ACE American Council on Education®

2026 FALL 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 postsecondary education. In the most recent survey—fielded in July 2026—328 senior leaders* from institutions and systems nationwide shared insights on their top concerns, including recent federal policy actions and their implications for the sector.

As the new academic year begins, postsecondary leaders are confronting a volatile environment shaped by public skepticism about the value of college, heightened federal and state policy intervention, and mounting institutional pressures around finances and enrollment. At the same time, recent federal policy actions are creating new operational and strategic demands for campuses. Leaders are not only responding to immediate implementation challenges but also reassessing academic programs, partnerships, student support resources, and workforce-aligned offerings. Insights from this survey point to a sector entering the academic year under heightened uncertainty, with institutions working to preserve access, academic quality, and public trust while adapting to a policy environment that is reshaping the conditions under which colleges and universities operate.

** "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 328 senior leaders who responded, 109 were college or system presidents.

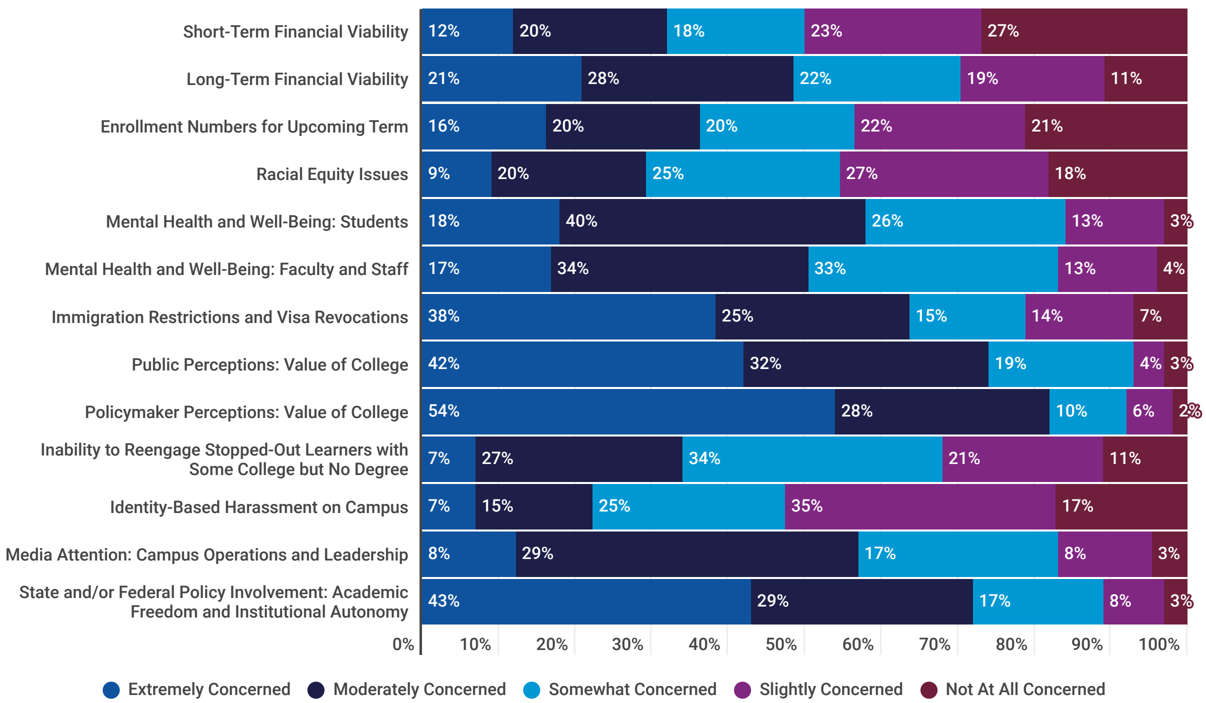
Among respondents, 152 serve at public four-year institutions (46 percent); 130 serve at private not-for-profit four-year institutions (40 percent); 42 serve at public two-year institutions (13 percent); and four serve at other types of institutions, including for-profit institutions and less-than-two-year institutions (1 percent).

