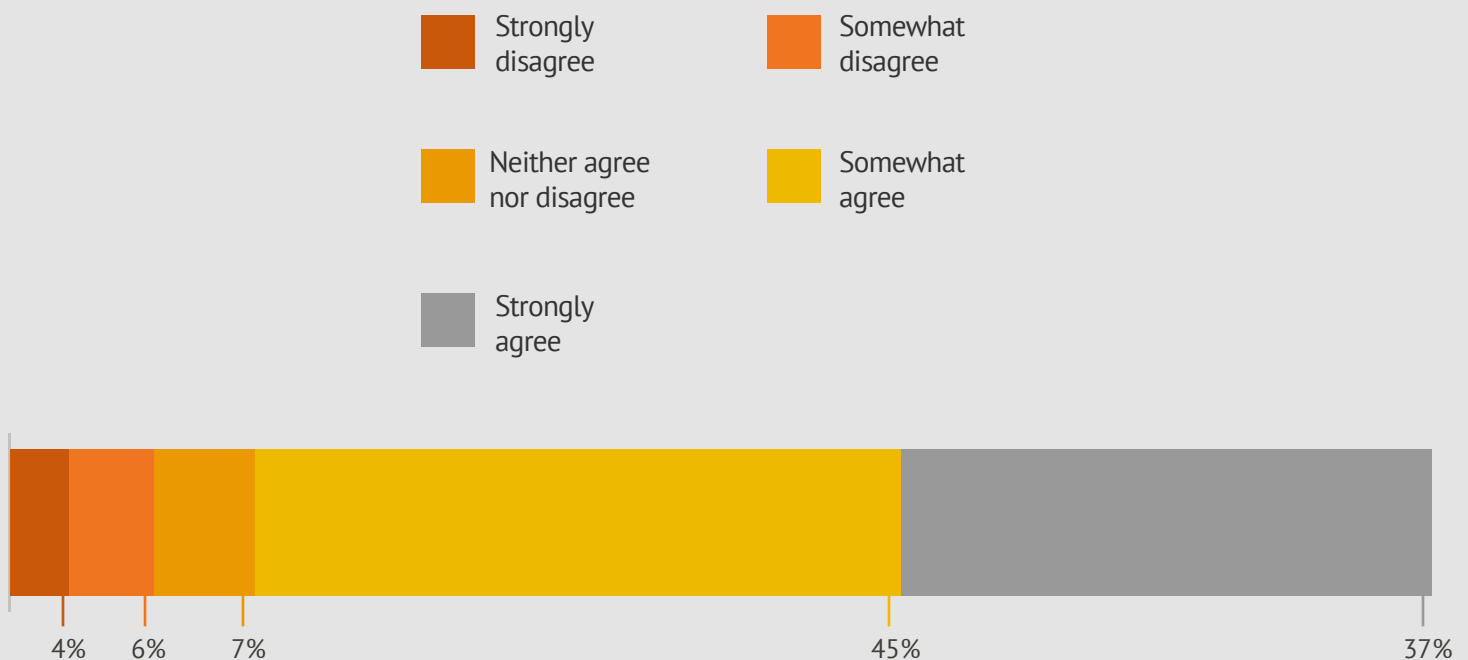


OPPORTUNITY FOR CHANGES DURING THE PANDEMIC

Most presidents agree that the pandemic, and the subsequent changes it necessitated, created an opportunity for their institutions to make other institutional changes they had wanted to make anyway. Eighty-two percent indicate that this is the case.

To what extent do you agree or disagree with the following statement regarding how your institution has changed during the pandemic?

The pandemic, and subsequent necessary changes (e.g., adjusting to distance learning in the spring and fall), has created an opportunity for my institution to make other institutional changes we have been wanting to make anyway.

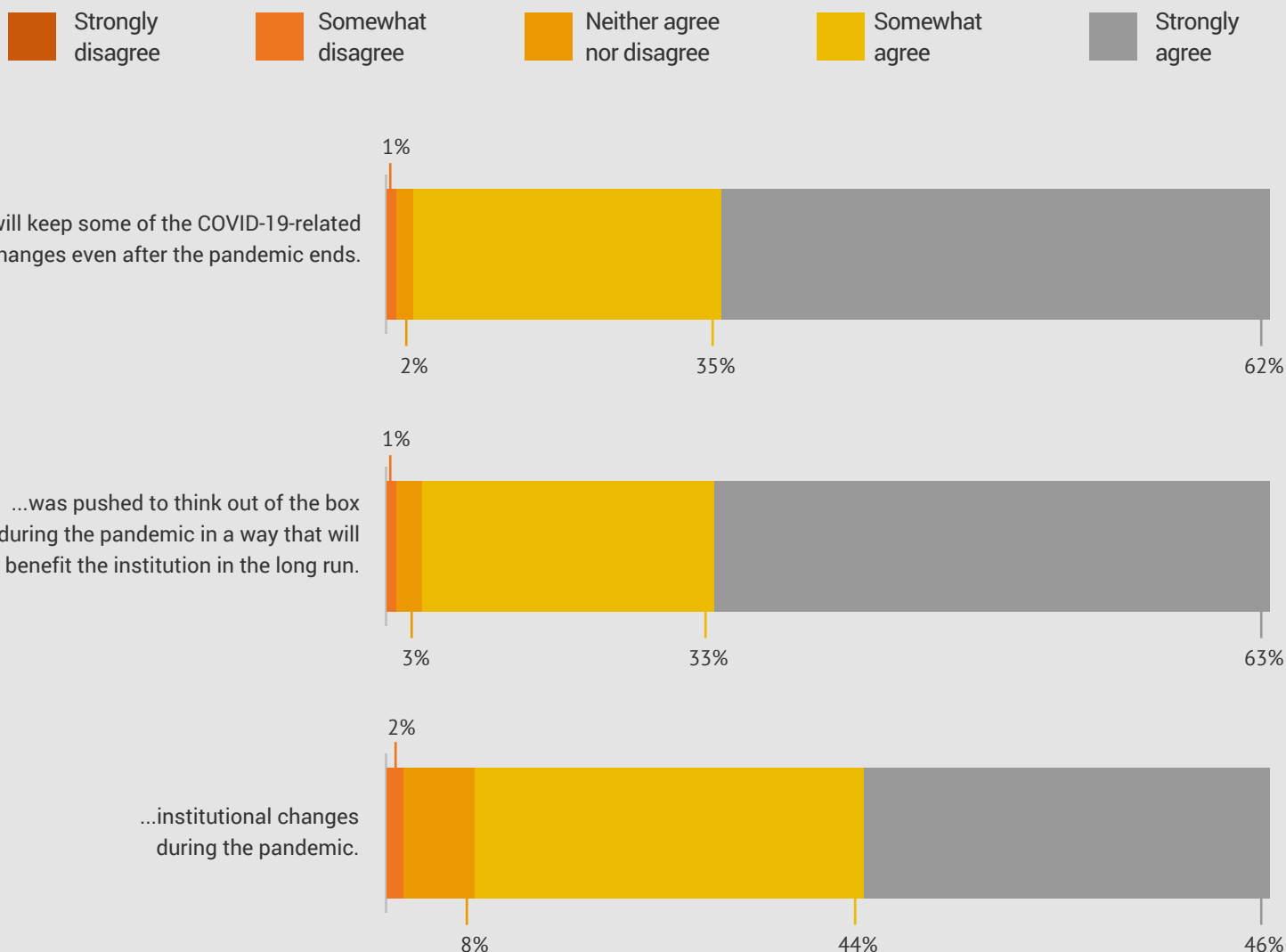


HOW INSTITUTIONS REACTED TO COVID-19

Nine in 10 presidents agree that they will keep some COVID-19-related changes even after the pandemic ends (97 percent), that they were pushed to think outside of the box in a way that will benefit their institution in the future (95 percent), and that they were able to implement some positive, long-lasting institutional changes during the pandemic (90 percent). But significantly fewer agree strongly with the latter than with the first two statements.

