



Inside
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Ed

2023 Survey of

College and University Presidents

A SURVEY BY *INSIDE HIGHER ED* AND HANOVER RESEARCH

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INTRODUCTION AND METHODOLOGY

Inside Higher Ed has partnered with Hanover Research to conduct its 13th annual Survey of College and University Presidents. The survey was administered in February and March 2023. A total of 2,670 presidents of public, private nonprofit and for-profit colleges were invited to participate; specialty colleges, namely Bible colleges and seminaries, and institutions with enrollments under 500 were excluded from the sample. Hanover collected 442 fully or partially completed surveys, yielding a 16.6 percent response rate.

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 database. The margin of error for this survey is 4.26 percent given a total n-count of 442. Conclusions drawn from a small sample size ($n < 20$) should be interpreted with caution.

All Institutions, by Sector					Public			Private Nonprofit	
	All	Public	Private Nonprofit	For-profit*	Doctoral	Master's/ Bacc.	Associate	Doctoral/ Master's	Bacc.
Total sample size	442	259	173	10	33	82	140	94	62

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

KEY FINDINGS

- Most presidents are confident that their institution will be financially stable over the next 5 to 10 years. More than three quarters “somewhat agree” or “strongly agree” that they are confident their institution will be financially stable over the next five (83 percent) and 10 (78 percent) years. Those figures are up slightly from 2022.
- More than half of presidents agree that their institution is more financially stable now than it was in 2019. And most campus leaders expect their institution to be better off next year than it is now, with 58 percent disagreeing (20 percent strongly) that their institution is “more financially stable now than I expect it to be a year from now.”
- Almost two-thirds of presidents who reported that their institutions are less financially stable now than in 2019 cited decreased net tuition revenue and increased salary and benefits expenses as the reasons why. About two-thirds of presidents who said their institutions were more financially stable now than in 2019 cited increased revenue from sources such as charitable giving, government support or auxiliary enterprises as the reasons why. That was likely due to the continued impact of federal stimulus dollars.
- More than 7 in 10 campus leaders who expect their institutions to be less financially stable a year from now cite higher labor costs and impact of inflationary pressures as the reasons why. Just over half expect enrollment to be lower (53 percent). About two-thirds of presidents who believe their institution will be more financially stable in 2024 expect their enrollment will be higher, and nearly 6 in 10 expect net tuition revenue to increase.
- Most presidents indicate that senior administrators at their institution have not had serious discussions regarding merging with another college or university in the past year. Most also say senior administrators have not had discussions about consolidating some of its programs or operations with another college or university (71 percent).
- Presidents are twice as likely (18 percent to 9 percent) to say that they are at least “somewhat” likely to acquire another institution in the next five years than to say they will be acquired or merge into another college. More than a quarter of presidents (27 percent) think their institution should consider merging with another college or university in the next five years.
- Presidents rate the quality of their institutions’ in-person courses much more highly than they view their hybrid and fully online courses. More than two-thirds say their in-person courses are of excellent quality, compared to fewer than a third who say that about their hybrid courses and just one in five who rate their fully online courses as excellent.

KEY FINDINGS (CONT.)

- One in five presidents report that their institution is “somewhat” (14 percent) or “very likely” (7 percent) to shrink its physical campus footprint in the next five years, while 50 percent say they are not at all likely to do so.
- Just over half of respondents indicate that their institution has altered its employment policies in ways that will give employees modestly more latitude to work remotely after the pandemic ends (52 percent).
- Few presidents report being “very” or “extremely worried” about the turnover rate of faculty and staff at their institution. More than one third of presidents indicate that they are “somewhat worried” (36 percent). An overwhelming majority of presidents think that a major cause of turnover at their institution is competitive offers from other employers. More than half of presidents believe that natural career progression (55 percent) and burnout (52 percent) are major causes of turnover.
- More than two-thirds of presidents agree that their institution has sufficient capacity to meet the mental health needs of undergraduate students, but fewer say the same for other stakeholders. More than a third of presidents disagree that their institution has sufficient capacity to meet the mental health needs of staff (37 percent) and faculty members (36 percent).
- Presidents who agree that their institution has sufficient capacity to meet the needs of any of their stakeholders indicate that this is because of increased staffing for on-campus counseling services (70 percent), increased budget for mental health-related services (70 percent), investment in telehealth services (68 percent), and increased availability of appointments with mental health services (65 percent).
- Presidents most attribute the increased demand for student mental health services to declining student resilience and the declining sense of belonging due to factors related to the pandemic. More than half also cite as “very” or “extremely influential” students’ pre-existing mental health conditions (56 percent) and their need to balance personal economic and familial duties with schoolwork (55 percent).
- Fewer than half of presidents indicate that digital transformation is at least a “high priority” for leaders at their institution. However, most presidents indicate that the digital transformation efforts at their institution as it relates to data/student success (83 percent) and leveraging student data for better learning of retention insights (82 percent) are of “high priority” or “essential.”

KEY FINDINGS (CONT.)

- Most presidents believe that the state of race relations on their campus is “good” (66 percent) or “excellent” (12 percent), while just 29 percent say that about the state of race relations on campuses nationally.
- Most presidents disagree that there will be any major effects at their institution if the U.S. Supreme Court curtails the use of affirmative action in admissions. Four in five disagree that their institution would have to significantly adjust its admissions policy, and nearly two-thirds disagree that race relations at their institutions will worsen (65 percent).
- Most presidents agree that the perception of colleges as places that are intolerant of conservative views is having a negative impact on attitudes about higher education. Presidents are as likely (43 percent) to agree as to disagree that the perception of colleges as places that are intolerant of conservative views is accurate.
- Two-thirds of respondents report that their institution has not identified steps it might take in response to a possible Supreme Court decision limiting or barring affirmative action. Nearly a quarter of presidents indicate that their institution has identified steps it might take in this scenario (22 percent).

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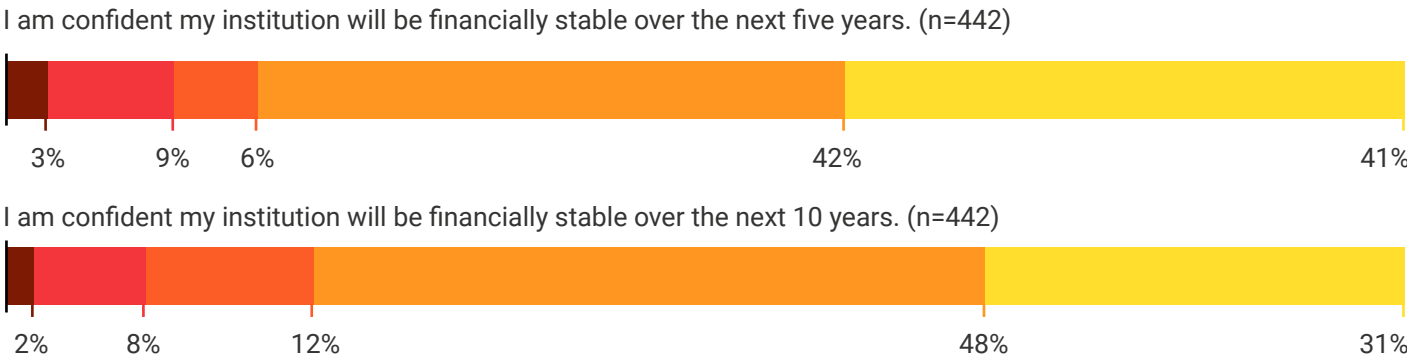
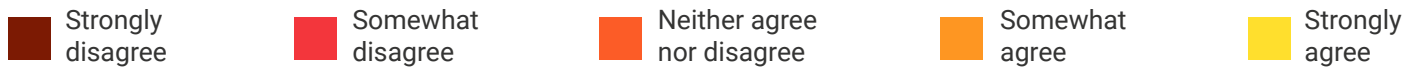


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CONFIDENCE IN INSTITUTION’S FINANCIAL SITUATION

Most presidents are confident that their institution will be financially stable over the next 5 to 10 years. More than three quarters “somewhat agree” or “strongly agree” that they are confident their institution will be financially stable over the next five (83 percent) and 10 (79 percent) years. Those figures are up slightly from 2022.

Please indicate how much you disagree or agree with the following statements.



Presidents in all sectors express confidence in the 10-year outlook for their institutions, although leaders of public master’s and baccalaureate institutions are significantly less likely than their peers to strongly agree that they are confident in their stability over a decade.

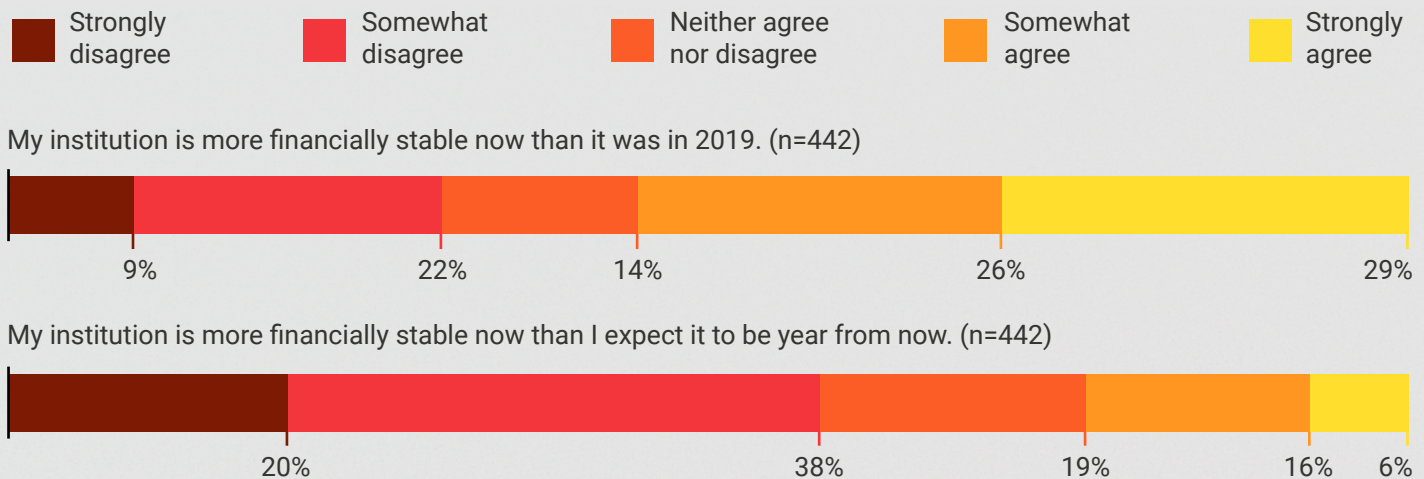
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral-Master's	Bacc.
I am confident my institution will be financially stable over the next 10 years.								
% Strongly disagree	2	3	2	3	4	2	3	2
% Somewhat disagree	8	9	6	6	11	9	4	10
% Neither agree nor disagree	12	12	10	6	15	13	5	18
% Somewhat agree	48	48	47	30	54	48	55	34
% Strongly agree	31	28	34	55	17	29	32	37

FINANCIAL STABILITY COMPARED TO OTHER YEARS

More than half of presidents agree that their institution is more financially stable now than it was in 2019. And most campus leaders expect their institution to be better off next year than it is now, with 58 percent disagreeing (20 percent strongly) that their institution is “more financially stable now than I expect it to be a year from now.”

Significantly more presidents from public institutions (30 percent) than from private nonprofit institutions (12 percent) agree that their institution is more financially stable now they expect it to be next year. That is especially true for community college leaders. Presidents in the South (67 percent) are more likely than those in the West (52 percent), Midwest (50 percent) and Northeast (50 percent) to agree that their institution is more financial stable now than it was in 2019.

Please indicate how much you disagree or agree with the following statements.

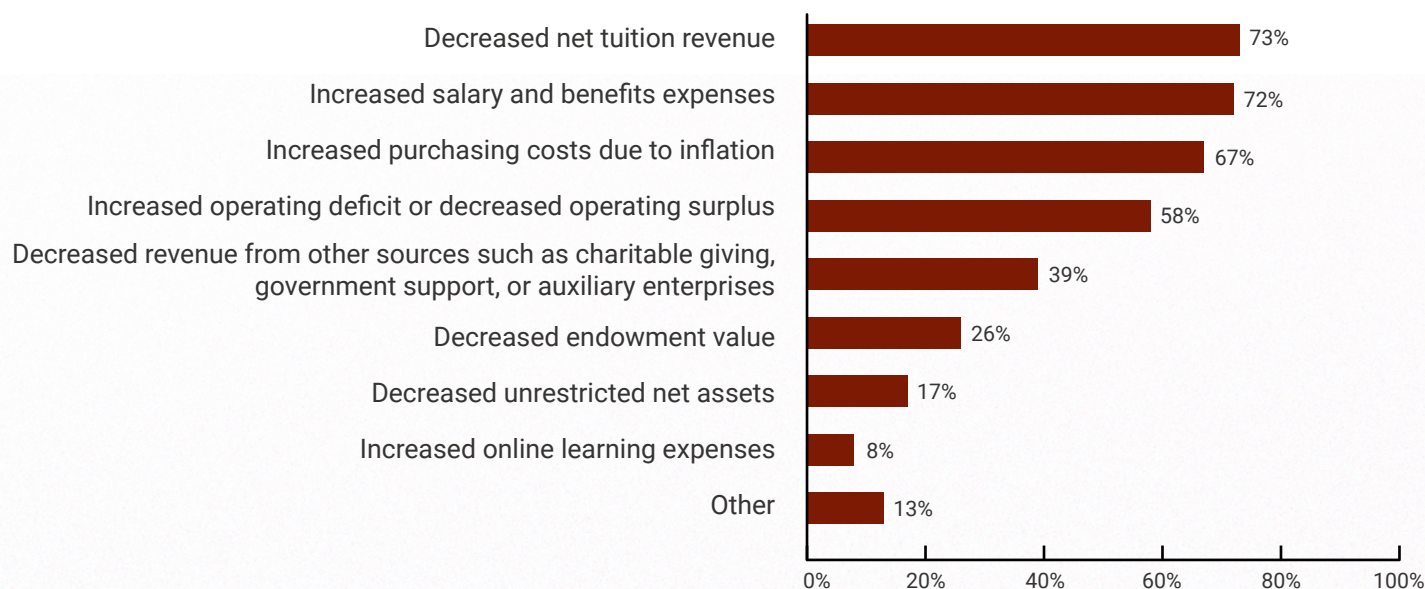


REASONS FOR BEING LESS FINANCIALLY STABLE NOW THAN IN 2019

Almost two-thirds of presidents who reported that their institutions are less financially stable now than in 2019 cited decreased net tuition revenue and increased salary and benefits expenses as the reasons why. Other common factors include increased purchasing costs due to inflation (67 percent) and increased operating deficit or decreased operating surplus (58 percent).

Why is your institution less financially stable now than it was in 2019?

Please select all that apply. (n=135)



Note: Only respondents who "somewhat disagree" or "strongly disagree" that their institution is more financially stable than it was in 2019 saw this question.

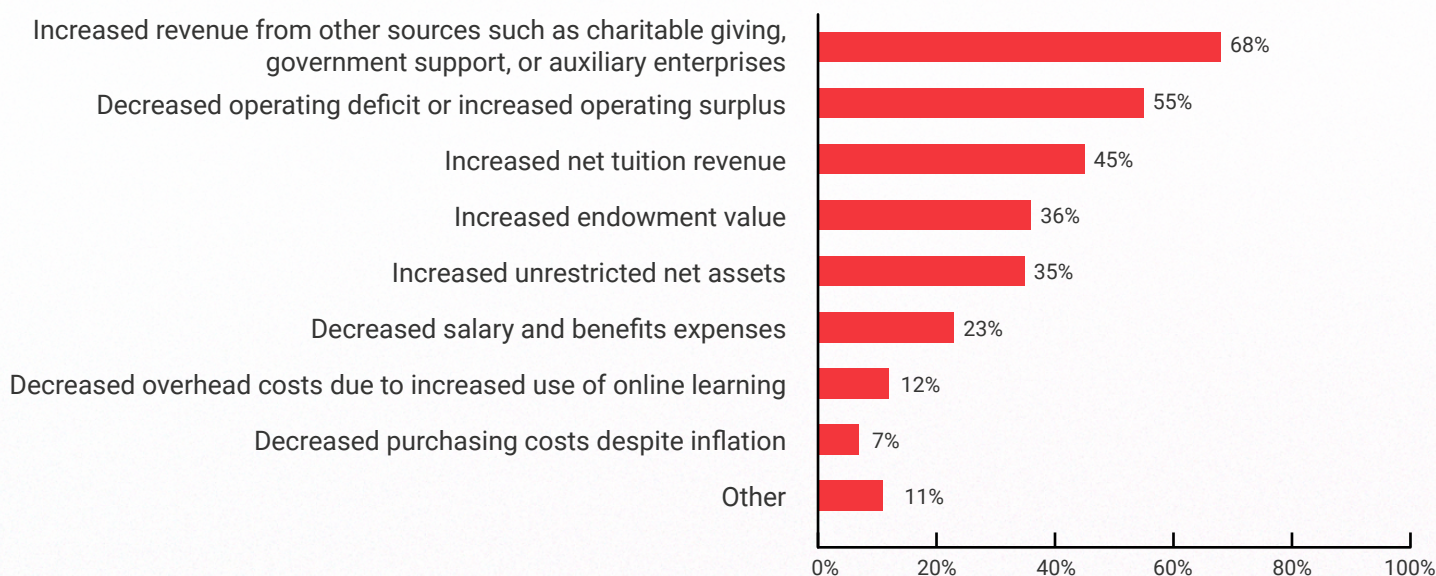
REASONS FOR BEING MORE FINANCIALLY STABLE NOW THAN IN 2019

About two-thirds of presidents who said their institutions were more financially stable now than in 2019 cited increased revenue from sources such as charitable giving, government support or auxiliary enterprises as the reason why. That was likely due to the continued impact of federal stimulus dollars.