The survey was launched on July 13, 2026 and closed on July 31, 2026.

TOP-OF-MIND ISSUES

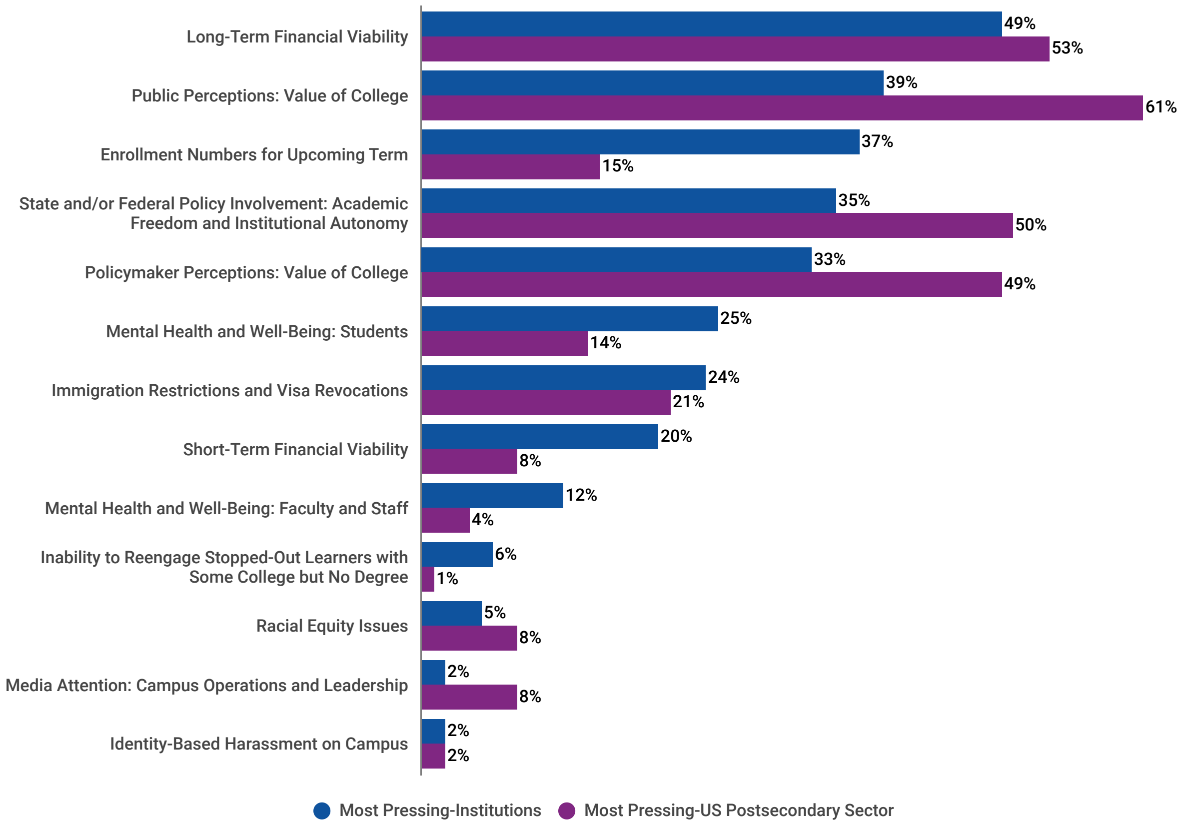
Senior leaders were given a list of 13 issues that higher education is currently facing and were asked to rate the level of concern they have for each issue (Figure 1). Then respondents were asked to indicate up to three issues that were most pressing to them for their institution and for U.S. postsecondary education more broadly (Figure 2) as well as the concerns for which they feel their campus is least prepared to navigate.

