

GALLUP AND INSIDE HIGHER ED COLLEGE AND UNIVERSITY PRESIDENTS STUDY

SURVEY 1 FINDINGS

September 2015

INSIDE
HIGHER ED

GALLUP®

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EXECUTIVE SUMMARY

In 2013, Gallup launched a study focused on U.S. college and university presidents to understand their opinions on the important topics and issues facing higher education. The most recent survey is the first of two planned for 2015. The following are key findings from the July 2015 study.

INSTITUTIONAL IDENTITY

- College presidents focus on a limited number of themes when describing the purpose of their institutions, primarily emphasizing educating students and preparing them for the future.
- Presidents' descriptions of their institution's brand are slightly more varied, but in many cases, are derivatives of the institution's purpose. Common brand themes include providing high-quality education, serving a particular region or demographic group, providing affordable education and providing training for specific professions or fields.
- Presidents' descriptions of their institution's culture are also wide-ranging. Common descriptions involve collaboration and teamwork, a sense of community or a family atmosphere, inclusiveness and a focus on students.

THE FUTURE OF HIGHER EDUCATION

- Nine in 10 college presidents agree they are excited about the future of their institution, including 68% who strongly agree.
- College presidents are far less likely to agree they are excited about the future of higher education in the U.S.: 55% agree, including 15% who strongly agree.
- Most presidents do not expect their institution will have to shut down as a result of financial challenges, but about one in five believe their institution may close in the coming decades, if not sooner.

ENROLLMENT

- More presidents say enrollment at their institution will increase (48%) rather than decrease (25%) in the fall of 2015.
- Most presidents expect enrollment at their school will be higher 10 years from now, with 34% expecting it will be substantially higher and 48% saying somewhat higher.

MISSION STATEMENTS

- Presidents are near-unanimous in saying their institution has a mission statement, and 77% say the daily activities of students, faculty and staff follow that mission statement "very closely."

DEBT-FREE COLLEGE PROPOSALS

- Eight in 10 college presidents have heard at least a fair amount about debt-free college proposals.

- Presidents are divided in their support for a specific proposal that would give federal matching funds to states to provide two years of free public higher education to students. Private school presidents largely oppose this proposal.
- Most presidents do not expect the federal government to pass legislation on debt-free college.

INSTITUTIONAL INITIATIVES

- When deciding to adopt new initiatives at their institution, college presidents are most likely to say evidence-based and evaluation reports and information about long-term sustainability influence these decisions.
- Among a list of initiatives commonly offered for nontraditional students, college presidents are most likely to say their institution offers dual-enrollment programs for high school students and prior learning assessments that give college credit for work experience or other types of pre-college learning.

METHODOLOGY

The survey is an attempted census of U.S. college and university presidents. For this survey, Gallup purchased a list of email addresses from 4,047 college and university presidents across the U.S. Data are not weighted, and the sample reflects the opinions of those surveyed only and is not representative of all U.S. colleges and universities.

The results presented in this report are based on 523 Web surveys completed July 9-24, 2015.

Gallup surveyed college and university presidents from public, private, two-year, four-year, community colleges and for-profit institutions. The degree offerings from these schools include associate, bachelor, masters and doctorate.

The following table shows total participation by sector.

	All	Community college (public and private)	Public BA/MA and doctorate	Private BA/MA and doctorate	For-profit institution
Total sample size	523	162	95	161	22

Note: The total sample size includes 50 presidents from specialized institutions and 33 whose institutions Gallup could not categorize because of missing sample information on institution type.

In the tables that appear in the report, the results are based on those who answered each question, thus excluding any missing responses for a given question. “Don’t know/Refused” or “No opinion” percentages appear when a question explicitly offered that response option.

DETAILED FINDINGS

INSTITUTIONAL IDENTITY

Gallup helps organizations define *and* actively strengthen their institutional identities, supporting them in translating their aspired purpose, brand and culture into an educational setting for students, faculty and staff, and the broader university community. As part of this survey, Gallup asked presidents to describe their school’s purpose, brand and culture using three words or short phrases for each.

Presidents are mostly consistent in their responses about the purpose of their institution, with 80% of responses falling into six broad themes. The dominant theme that 33% of presidents mention is to educate students, prepare them for the future and enrich their lives. The other common themes also largely focus on providing education, but for specific groups such as residents of a particular state, women, people of a particular religious faith and underserved students, to cite a few examples.