Presidents from private nonprofit institutions are more likely than those from public institutions to agree that their institution is more financially stable now than it was in 2019 because of increased net tuition revenue and increased endowment value.

Why is your institution more financially stable now than it was in 2019?

Please select all that apply. (n=243)



Note: Only respondents who "somewhat agree" or "strongly agree" that their institution is more financially stable than it was in 2019 saw this question.

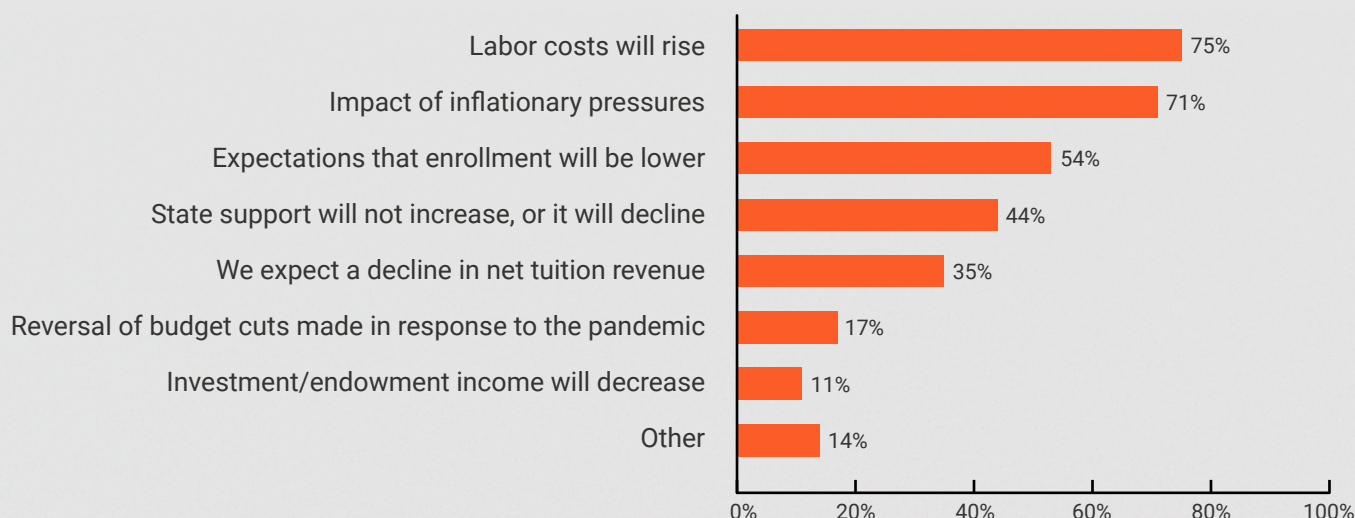
REASONS FOR PREDICTING LESS STABILITY IN 2024

More than 7 in 10 campus leaders who expect their institutions to be less financially stable a year from now cite higher labor costs and impact of inflationary pressures as the reasons why. Just over half expect enrollment to be lower (53 percent).

Presidents from private nonprofit institutions who expect their institutions to be less financially stable in 2024 than they are now are more likely (90 percent) than those from public institutions (67 percent) to cite inflationary pressures as a reason why. Leaders in the Northeast (68 percent) are more likely than those in the South (38 percent) to indicate that their institution will be less financially stable in 2024 than it is now because of the expectations that enrollment will be lower.

Why is your institution more financially stable now than you expect it will be in 2024?

Please select all that apply. (n=100)

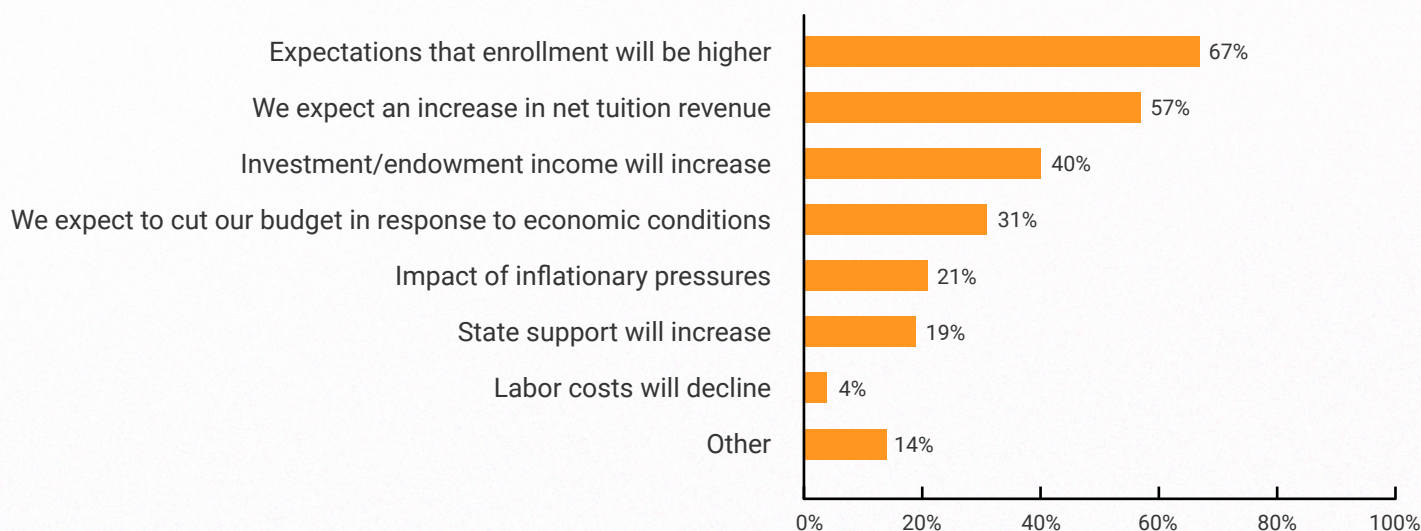


Note: Only respondents who "somewhat agree" or "strongly agree" that their institution is more financially stable now than they expect it to be in a year from now.

REASONS FOR PREDICTING GREATER STABILITY IN 2024

About two-thirds of presidents who believe their institution will be more financially stable in 2024 expect their enrollment will be higher, and nearly 6 in 10 expect net tuition revenue to increase. Presidents from private nonprofit institutions who expect their institution to be more financially stable in 2024 than it is now are significantly more likely (68 percent) than those from public institutions (48 percent) to expect an increase in net tuition revenue by 2024. Presidents in the South (78 percent) are more likely than those in the Northeast (58 percent) to indicate that their institution will be more financially stable in 2024 because they expect enrollment to be higher.

Why is your institution less financially stable now than you expect it will be in 2024? Please select all that apply. (n=257)



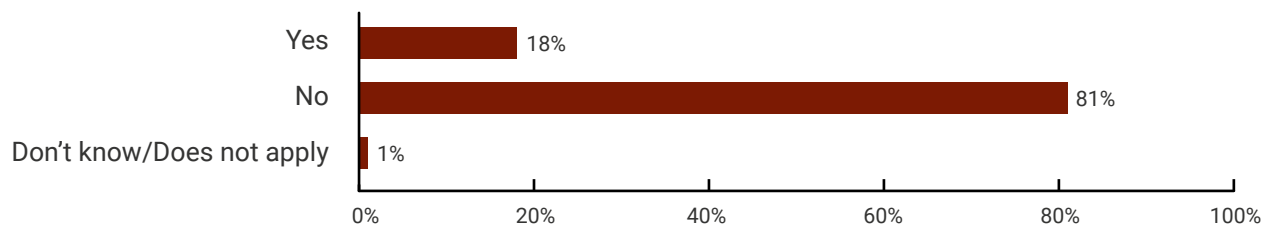
Note: Only respondents who "somewhat disagree" or "strongly disagree" that their institution is more financially stable now than they expect it to be in a year from now.

MERGING OR CONSOLIDATING PROGRAMS

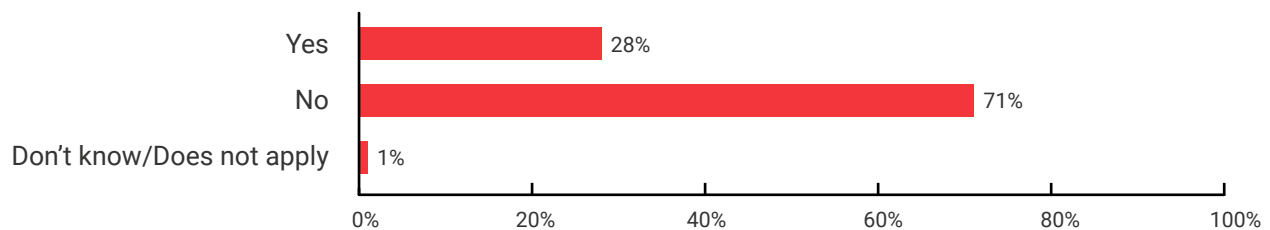
Most presidents indicate that senior administrators at their institution have not had serious discussions regarding merging with another college or university in the past year. Most also say senior administrators have not had discussions about consolidating some of its programs or operations with another college or university (71 percent).

Presidents from private nonprofit institutions (28 percent and 34 percent, respectively) are more likely than those from public institutions (12 percent and 24 percent) to report having had serious discussions about merging with another college and about consolidating some of its programs with another college in the past year.

Have senior administrators at your college had serious internal discussions in the last year about merging with another college or university? (n=400)

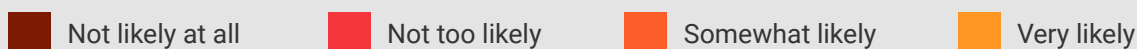


Have senior administrators at your college had serious internal discussions in the last year about consolidating some of its programs or operations with another college or university? (n=400)



LIKELIHOOD OF MERGING OR ACQUIRING

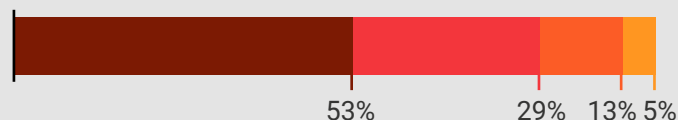
Presidents are twice as likely (18 percent to 9 percent) to say that they are at least “somewhat” likely to acquire another institution in the next five years than to say they will be acquired or merge into another college. Presidents from private doctoral/master’s institutions (17 percent) are twice as likely as those in any other sector to say their institution is at least somewhat likely to merge into another institution. And presidents of private nonprofit institutions (31 percent) are more likely than those from public institutions (10 percent) to say they are “somewhat likely” or “very likely” to acquire another college or university in the next five years.



How likely is your institution to merge into or be acquired by another college or university in the next five years? (n=395)



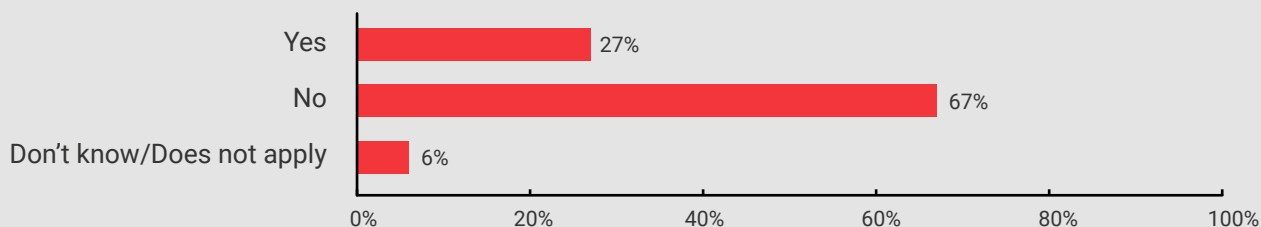
How likely is your institution to acquire another college or university in the next five years? (n=393)



MERGING WITH ANOTHER COLLEGE OR UNIVERSITY IN FIVE YEARS

More than a quarter of presidents (27 percent) think their institution should consider merging with another college or university in the next five years. Presidents from private nonprofit institutions (38 percent) are twice as likely as those from public institutions (19 percent) to indicate that their institution should consider merging with another college or university in the next five years.

Do you think your institution should consider merging with another college or university in the next five years? (n=400)



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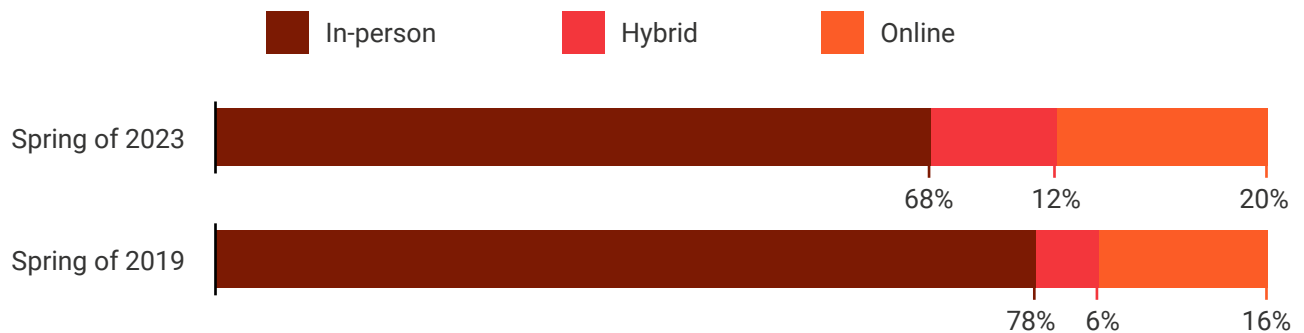
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FORMATS OF UNDERGRADUATE COURSES

Presidents report that the percentage of in-person undergraduate courses at their institutions in the spring of 2023 is slightly lower than it was in the spring of 2019. The proportion of courses being delivered online is up slightly (to 20 percent from 16 percent), while the percentage of courses being delivered in a hybrid format has doubled, to 12 percent from 6 percent.

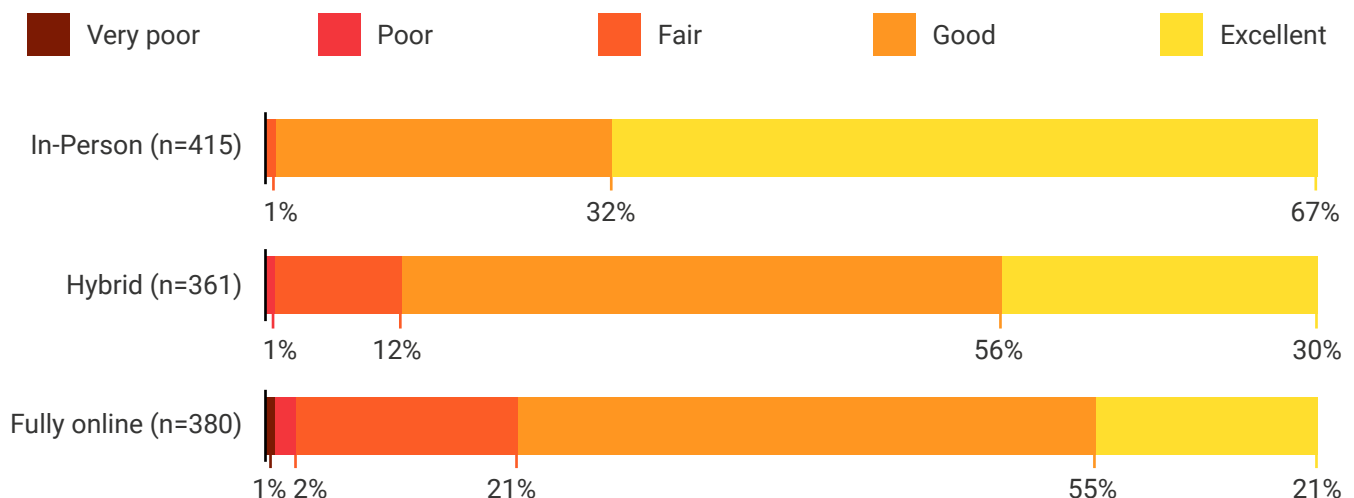
In the spring of [2019/2023], what percentage of your undergraduate courses [are/were] being delivered in an in-person, hybrid, or fully online format?



QUALITY OF COURSES BASED ON FORMAT

Presidents rate the quality of their institutions' in-person courses much more highly than they view their hybrid and fully online courses. More than two-thirds say their in-person courses are of excellent quality, compared to fewer than a third who say that about their hybrid courses and just one in five who rate their fully online courses as excellent.

