



2026 WINTER TERM PULSE POINT SURVEY

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The American Council on Education's (ACE) Pulse Point survey series captures senior leaders' perspectives on the most pressing issues facing higher education. In the most recent survey, fielded in December 2025, 386 senior leaders* from institutions and systems nationwide shared insights on their top concerns, including recent federal higher education policy actions by the current presidential administration and their implications for the sector.

These insights underscore that senior leaders' top concerns as 2026 begins are closely tied to the current federal policy environment and actions taken by the administration. Uncertainty around research funding, immigration and international engagement, academic freedom, and student aid policy are shaping institutional decision-making and straining long-term planning efforts. As attention is increasingly diverted from core educational and research missions, institutions and systems continue to navigate fiscal constraints, regulatory pressures, and public and policymaker perceptions of the value of higher education. While the full consequences for students and institutions are still unfolding, the findings reflect a desire to mitigate an immediate disruption in the sector.

* "Senior leaders" includes several position types at institutions and systems, including associate/assistant provosts; associate/assistant vice presidents; chiefs of department; chiefs of staff; deans; executive directors; general counsel; presidents/chancellors/chief executive officers/rectors; provosts/chief academic officers; trustees; vice presidents/vice chancellors; and vice provosts.

Of the 386 senior leaders who responded, 112 were college or system presidents.

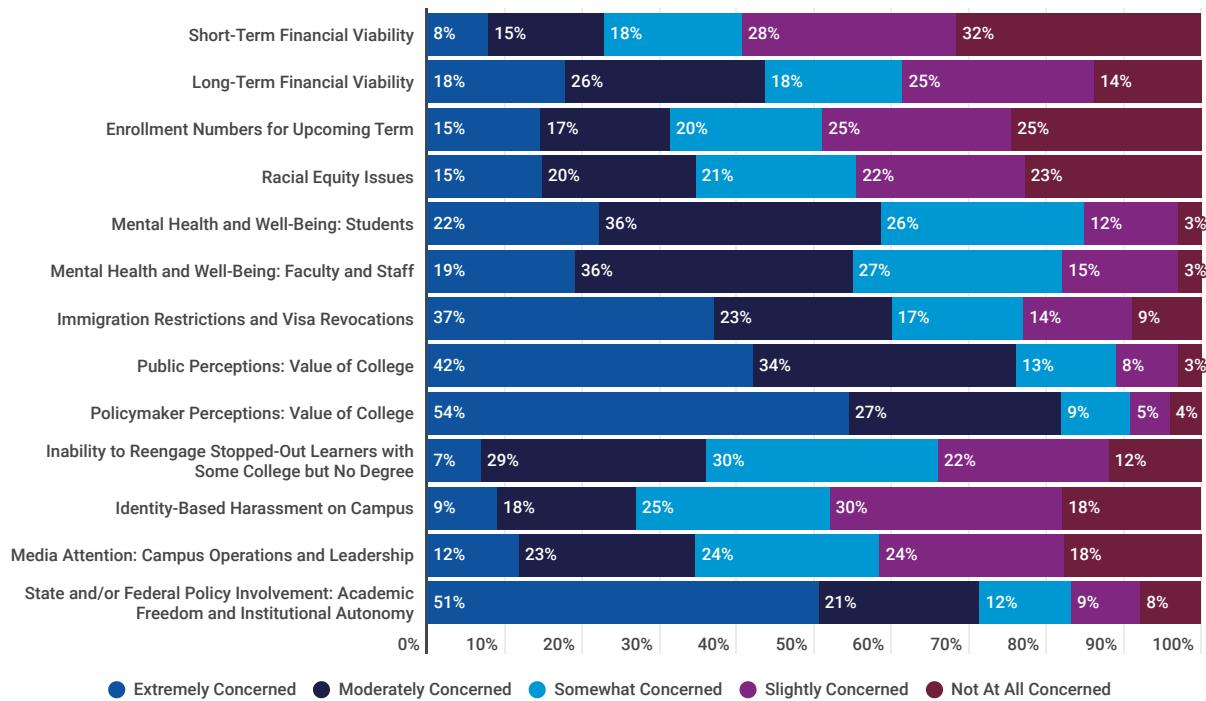
Among respondents, 157 serve at public four-year institutions (41 percent); 167 serve at private not-for-profit four-year institutions (43 percent); 58 serve at public two-year institutions (15 percent); and four serve at other types of institutions, including for-profit institutions and less-than-two-year institutions (1 percent).

The survey was launched on December 2, 2025 and closed on December 16, 2025.