To what extent do you agree or disagree with the following statements?

My institution...
(n=412-413)



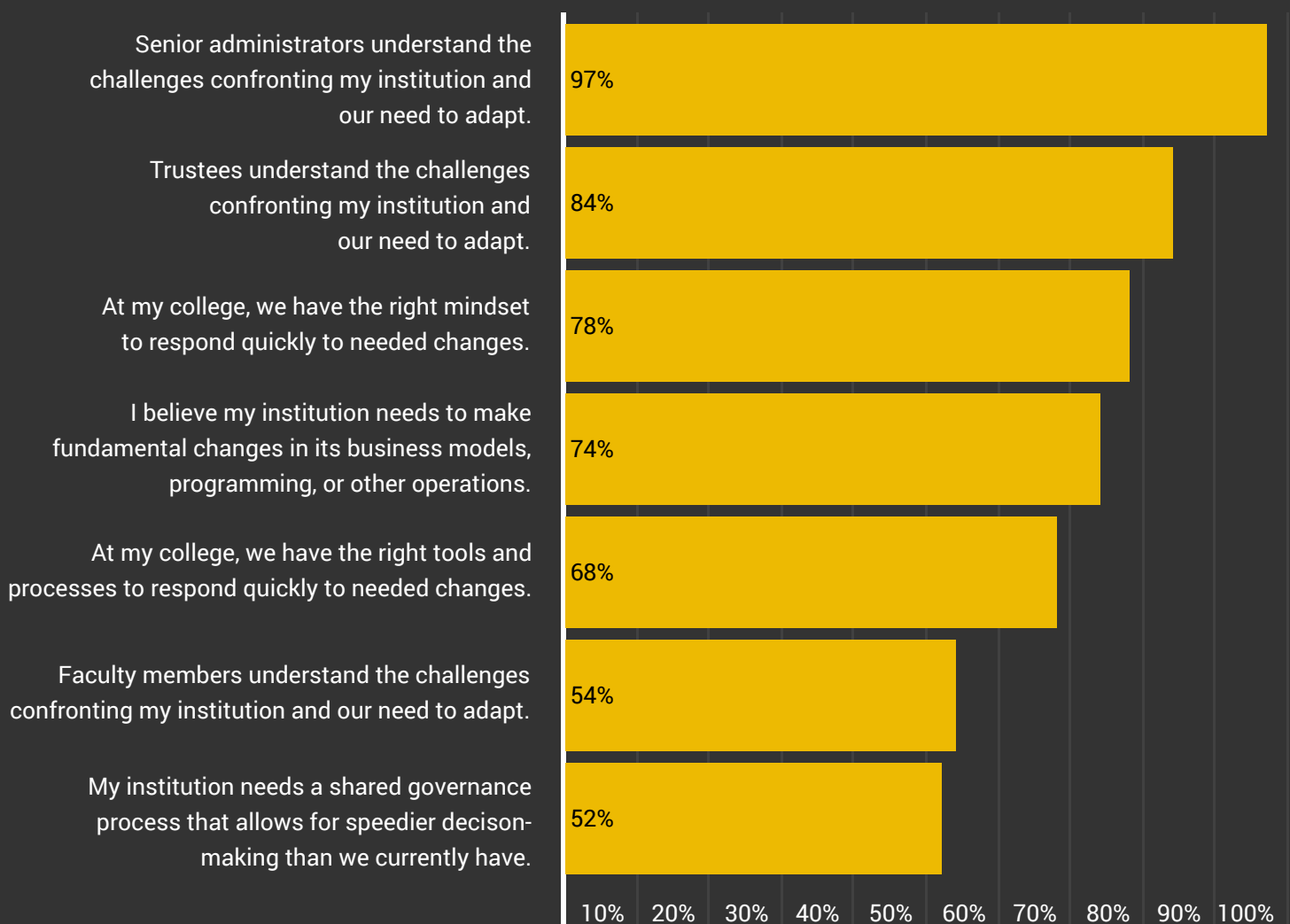
CHANGE MANAGEMENT AT THEIR INSTITUTION

Presidents believe that stakeholders have varying levels of understanding when it comes to the challenges their institutions face. While most presidents believe that senior administrators (97 percent) and trustees (84 percent) understand the challenges confronting their institution and their need to adapt, only 54 percent say the same for faculty members.

About half say that their institution needs a shared governance process that allows for speedier decision-making than it currently has. More say that at their college they have the right tools and processes (68 percent) and the right mindset (78 percent) to respond quickly to needed changes.

To what extent do you agree or disagree with the following statements?

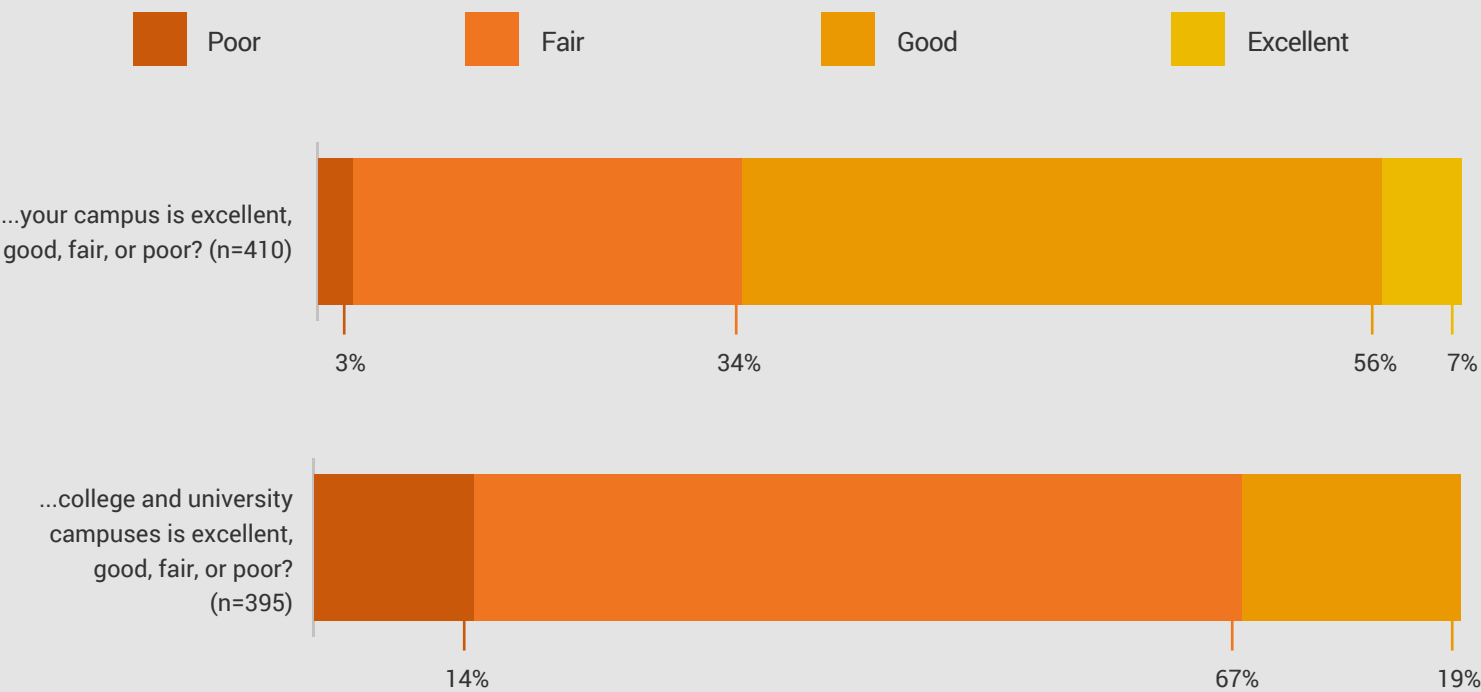
% Strongly Agree + % Somewhat Agree
(n=406-412)



STATE OF RACE RELATIONS IN HIGHER EDUCATION

Presidents find that the state of race relations on their own campus is better than on college and university campuses generally. While 63 percent say that the state of race relations on their campus is at least good or excellent (7 percent say it is excellent), only 19 percent say the same for colleges and universities as a whole.