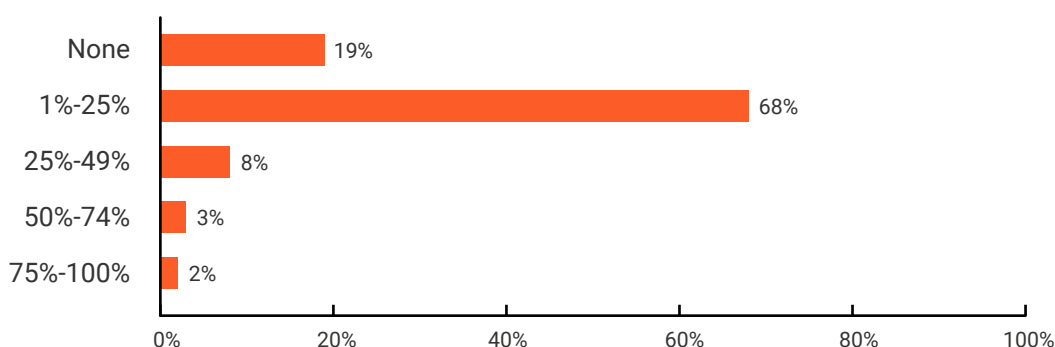
How would you rate the overall/average quality of each of the following types of courses being delivered this spring at your institution?



REMOTE WORK FOR NON-FACULTY STAFF

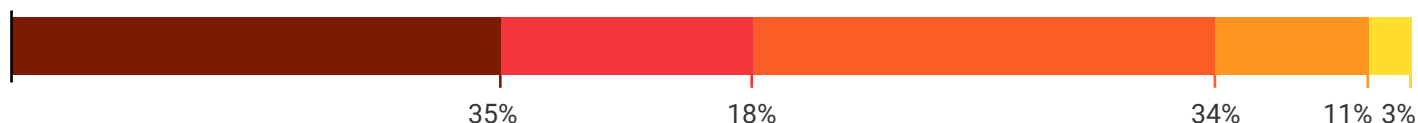
Most presidents report that few of their institution's non-faculty staff are working remotely as of the spring of 2023, with one in five saying none of those employees are working remotely and more than two-thirds (68 percent) saying fewer than a quarter work remotely. More than half of respondents (53 percent) say the percentage of non-faculty staff working remotely is slightly or significantly smaller in the 2022-23 academic year than it was in 2021-22; a third indicate the percentage is about the same.

What percentage of your institution's non-faculty staff is working remotely as of the spring of 2023? (n=425)



How has the proportion of non-faculty staff working remotely changed in the 2022-23 academic year as compared to 2021-22? (n=424)

- A significantly smaller percentage †
- A slightly smaller percentage †
- Around the same percentage †
- A slightly larger percentage †
- A significantly larger percentage †



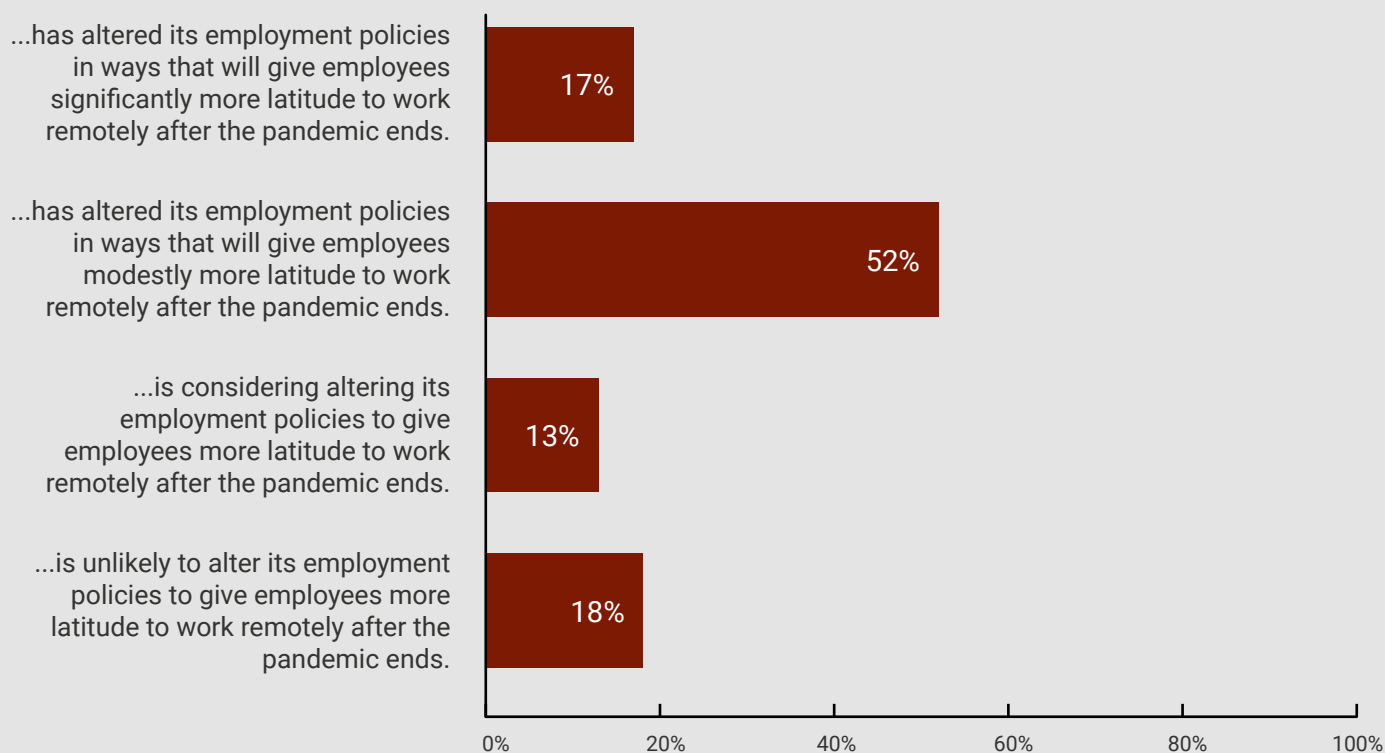
Note: † indicates that text has been truncated to fit the figure – consult the data supplement to see the full text.

CAMPUS FOOTPRINT AND REMOTE WORK POLICIES

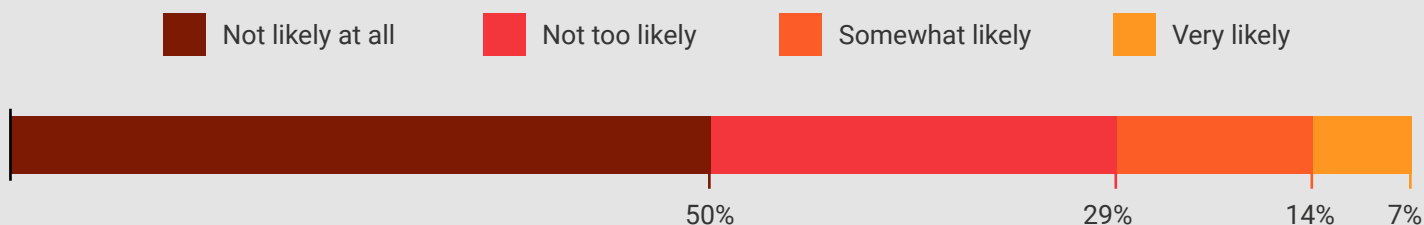
One in five presidents report that their institution is “somewhat” (14 percent) or “very likely” (7 percent) to shrink its physical campus footprint in the next five years, while 50 percent say they are not at all likely to do so. Additionally, presidents in the Midwest (27 percent) are more likely than those in the South (16 percent) to say their institution is at least “somewhat likely” to shrink its physical footprint in the next five years.

Just over half of respondents indicate that their institution has altered its employment policies in ways that will give employees modestly more latitude to work remotely after the pandemic ends (52 percent).

Which of the following best describes your institution? My institution... (n=424)



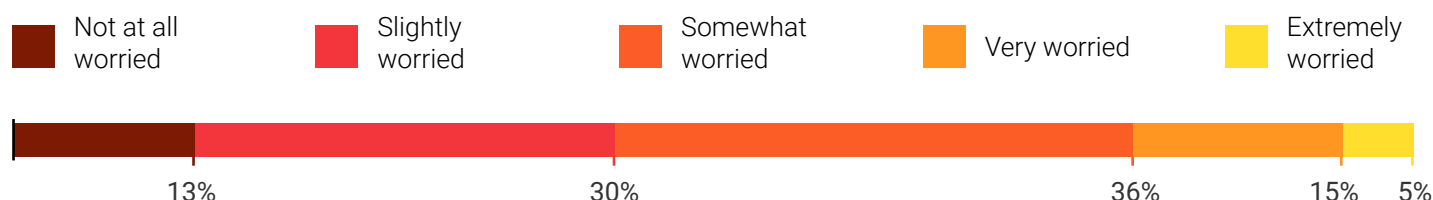
Given the rise of remote learning and remote work, how likely or unlikely is your institution to shrink its physical campus footprint in the next five years? (n=420)



FACULTY AND STAFF TURNOVER

Few presidents report being “very” or “extremely worried” about the turnover rate of faculty and staff at their institution. More than one third of presidents indicate that they are “somewhat worried” (36 percent). Presidents from public institutions (25 percent) are more likely than those from private nonprofit institutions (15 percent) to be “very worried” or “extremely worried” about the turnover rate of faculty and staff at their institution.

How worried are you about the turnover rate of faculty and staff at your institution? (n=423)

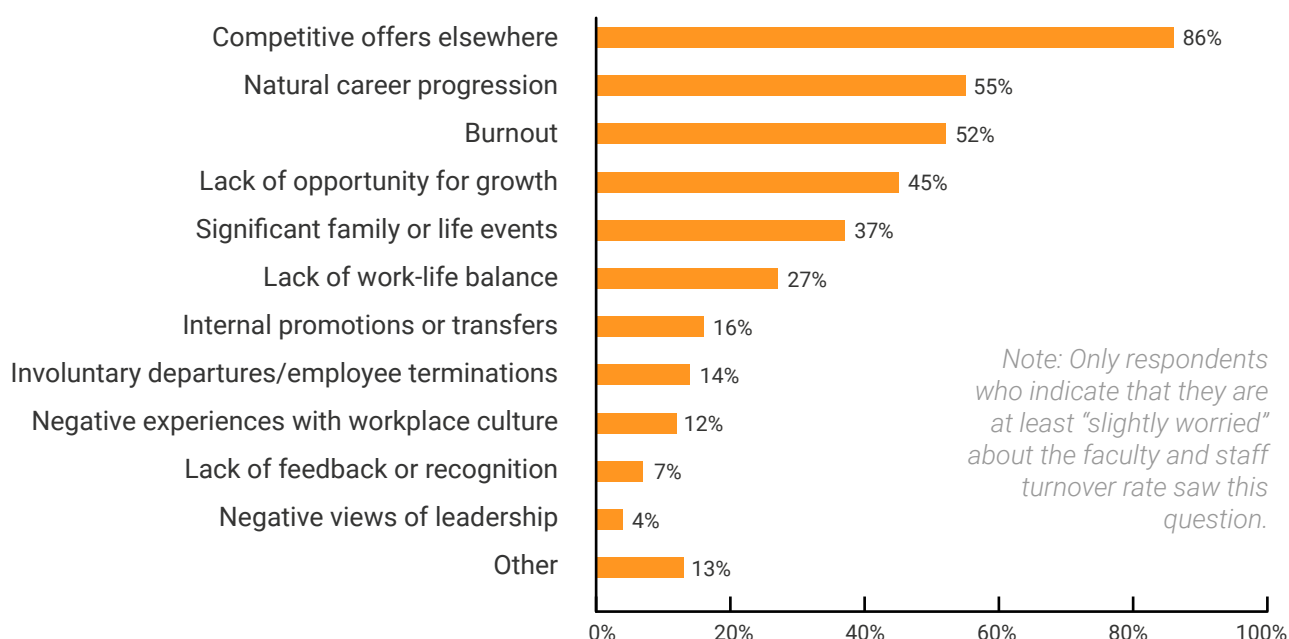


REASONS FOR FACULTY AND STAFF TURNOVER

An overwhelming majority of presidents think that a major cause of turnover at their institution is competitive offers from other employers. More than half of presidents believe that natural career progression (55 percent) and burnout (52 percent) are major causes of turnover.

Campus leaders in the Northeast (61 percent) are likelier than those in the South (43 percent) to think that burnout is a major cause of turnover at their institution. Presidents in the West (20 percent) are more likely than those in the South (7 percent) to think that negative experience with workplace culture is a major cause of turnover at their institution.

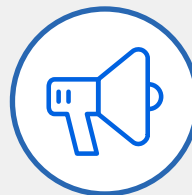
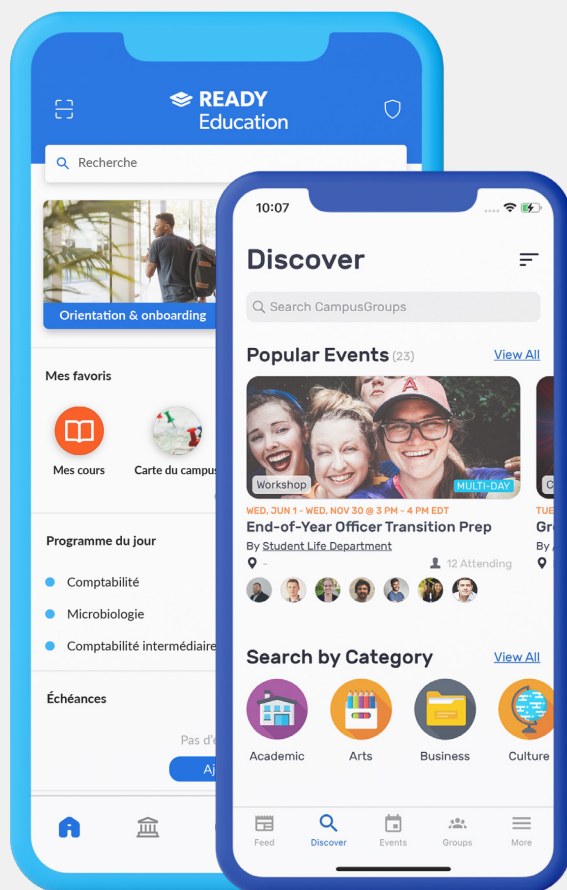
What do you think are the major causes of turnover at your institution? Please select up to five options. (n=367)





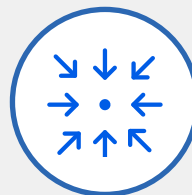
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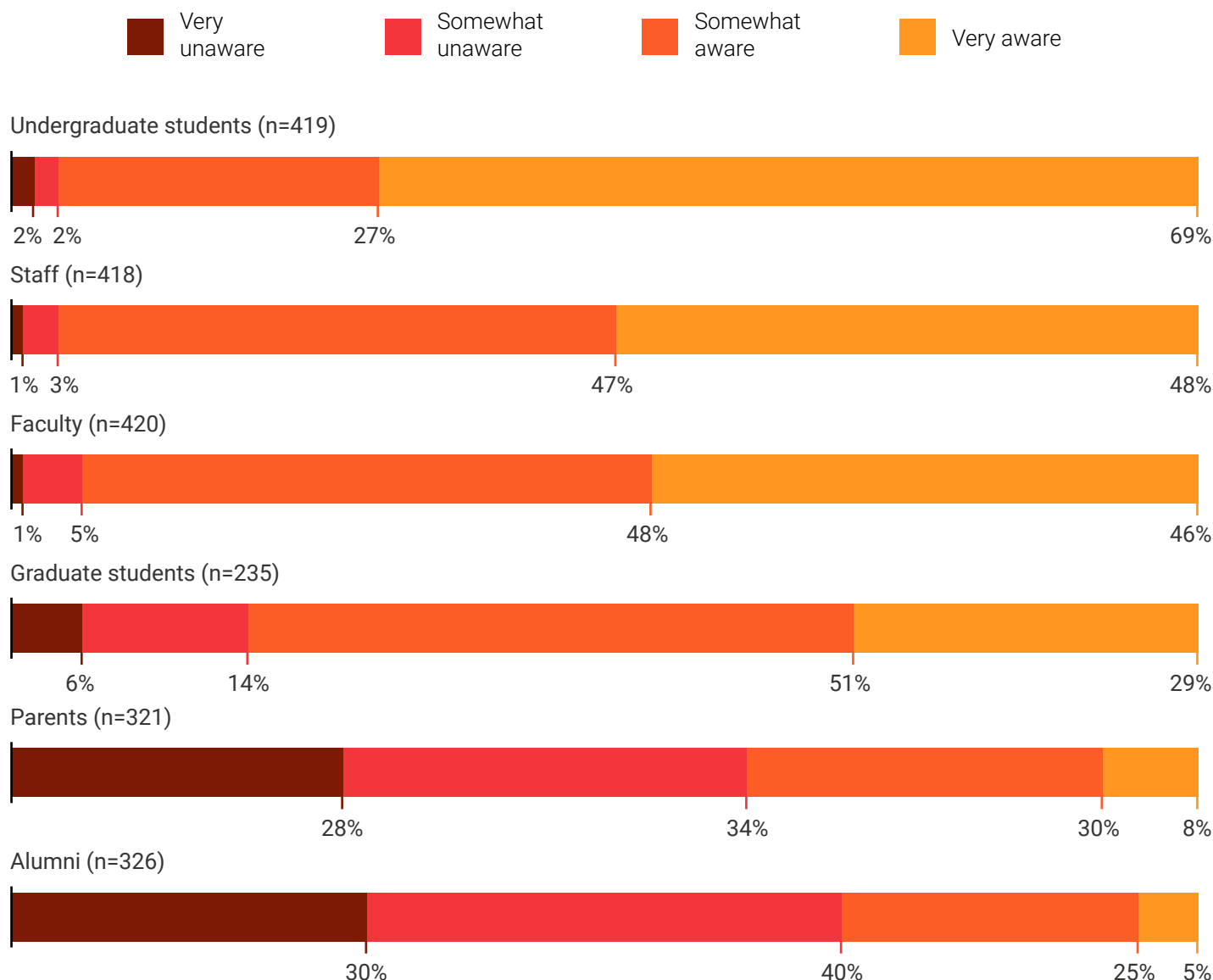
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AWARENESS OF COMMUNITY MENTAL HEALTH

Almost all presidents report that they are “somewhat” or “very aware” of the state of mental health as it relates to staff, undergraduate students, and faculty. Most also report that they are at least somewhat aware of the general state of mental health of graduate students (80 percent), with fewer than half saying the same for parents (38 percent) or alumni (30 percent).