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



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

Figure 2. Distribution of Most Pressing Concerns



- **Policymaker and public perceptions of the value of college continue to register the highest levels of concern among senior leaders. More than eight in 10 respondents reported extreme (54 percent) or moderate (28 percent) concern about policymaker perceptions of value**—the highest of any issue in the survey. Nearly three-fourths of senior leaders similarly reported extreme (42 percent) or moderate (32 percent) concern for public perceptions of value. At the institutional level, public perceptions of value ranked as the second most pressing concern (39 percent), while policymaker perceptions ranked fifth (33 percent). Compared to the previous Pulse Point survey, selection of public perceptions of value as a pressing concern for institutions was slightly higher on the current survey (39 percent) than in December 2025 (36 percent). Selection of policymaker perceptions of value as a pressing concern for institutions has remained relatively constant between December 2025 (34 percent) and July 2026 (33 percent).
- **State and/or federal policy involvement in matters of academic freedom and institutional autonomy is among the most pressing and least navigable challenges facing the sector.** Nearly three-fourths of senior leaders reported extreme (43 percent) or moderate (29 percent) concern for this issue. It ranked as the third most frequently selected pressing concern for U.S. postsecondary education (50 percent) and fourth for their own institutions (35 percent). Notably, this issue topped the list of concerns for which senior leaders feel their campuses are least prepared to navigate, with 45 percent indicating unpreparedness. This suggests that while the concern is widely felt, institutional capacity to respond remains limited. Compared to the previous Pulse Point survey, selection of public perceptions of value as a pressing concern for institutions was more frequent in December 2025 (42 percent) than on the current survey.
- **Long-term financial viability is the top pressing concern at the institutional level**, selected by nearly half of all senior leaders (49 percent). It ranked second as a sector-wide pressing concern (53 percent) and fifth in terms of unpreparedness to navigate (29 percent). In terms of overall level of concern, approximately half of respondents reported extreme (21 percent) or moderate (28 percent) concern for long-term financial viability of their institutions or systems.

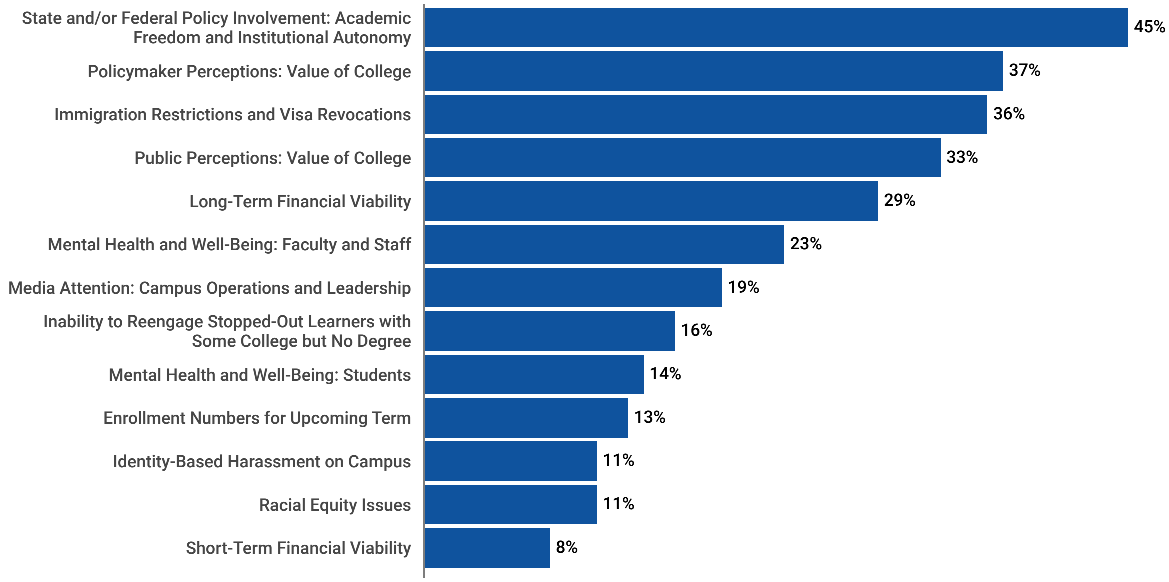
- Nearly two-thirds of senior leaders reported extreme (38 percent) or moderate (25 percent) concern for **immigration restrictions and visa revocations**. About one-fourth of respondents identified it as a pressing concern at the institutional level and for the sector (21 percent). It also ranked third among issues for which campuses feel least prepared to navigate (36 percent), reflecting the acute uncertainty surrounding federal immigration policy and its impacts on international students and scholars. Selection of immigration restrictions and visa revocations as a pressing concern for institutions has remained relatively constant between December 2025 (23 percent) and July 2026 (24 percent).
- More than one-third of senior leaders (37 percent) identified **enrollment for the upcoming term** as one of their most pressing institutional concerns—ranking third overall—while more than one in three leaders reported extreme (16 percent) or moderate (20 percent) concern for this issue. By contrast, enrollment ranked sixth as a sector-wide concern (15 percent), suggesting that leaders view it primarily as an institutional-level challenge rather than a systemic one.
- **The mental health and well-being of students weigh on leaders' minds**, with more than half of respondents reporting extreme (18 percent) or moderate (40 percent) concern. One-fourth of senior leaders (25 percent) selected student mental health as one of their most pressing institutional concerns. Mental health of faculty and staff registered similarly high levels of concern (51 percent extreme or moderate), though it was selected less frequently as a pressing institutional concern (12 percent) and was more often cited as an area of unpreparedness to navigate (23 percent) than student mental health (14 percent).