In three words or short phrases, please describe your institution's purpose (i.e., why your institution exists).		
Theme	Common responses	% Presidents mentioning theme
Educate students, prepare them for the future, enrich/create/transform lives	“Educate students for life, work and citizenship” “Serve students to attain their educational goals” “Educate students for meaningful lives”	33
Emphasis on serving a particular area, region or demographic	“Flagship public university for the state” “Excellent education for women”	14
Providing access to education	“Quality education for underserved students” “Open access to higher education”	11
Workforce training and/or economic development	“Help students obtain a career”	8
Religious affiliation	“Provide Catholic, Dominican higher education”	8
Emphasis on preparation, education or training for a specific field	“Help students enter the nursing profession”	6

Presidents show slightly less consensus when describing their school’s brand, with 61% of responses falling into seven major themes. But many of the same themes that appear in presidents’ descriptions of their school’s purpose also show up in their descriptions of their school’s brand, most notably in pointing out specific groups their institution is designed to serve.

Beyond comments about serving a particular group, some of the other common brand themes are overall excellence, providing affordable education, emphasizing the student and the student’s experience, and preparing students for work in a specific field.

In three words or short phrases, please describe your institution's brand (i.e., how your institution is known in the higher education industry or its reputation).		
Theme	Common responses	% Presidents mentioning theme
Known for excellence, being the best or high quality of educational offerings	“Academic excellence” “Highly selective liberal arts college”	12
Known primarily relative to a certain geographic area, region, community or demographic	“Women’s college” “Regional state university” “Major Atlanta institution” “Pennsylvania’s land-grant institution”	11
Known for providing value, affordability or access in their educational offerings	“Value for money” “Accessible” “Affordable education” “Open-access community college” “Best value”	9
Associated with a specific profession or job field	“Outstanding arts and science university” “Most historic optometric institution in the country”	8
Known for a religious affiliation or experience	“Catholic Franciscan” “Evangelical, Christian, liberal arts university”	7
Known specifically for workforce or career readiness	“Workforce development” “Responsive to industry needs”	7
Known for emphasis on the student or student experience	“Singular focus on students” “Small, safe, secure” “The student is at the center of our programs”	7

There is even less consensus in presidents’ descriptions of their institution’s culture, which was described for respondents as how people interact and how things get done at the school. In all, 58% of responses fall into six main categories. The most common specific theme is “collaboration or teamwork,” with 19% of presidents mentioning this category. The other major culture themes are a focus on students or emphasis on teaching; a sense of community or family atmosphere; being caring, friendly, supportive and positive; being innovative, nimble, agile and able to adapt; and being open, inclusive and welcoming.

Interestingly, while presidents described their institution’s purpose and brand in overwhelmingly positive tones, and in most cases complementary to one another, some negative characterizations of institutions’ culture emerged such as “distrustful of change” and “somewhat siloed.” These negative descriptions could indicate that an institution’s culture is more nuanced than purpose and brand, as well as more difficult to actively manage.

In three words or short phrases, please describe your institution's culture (i.e., the way people interact and how things get done).		
Theme	Common responses	% Presidents mentioning theme
Collaborative or teamwork	“Highly collaborative shared governance” “Cooperative” “Teamwork”	19
Focus on students or emphasis on teaching	“Student first” “Committed to our students”	12
Known for sense of community or family atmosphere	“Family-like institution” “Small college community”	9
Caring, friendly, supportive, positive	“Compassionate, genuine caring for others”	8
Innovative, nimble, agile or able to adapt	“Dynamic” “Innovative” “Nimble”	5
Open, inclusive, welcoming	“Open and transparent” “Inclusive”	5

THE FUTURE OF HIGHER EDUCATION

Presidents are highly enthusiastic about the future of their institution, with 91% saying they strongly agree (68%) or agree (23%) they are excited about the future. But they are much more tepid in their views of higher education more generally, just 15% strongly agree and 40% agree they are excited about the future of higher education.

Please indicate your level of agreement with the following statements:						
	%1 Strongly disagree	%2	%3	%4	%5 Strongly agree	% Don't know/ Does not apply
I am excited about the future of my institution.	1	2	6	23	68	Less than 1
I am excited about the future of higher education.	2	11	32	40	15	0

To a large degree, the higher ratings for the future of one’s own institution than for higher education’s future could reflect a pattern Gallup usually finds when asking respondents to rate their own situation and the situation in the country more generally. The natural tendency is for respondents to rate their own situations more positively than the situation “out there,” whether that is rating education, healthcare, crime or the U.S. economy.