Presidents from private nonprofit institutions (87 percent) are more likely than those from public institutions (72 percent) to be at least “somewhat aware” of graduate students’ state of mental health.

How would you rate your own level of awareness of the general state of mental health as it relates to the following members of your community?

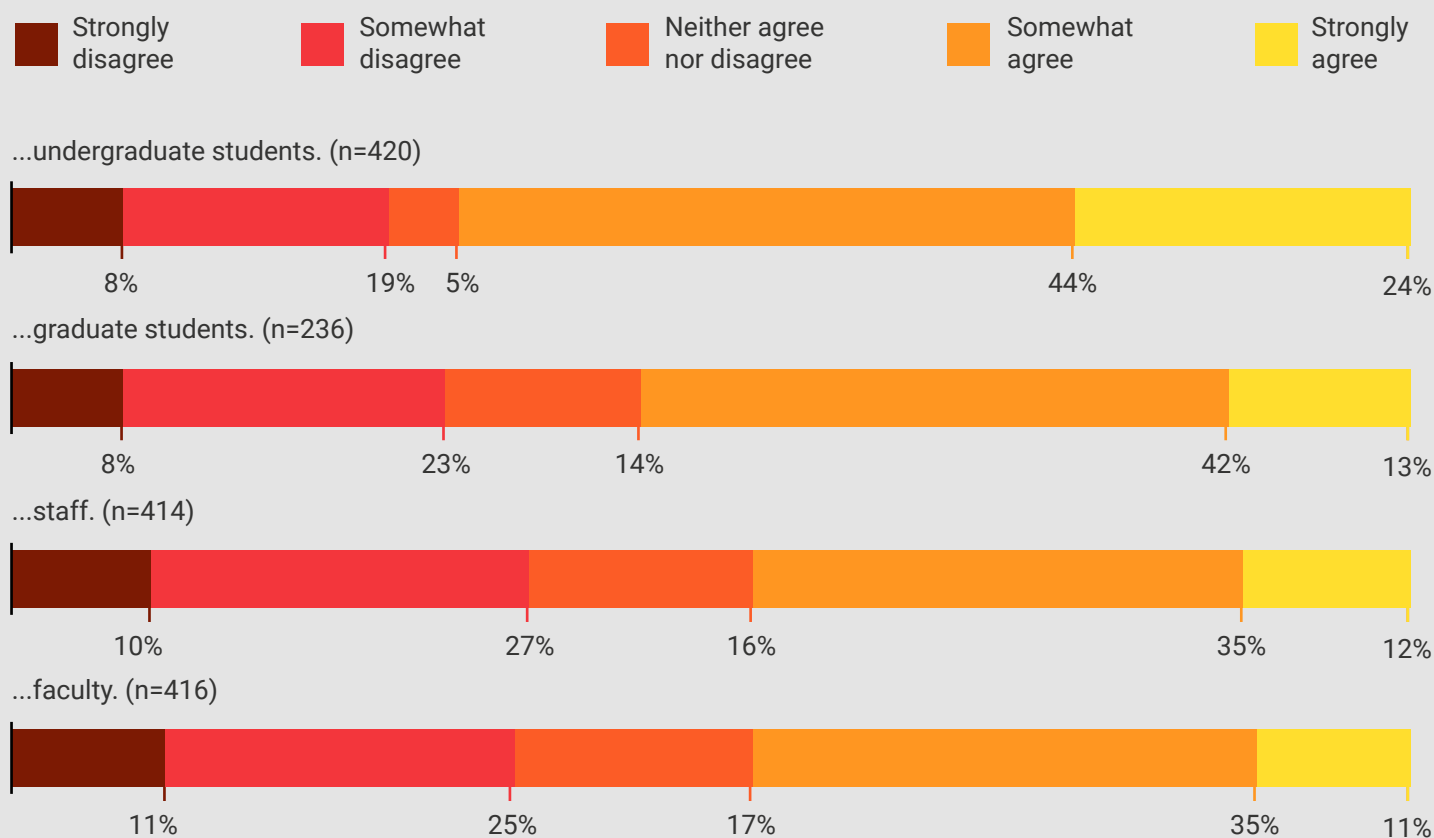


INSTITUTIONAL CAPACITY TO MEET MENTAL HEALTH NEEDS

More than two-thirds of presidents agree that their institution has sufficient capacity to meet the mental health needs of undergraduate students, but fewer say the same for other stakeholders. More than a third of presidents disagree that their institution has sufficient capacity to meet the mental health needs of staff (37 percent) and faculty members (36 percent).

Presidents from private institutions (77 percent) are likelier than their counterparts at public institutions (61 percent) to agree that they have the capacity to meet the mental health needs of undergraduates. Presidents from community colleges and from private doctoral/master's institutions are likelier than their peers to agree that their institution has sufficient capacity to meet the mental health needs of faculty and staff members.

To what extent do you agree or disagree with the following statements? My institution has sufficient capacity to meet the mental health needs of...

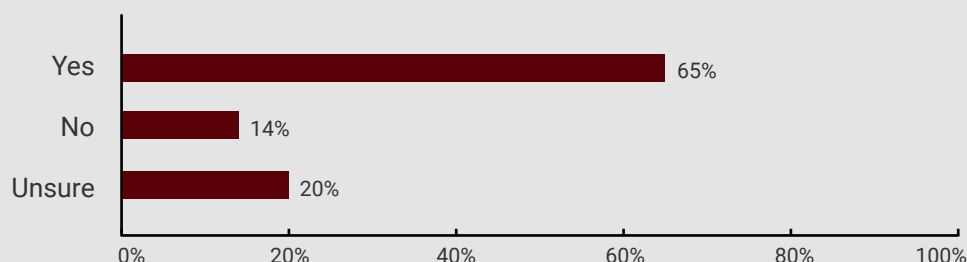


INSTITUTIONAL CAPACITY TO MEET MENTAL HEALTH NEEDS (cont.)

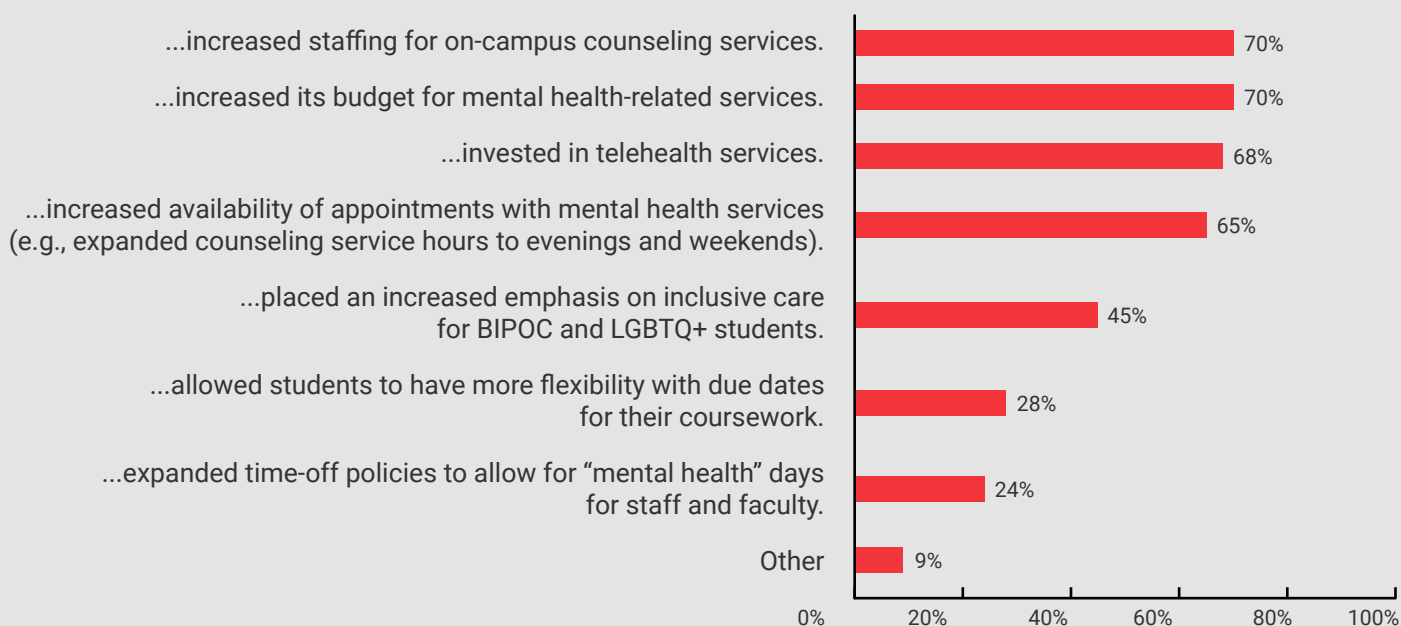
Presidents who agree that their institution has sufficient capacity to meet the needs of any of their stakeholders indicate that this is because of increased staffing for on-campus counseling services (70 percent), increased budget for mental health-related services (70 percent), investment in telehealth services (68 percent), and increased availability of appointments with mental health services (65 percent).

Most presidents indicate that they plan on increasing their institution's capacity to meet the mental health needs of students and staff and faculty members.

Do you plan on increasing your institution's capacity to meet the mental health needs of students, staff, and faculty? (n=423)



Why do you feel that your institution has sufficient capacity to meet the mental health needs of at least some of your stakeholders? Please select all that apply. My institution has... (n=306)



Note: Only respondents who indicated that their institution had sufficient capacity to meet any the needs of any of their stakeholders saw the question on the right.

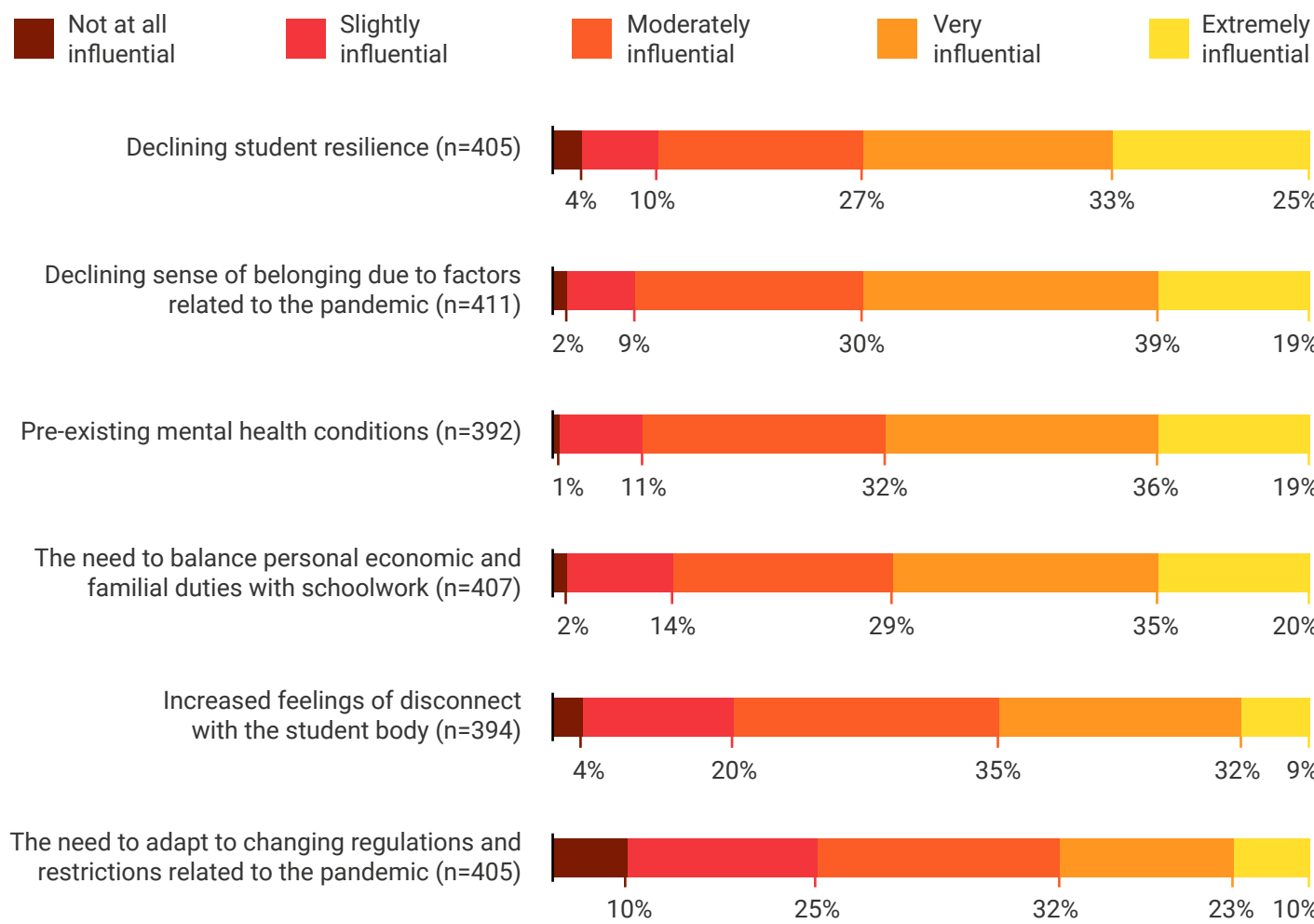
MENTAL HEALTH

CAUSES OF INCREASED DEMAND FOR MENTAL HEALTH SERVICES

Presidents most attribute the increased demand for student mental health services to declining student resilience and the declining sense of belonging due to factors related to the pandemic. More than half also cite as “very” or “extremely influential” students’ pre-existing mental health conditions (56 percent) and their need to balance personal economic and familial duties with schoolwork (55 percent).

Presidents from private nonprofit institutions (70 percent) are more likely than those from public institutions (50 percent) to indicate that declining student resilience is very or extremely influential to the increased demand for mental health services.

To what extent do you believe each of the following has influenced the increased demand for student mental health services?



Harvard Institutes for Higher Education

A scenic view of the Harvard University campus. In the background, a white clock tower with a red dome and a golden weather vane stands prominently. Below the tower, a large brick building with multiple chimneys is partially obscured by lush green trees. In the foreground, a stone bridge with multiple arches spans a body of water. A person is visible kayaking on the water to the left.

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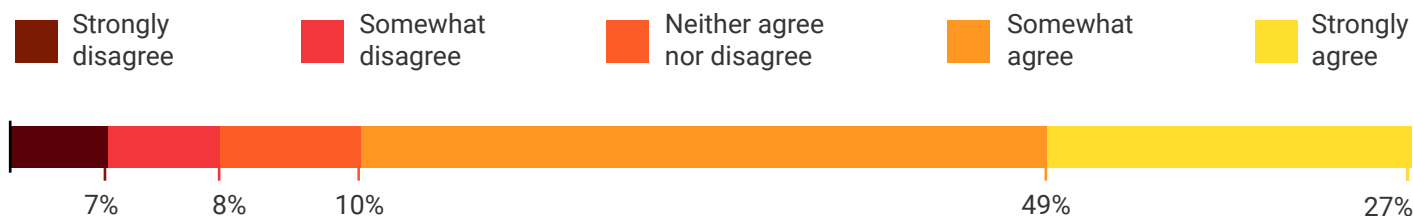
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OPPORTUNITY FOR CHANGE DURING THE PANDEMIC

Approximately three-quarters of presidents agree that the pandemic created an opportunity for their institution to make other institutional changes they have wanted to make anyway. Presidents in the Northeast (68 percent) are less likely than those in the West (87 percent) and Midwest (80 percent) to agree with this statement.