Generally speaking, would you say the state of race relations on...

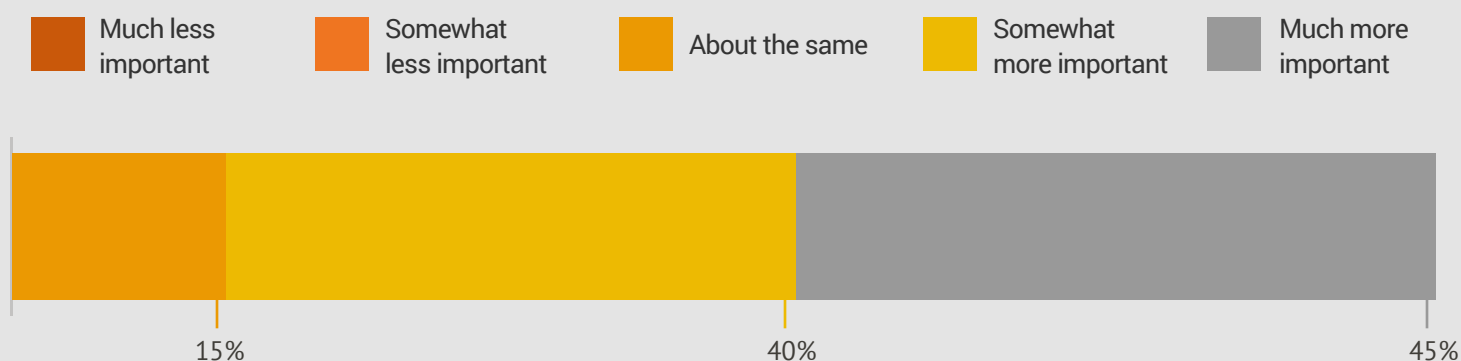


ADDRESSING ISSUES AROUND RACE THIS YEAR

In general, presidents report that it has been more important for their institution to address issues around race this academic year than in past years. Eight-four percent indicate that this is the case.

Perception related to how difficult it has been to address issues of race this year as compared to previous years is mixed. About the same percentage of presidents report that addressing issues of race has been easier (30 percent), about the same (32 percent), or more difficult (38 percent) than previous years.

How important has it been for your institution to address issues around race during the 2020-21 academic year as compared to previous years? (n=411)



How much easier or more difficult has it been to address issues of race at your institution during the 2020-21 academic year as compared to previous years? (n=411)

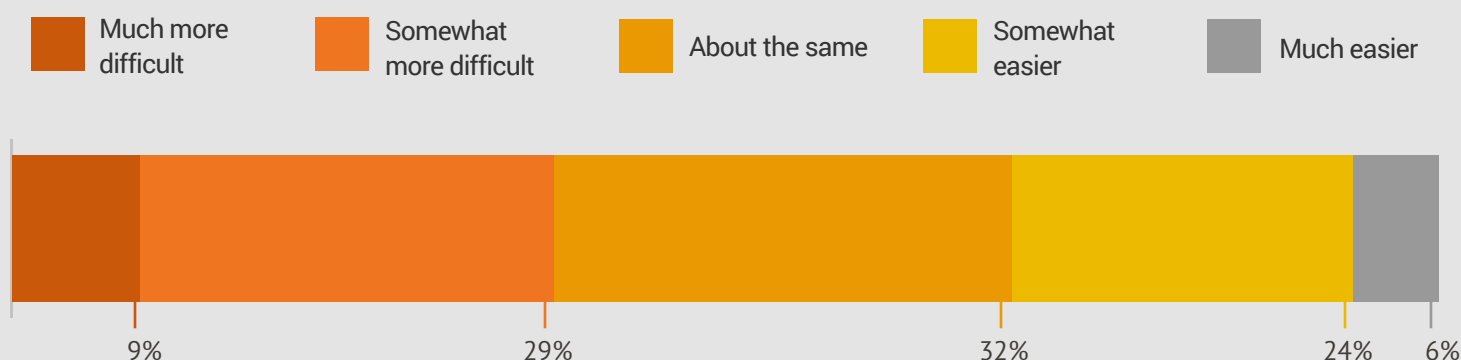


IMAGE OF HIGHER EDUCATION

Most college leaders agree that attention to student debt has led prospective students and parents to believe that college is less affordable than it is, with 86 percent believing that this is the case.

Few presidents agree that most Americans have an accurate view of the purpose of higher education. Only 18 percent agree that parents have an accurate view of the purpose of higher education in general, and 25 percent agree that Americans have an accurate view of the purpose of their sector of higher education.

To what extent do you agree or disagree with the following statements?

% Strongly Agree + % Somewhat Agree

(n=410)