Regardless of this response pattern, many real-world reasons presidents are not excited about the future of higher education. Many U.S. institutions are facing financial challenges in terms of declining enrollment, diminished government revenues and increased competition from more affordable online education institutions. Some long-standing institutions, smaller colleges in particular, have recently closed because of funding problems.

Most presidents, 82%, say their institution is unlikely to shut down at any point in the foreseeable future, but this leaves nearly one in five presidents who think their institution may have to close its doors within the next five years (2%) or within the coming decades (17%).

As you may know, some colleges are having to decide whether to shut down due to financial challenges they are facing. Which of the following best applies to your own institution?	
	%
My institution may have to shut down within the next five years.	2
My institution is unlikely to shut down in the near term, but may have to in the coming decades.	17
My institution is unlikely to shut down at any point in the foreseeable future.	82

Presidents of public institutions (92%) are more confident than presidents of private institutions (70%) that their institution will not have to close in the foreseeable future.

ENROLLMENT

Many more presidents expect enrollment at their institution will increase (48%) rather than decrease (25%) in the coming school year.

I think that enrollment at my institution in the fall of 2015, compared to the fall of 2014, will ...	
	%
Substantially increase	7
Somewhat increase	41
Remain unchanged	26
Somewhat decrease	23
Substantially decrease	2
Don't know/Does not apply	0

Private school presidents (55%) are more likely than public school presidents (44%) to expect an increase in their institution's enrollment. And presidents at four-year or graduate-degree-granting institutions are more likely to expect an increase (55%) than those at two-year-degree-granting institutions (34%). In fact, slightly more two-year-degree college presidents expect a decrease in enrollment (40%) than an increase.

Most presidents, 82%, expect an increase in enrollment 10 years from now, including 34% who expect enrollment will be substantially higher at that time. Just 8% predict enrollment at their school will be lower than it is now.

Looking ahead, in 10 years — that is in 2025 — do you think enrollment at your institution will be ... ?	
	%
Substantially higher than now	34
Somewhat higher than now	48
The same as now	9
Somewhat lower than now	6
Substantially lower than now	2
Don't know/Does not apply	Less than 1

Private school presidents (85%) are more likely than public school presidents (78%) to believe enrollment at their institution will be higher 10 years from now. Community college presidents (73%) are less likely than those at four-year or graduate institutions (85%) to predict an increase in enrollment over the next decade.

MISSION STATEMENTS

Mission statements are near-universal at higher education institutions: All but one president surveyed indicated their school has a mission statement. And presidents overwhelmingly believe that the daily activities of faculty, students and staff align with the university's mission statement. Seventy-seven percent of presidents say daily activities of these groups align very closely with the mission statement of their institution, with another 22% saying somewhat closely.

How closely does the daily activity of faculty, students and staff align with your university's mission statement?	
	%
Very closely	77
Somewhat closely	22
Not too closely	1
Not at all	Less than 1

Private school presidents (82%) are slightly more likely than public school presidents (72%) to say daily university activities align very closely with the school's mission statement.

The vast majority of presidents, 95%, say their institution has a strategic plan listing out specific and defined goals that help them know whether their institution is achieving its mission.

Does your institution have a strategic plan that lists out specific and defined goals that help you know whether your institution is achieving its mission, or not? <i>Note: Based on those who say their institution has a mission statement</i>	
	%
Yes	95
No	5

DEBT-FREE COLLEGE PROPOSALS

Eight in 10 college presidents have heard a great deal (32%) or a fair amount (49%) about debt-free college proposals being offered by presidential candidates and other elected officials. Presidents of public institutions (89%) are more likely to have heard a great deal or fair amount about these proposals than presidents of private schools (71%).

How much have you heard about debt-free college proposals being offered by some presidential candidates and elected officials?	
	%
A great deal	32
A fair amount	49
Not much	18
Nothing at all	1

Presidents are divided in their support for and opposition to one specific debt-free college proposal, which would involve the federal government providing states with matching funds to allow two years of free public higher education to students. Fifty percent of presidents are in favor of the proposal, including 21% strongly in favor. Forty-six percent of presidents say they oppose this proposal, including 27% who strongly oppose it.