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., adopting remote learning), has created an opportunity for my institution to make other institutional changes we have been needing to make anyway.

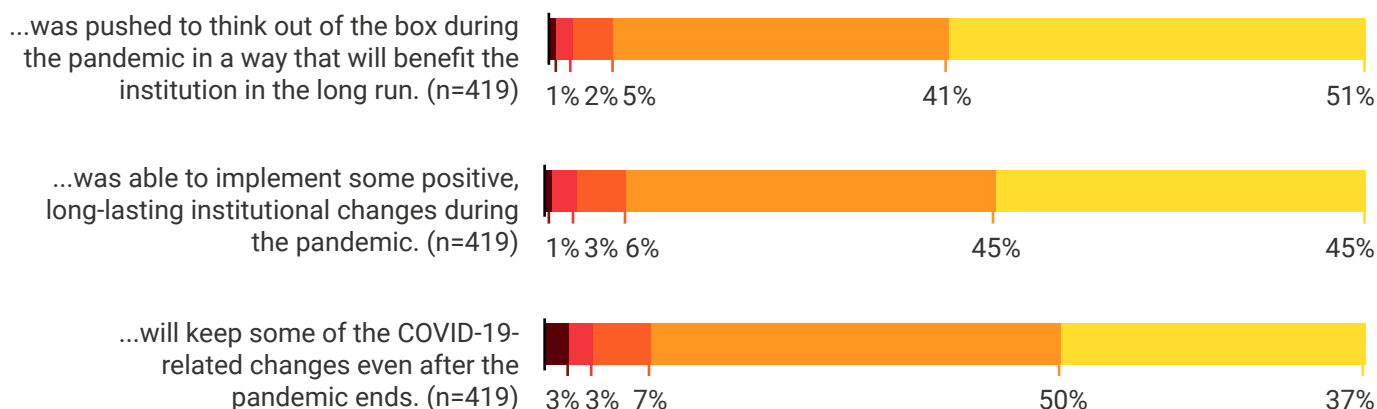


CHANGES MADE DURING THE PANDEMIC

Most presidents indicate that their institutions implemented beneficial changes during the pandemic that they will keep even after it ends. A vast majority of presidents “somewhat agree” or “strongly agree” that their institution was pushed to think out of the box during the pandemic in a way that will benefit the institution in the long run (92 percent). Presidents from public institutions (91 percent) are more likely than those from private nonprofit institutions (79 percent) to agree that their institution will keep some of the COVID-19-related changes even after the pandemic ends.

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

My institution...

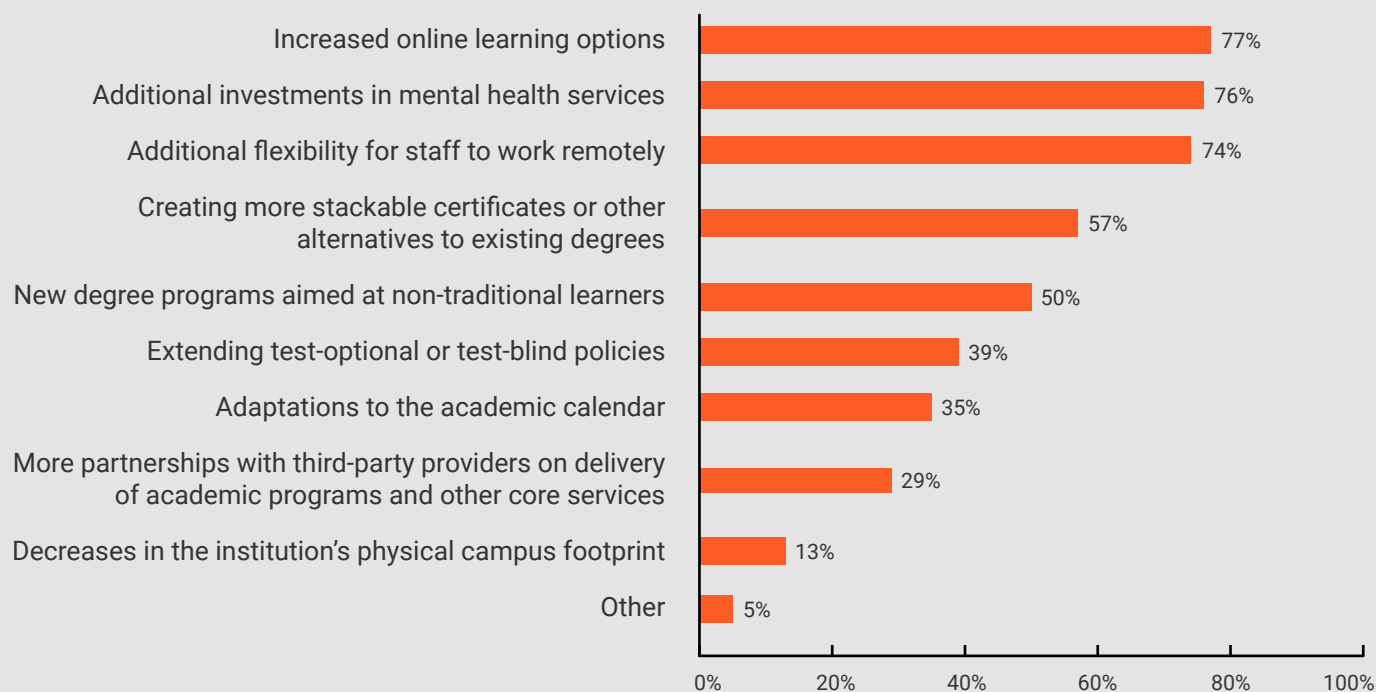


CHANGES INSTITUTIONS WANT TO KEEP

About three-quarters of presidents report that their institutions will keep pandemic-era changes related to online learning, mental health services, and remote work options for staff. Just over three-quarters of presidents report that their institution will keep increased online learning options (77 percent) and additional investments in mental health services (76 percent). More than half report that they plan to continue to create more stackable certificates or other alternatives to existing degrees (57 percent).

Presidents from public institutions (86 percent) are statistically significantly more likely than those from private nonprofit institutions (63 percent) to indicate that their institution will keep increased online learning opportunities.

**Which of the following changes has your institution made because of the pandemic that it plans to keep in the long term?
Please select all that apply. (n=402)**



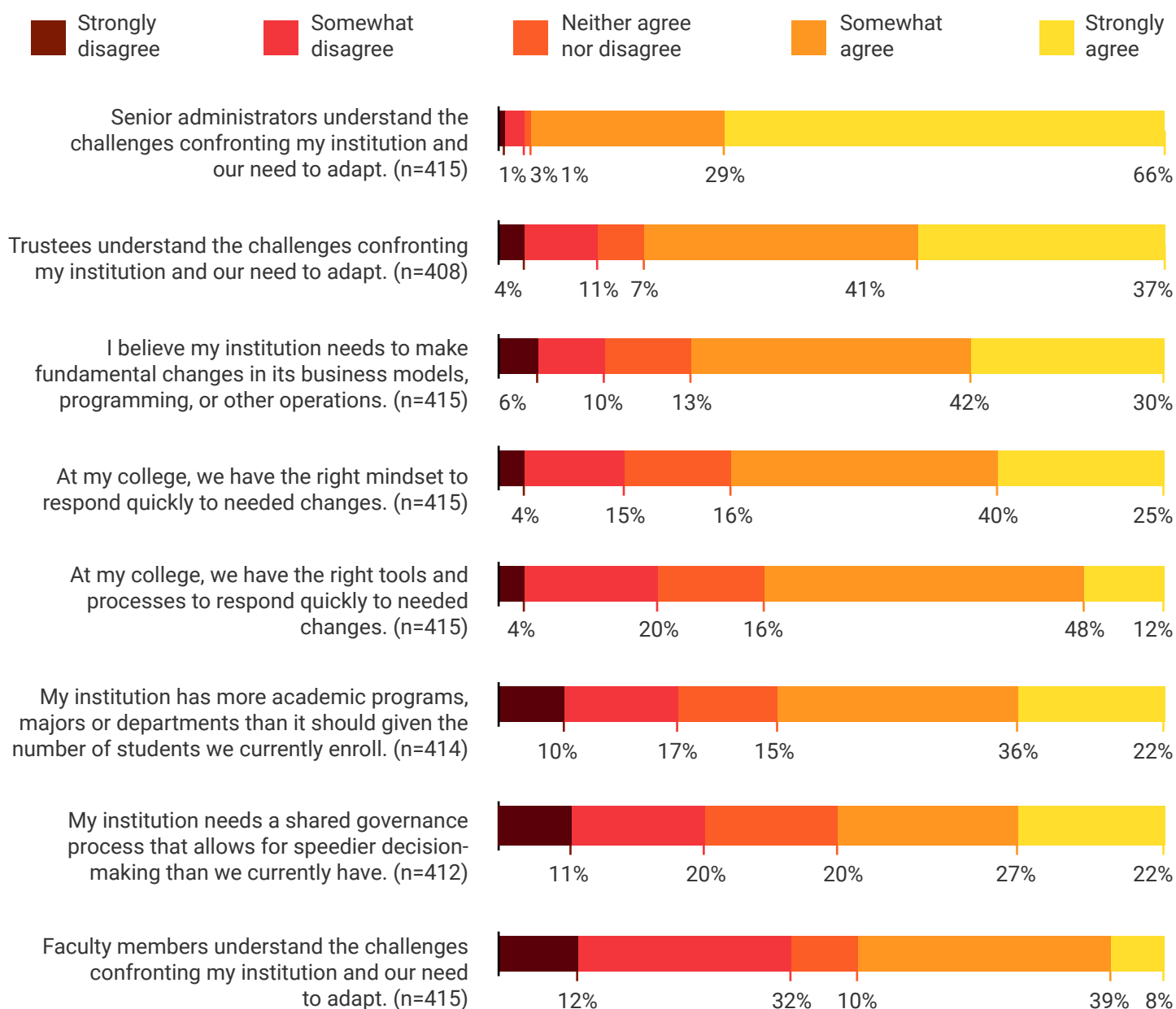
Note: Only respondents who agreed that their institutions would keep some of the COVID-19 related changes after the pandemic ends or was able to implement some positive, long-lasting institutional changes during the pandemic saw this question.

INSTITUTIONAL CHANGE

CHANGE MANAGEMENT

Presidents hold mixed opinions about the climate for change at their institutions. Most agree that senior administrators (95 percent) and trustees (78 percent) understand the challenges confronting their institution and their need to adapt. Fewer (47 percent) agree that faculty members understand these challenges and the need to adapt. In fact, 44 percent of presidents disagree with this statement regarding faculty members. Nearly three-quarters of respondents say they believe their institution needs to make fundamental changes in its business models, programming, or other operations (72 percent). Nearly three-quarters of respondents say they believe their institution needs to make fundamental changes in its business models, programming, or other operations (72 percent).

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

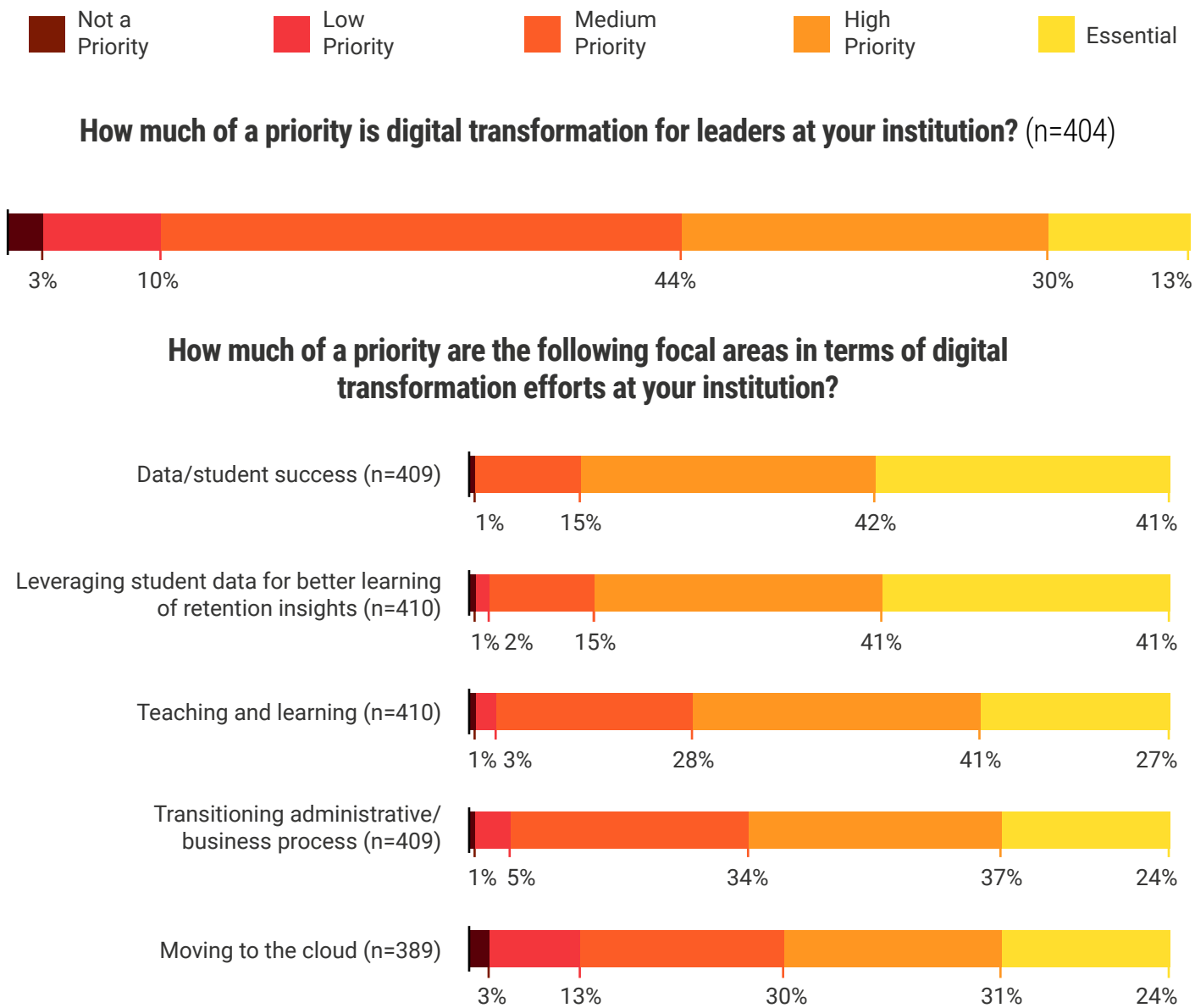


INSTITUTIONAL CHANGE

DIGITAL TRANSFORMATION

Fewer than half of presidents indicate that digital transformation is at least a “high priority” for leaders at their institution. However, most presidents indicate that digital transformation efforts at their institution related to data/student success (83 percent) and leveraging student data for better learning of retention insights (82 percent) are of “high priority” or “essential.”

Presidents from public institutions (89 percent, 75 percent) are more likely than those from private nonprofit institutions (74 percent, 56 percent) to indicate that digital transformation in data/student success and teaching and learning are at least a “high priority.”