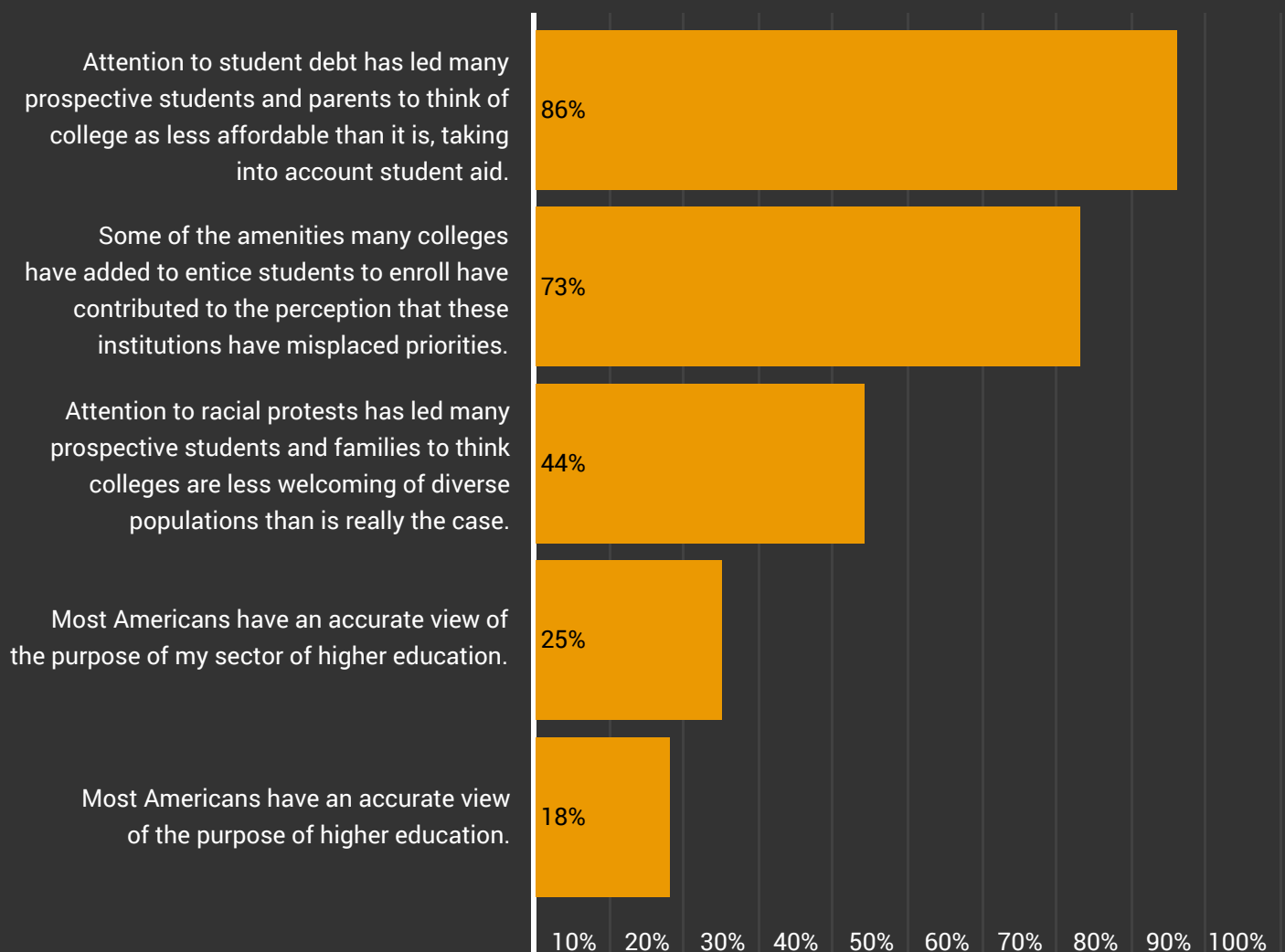


IMAGE OF HIGHER EDUCATION (cont.)

Community college leaders are more likely than presidents in other sectors to say that Americans have an accurate view of their sector. Forty percent agree (37 percent) or strongly agree, compared with no more than 22 percent in any other sector of higher education.

Most Americans have an accurate view of my sector of higher education.

	Public			Private Nonprofit	
	Doctoral	Master's/Bacc.	Associate	Doctoral/Master's	Bacc.
Strongly disagree	29%	22%	13%	28%	31%
Somewhat disagree	39%	42%	37%	38%	37%
Neither agree nor disagree	18%	20%	10%	16%	10%
Somewhat agree	14%	15%	37%	16%	19%
Strongly agree	0%	2%	3%	1%	2%

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR PRIMARY ROLE AT YOUR INSTITUTION?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% President	92	99	87	83	77	96	99	100
% Chancellor	8	1	13	17	23	4	1	0

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR INSTITUTION?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% 4-Year Private	45	100	3	3	9	0	100	100
% 4-Year Public	22	0	39	97	91	4	0	0
% 2-Year Public	33	0	58	0	0	96	0	0

PLEASE INDICATE HOW MUCH YOU DISAGREE OR AGREE WITH THE FOLLOWING STATEMENTS:

I am confident my institution will be financially stable over the next five years.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly Disagree	2	2	2	0	0	3	1	3
% Somewhat Disagree	9	9	9	10	11	8	6	11
% Neither Agree Nor Disagree	8	6	9	7	9	10	5	6
% Somewhat Agree	44	44	42	34	50	40	48	40
% Strongly Agree	38	40	38	48	30	39	40	40
% Top 2	82	83	80	83	80	79	88	80

I am confident my institution will be financially stable over the next 10 years.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly Disagree	2	2	2	0	0	3	2	1
% Somewhat Disagree	6	7	5	0	6	6	6	8
% Neither Agree Nor Disagree	13	8	16	7	18	17	10	7
% Somewhat Agree	51	51	50	52	52	50	44	58
% Strongly Agree	28	32	27	41	24	24	38	27
% Top 2	79	82	77	93	76	74	82	84

HOW CONCERNED ARE YOU ABOUT YOUR INSTITUTION'S ECONOMIC STABILITY WHILE WAITING FOR A COVID-19 VACCINE TO BE WIDELY DISTRIBUTED IN 2021?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Not at all Concerned	10	13	7	3	9	7	14	12
% Slightly Concerned	38	47	31	28	30	33	50	47
% Moderately Concerned	36	27	44	59	47	39	25	28
% Very Concerned	13	10	14	10	12	17	10	10
% Extremely Concerned	3	3	3	0	2	4	1	3
% Top 2	16	13	17	10	14	21	11	13

IN GENERAL, WHAT EFFECT DO YOU BELIEVE THE BIDEN ADMINISTRATION'S POLICIES WILL HAVE ON YOUR INSTITUTION?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Significantly Negative Effect	6	10	1	0	0	1	11	10
% Somewhat Negative Effect	12	23	3	7	3	2	21	25
% No Effect	8	10	7	10	9	5	15	4
% Somewhat Positive Effect	49	40	56	55	64	55	37	43
% Significantly positive Effect	25	17	33	28	24	37	15	18
% Top 2	74	57	89	83	88	92	52	61

WHICH OF THE FOLLOWING POLICY APPROACHES DO YOU BELIEVE THE BIDEN ADMINISTRATION IS LIKELY TO PURSUE?

Broad student loan cancellation/forgiveness

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	2	1	2	0	2	2	1	1
% Somewhat Unlikely	12	15	10	10	13	9	16	14
% Neither Likely nor Unlikely	16	14	17	31	23	11	15	14
% Somewhat Likely	53	55	52	41	56	53	54	56
% Very Likely	18	15	18	17	6	24	14	15
% Top 2	70	70	71	59	63	78	68	71

Double Pell Grants

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	3	3	2	4	0	3	5	1
% Somewhat Unlikely	11	9	13	4	15	13	9	9
% Neither Likely nor Unlikely	20	18	23	18	8	32	14	23
% Somewhat Likely	50	49	50	75	68	37	47	49
% Very Likely	16	21	12	0	8	14	24	19
% Top 2	66	70	62	75	76	52	72	68

Free tuition at community colleges

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	3	4	3	8	2	2	4	4
% Somewhat Unlikely	6	5	6	4	9	6	7	4
% Neither Likely nor Unlikely	12	6	16	15	23	14	7	5
% Somewhat Likely	49	51	47	62	43	45	42	60
% Very Likely	30	34	27	12	23	33	40	28
% Top 2	79	85	74	73	66	78	81	88

Free tuition at public colleges

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	11	9	11	14	19	5	10	9
% Somewhat Unlikely	22	20	25	39	23	24	19	21
% Neither Likely nor Unlikely	21	22	20	29	20	18	19	26
% Somewhat Likely	37	41	34	18	38	37	44	38
% Very Likely	9	8	10	0	0	16	9	6
% Top 2	46	49	44	18	38	53	53	44

Increased aid for historically Black and other minority-serving institutions

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	1	1	0	0	1	1	1
% Somewhat Unlikely	1	1	1	0	2	0	1	0
% Neither Likely nor Unlikely	2	3	2	3	2	2	2	2
% Somewhat Likely	35	26	43	41	45	42	22	29
% Very Likely	60	69	53	55	52	55	73	67
% Top 2	96	95	96	97	97	97	95	97

Increased institutional accountability for student debt (e.g., strengthened cohort default rate, risk sharing)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	2	2	2	0	2	2	4	1
% Somewhat Unlikely	8	5	11	7	6	15	5	5
% Neither Likely nor Unlikely	23	18	27	31	29	25	19	19
% Somewhat Likely	46	51	44	48	52	38	48	52
% Very Likely	20	24	16	14	11	20	24	23
% Top 2	66	74	60	62	63	58	72	76