TOP-OF-MIND ISSUES

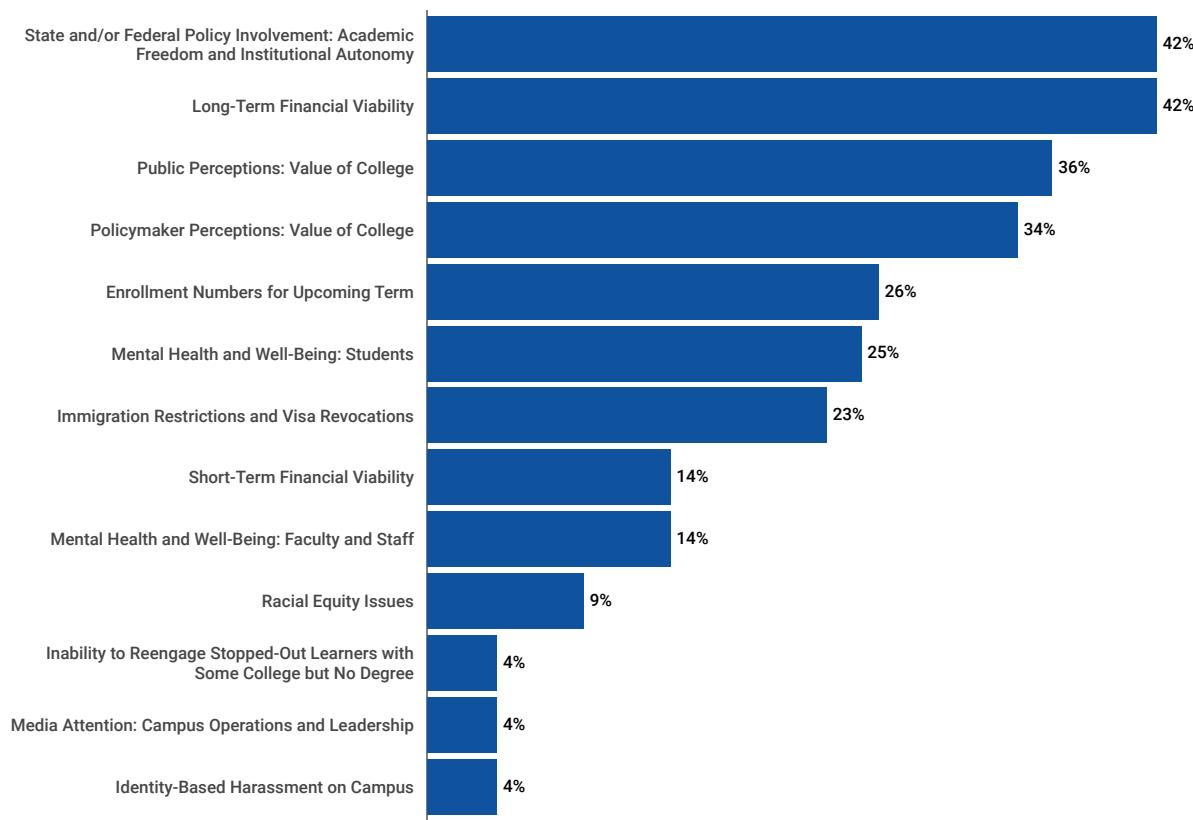
Senior leaders were given a list of 13 issues that higher education is currently facing and were asked to rate the level of concern they have for each issue (figure 1). Then respondents were asked to indicate up to three issues that were most pressing to them at the time the survey was completed (figure 2).

Figure 1. Distribution of Concern for Top-of-Mind Issues



Note: Percentages may not add up to 100 percent due to rounding.

Figure 2. Distribution of Most Pressing Concerns



- **Perceptions of the value of college**, including those of the public and policymakers, were among the issues with both high levels of concern and among the most frequently selected pressing issues. When considering the overall level of concern for perceptions of the value of college, more than eight in 10 senior leaders reported extreme (54 percent) or moderate (27 percent) concern for **policymaker perceptions of value**, while over three-fourths of respondents indicated extreme (42 percent) or moderate (34 percent) concern for **public perceptions of value**.
- Seven in 10 respondents reported either extreme (51 percent) or moderate (21 percent) concern about **state and/or federal policy involvement in matters of academic freedom and institutional autonomy**—an issue that has remained a high concern since [our previous Pulse Point survey in fall 2025](#). **Senior leaders also reported this as their most pressing concern (42 percent)**.
- Among senior leaders, **immigration restrictions and visa revocations represented the fourth highest response in terms of level of concern**, with six in 10 respondents indicating extreme (37 percent) or moderate (23 percent) concern for this issue. About one-fourth of respondents (23 percent) also indicated this as one of their most pressing concerns.
- **Long-term financial viability continues to be a pressing concern among senior leaders**, with 42 percent indicating this as top of mind. This issue was most frequently selected as a pressing concern by senior leaders serving at private not-for-profit four-year institutions (49 percent) and public two-year institutions (43 percent). Presidents also reported it as their top concern (53 percent).
- More than half of respondents (58 percent) reported extreme (22 percent) or moderate (36 percent) concern for the **mental health and well-being of students**. One-fourth of senior leaders also selected this issue as one of their most pressing concerns. While 55 percent of senior leaders reported the mental health of faculty and staff as extremely (19 percent) or moderately (36 percent) concerning, it was reported with less frequency as a pressing concern (14 percent).