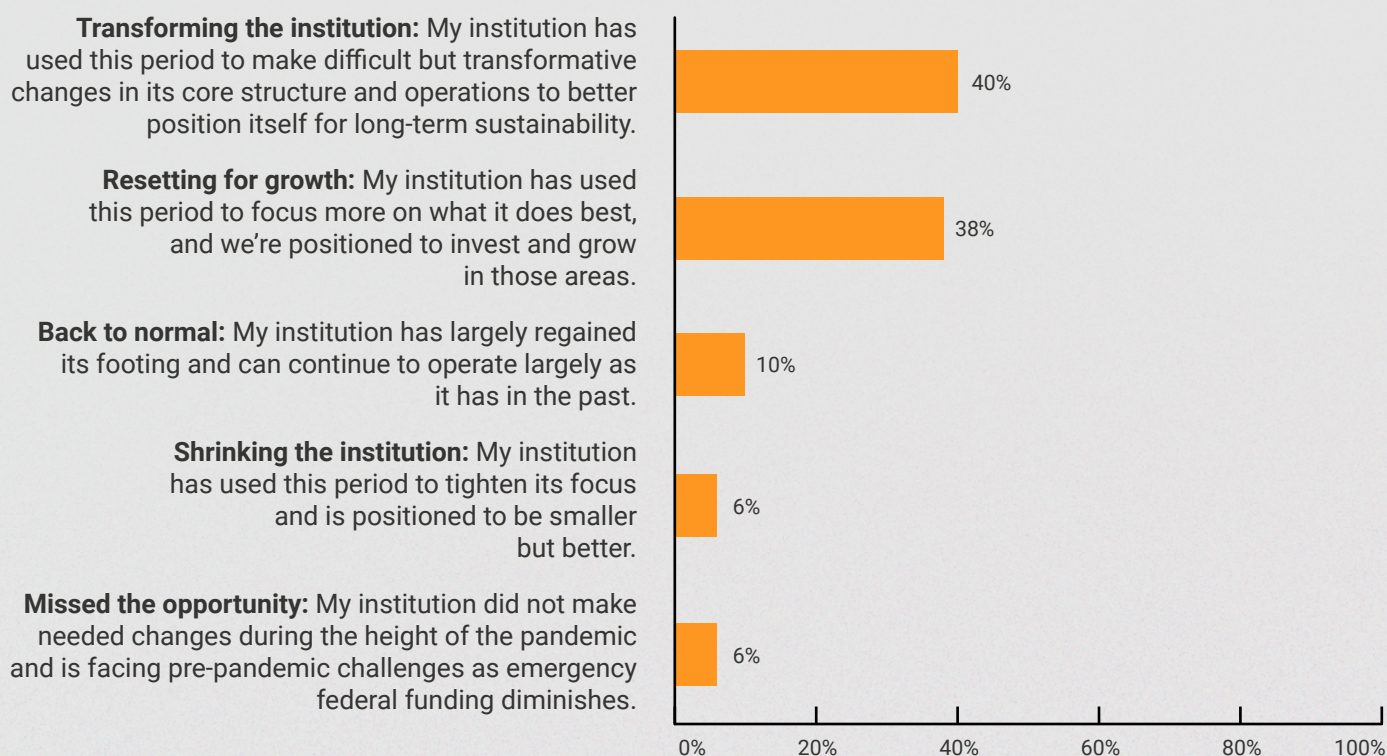


INSTITUTIONAL MINDSET FOR THE FUTURE

Most presidents indicate that, as the pandemic recedes, their institution is either in the process of transforming or is resetting for growth. Two in five presidents report that their institution has used this period to make difficult but transformative changes in its core structure and operations to better position itself for long-term security. Nearly that many indicate that their institution has used this period to focus more on what it does best, and is positioned to invest and grow in those areas. Only 10 percent of presidents report that their institution is going “back to normal,” meaning it has largely regained its footing and can continue to operate largely as it has in the past.

Presidents in the Northeast (48 percent) and South (45 percent) are more likely than those in the Midwest (27 percent) to report that they are transforming the institution as the pandemic recedes.

As the pandemic recedes, which of the following statements best represents your view of your institution's current situation and positioning for the near future? (n=411)



STATE OF RACE RELATIONS

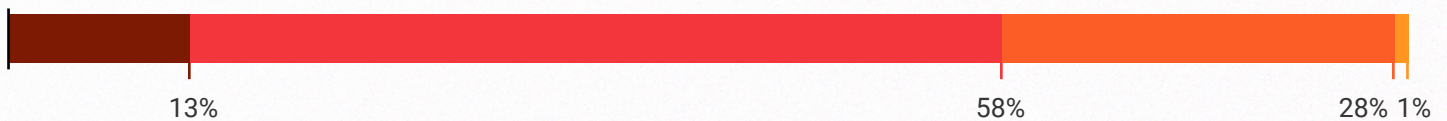
Most presidents believe that the state of race relations on their campus is “good” (66 percent) or “excellent” (12 percent), while just 29 percent say that about the state of race relations on campuses nationally. Presidents from public institutions (81 percent) are more likely than those from private nonprofit institutions (73 percent) to indicate that the state of race relations on their campus is “good” or “excellent”.



Generally speaking, how would you rate the state of race relations on your campus? (n=404)



Generally speaking, how would you rate the state of race relations on college and university campuses? (n=389)



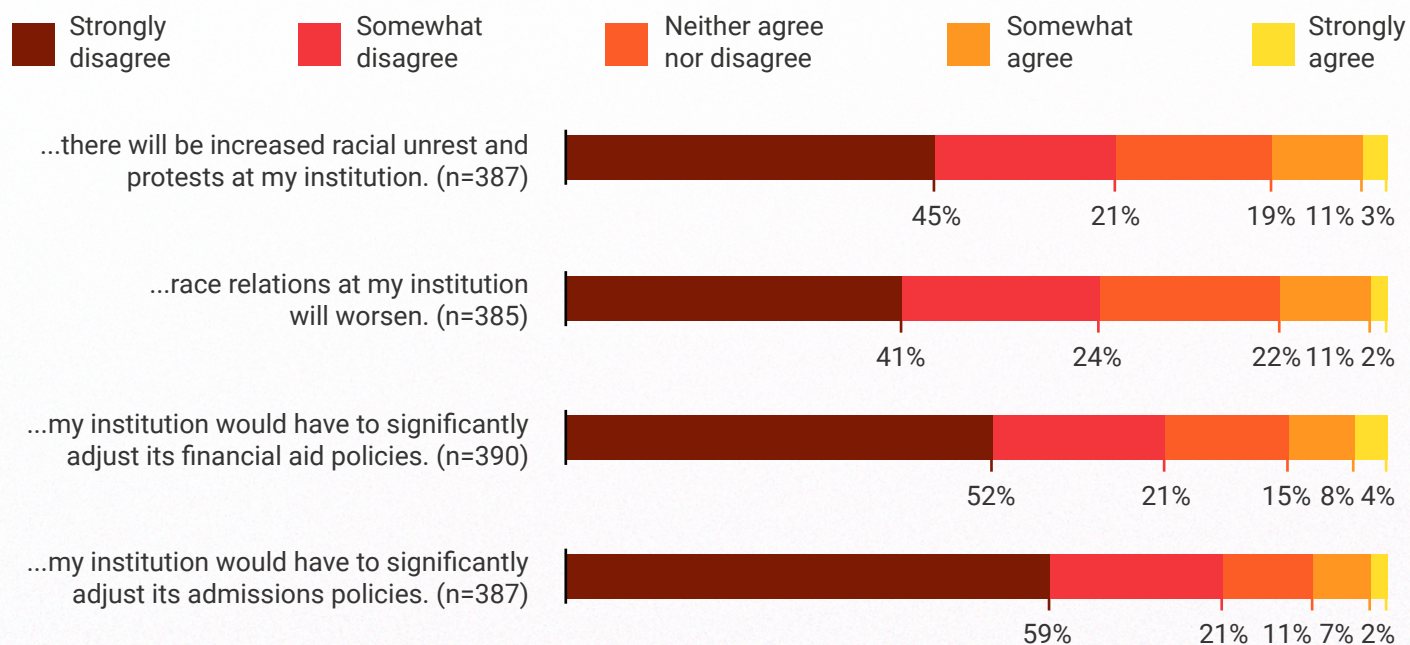
AFFIRMATIVE ACTION AND THE SUPREME COURT

Most presidents disagree that there will be any major effects at their institution if the U.S. Supreme Court curtails the use of affirmative action in admissions. Four in five disagree that their institution would have to significantly adjust its admissions policy, and nearly two-thirds disagree that race relations at their institutions will worsen (65 percent).

Presidents from private nonprofit institutions (18 percent, 16 percent) are more likely than those from public institutions (8 percent, 5 percent) to agree that their institution would have to significantly adjust its financial aid policies and its admissions policies if the Supreme Court curtails the use of affirmative action in admissions.

To what extent do you agree or disagree with the following statements regarding race relations and the Supreme Court?

If the Supreme Court does curtail the use of affirmative action in admissions...

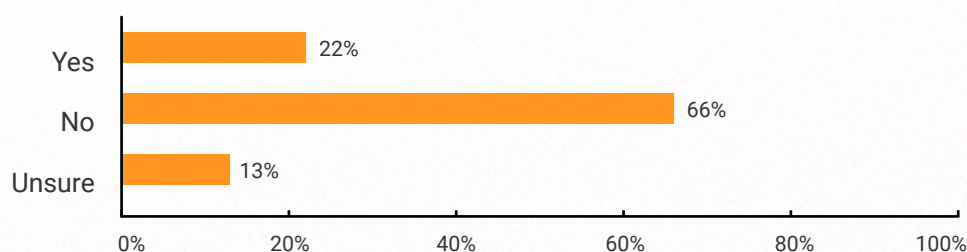


AFFIRMATIVE ACTION AND THE SUPREME COURT (cont.)

Two-thirds of respondents report that their institution has not identified steps it might take in response to a possible Supreme Court decision limiting or barring affirmative action. Nearly a quarter of presidents indicate that their institution has identified steps it might take in this scenario (22 percent).

Presidents from private nonprofit institutions (35 percent) are likelier than their public institution peers (14 percent) to indicate that their institution has identified steps it might take in response to a possible Supreme Court decision limiting or barring affirmative action.

Has your institution identified steps it might take in response to a possible Supreme Court decision limiting or barring affirmative action? (n=407)



SATISFACTION WITH THE BIDEN ADMINISTRATION

Fewer than half of presidents are at least “somewhat satisfied” with what the Biden administration has accomplished in the realm of higher education during its term so far.

Presidents from public institutions (44 percent) are more likely than those from private nonprofit institutions (34 percent) to be “somewhat satisfied” or “completely satisfied” with what the administration has accomplished so far.

How satisfied are you with what the Biden administration has accomplished in the realm of higher education during its term so far? (n=441)



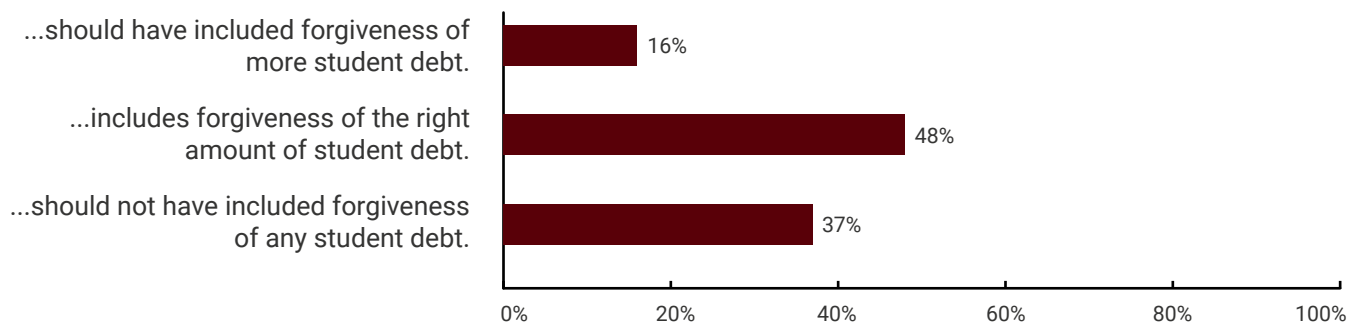
STUDENT DEBT CANCELLATION

A majority of presidents (59 percent) do not believe that student debt cancellation would make college more affordable. Nearly half feel as though the Biden administration's plan includes the forgiveness of the right amount of student debt (48 percent). More than a third, though, believe that the proposed plan should not have included forgiveness of any student debt.

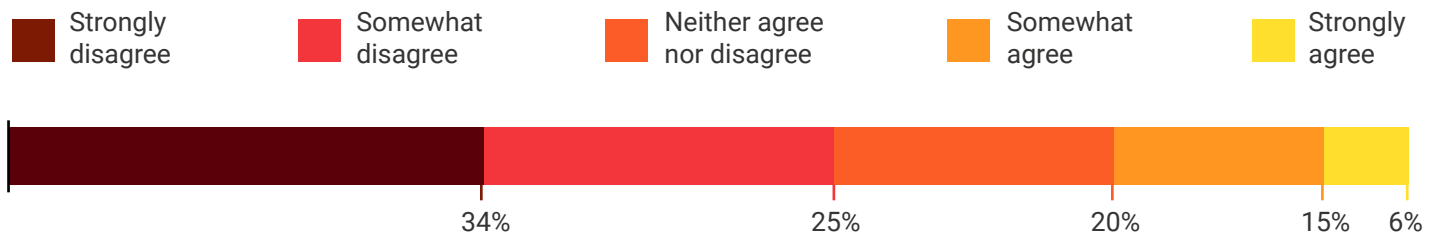
Presidents from private nonprofit institutions (44 percent) and those in the South (48 percent) are likelier than their peers to indicate that the plan should not have included forgiveness of any student debt.

The Biden administration proposed canceling debt for millions of student loan borrowers. At this time, the plan is under review by the U.S. Supreme Court. Which of the following options best describe your views of the Biden administration's proposed actions on debt cancellation?

The Biden administration's plan...



**To what extent do you agree or disagree with the following statement:
Student debt cancellation would make college more affordable. (n=432)**



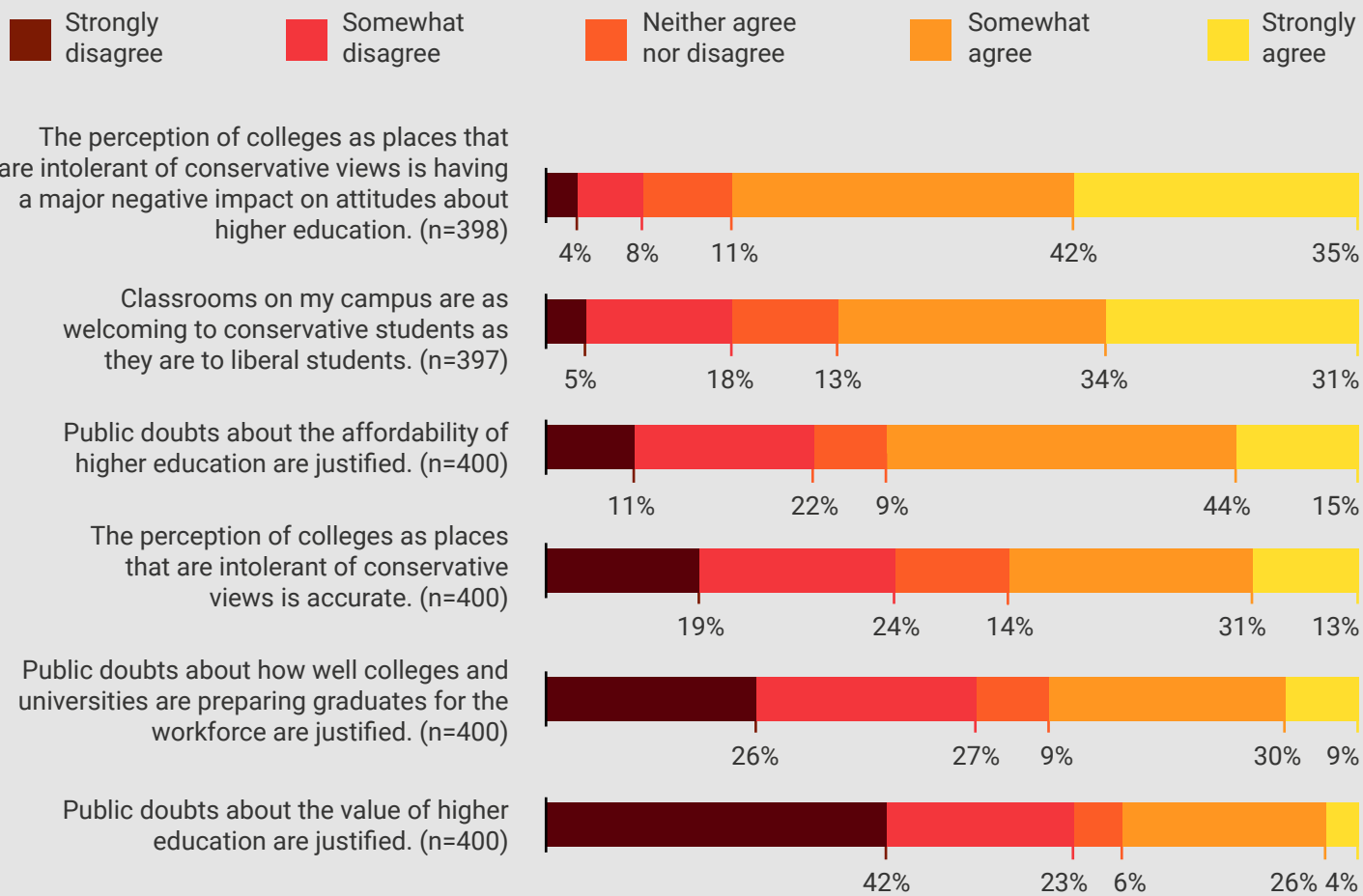
POLITICS, POLICY AND PUBLIC IMAGE

IMAGE OF HIGHER EDUCATION

Most presidents agree that the perception of colleges as places that are intolerant of conservative views is having a negative impact on attitudes about higher education. Presidents are as likely (43 percent) to agree as to disagree that the perception of colleges as places that are intolerant of conservative views is accurate.

Nearly two-thirds of presidents agree that classrooms on their campuses are as welcoming to conservative students as they are to liberal students (64 percent). Presidents in the South (78 percent) are more likely than those in all other regions (54-64 percent) to agree that classrooms on their campuses are as welcoming to conservative students as they are to liberal students.