More stimulus funding for higher education institutions

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	2	0	--	--	--	3	1
% Somewhat Unlikely	4	6	3	10	3	2	5	7
% Neither Likely nor Unlikely	9	11	7	7	3	9	9	13
% Somewhat Likely	46	47	46	55	52	43	41	52
% Very Likely	40	34	43	28	42	46	42	27
% Top 2	86	81	90	83	94	89	83	79

More transparent student outcome data for public consumption

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	2	0	--	--	--	4	0
% Somewhat Unlikely	3	4	2	0	5	2	3	5
% Neither Likely nor Unlikely	18	19	18	7	19	20	19	21
% Somewhat Likely	51	51	51	61	52	51	52	49
% Very Likely	27	24	29	32	25	28	23	26
% Top 2	78	75	80	93	77	79	75	74

Reinstatement of DACA (Deferred Action for Childhood Arrivals)

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	1	1	0	2	0	0	1
% Somewhat Unlikely	0	1	0	--	--	--	0	1
% Neither Likely nor Unlikely	1	1	0	0	0	1	0	1
% Somewhat Likely	14	11	16	21	14	17	16	5
% Very Likely	84	87	83	79	85	83	84	92
% Top 2	98	98	99	100	98	99	100	97

Reversal of immigration policies that affect international student enrollment in U.S. institutions

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	1	0	--	--	--	0	1
% Somewhat Unlikely	0	--	--	--	--	--	--	--
% Neither Likely nor Unlikely	1	0	2	0	2	2	--	--
% Somewhat Likely	22	19	24	31	21	23	16	21
% Very Likely	76	80	74	69	77	74	84	78
% Top 2	98	99	98	100	98	98	100	99

Reversal of Trump administration guidance on campus sexual assault

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	1	1	1	0	2	0	1	1
% Somewhat Unlikely	0	0	0	0	0	1	--	--
% Neither Likely nor Unlikely	5	4	5	4	0	8	3	5
% Somewhat Likely	34	34	35	41	55	23	39	29
% Very Likely	60	61	59	56	44	69	58	65
% Top 2	94	95	94	96	98	92	96	94

Significantly increased spending on academic research

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	2	2	1	0	2	2	1	1
% Somewhat Unlikely	9	14	6	3	8	4	12	16
% Neither Likely nor Unlikely	37	31	40	34	31	48	40	24
% Somewhat Likely	39	38	41	38	49	35	36	41
% Very Likely	13	15	12	24	10	10	11	18
% Top 2	52	53	53	62	59	46	47	59

Tougher regulation of all colleges, including applying key principles of gainful employment to nonprofit institutions

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	3	2	2	0	2	2	4	0
% Somewhat Unlikely	12	10	13	15	17	11	9	10
% Neither Likely nor Unlikely	26	27	25	22	29	24	26	27
% Somewhat Likely	44	44	45	44	46	46	43	44
% Very Likely	15	18	14	19	6	17	18	18
% Top 2	59	62	60	63	52	63	61	62

Tougher regulation of for-profit colleges, including reinstating gainful employment rules

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very Unlikely	0	1	0	--	--	--	1	0
% Somewhat Unlikely	3	2	4	0	5	3	1	2
% Neither Likely nor Unlikely	9	8	10	11	8	11	5	9
% Somewhat Likely	36	38	36	39	35	35	44	34
% Very Likely	52	52	50	50	52	51	49	54
% Top 2	88	90	86	89	87	86	92	88

Which of the following potential Biden administration policy approaches do you think would most benefit your institution and its students? Please select up to five options

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Double Pell Grants	79	85	75	72	82	72	94	76
% More stimulus funding for higher education institutions	77	81	74	76	79	71	80	82
% Reversal of immigration policies that affect international student enrollment in US institutions	50	60	43	79	53	29	55	66
% Reinstatement of DACA (Deferred Action for Childhood Arrivals)	45	36	52	48	45	55	37	37
% Broad student loan cancellation/forgiveness	34	39	31	7	33	37	31	46
% Tougher regulation of for-profit colleges, including reinstating gainful employment rules	29	25	32	21	30	35	30	22
% Free tuition at community colleges	25	1	44	7	5	71	0	2
% Reversal of Trump administration guidance on campus sexual assault	23	24	23	24	24	23	20	29
% Increased aid for historically Black and other minority-serving institutions	16	13	19	14	23	18	11	15
% Significantly increased spending on academic research	14	13	16	86	18	0	16	11
% Free tuition at public colleges	13	0	22	28	32	17	--	--
% More transparent student outcome data for public consumption	11	9	12	14	12	11	11	8
% Tougher regulation of all colleges, including applying key principles of gainful employment to nonprofit institutions	5	4	5	0	3	6	6	2
% Increased institutional accountability for student debt (e.g., strengthened cohort default rate, risk sharing)	5	7	4	3	8	2	10	5
% None of these policies will benefit my institution	1	1	0	--	--	--	1	1

HOW WOULD YOU RATE YOUR CURRENT LEVEL OF CONCERN RELATED TO THE FOLLOWING ISSUES IN REGARD TO COVID-19?

Ability to afford to employ staff and faculty

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	5	8	3	0	2	3	10	6
% Somewhat unconcerned	14	13	15	17	18	13	13	14
% Neither concerned nor unconcerned	19	23	16	28	11	16	23	25
% Somewhat concerned	42	39	43	38	48	42	36	40
% Very concerned	20	16	23	17	21	26	18	15
% Top 2	60	56	67	55	70	68	54	55

Ability to communicate effectively with constituencies regarding updates

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	12	18	8	3	12	8	20	15
% Somewhat unconcerned	23	23	24	21	29	23	27	20
% Neither concerned nor unconcerned	24	23	23	31	20	21	17	29
% Somewhat concerned	33	29	37	38	30	40	29	28
% Very concerned	8	7	8	7	9	9	7	7
% Top 2	40	36	45	45	39	49	36	35

Accelerated rates of student attrition

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	2	3	1	0	0	1	4	2
% Somewhat unconcerned	6	7	4	14	5	2	10	5
% Neither concerned nor unconcerned	8	14	4	14	6	2	16	13
% Somewhat concerned	44	51	38	45	33	40	47	54
% Very concerned	41	25	52	28	56	56	24	26
% Top 2	85	76	91	72	89	95	71	80

Decline in alumni/donor giving rates

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	7	7	6	14	5	5	7	7
% Somewhat unconcerned	18	21	16	21	23	13	18	24
% Neither concerned nor unconcerned	26	23	29	28	18	34	29	18
% Somewhat concerned	35	33	36	24	44	34	34	34
% Very concerned	14	15	13	14	11	14	12	18
% Top 2	49	49	49	38	55	48	46	52

Decline in international student enrollment

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	13	12	14	3	3	21	14	9
% Somewhat unconcerned	8	8	8	3	8	8	7	8
% Neither concerned nor unconcerned	22	18	27	7	23	33	17	16
% Somewhat concerned	32	34	30	52	44	20	30	39
% Very concerned	25	29	22	34	23	18	31	27
% Top 2	57	63	51	86	67	38	61	66

Disproportionate impact on students from disadvantaged backgrounds

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	1	1	1	0	2	1	1	0
% Somewhat unconcerned	1	2	1	0	2	1	1	2
% Neither concerned nor unconcerned	4	5	3	0	5	4	7	2
% Somewhat concerned	27	33	22	28	27	20	35	31
% Very concerned	67	60	73	72	65	75	55	65
% Top 2	94	93	95	100	92	95	90	95

