What Keeps Campus Leaders Up at Night

Webcast on Inside Higher Ed/Gallup
2018 Survey of College and University Presidents
Tuesday, April 3, 2018,
2 p.m. EDT
Presenters

• Doug Lederman, editor, *Inside Higher Ed*
  doug.lederman@insidehighered.com

• Scott Jaschik, editor, *Inside Higher Ed*
  scott.jaschik@insidehighered.com
Methodology

• Questions prepared by *Inside Higher Ed*, in collaboration with Gallup. Polling conducted by Gallup in January-February.

• Results from 618 presidents or chancellors.

• Complete anonymity for respondents, but answers coded to allow for breakdown by sector, etc.
Big Issue 1: Public Perception

- Why It Is Declining
- Fair or Not?
- What to Do About It
‘Don’t Let Me Be Misunderstood’

• Only 13% of presidents agree that "most Americans have an accurate view of the purpose of higher education."

• 16% say the public has an accurate view of the purpose of their sector of higher education; 5% at public doctoral universities, 22% at community colleges.
Major Misperceptions

- 86%: news media and political focus on student debt has "led many prospective students and parents to think of college as less affordable than it is."

- 84%: attention to institutions with large endowments creates "perception that most colleges are wealthier than they are."

- 78%: “amenities” create perception of colleges’ “misplaced priorities.”
Perceived Liberal Bias

• More campus CEOs cite concerns about affordability (98%) and failure to prepare students for careers (95%) than liberal bias (86%) as damaging public support.

• But: 32% of presidents agree with perception that colleges are “intolerant of conservative views” (49% disagree) and 16% disagree that classrooms are “as welcoming to conservative students” as to liberal ones.
From 2017 to ’18, uptick in % of presidents saying they see:

- Rise in anti-intellectual sentiment (69 to 77%)
- They see damage to flow of international students (58 to 69%)
- Pullback on diversifying higher ed (55 to 61%)
- And agreeing Trump “does not accept scientific consensus” (76 to 84%)
## Perspective on U.S. Policies

<table>
<thead>
<tr>
<th>Policy</th>
<th>Favor</th>
<th>Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer of more flexibility on Title IX</td>
<td>44%</td>
<td>28%</td>
</tr>
<tr>
<td>Revoking of U.S. guidance on Title IX</td>
<td>36%</td>
<td>40%</td>
</tr>
<tr>
<td>GOP plan linking grants for minority institutions to &gt;25% graduation rate</td>
<td>41%</td>
<td>30%</td>
</tr>
<tr>
<td>Weakening of “borrower defense” rules</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>Weakening of gainful employment and 90/10</td>
<td>24%</td>
<td>61%</td>
</tr>
<tr>
<td>Imposition of tax on large endowments</td>
<td>14%</td>
<td>62%</td>
</tr>
</tbody>
</table>
Big Issue 2: Money
Our ‘Consumer Confidence’ Index

Presidents' Confidence in Their Institution's Stability

- Overall
- All Public
- All Private
- Public Doctoral
- Public Master's/Bacc.
- Public Associate
- Private Doctoral/Master's
- Private Bachelor's
## Modest Predictions on Consolidations in 2018

<table>
<thead>
<tr>
<th></th>
<th>0</th>
<th>1-5</th>
<th>6-10</th>
<th>11-20</th>
<th>&gt;20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closures</td>
<td>&lt;1%</td>
<td>30%</td>
<td>40%</td>
<td>19%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>0</th>
<th>1-5</th>
<th>6-10</th>
<th>More Than 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private College Mergers</td>
<td>3%</td>
<td>56%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>Public University Mergers</td>
<td>12%</td>
<td>55%</td>
<td>23%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Tuition Resets and Freezes

• 2/3 of presidents (67%, 17% strongly) predict more tuition resets at private institutions in 2018 – 81% of public college leaders say so, 60% of private.

• 62% of presidents anticipate more tuition freezes at public institutions -- larger majorities of public doctoral and four-year universities agreeing (76 and 75%), 61% of community college leaders.
Enrollment Doubts Linger

% of Presidents "Very Concerned" About Meeting Undergraduate Enrollment Goal

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Doctoral Universities</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>Public Master’s/Baccalaureate Institutions</td>
<td>51%</td>
<td>40%</td>
</tr>
<tr>
<td>Public Associate Colleges</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Private Doctoral/Master’s Universities</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>Private Baccalaureate Colleges</td>
<td>73%</td>
<td>60%</td>
</tr>
</tbody>
</table>
Race Relations Good or Excellent?

The graph shows the percentage of respondents who believe the race relations on their own campus and U.S. campuses to be good or excellent from 2014 to 2018. Over this period, the percentage for bothOwn Campus and U.S. Campuses has decreased. In 2014, 90% of respondents rated the race relations as good or excellent on their own campus and 53% did so on U.S. campuses. By 2018, these numbers had dropped to 80% and 20%, respectively.
Other Findings

• 55% of presidents speaking out more on political issues (58% private, 51% public).

• 85% said colleges should embrace OER, but 44% agree/34% disagree about “changing textbooks or other materials to save students money, even if the lower-cost options are of lesser quality."

• Presidents best-prepared for academic affairs, then financial management, then student affairs, then digital learning.
Survey article:
https://www.insidehighered.com/surveys

Survey report:
With Thanks