Please indicate the extent to which you agree or disagree with the following statements about the image of higher education:



Which of the following best describes your primary role at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% President	92	88	98	76	83	94	99	98
% Chancellor	8	12	2	24	17	6	1	2

Please indicate how much you disagree or agree with the following statements:								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
I am confident my institution will be financially stable over the next five years.								
% Strongly disagree	3	3	3	9	5	1	3	3
% Somewhat disagree	9	10	6	0	13	10	5	10
% Neither agree nor disagree	6	5	7	6	4	6	3	15
% Somewhat agree	42	41	43	12	52	40	51	35
% Strongly agree	41	42	40	73	26	44	37	37
I am confident my institution will be financially stable over the next 10 years.								
% Strongly disagree	2	3	2	3	4	2	3	2
% Somewhat disagree	8	9	6	6	11	9	4	10
% Neither agree nor disagree	12	12	10	6	15	13	5	18
% Somewhat agree	48	48	47	30	54	48	55	34
% Strongly agree	31	28	34	55	17	29	32	37

DETAILED TABLES

Please indicate how much you disagree or agree with the following statements.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
My institution is in better financial shape now than I expect it to be a year from now.								
% Strongly disagree	20	17	23	24	16	15	20	31
% Somewhat disagree	38	34	46	39	44	28	48	44
% Neither agree nor disagree	19	19	19	15	20	19	20	18
% Somewhat agree	16	22	8	12	11	31	7	5
% Strongly agree	6	8	4	9	10	7	4	3
My institution is in better financial shape now than it was in 2019.								
% Strongly disagree	9	8	11	6	13	5	16	6
% Somewhat disagree	22	23	20	9	26	24	22	18
% Neither agree nor disagree	14	13	17	24	12	11	16	21
% Somewhat agree	26	27	25	30	23	28	22	26
% Strongly agree	29	29	27	30	26	31	23	29

Why is your institution less financially stable now than it was in 2019? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Decreased net tuition revenue	73	73	72	80	78	71	61	100
% Increased salary and benefits expenses	72	81	57	100	75	85	56	53
% Increased purchasing costs due to inflation	67	71	61	80	66	76	58	60
% Increased operating deficit or decreased operating surplus	58	51	69	80	53	46	58	93
% Decreased revenue from other sources such as charitable giving, government support, or auxiliary enterprises	39	44	31	40	47	41	36	27
% Decreased endowment value	26	6	56	0	13	2	56	53
% Decreased unrestricted net assets	17	6	31	0	13	2	39	20
% Increased online learning expenses	8	11	4	0	6	17	6	0
% Other	13	13	13	20	19	7	17	7

Why is your institution more financially stable now than it was in 2019? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Increased revenue from other sources such as charitable giving, government support, or auxiliary enterprises	68	70	69	70	75	69	70	79
% Decreased operating deficit or increased operating surplus	55	54	54	60	58	52	51	62
% Increased net tuition revenue	45	38	53	50	30	39	56	56
% Increased endowment value	36	26	54	45	33	19	63	56
% Increased unrestricted net assets	35	31	44	40	23	34	53	47
% Decreased salary and benefits expenses	23	20	29	10	25	20	44	15
% Decreased overhead costs due to increased use of online learning	12	15	9	10	10	17	7	9
% Decreased purchasing costs despite inflation	7	8	7	5	8	8	5	12
% Other	11	12	10	15	8	14	9	9

Why is your institution more financially stable now than you expect it will be in 2024? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Labor costs will rise	75	74	81	57	71	79	82	80
% Impact of inflationary pressures	71	67	90	86	71	64	100	80
% Expectations that enrollment will be lower	53	55	48	29	65	57	27	60
% State support will not increase, or it will decline	44	54	10	57	53	53	9	0
% We expect a decline in net tuition revenue	35	35	38	14	41	36	45	40
% Reversal of budget cuts made in response to the pandemic	17	18	14	14	18	19	18	20
% Investment/endowment income will decrease	11	5	33	0	0	8	27	40
% Other	14	17	0	14	18	17	0	0

Why is your institution less financially stable now than you expect it will be in 2024? Please select all that apply.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Expectations that enrollment will be higher	67	68	66	67	78	60	69	61
% We expect an increase in net tuition revenue	57	48	68	62	61	32	69	70
% Investment/endowment income will increase	40	37	45	48	43	28	38	57
% We expect to cut our budget in response to economic conditions	31	32	31	29	35	32	33	33
% Impact of inflationary pressures	21	21	20	29	14	25	20	22
% State support will increase	19	34	3	33	33	35	2	7
% Labor costs will decline	4	2	5	5	2	2	5	7
% Other	14	15	12	10	12	20	14	7

How satisfied are you with what the Biden administration has accomplished in the realm of higher education during its term so far?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Completely dissatisfied	11	8	12	6	10	9	13	10
% Somewhat dissatisfied	18	16	22	21	20	13	24	18
% Neither satisfied or dissatisfied	31	31	31	24	29	34	31	33
% Somewhat satisfied	34	37	31	42	37	36	31	34
% Completely satisfied	5	7	3	6	5	9	1	5

The Biden administration proposed canceling debt for millions of student loan borrowers. At this time, the plan is under review by the U.S. Supreme Court. Which of the following options best describe your views of the Biden administration's proposed actions on debt cancellation?
The Biden administration's plan...

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% ...should have included forgiveness of more student debt.	16	18	12	9	11	24	8	17
% ...includes forgiveness of the right amount of student debt.	48	51	44	55	58	46	46	42
% ...should not have included forgiveness of any student debt.	37	31	44	36	31	30	47	42

**To what extent do you agree or disagree with the following statement:
Student debt cancellation would make college more affordable.**

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Strongly disagree	34	29	41	42	30	26	45	37
% Somewhat disagree	25	25	25	21	23	28	25	27
% Neither agree nor disagree	20	24	14	24	27	21	12	17
% Somewhat agree	15	14	16	9	15	15	15	15
% Strongly agree	6	8	4	3	5	11	3	3

**In the spring of 2023, what percentage of your undergraduate courses are being delivered
in an in-person, hybrid, or fully online format? Please enter percentages below.
If you are unsure, please submit your best estimates.**

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Hybrid:								
Average	12	16	7	10	15	19	8	3
25th Percentile	4	5	0	5	5	10	0	0
50th Percentile	10	15	5	10	10	16	5	0
75th Percentile	20	25	10	15	22	25	10	5
In-Person:								
Average	68	59	83	76	65	51	80	92
25th Percentile	50	40	78	70	50	40	74	90
50th Percentile	70	60	90	80	65	50	80	95
75th Percentile	90	75	95	85	85	61	90	100
Online:								
Average	20	25	11	13	20	31	12	5
25th Percentile	5	10	0	5	5	20	5	0
50th Percentile	15	25	5	10	20	30	10	1
75th Percentile	30	35	13	20	30	40	15	7

In the spring of 2019, what percentage of your undergraduate courses were delivered in an in-person, hybrid, or fully online format? Please enter percentages below. If you are unsure, please submit your best estimates.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Hybrid:								
Average	6	8	4	3	7	9	4	1
25th Percentile	0	0	0	0	0	0	0	0
50th Percentile	1	5	0	0	5	5	0	0
75th Percentile	10	10	5	5	10	10	5	0
In-Person:								
Average	78	73	86	80	76	70	86	93
25th Percentile	70	61	85	79	70	60	80	95
50th Percentile	85	80	95	88	80	70	90	100
75th Percentile	95	90	100	91	94	83	99	100
Online:								
Average	16	19	9	17	17	21	11	6
25th Percentile	2	10	0	5	5	10	0	0
50th Percentile	10	15	2	10	10	20	5	0
75th Percentile	20	25	10	20	23	30	10	5

How would you rate the overall/average quality of each of the following types of courses being delivered this spring at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Fully online								
% Very poor	1	1	0	0	1	1	0	0
% Poor	2	2	2	0	4	1	1	0
% Fair	21	23	18	21	26	21	11	34
% Good	55	58	53	66	51	60	62	37
% Excellent	21	16	28	14	17	16	26	29
Hybrid								
% Very poor	0	0	0	0	0	0	0	0
% Poor	1	1	1	0	0	2	1	0
% Fair	12	11	13	8	14	11	10	23
% Good	56	57	56	69	59	54	60	40
% Excellent	30	30	30	23	27	33	28	37
In-person								
% Very poor	0	0	0	0	0	1	0	0
% Poor	0	0	0	0	0	0	0	0
% Fair	1	2	1	0	1	2	0	0
% Good	32	36	26	29	34	39	29	18
% Excellent	67	62	73	71	65	58	71	82

What percentage of your institution's non-faculty staff is working remotely as of the spring of 2023?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% None	19	20	16	6	15	24	12	21
% 1%-25%	68	66	75	81	68	62	84	69
% 25%-49%	8	9	5	9	13	7	3	7
% 50%-74%	3	3	4	0	3	4	1	3
% 75%-100%	2	2	1	3	1	2	0	0

How has the proportion of non-faculty staff working remotely changed in the 2022-23 academic year as compared to 2021-22?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% A significantly smaller percentage of non-faculty staff are working remotely during the 2022-23 academic year as compared to 2021-22.	35	39	27	44	41	37	24	33
% A slightly smaller percentage of non-faculty staff are working remotely during the 2022-23 academic year as compared to 2021-22.	18	16	19	22	15	16	22	16
% Around the same percentage of non-faculty staff are working remotely this academic year as they did last year.	34	30	39	22	33	31	40	36
% A slightly larger percentage of non-faculty staff are working remotely during the 2022-23 academic year as compared to 2021-22.	11	10	12	6	8	13	13	14
% A significantly larger percentage of non-faculty staff are working remotely during the 2022-23 academic year as compared to 2021-22.	3	4	2	6	4	4	1	2

Which of the following best describes your institution? My institution...								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% ...has altered its employment policies in ways that will give employees significantly more latitude to work remotely after the pandemic ends.	17	15	16	25	16	12	16	12
% ...has altered its employment policies in ways that will give employees modestly more latitude to work remotely after the pandemic ends.	52	54	50	56	49	56	59	40
% ...is considering altering its employment policies to give employees more latitude to work remotely after the pandemic ends.	13	14	14	6	18	13	9	21
% ...is unlikely to alter its employment policies to give employees more latitude to work remotely after the pandemic ends.	18	17	19	13	16	19	15	28

Given the rise of remote learning and remote work, how likely or unlikely is your institution to shrink its physical campus footprint in the next five years?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Not at all likely	50	43	60	56	40	42	57	70
% Not too likely	29	35	21	28	35	37	28	11
% Somewhat likely	14	13	15	13	15	11	12	14
% Very likely	7	9	4	3	10	10	3	5

How worried are you about the turnover rate of faculty and staff at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Not at all worried	13	13	14	13	9	17	18	10
% Slightly worried	30	28	32	28	25	29	32	31
% Somewhat worried	36	34	39	28	37	35	37	43
% Very worried	15	19	10	28	23	15	10	12
% Extremely worried	5	6	4	3	6	5	3	3

What do you think are the major causes of turnover at your institution? Please select up to five options.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Competitive offers elsewhere	86	87	88	93	92	84	88	90
% Natural career progression	55	54	59	57	51	54	68	52
% Burnout	52	49	57	46	50	49	56	56
% Lack of opportunity for growth	45	49	42	61	44	46	39	44
% Significant family or life events	37	37	37	36	40	34	39	35
% Lack of work-life balance	27	26	29	29	28	25	31	25
% Internal promotions or transfers	16	21	8	11	18	23	15	0
% Involuntary departures/employee terminations	14	13	14	0	14	16	15	15
% Negative experiences with workplace culture	12	13	13	11	14	13	9	21
% Lack of feedback or recognition	7	6	8	7	7	6	3	10
% Negative views of leadership	4	3	5	4	1	4	3	8
% Other	13	16	10	18	18	13	8	12

How would you rate your own level of awareness of the general state of mental health as it relates to the following members of your community?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Alumni								
% Very unaware	30	34	25	29	30	38	23	30
% Somewhat unaware	40	38	42	35	47	34	41	41
% Somewhat aware	25	23	29	29	16	24	32	24
% Very aware	5	6	4	6	7	5	4	4
Faculty								
% Very unaware	1	2	1	0	4	1	1	0
% Somewhat unaware	5	6	3	6	5	5	2	5
% Somewhat aware	48	53	42	56	54	52	43	37
% Very aware	46	40	54	38	37	42	54	58
Graduate students								
% Very unaware	6	6	6	0	5	38	2	18
% Somewhat unaware	14	22	7	13	22	50	8	7
% Somewhat aware	51	43	57	31	54	13	63	46
% Very aware	29	29	30	56	19	0	27	29
Parents								
% Very unaware	28	27	28	26	26	29	24	38
% Somewhat unaware	34	34	35	35	33	35	37	27
% Somewhat aware	30	29	30	26	29	29	33	27
% Very aware	8	9	7	13	12	7	6	9
Staff								
% Very unaware	1	2	1	0	4	1	1	0
% Somewhat unaware	3	3	4	6	5	2	1	9
% Somewhat aware	47	49	46	47	47	52	45	46
% Very aware	48	46	50	47	44	46	53	46
Undergraduate students								
% Very unaware	2	2	1	3	4	1	1	0
% Somewhat unaware	2	3	1	3	1	3	0	2
% Somewhat aware	27	34	15	16	24	45	12	21
% Very aware	69	61	83	78	71	52	87	77

To what extent do you agree or disagree with the following statements? My institution has sufficient capacity to meet the mental health needs of...								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
...faculty.								
% Strongly disagree	11	12	11	22	14	8	7	20
% Somewhat disagree	25	26	25	19	27	26	27	24
% Neither agree nor disagree	17	17	19	25	23	11	16	24
% Somewhat agree	35	35	34	25	30	41	37	25
% Strongly agree	11	11	11	9	5	15	13	7
...graduate students.								
% Strongly disagree	8	10	7	13	10	0	6	14
% Somewhat disagree	23	26	21	25	23	60	21	18
% Neither agree nor disagree	14	14	13	16	13	20	14	11
% Somewhat agree	42	37	46	34	41	20	51	36
% Strongly agree	13	12	13	13	13	0	8	21
...staff.								
% Strongly disagree	10	11	10	19	13	8	6	18
% Somewhat disagree	27	28	26	22	33	26	30	25
% Neither agree nor disagree	16	15	18	25	17	11	16	24
% Somewhat agree	35	35	35	22	32	40	35	27
% Strongly agree	12	11	11	13	5	15	14	5
...undergraduate students.								
% Strongly disagree	8	11	4	9	9	14	3	7
% Somewhat disagree	19	21	16	25	22	19	16	14
% Neither agree nor disagree	5	6	3	9	6	5	3	2
% Somewhat agree	44	43	45	38	46	42	44	47
% Strongly agree	24	18	32	19	17	20	33	31

Do you plan on increasing your institution's capacity to meet the mental health needs of students, staff, and faculty?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Yes	65	66	64	88	67	60	68	53
% No	14	11	19	9	12	12	19	22
% Unsure	20	23	18	3	22	28	13	24

Why do you feel that your institution has sufficient capacity to meet the mental health needs of at least some of your stakeholders? Please select all that apply. My institution has...								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% ...increased staffing for on-campus counseling services.	70	68	75	95	73	60	78	76
% ...increased its budget for mental health-related services.	70	70	72	74	79	66	70	76
% ...invested in telehealth services.	68	66	70	74	60	69	74	67
% ...increased availability of appointments with mental health services (e.g., expanded counseling service hours to evenings and weekends).	65	62	72	58	65	60	70	78
% ...placed an increased emphasis on inclusive care for BIPOC and LGBTQ+ students.	45	38	54	37	40	37	47	72
% ...allowed students to have more flexibility with due dates for their coursework.	28	24	31	16	25	25	31	30
% ...expanded time-off policies to allow for "mental health" days for staff and faculty.	24	18	30	21	21	14	31	28
% Other	9	10	7	11	12	10	7	9

To what extent do you believe each of the following has influenced the increased demand for student mental health services?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Declining sense of belonging due to factors related to the pandemic								
% Not at all influential	2	3	2	3	4	2	2	0
% Slightly influential	9	9	10	3	4	14	11	11
% Moderately influential	30	30	31	32	28	31	30	33
% Very influential	39	41	36	42	45	38	45	28
% Extremely influential	19	18	20	19	19	15	11	28
Declining student resilience								
% Not at all influential	4	6	1	6	1	8	1	0
% Slightly influential	10	13	6	16	15	13	7	5
% Moderately influential	27	31	23	22	31	31	22	23
% Very influential	33	29	39	31	27	30	41	34
% Extremely influential	25	21	32	25	26	19	29	38
Increased feelings of disconnect with the student body								
% Not at all influential	4	3	5	7	1	3	6	5
% Slightly influential	20	16	26	21	18	14	23	38
% Moderately influential	35	39	27	34	37	42	28	25
% Very influential	32	32	34	28	34	31	39	20
% Extremely influential	9	10	7	10	10	10	5	13
Pre-existing mental health conditions								
% Not at all influential	1	1	1	3	0	1	1	0
% Slightly influential	11	15	6	13	14	15	5	8
% Moderately influential	32	35	27	29	35	35	27	30
% Very influential	36	32	43	45	32	30	43	42
% Extremely influential	19	17	23	10	19	19	24	21

To what extent do you believe each of the following has influenced the increased demand for student mental health services?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
The need to adapt to changing regulations and restrictions related to the pandemic								
% Not at all influential	10	11	8	10	14	9	8	9
% Slightly influential	25	23	29	32	23	22	29	32
% Moderately influential	32	34	29	32	37	33	32	25
% Very influential	23	21	24	19	15	25	25	20
% Extremely influential	10	11	10	6	11	11	6	14
The need to balance personal economic and familial duties with schoolwork								
% Not at all influential	2	1	3	3	0	1	2	4
% Slightly influential	14	11	21	26	9	8	21	24
% Moderately influential	29	27	31	32	30	25	30	35
% Very influential	35	39	28	29	38	41	32	19
% Extremely influential	20	23	17	10	22	26	15	19

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., adopting remote learning), has created an opportunity for my institution to make other institutional changes we have been needing to make anyway.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Strongly disagree	7	7	7	6	9	6	6	5
% Somewhat disagree	8	8	6	6	12	6	8	4
% Neither agree nor disagree	10	10	10	6	16	7	10	11
% Somewhat agree	49	47	52	56	44	47	50	56
% Strongly agree	27	28	25	25	19	34	27	25

To what extent do you agree or disagree with the following statements? My institution...								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
...was able to implement some positive, long-lasting institutional changes during the pandemic.								
% Strongly disagree	1	1	0	6	1	0	0	0
% Somewhat disagree	3	2	4	0	4	1	3	5
% Neither agree nor disagree	6	7	5	3	16	3	4	7
% Somewhat agree	45	45	45	53	43	44	47	42
% Strongly agree	45	45	46	38	36	51	46	46
...was pushed to think out of the box during the pandemic in a way that will benefit the institution in the long run.								
% Strongly disagree	1	1	1	3	1	0	0	2
% Somewhat disagree	2	2	2	0	1	3	0	4
% Neither agree nor disagree	5	4	6	6	10	1	6	5
% Somewhat agree	41	41	40	44	48	36	44	35
% Strongly agree	51	52	52	47	39	60	50	54
...will keep some of the COVID-19-related changes even after the pandemic ends.								
% Strongly disagree	3	2	5	3	3	1	4	4
% Somewhat disagree	3	2	4	0	3	3	3	7
% Neither agree nor disagree	7	4	12	0	9	3	9	19
% Somewhat agree	50	52	45	63	55	48	53	32
% Strongly agree	37	39	34	34	31	46	30	39

Which of the following changes has your institution made because of the pandemic that it plans to keep in the long term? Please select all that apply.