Faculty ability to conduct online learning or hybrid learning

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	8	9	7	0	8	8	10	8
% Somewhat unconcerned	20	26	15	10	18	16	29	25
% Neither concerned nor unconcerned	17	21	14	28	15	11	23	19
% Somewhat concerned	42	37	47	45	50	46	33	40
% Very concerned	13	7	17	17	9	20	6	8
% Top 2	55	44	64	62	59	66	39	48

Long-term financial viability

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	6	8	5	10	3	5	12	4
% Somewhat unconcerned	15	20	12	10	8	14	19	21
% Neither concerned nor unconcerned	13	11	14	21	14	14	11	12
% Somewhat concerned	50	47	53	45	65	48	45	47
% Very concerned	15	15	16	14	11	20	13	16
% Top 2	65	61	69	59	76	68	58	64

Mental health of employees

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Somewhat unconcerned	2	2	1	0	2	2	2	2
% Neither concerned nor unconcerned	5	9	1	0	0	1	10	8
% Somewhat concerned	48	53	44	52	42	44	53	54
% Very concerned	46	36	54	48	56	53	35	35
% Top 2	94	88	98	100	98	98	88	89

Mental health of students

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	0	1	0	–	–	–	1	0
% Somewhat unconcerned	2	2	1	0	0	2	1	4
% Neither concerned nor unconcerned	2	2	1	0	3	1	1	4
% Somewhat concerned	31	35	29	38	18	34	39	31
% Very concerned	64	60	68	62	79	64	58	62
% Top 2	96	95	97	100	97	98	96	93

Physical health of employees

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	2	3	2	3	3	1	5	1
% Somewhat unconcerned	5	6	5	3	11	2	4	8
% Neither concerned nor unconcerned	16	18	15	21	17	13	23	13
% Somewhat concerned	52	57	49	52	44	50	49	65
% Very concerned	24	16	30	21	26	35	19	13
% Top 2	76	73	79	72	70	84	69	78

Physical health of students

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	2	4	1	0	3	1	5	1
% Somewhat unconcerned	7	11	4	7	6	2	12	9
% Neither concerned nor unconcerned	14	16	11	14	14	11	20	12
% Somewhat concerned	52	50	52	55	58	50	48	53
% Very concerned	25	20	31	24	20	37	14	25
% Top 2	77	70	83	79	77	86	63	78

Short-term financial viability

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	14	16	11	7	9	11	17	16
% Somewhat unconcerned	18	20	17	10	17	19	24	18
% Neither concerned nor unconcerned	18	19	18	28	12	20	25	14
% Somewhat concerned	39	33	44	41	52	40	28	36
% Very concerned	11	11	11	14	11	11	6	15
% Top 2	50	44	55	55	62	50	34	52

Student accessibility to online learning platforms and tools

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	4	6	2	0	5	2	6	7
% Somewhat unconcerned	13	19	9	7	11	10	19	20
% Neither concerned nor unconcerned	13	16	10	21	12	8	13	10
% Somewhat concerned	48	48	48	52	52	46	52	45
% Very concerned	21	10	30	21	21	35	10	9
% Top 2	70	58	78	72	73	81	61	54

Technological ability to conduct online learning

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	12	15	8	3	12	8	18	13
% Somewhat unconcerned	24	32	18	24	23	15	34	31
% Neither concerned nor unconcerned	18	19	16	31	12	17	18	21
% Somewhat concerned	35	27	40	31	44	38	23	29
% Very concerned	12	6	17	10	9	23	7	6
% Top 2	47	33	57	41	53	61	30	35

Unbudgeted financial costs related to COVID-19

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unconcerned	1	1	1	0	0	2	1	1
% Somewhat unconcerned	10	12	8	7	8	10	16	8
% Neither concerned nor unconcerned	13	12	13	17	9	14	11	14
% Somewhat concerned	48	51	47	45	48	46	52	51
% Very concerned	28	23	30	31	35	28	20	26
% Top 2	76	74	77	76	83	74	72	76

HOW LIKELY IS YOUR INSTITUTION TO TAKE THE FOLLOWING ACTIONS IN THE FUTURE TO INCREASE REVENUE OR CUT COSTS?

Apply a sliding scale for tuition based on program

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unlikely	44	42	45	10	45	53	35	49
% Somewhat unlikely	21	25	20	28	23	17	23	26
% Neither likely nor unlikely	19	20	19	28	15	18	25	15
% Somewhat likely	12	10	13	28	15	7	12	7
% Very likely	4	4	4	7	2	5	5	2
% Top 2	15	14	17	34	17	12	17	10

Cultivate new donor bases

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Very unlikely	1	0	0	0	0	1	—	—
% Somewhat unlikely	1	2	1	0	0	2	2	1
% Neither likely nor unlikely	7	7	7	14	3	6	6	8
% Somewhat likely	34	27	39	31	39	41	24	28
% Very likely	56	64	52	55	58	50	67	62
% Top 2	91	91	91	86	97	91	92	91

Decrease financial aid

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	58	54	60	34	59	67	51	58
% Somewhat unlikely	25	27	23	41	20	21	28	27
% Neither likely nor unlikely	12	11	12	17	14	8	13	8
% Somewhat likely	5	7	3	3	6	2	7	6
% Very likely	1	1	2	3	2	2	1	1
% Top 2	6	8	5	7	8	4	8	7

Increase grant procurement

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	2	2	1	3	0	1	4	1
% Somewhat unlikely	4	5	3	0	8	2	5	6
% Neither likely nor unlikely	12	15	10	7	15	7	13	18
% Somewhat likely	45	43	48	59	58	40	43	44
% Very likely	36	34	38	31	20	50	35	32
% Top 2	81	77	86	90	77	90	78	75

Increase tuition rates

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	16	8	20	7	18	23	7	10
% Somewhat unlikely	17	16	17	24	21	14	12	20
% Neither likely nor unlikely	16	16	16	10	18	16	14	18
% Somewhat likely	35	42	30	38	29	28	53	30
% Very likely	17	18	17	21	14	19	13	23
% Top 2	51	59	47	59	42	47	66	52

Make unscheduled or larger-than-planned draws from our endowment

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	44	35	52	41	56	53	40	30
% Somewhat unlikely	24	27	22	31	29	18	28	26
% Neither likely nor unlikely	15	15	14	17	5	17	16	13
% Somewhat likely	11	15	9	10	8	8	11	19
% Very likely	6	9	3	0	2	4	6	12
% Top 2	17	24	11	10	10	13	17	31

Reassess the long-term mix of in-person vs. virtual education we offer

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	5	7	2	0	6	1	7	7
% Somewhat unlikely	8	15	3	7	6	1	11	19
% Neither likely nor unlikely	8	1	5	7	9	2	16	10
% Somewhat likely	35	38	32	48	38	26	45	33
% Very likely	44	27	58	38	41	70	22	31
% Top 2	79	65	90	86	79	96	66	64

Reconsider our tenure policies

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	49	43	53	52	51	56	48	36
% Somewhat unlikely	18	19	18	21	25	14	12	27
% Neither likely nor unlikely	19	21	17	17	11	18	25	17
% Somewhat likely	9	12	7	10	10	6	13	12
% Very likely	4	5	4	0	3	6	3	8
% Top 2	14	17	11	10	13	12	16	19

Reduce academic program portfolio

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	17	18	15	10	15	17	13	24
% Somewhat unlikely	27	26	27	21	32	27	28	25
% Neither likely nor unlikely	17	13	20	17	25	18	13	12
% Somewhat likely	25	28	24	38	14	25	31	25
% Very likely	13	14	13	14	14	12	14	14
% Top 2	39	42	37	52	28	38	46	39