Other pressing concerns reported by senior leaders centered on **student affordability and federal loan policy**, followed by **issues related to diversity, equity, and inclusion (DEI)**, **ideological polarization, leadership capacity**, and **regulatory burden**.

IMPACT OF THE CURRENT POLICY ENVIRONMENT

The survey asked senior leaders to reflect on the current policy environment in relation to their institutions or systems. Questions gauged the impact of federal policy on uncertainty and decision-making in planning and operations.

Senior leaders reported that the current federal policy environment introduced uncertainty into institution and system planning, with nearly all senior leaders (98 percent) reporting some level of uncertainty.

- About three-quarters of senior leaders reported uncertainty as extreme (27 percent) or moderate (46 percent), followed by some (19 percent) and slight (7 percent). Among presidents, a similar share—more than seven in 10—reported moderate (46 percent) or extreme (28 percent) uncertainty.

Respondents were also asked to rate the impact of the current federal policy environment on decision-making at their institutions and systems. **More than two-thirds of senior leaders reported that the current federal policy environment was extremely (35 percent) or moderately (36 percent) impactful on decision-making at their institution or system**. Very few leaders (2 percent) reported that it was not at all impactful.

INSTITUTIONAL & FINANCIAL IMPACTS

The survey then explored how fiscal constraints, federal policy changes, and political pressures are affecting institutions and systems, including financial stability, compliance workload, capacity to provide student services, and access to financing for graduate and professional students.

Senior leaders were asked which way(s) their institutions or systems have been impacted by fiscal constraints or federal funding uncertainty. **Operational and financial adjustments were widely reported, with budgetary changes—including cuts to research or student support budgets—reported by more than half of senior leaders (53 percent)**.

- Leaders at public four-year institutions (64 percent) most frequently reported budgetary changes, followed by leaders at private not-for-profit institutions (49 percent) and public two-year institutions (39 percent).

Almost a third of all senior leaders (30 percent) indicated that their institutions or systems had been affected by staff furloughs or hiring freezes, while about a quarter of senior leaders reported program closures or mergers. The least frequently reported impact was the use of issue bonds or alternative financing mechanisms (7 percent). Of note, 28 percent of senior leaders reported no impact by the fiscal constraints or federal funding uncertainties listed.

Other impacts or efforts reported by senior leaders included **declining enrollment** (particularly among graduate and international students), **other budget cuts and reorganizations, reductions in grant funding**, and **cuts to faculty and staff benefits**.

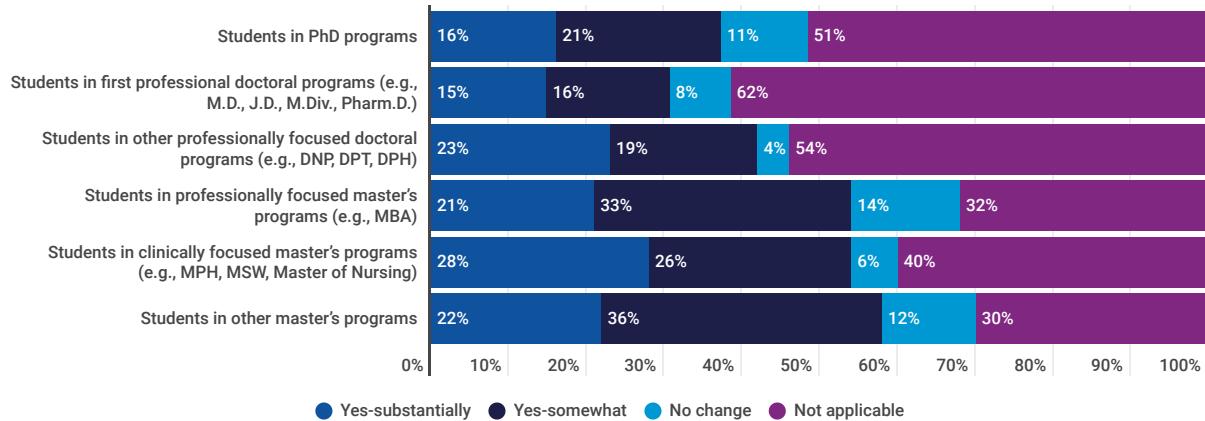
Senior leaders were also asked about added financial constraints and anticipated changes in workload or capacity needed to comply with new or proposed federal policies.