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Increased online learning options	77	86	63	81	82	89	69	53
% Additional investments in mental health services	76	77	76	87	78	75	72	85
% Additional flexibility for staff to work remotely	74	73	75	81	69	73	79	68
% Creating more stackable certificates or other alternatives to existing degrees	57	64	44	58	56	71	49	38
% New degree programs aimed at non-traditional learners	50	53	44	65	53	53	54	34
% Extending test-optional or test-blind policies	39	30	54	45	44	18	53	60
% Adaptations to the academic calendar	35	33	37	35	24	39	38	34
% More partnerships with third-party providers on delivery of academic programs and other core services	29	25	34	10	33	24	34	34
% Decreases in the institution's physical campus footprint	13	15	10	6	21	14	9	4
% Other	5	5	6	6	3	5	5	8

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

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
At my college, we have the right mindset to respond quickly to needed changes.								
% Strongly disagree	4	3	4	3	5	2	2	7
% Somewhat disagree	15	16	15	22	20	11	17	16
% Neither agree nor disagree	16	18	13	19	22	16	11	19
% Somewhat agree	40	38	45	44	38	36	44	44
% Strongly agree	25	25	22	13	14	34	26	14

To what extent do you agree or disagree with the following statements?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
At my college, we have the right tools and processes to respond quickly to needed changes.								
% Strongly disagree	4	5	3	13	4	2	2	5
% Somewhat disagree	20	20	22	25	28	14	18	32
% Neither agree nor disagree	16	14	19	3	21	14	17	23
% Somewhat agree	48	52	41	56	39	57	43	33
% Strongly agree	12	10	15	3	8	13	20	7
Faculty members understand the challenges confronting my institution and our need to adapt.								
% Strongly disagree	12	12	11	16	16	9	13	7
% Somewhat disagree	32	32	33	28	36	30	29	42
% Neither agree nor disagree	10	12	6	13	14	11	7	7
% Somewhat agree	39	36	42	38	29	39	42	39
% Strongly agree	8	8	7	6	5	10	9	5
I believe my institution needs to make fundamental changes in its business models, programming, or other operations.								
% Strongly disagree	6	5	6	3	3	5	4	7
% Somewhat disagree	10	10	10	22	12	7	10	11
% Neither agree nor disagree	13	14	10	25	13	10	8	14
% Somewhat agree	42	46	35	44	47	48	39	26
% Strongly agree	30	25	38	6	25	30	38	42
My institution has more academic programs, majors or departments than it should given the number of students we currently enroll.								
% Strongly disagree	10	9	9	9	8	9	4	14
% Somewhat disagree	17	16	19	34	13	13	16	19
% Neither agree nor disagree	15	17	12	16	17	17	12	11
% Somewhat agree	36	37	35	28	41	38	39	32
% Strongly agree	22	21	25	13	21	23	28	25

To what extent do you agree or disagree with the following statements?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
My institution needs a shared governance process that allows for speedier decision-making than we currently have.								
% Strongly disagree	11	10	14	6	7	12	12	14
% Somewhat disagree	20	24	14	34	15	27	17	7
% Neither agree nor disagree	20	20	20	6	21	21	17	23
% Somewhat agree	27	28	26	31	33	25	33	21
% Strongly agree	22	19	27	22	24	15	21	35
Senior administrators understand the challenges confronting my institution and our need to adapt.								
% Strongly disagree	1	1	1	3	0	1	0	2
% Somewhat disagree	3	4	2	0	4	5	1	5
% Neither agree nor disagree	1	2	1	3	4	0	1	2
% Somewhat agree	29	33	23	41	32	31	26	19
% Strongly agree	66	61	72	53	61	64	72	72
Trustees understand the challenges confronting my institution and our need to adapt.								
% Strongly disagree	4	5	3	16	7	2	2	5
% Somewhat disagree	11	12	10	9	14	11	10	12
% Neither agree nor disagree	7	8	6	13	5	8	8	4
% Somewhat agree	41	44	35	44	44	44	35	30
% Strongly agree	37	31	46	19	30	35	45	49

How much of a priority is digital transformation for leaders at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Not a Priority	3	3	3	3	3	3	2	4
% Low Priority	10	7	15	6	9	5	10	25
% Medium Priority	44	44	45	39	49	42	48	38
% High Priority	30	35	24	42	31	36	24	25
% Essential	13	11	15	10	8	14	16	9

How much of a priority are the following focal areas in terms of digital transformation efforts at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Data/Student success								
% Not a Priority	1	1	1	3	0	1	1	2
% Low Priority	0	0	1	0	1	0	0	2
% Medium Priority	15	10	24	6	15	8	25	21
% High Priority	42	45	38	39	41	49	35	43
% Essential	41	44	37	52	43	42	39	32
Leveraging student data for better learning of retention insights								
% Not a Priority	1	1	1	3	0	1	0	4
% Low Priority	2	0	4	0	0	1	1	9
% Medium Priority	15	14	17	6	12	17	17	12
% High Priority	41	42	41	39	47	41	44	44
% Essential	41	43	37	52	41	41	38	32
Moving to the cloud								
% Not a Priority	3	2	5	3	1	2	5	4
% Low Priority	13	14	12	10	18	13	11	14
% Medium Priority	30	31	28	32	31	30	34	22
% High Priority	31	28	35	26	26	30	33	42
% Essential	24	25	21	29	24	25	18	18
Teaching and learning								
% Not a Priority	1	1	1	3	1	1	1	2
% Low Priority	3	1	5	3	1	1	7	4
% Medium Priority	28	23	38	32	33	14	38	46
% High Priority	41	45	36	35	37	52	35	37
% Essential	27	30	20	26	27	32	19	12
Transitioning administrative/business process								
% Not a Priority	1	0	1	3	0	0	2	0
% Low Priority	5	3	7	0	3	5	6	9
% Medium Priority	34	35	34	26	40	34	38	34
% High Priority	37	38	36	45	31	40	30	45
% Essential	24	24	22	26	27	22	25	13

As the pandemic recedes, which of the following statements best represents your view of your institution's current situation and positioning for the near future?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Transforming the institution: My institution has used this period to make difficult but transformative changes in its core structure and operations to better position itself for long-term sustainability.	40	44	35	53	32	50	42	25
% Resetting for growth: My institution has used this period to focus more on what it does best, and we're positioned to invest and grow in those areas.	38	34	43	28	41	31	47	35
% Back to normal: My institution has largely regained its footing and can continue to operate largely as it has in the past.	10	9	12	13	11	6	6	21
% Shrinking the institution: My institution has used this period to tighten its focus and is positioned to be smaller but better.	6	7	4	3	12	5	2	7
% Missed the opportunity: My institution did not make needed changes during the height of the pandemic and is facing pre-pandemic challenges as emergency federal funding diminishes.	6	6	6	3	4	8	3	12

Generally speaking, how would you rate the state of race relations on your campus?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Poor	1	0	1	0	1	0	0	4
% Fair	21	18	26	9	21	19	17	36
% Good	66	70	62	78	67	70	70	54
% Excellent	12	12	11	13	11	12	13	7

Generally speaking, how would you rate the state of race relations on college and university campuses?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Poor	13	11	17	0	15	11	16	15
% Fair	58	56	60	63	54	56	57	66
% Good	28	32	22	37	31	30	27	17
% Excellent	1	1	1	0	0	2	0	2

To what extent do you agree or disagree with the following statements regarding race relations and the Supreme Court? If the Supreme Court does curtail the use of affirmative action in admissions...

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
...my institution would have to significantly adjust its admissions policies.								
% Strongly disagree	59	67	46	48	56	79	44	51
% Somewhat disagree	21	17	27	23	29	9	34	15
% Neither agree nor disagree	11	11	10	13	11	11	9	11
% Somewhat agree	7	4	13	13	4	1	11	16
% Strongly agree	2	1	3	3	0	1	1	7
...my institution would have to significantly adjust its financial aid policies.								
% Strongly disagree	52	59	42	50	46	69	43	41
% Somewhat disagree	21	18	26	17	31	11	33	18
% Neither agree nor disagree	15	15	15	13	17	15	9	18
% Somewhat agree	8	6	12	10	7	3	11	13
% Strongly agree	4	2	6	10	0	2	3	11

To what extent do you agree or disagree with the following statements regarding race relations and the Supreme Court? If the Supreme Court does curtail the use of affirmative action in admissions...

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
...race relations at my institution will worsen.								
% Strongly disagree	41	44	36	30	37	53	37	36
% Somewhat disagree	24	21	27	30	23	18	32	18
% Neither agree nor disagree	22	22	22	20	25	21	22	24
% Somewhat agree	11	10	12	17	13	7	8	18
% Strongly agree	2	2	2	3	3	1	1	4
...there will be increased racial unrest and protests at my institution.								
% Strongly disagree	45	48	39	26	40	60	37	42
% Somewhat disagree	21	20	23	39	17	17	25	20
% Neither agree nor disagree	19	19	22	23	21	15	24	16
% Somewhat agree	11	12	11	10	20	7	10	13
% Strongly agree	3	1	5	3	1	1	3	9

Has your institution identified steps it might take in response to a possible Supreme Court decision limiting or barring affirmative action?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Yes	22	14	35	34	18	6	31	48
% No	66	72	56	59	74	74	63	39
% Don't know/NA	13	15	9	6	8	19	7	13

Please indicate the extent to which you agree or disagree with the following statements about the image of higher education:								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Classrooms on my campus are as welcoming to conservative students as they are to liberal students.								
% Strongly disagree	5	3	8	3	1	3	8	9
% Somewhat disagree	18	16	20	25	25	9	17	26
% Neither agree nor disagree	13	15	10	16	14	16	10	11
% Somewhat agree	34	34	33	22	32	38	37	28
% Strongly agree	31	32	28	34	28	34	27	26
Public doubts about how well colleges and universities are preparing graduates for the workforce are justified.								
% Strongly disagree	26	24	29	28	36	17	24	35
% Somewhat disagree	27	27	28	31	30	23	39	15
% Neither agree nor disagree	9	9	7	13	8	9	7	7
% Somewhat agree	30	30	30	28	21	37	22	37
% Strongly agree	9	9	6	0	5	13	8	6
Public doubts about the affordability of higher education are justified.								
% Strongly disagree	11	10	13	25	11	6	16	11
% Somewhat disagree	22	19	27	19	21	17	34	20
% Neither agree nor disagree	9	10	7	9	14	8	5	13
% Somewhat agree	44	46	42	38	45	48	37	44
% Strongly agree	15	15	12	9	10	20	8	11
Public doubts about the value of higher education are justified.								
% Strongly disagree	42	38	49	50	51	29	49	52
% Somewhat disagree	23	23	23	22	21	24	25	20
% Neither agree nor disagree	6	8	3	9	8	8	5	2
% Somewhat agree	26	27	23	19	16	35	21	20
% Strongly agree	4	3	3	0	4	4	0	6

Please indicate the extent to which you agree or disagree with the following statements about the image of higher education:								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
The perception of colleges as places that are intolerant of conservative views is accurate.								
% Strongly disagree	19	22	13	28	25	20	11	17
% Somewhat disagree	24	24	25	34	23	23	26	22
% Neither agree nor disagree	14	14	13	13	11	14	11	13
% Somewhat agree	31	31	31	25	34	31	34	30
% Strongly agree	13	8	18	0	7	12	16	19
The perception of colleges as places that are intolerant of conservative views is having a major negative impact on attitudes about higher education.								
% Strongly disagree	4	4	3	13	0	5	1	4
% Somewhat disagree	8	8	8	0	10	9	8	6
% Neither agree nor disagree	11	12	9	9	7	16	9	6
% Somewhat agree	42	43	41	31	49	43	48	35
% Strongly agree	35	32	40	47	34	28	34	50

Have senior administrators at your college had serious internal discussions in the last year about merging with another college or university?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Yes	18	12	28	22	12	10	31	20
% No	81	87	71	78	86	89	69	78
% Don't know/Does not apply	1	1	1	0	1	1	0	2

Have senior administrators at your college had serious internal discussions in the last year about consolidating some of its programs or operations with another college or university?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Yes	28	24	34	28	27	21	33	33
% No	71	75	65	72	71	78	67	67
% Don't know/Does not apply	1	1	1	0	1	1	0	0

How likely is your institution to merge into or be acquired by another college or university in the next five years?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Not at all likely	67	70	62	94	57	71	63	64
% Not too likely	24	24	22	6	38	22	20	28
% Somewhat likely	7	3	13	0	4	4	15	4
% Very likely	3	2	3	0	1	3	2	4

How likely is your institution to acquire another college or university in the next five years?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Not at all likely	53	63	38	56	56	68	27	57
% Not too likely	29	27	32	22	33	25	36	28
% Somewhat likely	13	8	22	16	10	5	25	13
% Very likely	5	2	9	6	1	2	12	2

Do you think your institution should consider merging with another college or university in the next five years?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Yes	27	19	38	22	22	18	40	33
% No	67	74	56	75	68	77	53	61
% Don't know/ Does not apply	6	6	6	3	10	5	7	6

What is your age?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Under 30	0	0	0	0	0	0	0	0
% 30 - 39	1	2	0	0	0	3	0	0
% 40 - 49	9	8	7	0	0	15	6	9
% 50 - 59	37	39	35	47	30	42	33	44
% 60 - 69	43	39	49	38	52	32	52	41
% 70 and older	10	11	8	16	14	8	8	6
% Prefer not to respond	1	1	1	0	4	0	1	0

With which of the following gender identities do you most identify?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Male	63	65	61	69	59	67	66	54
% Female	35	34	36	31	37	33	33	41
% Non-binary/Gender non-conforming	0	0	1	0	0	0	0	2
% Not listed/Prefer to self-describe (specify, if desired):	0	0	0	0	0	0	0	0
% Prefer not to respond	2	1	2	0	4	0	1	4

How many years have you served as the president of your current institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Less than 6 months	1	1	1	3	1	0	0	2
% 6 months to less than 3 years	26	22	32	28	19	23	26	44
% 3 years to less than five years	18	21	14	22	19	22	15	11
% 5 years to less than 10 years	36	37	33	38	41	34	36	28
% 10 or more years	20	19	21	9	19	22	23	15
% Don't know/Does not apply	0	0	0	0	0	0	0	0
% Prefer not to respond	0	0	0	0	0	0	0	0

How many years have you served as the president at any institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
% Less than 6 months	1	1	0	3	1	0	0	0
% 6 months to less than 3 years	19	16	24	13	12	19	17	39
% 3 years to less than 5 years	15	18	12	28	15	17	13	9
% 5 years to less than 10 years	32	35	29	34	37	32	31	28
% 10 or more years	33	30	35	19	34	31	39	22
% Don't know/Does not apply	1	1	1	3	0	1	0	2
% Prefer not to respond	0	0	0	0	0	0	0	0

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