Reduce extracurricular offerings

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	20	26	13	7	13	15	29	23
% Somewhat unlikely	36	40	34	31	37	34	39	42
% Neither likely nor unlikely	23	17	28	34	34	25	12	20
% Somewhat likely	17	14	19	24	11	20	16	13
% Very likely	4	3	5	3	5	6	5	1
% Top 2	21	17	24	28	16	26	20	14

Reduce the institution's physical footprint

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	38	47	32	31	36	31	43	51
% Somewhat unlikely	27	22	30	24	35	30	25	20
% Neither likely nor unlikely	12	11	14	10	9	17	13	7
% Somewhat likely	15	10	17	21	18	15	10	11
% Very likely	8	10	7	14	2	8	8	11
% Top 2	23	20	25	34	20	23	18	21

Renegotiate existing donation terms to allow for more flexibility

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	24	24	23	21	29	20	27	20
% Somewhat unlikely	25	26	25	28	34	21	31	23
% Neither likely nor unlikely	27	23	29	34	17	34	26	20
% Somewhat likely	17	18	17	14	15	18	13	24
% Very likely	7	8	6	3	5	7	4	13
% Top 2	24	27	23	17	20	26	17	37

Request/lobby for additional federal and/or state support

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	4	4	2	0	3	1	5	4
% Somewhat unlikely	4	5	3	0	6	2	2	8
% Neither likely nor unlikely	5	8	3	3	2	4	10	5
% Somewhat likely	31	33	30	45	25	31	29	39
% Very likely	56	50	62	52	65	61	54	45
% Top 2	87	83	92	97	89	93	83	83

Start or expand a capital campaign

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Very unlikely	9	7	10	7	6	10	4	8
% Somewhat unlikely	11	10	12	4	8	17	9	11
% Neither likely nor unlikely	16	12	19	11	14	23	11	12
% Somewhat likely	26	25	26	36	29	22	28	23
% Very likely	38	47	32	43	43	27	49	46
% Top 2	64	72	59	79	72	50	77	69

WHICH OF THE FOLLOWING OUTCOMES MUST CLOSELY REFLECT YOUR VIEW OF HOW YOUR INSTITUTION WILL RESPOND TO THE COVID-19 PANDEMIC AND ECONOMIC RECESSION?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Transform institution: My institution should use this period to make difficult but transformative changes in its core structure and operations to better position itself for long-term sustainability.	44	42	46	31	35	54	40	44
% Reset for growth: My institution should use this period to focus more on what it does best so it can invest and grow in those areas once the recession ends.	34	36	33	41	38	28	34	39
% Return to normal: My institution can ride out the current difficulties and return more or less to normal operations within 12-18 months.	20	19	20	28	24	16	25	12
% Shrink institution: My institution should use this period to tighten its focus to come out of the recession smaller but better.	3	3	2	0	3	2	1	5

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT HOW COVID-19 HAS CHANGED THE HIGHER EDUCATION LANDSCAPE?

COVID-19 will cause a shift from more expensive colleges to more affordable ones, such as community colleges

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	5	7	3	0	6	3	9	6
% Somewhat disagree	26	33	22	38	18	18	30	37
% Neither agree nor disagree	26	26	26	31	35	22	32	20
% Somewhat agree	37	32	41	31	36	46	28	33
% Strongly agree	5	2	7	0	5	11	1	4
% Top 2	43	35	49	31	41	57	30	37

COVID-19 will cause a shift in enrollment trends for years to come, with more prospective students favoring virtual instruction than before the pandemic.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	9	15	5	3	11	2	14	15
% Somewhat disagree	26	37	19	24	30	13	41	33
% Neither agree nor disagree	17	14	20	28	26	15	12	15
% Somewhat agree	38	28	45	41	29	54	26	30
% Strongly agree	9	7	11	3	5	15	7	6
% Top 2	47	35	56	45	33	69	33	36

Fewer prospective students and parents are interested in paying the same price for virtual learning as for in-person learning.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	2	1	2	0	0	3	1	1
% Somewhat disagree	5	4	5	10	0	6	2	6
% Neither agree nor disagree	11	8	13	7	12	15	6	8
% Somewhat agree	51	48	53	59	61	49	53	44
% Strongly agree	32	39	28	24	27	27	37	40
% Top 2	83	87	80	83	88	76	90	85

TO WHAT EXTENT DO YOU DISAGREE WITH THE FOLLOWING STATEMENT REGARDING HOW YOUR INSTITUTION HAS CHANGED DURING THE PANDEMIC?

The pandemic, and subsequent necessary changes (e.g., adjusting to distance learning in the spring and fall), has created an opportunity for my institution to make other institutional changes we have been wanting to make anyway.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	4	4	4	3	2	5	5	4
% Somewhat disagree	6	5	7	17	6	5	5	6
% Neither agree nor disagree	7	11	4	0	6	5	11	10
% Somewhat agree	45	45	46	52	50	42	49	42
% Strongly agree	37	35	39	28	36	45	30	39
% Top 2	82	80	85	79	86	86	79	81

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS? MY INSTITUTION...

...was able to implement some positive, long-lasting institutional changes during the pandemic.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	0	0	0	0	0	1	--	--
% Somewhat disagree	2	3	1	0	3	0	2	4
% Neither agree nor disagree	8	6	8	18	8	6	7	5
% Somewhat agree	44	44	43	50	48	38	49	38
% Strongly agree	46	47	47	32	42	55	41	54
% Top 2	90	91	91	82	89	93	90	92

...was pushed to think out of the box during the pandemic in a way that will benefit the institution in the long run.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Somewhat disagree	1	2	1	0	3	0	4	1
% Neither agree nor disagree	3	2	3	4	5	3	4	1
% Somewhat agree	33	34	31	36	38	27	33	34
% Strongly agree	63	62	64	61	54	70	59	64
% Top 2	95	95	96	96	92	97	93	98

...will keep some of the COVID-19 related changes even after the pandemic ends.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	0	1	0	--	--	--	0	1
% Somewhat disagree	1	2	0	--	--	--	2	1
% Neither agree nor disagree	2	2	2	4	0	2	4	1
% Somewhat agree	35	35	33	54	37	25	40	30
% Strongly agree	62	61	66	43	63	72	54	67
% Top 2	97	95	98	96	100	98	94	96

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

At my college, we have the right mindset to respond quickly to needed changes.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	2	4	1	0	2	1	4	4
% Somewhat disagree	11	10	13	25	12	9	10	11
% Neither agree nor disagree	9	6	11	7	15	10	1	11
% Somewhat agree	50	52	47	50	58	41	52	52
% Strongly agree	28	29	28	18	12	38	33	23
% Top 2	78	80	75	68	71	80	85	75

At my college we have the right tools and processes to respond quickly to needed changes.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	2	3	2	4	2	2	2	4
% Somewhat disagree	18	16	20	25	26	16	17	15
% Neither agree nor disagree	11	11	11	11	18	7	7	13
% Somewhat agree	51	49	53	50	38	62	49	51
% Strongly agree	17	21	13	11	15	13	23	17
% Top 2	68	70	67	61	54	75	73	68

Faculty members understand the challenges confronting my institution and our need to adapt.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	9	11	8	21	13	3	14	8
% Somewhat disagree	27	26	28	32	33	25	22	30
% Neither agree nor disagree	10	11	10	14	11	9	7	15
% Somewhat agree	43	42	44	25	34	51	46	37
% Strongly agree	10	10	10	7	9	12	11	10
% Top 2	54	52	54	32	44	63	57	46