- Six in 10 respondents reported extreme (25 percent) or moderate (35 percent) concern about added financial constraints to comply with new or proposed federal policies.
- More than half (54 percent) of senior leaders indicated that they were extremely (23 percent) or moderately (31 percent) concerned about anticipated changes in workload or capacity needed to comply with new or proposed federal regulations.

When asked about the extent to which their institution or system's ability to provide student services has been affected by political pressures since January 2025, **nearly a third of respondents (31 percent) reported that their ability to provide student services was significantly (8 percent) or moderately (23 percent) reduced**. Additionally, about 40 percent of senior leaders indicated their ability was somewhat (22 percent) or slightly (18 percent) reduced, and 29 percent indicated there was no change in their ability to provide student services.

Respondents were also asked to indicate if and to what extent they anticipated that graduate and professional students at their institutions or systems would face increased barriers to financing their education given the elimination of Grad PLUS loans, changes to loan caps, and the pending definition of “professional student” (figure 3).

Figure 3. Distribution of Impact - Elimination of Grad PLUS Loan Program



Senior leaders expressed the most concern for master's programs. When it comes to professionally focused master's programs such as master of business administration (MBA), 55 percent reported substantial (21 percent) or moderate (33 percent) concern. This was similar for clinically focused master's programs, including master of public health (MPH), master of social work (MSW), and master of nursing (MSN), with 54 percent reporting substantial (28 percent) or moderate (26 percent) concern. Leaders most frequently expressed concern for other master's programs, with six in 10 (58 percent) indicating substantial (22 percent) or moderate (36 percent) concern.

There was less concern for doctoral programs, with about 38 percent reporting substantial (16 percent) or moderate (21 percent) concern for PhD programs. Just under a third of respondents (31 percent) selected substantial (15 percent) or moderate (16 percent) concern for first professional doctoral programs such as medical degrees (M.D.), law degrees (J.D.), master of divinity (M.Div), and doctor of pharmacy (PharmD), representing the least selected option. Among doctoral programs, concern was highest for other professionally focused doctoral programs such as doctor of nursing practice (DNP), doctor of physical therapy (DPT), and doctor of public health (DPH) programs, with 42 percent reporting substantial (23 percent) or moderate (19 percent) concern.

LEGISLATIVE OUTLOOK AND POLICY PRIORITIES

Senior leaders were asked to reflect on the past year and share any “legislative wins” at the federal, state, or local level for their institutions, systems, and/or higher education.

- **The most frequently cited win was Workforce Pell, short-term workforce training, and workforce development more broadly.** Senior leaders widely viewed Workforce Pell as an important step toward aligning higher education with workforce needs and also noted challenges related to eligibility, accreditation, and implementation. While these efforts are meaningful, they are incomplete policy wins; more work is needed on program design and implementation to maximize the number of students who can benefit.
- **Preserving existing funding and student aid** was also frequently mentioned as a win. Senior leaders most often defined success as avoiding cuts to Pell Grants, federal student aid programs, research funding, and state appropriations, with flat funding frequently characterized as a win amid rising costs and enrollment pressures.
- At the state level, respondents most often pointed to **funding stability and free community college programs as key wins.** Flat or modestly increased state funding was frequently described as a win in an otherwise constrained environment, while free community college and expanded state grant programs were credited with improving access and reengaging adult and returning students.

- **Many senior leaders also reported no clear legislative wins.** Court interventions, regulatory delays, and institutions not being targeted by new policies were commonly cited as the best outcomes, reflecting a highly uncertain policy environment for higher education.

Finally, respondents were asked about their institution or system's federal policy priorities for 2026. The most frequently selected priority was **federal financial aid and student debt relief (66 percent)**. Additional top policy priorities for the new year included:

- Research funding and grant stability (48 percent)
- Workforce alignment and credential innovation (41 percent)
- Academic freedom and governance protection (40 percent)
- Immigration and international education (35 percent)

While federal financial aid and student debt relief was the most frequently selected priority by both presidents and other senior leaders, presidents (75 percent) selected it among their top policy priorities more often than other senior leaders (61 percent). By sector, senior leaders at public four-year institutions selected research funding and grant stability as their top priority (70 percent); senior leaders at private not-for-profit four-year institutions selected federal financial aid and student debt relief (77 percent); and senior leaders at public two-year institutions selected workforce alignment and credential innovation (78 percent).