Regardless of their views on the merit of the proposal, most presidents do not expect the federal government to pass it into law in the next four years. Eighty-six percent say it is “not too likely” or “not at all likely” the federal government will pass debt-free college legislation.

As you may know, one specific proposal calls for the federal government to provide states with \$18 billion in matching awards to allow for two years of free public higher education. Do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this proposal?	
	%
Strongly favor	21
Somewhat favor	29
Somewhat oppose	19
Strongly oppose	27
Don't know/No opinion	5

How likely do you think it is that debt-free college legislation will be passed by the federal government in the next four years?	
	%
Very likely	1
Somewhat likely	10
Not too likely	47
Not at all likely	39
Don't know/No opinion	3

There is a significant divide in opinions of the federal/state matching debt-free college proposal by institution type. Whereas most presidents of public institutions favor the proposal, most presidents of private institutions oppose it. This divide could be explained on the basis that the program, as described, would be for prospective students to attend public higher education institutions, benefiting public institutions at the expense of private ones.

As you may know, one specific proposal calls for the federal government to provide states with \$18 billion in matching awards to allow for two years of free public higher education. Do you strongly favor, somewhat favor, somewhat oppose or strongly oppose this proposal? <i>Results by institution type</i>		
	% Public	% Private
Strongly favor	34	7
Somewhat favor	37	21
Somewhat oppose	14	24
Strongly oppose	12	41
Don't know/No opinion	4	7

Most presidents, 69%, acknowledge that the increased focus on college debt has prompted their institution to take new actions on college affordability or debt levels. Public (70%) and private (69%) institution presidents answer similarly.

Has the increased focus on college debt prompted your institution to take new actions on college affordability or debt levels, or not?	
	%
Yes	69
No	31

INSTITUTIONAL INITIATIVES

College presidents are most likely to say evidence-based research and evaluation reports are a chief consideration in guiding decision-making in adopting new initiatives or college completion strategies. Sixty-nine percent chose research reports when asked to choose three from a list of eight considerations. A majority, 58%, also say long-term sustainability is a chief consideration. Faculty support, funding support and return on investment data are the next most commonly

selected choices. Presidents are far less likely to say state or system mandates, initiative adoptions at peer institutions or promise of rapid results are important considerations in adopting new initiatives or college completion strategies.

When adopting a new initiative or college completion strategy, what are the chief considerations that guide your decision-making process? <i>Please choose three items.</i>	
	%
Evidence-based research and evaluation reports	69
Long-term sustainability	58
Faculty support	46
Funding support	43
Return on investment data	39
State or system mandate	23
Initiative adoptions at peer institutions	14
Promise of rapid results	8

Most presidents, 79%, say their institution’s strategic and/or operational plan includes emphasis on activities to support the attainment of low-income students beyond traditional financial aid.

Does your institution's strategic and/or operational plan include a specific emphasis on activities — beyond traditional financial aid — that can support the attainment of low-income students?	
	%
Yes	79
No	21

The survey asked presidents whether their institution has adopted and supported each of several programs designed to increase college completion rates. The most common initiative, which 69% of presidents say their institution supports, are dual-enrollment plans that allow high school students to take college courses for credit. Fifty-one percent say their institution supports prior learning assessment, which can grant college credit for knowledge obtained through prior work or other pre-college life experiences. About the same percentage, 49%, say their institution has corequisite development or remedial education programs, which enroll students needing remediation in a program that provides both remedial and college-level instruction concurrently. Such programs can be more effective at getting students on a stronger path to degree completion than remedial classes alone.

Thirty-nine percent of presidents say their institution supports reverse transfer efforts. These efforts allow students who transfer from a two-year institution to a four-year institution before earning their associate degree to apply credits earned at the four-year institution toward fulfillment of the requirements for an associate degree at their former school.

Fewer presidents, 29%, say their school offers competency-based education — programs that do not require students to attend formal classes but do allow them to learn material on their own. If they pass an exam to demonstrate mastery of the necessary subject matter for the course, they receive course credit.

Please identify which, if any, of the following efforts or initiatives your institution has adopted and has actively supported on campus for over one year. <i>Select all that apply.</i>	
	%
Dual enrollment/Early-college high school programs	69
Prior learning assessment	51
Corequisite developmental/remedial education	49
Reverse transfer efforts	39
Competency-based education	29
ASAP — Accelerated Study in Associate Program	14
None of these	16

All of these initiatives are much more common at public institutions than private ones, with the largest differences on reverse transfer efforts (60% of public institutions versus 16% of private institutions support this) and corequisite development (69% of public versus 29% of private institutions). The vast majority of public institutions support dual enrollment programs, as do 51% of private institutions.