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

I believe my institution needs to make fundamental changes in its business models, programming, or other operations.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	3	5	2	0	2	2	5	5
% Somewhat disagree	9	11	7	4	5	10	12	11
% Neither agree nor disagree	14	11	16	18	15	16	15	6
% Somewhat agree	40	35	44	54	38	45	36	33
% Strongly agree	34	39	31	25	40	27	32	45
% Top 2	74	73	75	79	78	72	68	79

My institution needs a shared governance process that allows for speedier decision-making than we currently have.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	9	8	8	4	6	10	11	5
% Somewhat disagree	19	19	19	11	14	23	14	22
% Neither agree nor disagree	19	18	22	11	23	24	19	17
% Somewhat agree	29	30	28	43	37	22	31	30
% Strongly agree	23	26	23	32	20	20	26	27
% Top 2	52	56	51	75	57	42	57	57

Senior administrators understand the challenges confronting my institution and our need to adapt.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	0	--	--	--	--	--	--	--
% Somewhat disagree	2	3	2	0	3	1	1	4
% Neither agree nor disagree	1	1	1	4	0	1	0	2
% Somewhat agree	27	18	32	39	38	26	19	19
% Strongly agree	70	77	65	57	59	72	80	75
% Top 2	97	96	97	96	97	98	99	94

Trustees understand the challenges confronting my institution and our need to adapt.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	3	4	2	0	5	1	4	5
% Somewhat disagree	8	6	9	1	13	6	4	7
% Neither agree nor disagree	5	2	7	11	8	6	4	0
% Somewhat agree	37	31	42	39	41	43	33	29
% Strongly agree	47	57	41	39	34	44	56	60
% Top 2	84	88	82	79	75	87	89	88

GENERALLY SPEAKING, WOULD YOU SAY THE STATE OF RACE RELATIONS ON YOUR CAMPUS IS EXCELLENT, GOOD, FAIR, OR POOR?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Poor	3	4	3	0	3	4	4	4
% Fair	34	34	34	39	43	27	33	37
% Good	56	56	56	50	49	62	56	55
% Excellent	7	6	6	11	5	7	7	5
% Top 2	63	62	63	61	54	69	63	60

GENERALLY SPEAKING, WOULD YOU SAY THE STATE OF RACE RELATIONS ON COLLEGE AND UNIVERSITY CAMPUSES IS EXCELLENT, GOOD, FAIR, OR POOR?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Poor	14	15	13	0	12	17	16	15
% Fair	67	70	65	79	77	54	70	69
% Good	19	15	21	21	11	27	14	15
% Excellent	1	0	1	0	0	2	--	--
% Top 2	19	15	22	21	11	29	14	15

HOW IMPORTANT HAS IT BEEN FOR YOUR INSTITUTION TO ADDRESS AROUND RACE DURING THE 2020-21 ACADEMIC YEAR AS COMPARE TO PREVIOUS YEARS?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Much less important	0	0	0	0	0	1	--	--
% Somewhat less important	0	1	0	0	0	1	1	0
% About the same	15	10	17	18	20	17	10	11
% Somewhat more important	40	45	36	25	35	39	51	39
% Much more important	45	44	46	57	45	43	38	51
% Top 2	84	89	82	82	80	81	89	89

HOW MUCH EASIER OR MORE DIFFICULT HAS IT BEEN TO ADDRESS ISSUES OF RACE AT YOUR INSTITUTION DURING THE 2020-21 ACADEMIC YEAR AS COMPARED TO PREVIOUS YEARS?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Much more difficult	9	10	7	7	6	7	11	8
% Somewhat more difficult	29	29	30	36	32	27	26	31
% About the same	32	29	33	29	32	36	36	23
% Somewhat easier	24	26	23	18	28	22	23	28
% Much easier	6	7	6	11	2	9	4	10
% Top 2	30	32	30	29	29	30	27	37

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

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.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	3	4	3	0	2	5	4	2
% Somewhat disagree	19	22	17	11	12	20	25	18
% Neither agree nor disagree	34	33	34	21	32	38	33	34
% Somewhat agree	38	35	40	61	48	31	30	40
% Strongly agree	7	7	6	7	6	5	9	6
% Top 2	44	42	46	68	54	36	38	46

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.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	0	1	0	--	--	--	1	1
% Somewhat disagree	4	2	5	0	11	3	4	1
% Neither agree nor disagree	10	7	13	7	12	15	6	7
% Somewhat agree	57	54	60	54	55	62	54	52
% Strongly agree	28	36	23	39	22	20	35	39
% Top 2	86	90	82	93	77	82	89	90

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

Most Americans have an accurate view of the purpose of higher education.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	19	23	16	29	20	10	23	22
% Somewhat disagree	49	44	54	54	58	51	43	45
% Neither agree nor disagree	14	13	14	0	6	22	12	13
% Somewhat agree	17	20	15	11	15	16	20	20
% Strongly agree	1	1	1	7	0	1	1	0
% Top 2	18	20	16	18	15	17	21	20

Most Americans have an accurate view of the purpose of my sector of higher education.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	24	30	18	29	22	13	28	31
% Somewhat disagree	39	38	39	39	42	37	38	37
% Neither agree nor disagree	13	13	13	18	20	10	16	10
% Somewhat agree	23	17	27	14	15	37	16	19
% Strongly agree	2	2	2	0	2	3	1	2
% Top 2	25	19	30	14	17	40	17	22

Some of the amenities many colleges have added to entice students to enroll have contributed to the perception that these institutions have misplaced priorities.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Strongly disagree	2	2	1	0	2	2	2	2
% Somewhat disagree	6	8	5	4	6	5	7	7
% Neither agree nor disagree	19	17	21	18	14	26	21	13
% Somewhat agree	52	51	53	68	60	45	46	55
% Strongly agree	20	22	20	11	18	23	23	22
% Top 2	73	73	73	79	78	68	69	77

WHAT IS YOUR AGE?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% 30-39	0	0	1	0	0	2	--	--
% 40-49	10	10	9	0	5	13	6	12
% 50-59	38	38	38	29	35	42	38	37
% 60-69	43	47	40	57	46	31	51	43
% 70 and older	9	5	10	11	11	11	4	7
% Prefer not to respond	1	1	2	4	3	1	1	0

WITH WHICH OF THE FOLLOWING GENDER IDENTITIES DO YOU MOST IDENTIFY?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Male	62	65	60	68	65	56	70	59
% Female	36	34	38	29	34	42	28	39
% Prefer not to respond	2	2	2	4	2	2	1	2

HOW MANY YEARS HAVE YOU SERVED AS THE PRESIDENT OF THIS INSTITUTION?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Less than 6 months	1	1	2	0	0	3	0	1
% 6 months to less than 3 years	28	24	31	39	28	31	15	30
% 3 years to less than 5 years	19	25	16	29	17	13	23	27
% 5 years to less than 10 years	33	28	37	21	42	38	36	22
% 10 or more years	17	22	13	11	14	14	26	19
% Prefer not to respond	1	1	1	0	0	1	0	1

HOW MANY YEARS HAVE YOU SERVED AS THE PRESIDENT AT ANY INSTITUTION

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Private Nonprofit	Public	Doctoral	Master's/Bacc.	Assoc.	Doctoral/Master's	Bacc.
% Less than 6 months	1	1	2	0	2	3	1	0
% 6 months to less than 3 years	18	17	20	18	17	23	9	23
% 3 years to less than 5 years	16	20	14	32	15	10	17	23
% 5 years to less than 10 years	32	29	34	21	43	32	36	22
% 10 or more years	31	32	29	21	23	31	37	29
% Don't know/Does not apply	1	1	1	7	0	0	0	2
% Prefer not to respond	0	1	0	0	0	1	0	1

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