Please identify which, if any, of the following efforts or initiatives your institution has adopted and has actively supported on campus for over one year. <i>Select all that apply.</i>		
<i>Results by institution type</i>		
	% Public	% Private
Dual enrollment/Early-college high school programs	87	51
Prior learning assessment	58	43
Corequisite developmental/remedial education	69	29
Reverse transfer efforts	60	16
Competency-based education	37	19
ASAP — Accelerated Study in Associate Program	19	9
None of these	4	27

Eighty percent of college presidents say their institution participates in National Student Clearinghouse (NSC) data collection activities. NSC is an organization that collects information on students that participating institutions can use to track student outcomes.

The vast majority of presidents who submit data to NSC — 93%, equal to 71% of all presidents — say their institution provides data to NSC that show results by race and ethnicity. The small number of presidents who give data to NSC but do not report results by race and ethnicity divide about evenly as to whether they would provide that information if asked.

As you may know, the National Student Clearinghouse (NSC) serves participating institutions by facilitating the exchange and understanding of student enrollment, performance and related information. Does your institution participate in NSC data collection, or not?

(If institution submits data to NSC) Does your institution currently submit data to NSC that reports results by race/ethnicity, or not?

(If institution does not submit data to NSC) If asked, would your institution submit data to NSC, reporting results by race and ethnicity, or not?

Combined results	%
Submits data to NSC, including results by race and ethnicity	71
Submits data to NSC, would report results by race and ethnicity if asked	3
Submits data to NSC, would not report results by race and ethnicity if asked	2
Submits data to NSC, no response on reporting results by race and ethnicity	4
Does not submit data to NSC	20

Presidents of public institutions (90%) are much more likely than private institution presidents (71%) to say their institution provides data to NSC.

CONCLUSION

College presidents are optimistic about the future of their institution but less so about the future of higher education. They mostly expect enrollment at their institution to be higher 10 years from now, and few feel their institution faces a threat of closure because of financial challenges that have occurred at some colleges in recent years.

College presidents generally view their institution's purpose as educating students, preparing them for the future and enriching their lives. Many reserve this mission for particular regional, religious, gender or occupational subgroups. Schools' purposes and brands generally align, though presidents typically use different themes when describing their school's culture. The most common culture themes are collaboration and teamwork, focusing on students, and creating an inclusive and supportive community.

Presidents are essentially unanimous in saying their institution has a mission statement as well as a strategic plan to help them know whether their institution is achieving its mission. Three-quarters of presidents believe the daily activities of faculty, students and staff align with the school's mission statement very closely.

Various new initiatives have been proposed in recent years to address rising college costs and decreasing rates of degree completion. College presidents are most likely to cite evidence-based research reports as an important consideration in deciding to adopt and support new initiatives, followed by long-term sustainability. Faculty support, funding support and return-on-investment data are also commonly used considerations.

One of the more popular new higher education initiatives is dual enrollment programs, which 69% of presidents say their institution supports. But a substantial proportion of presidents say their institution offers prior learning assessments, corequisite developmental/remedial education and reverse transfer efforts.

Some of these programs may especially aid low-income students, and nearly eight in 10 presidents say their institution has programs, beyond financial aid, to promote educational attainment among low-income students.

Nearly seven in 10 presidents say the increased focus on college debt has caused their institution to take some action on college affordability and debt levels.

Most presidents have heard of debt-free college proposals being offered by many elected officials and presidential candidates, though they are skeptical that the federal government will pass such legislation in the next four years. Presidents are divided, largely along private versus public lines, in support of a proposal that would offer two years of free public education to students using a state/federal matching funds program.

RESPONDENT CHARACTERISTICS

What is your age?	%
Under 30	0
30 to 39	1
40 to 49	8
50 to 59	33
60 to 69	49
70 and older	8

What is your gender?	%
Male	72
Female	28
How many years have you served as the president at this institution?	%
Less than six months	1
Six months to less than three years	28
Three years to less than five years	20
Five years to less than 10 years	27
10 or more years	25
Don't know/Does not apply	Less than 1