A notable pattern is that several issues viewed as highly pressing for the sector appear to be less urgent when respondents assess their own campuses (Figure 3).

- State and/or federal policy involvement was identified as pressing by half of respondents for the sector, compared with 35 percent for their own institutions.
- Similar gaps appear in concerns about policymaker perceptions of college's value—with nearly half (49 percent) citing this as pressing for the sector versus one-third of respondents for their institution—and public perceptions of value, where the gap is even wider (61 percent for the sector compared with 39 percent for individual institutions).
- Long-term financial viability of institutions is reported as slightly more pressing for the sector overall (53 percent) than for respondents' own institutions (49 percent).

These differences suggest that respondents may perceive broad structural and reputational challenges as more urgent for the U.S. postsecondary sector as a whole than for their own campuses. In other words, institutional leaders may recognize sector-wide vulnerabilities while feeling more confident about their own institution's position.

Figure 3. Issues Unprepared to Navigate



Senior leaders who provided written responses across top-of-mind questions revealed several recurring themes that both reinforce and extend the survey findings.

- Most prominently, **artificial intelligence (AI)** emerged as a cross-cutting concern—from its implications for learning to institutional preparedness—suggesting this issue has reached a threshold of urgency.
- Additional concerns included **unsustainable athletics funding, federal research funding** with restrictive conditions, and increasing **regulation that limits innovation**.
- Senior leaders also highlighted **workforce availability challenges, pre-college education** and **college readiness gaps**, and families' lack of understanding regarding **federal loan policy changes**.
- Several respondents also noted **difficulties establishing strategic priorities** amid bleak near- and long-term projections and **navigating federal accreditation changes**.

FEDERAL POLICY CHANGES

The federal policy landscape for higher education has undergone significant transformation over the past year. The passage and signing of the One Big Beautiful Bill (OBBB) introduced sweeping changes to accountability, student loans, and accreditation. Concurrently, the Trump administration has implemented new restrictions on international student visas and reductions in federal grants. To understand the sector's response, college and university presidents were asked to assess the impact of these changes on their institutions and describe how their campuses are adjusting to this evolving climate.

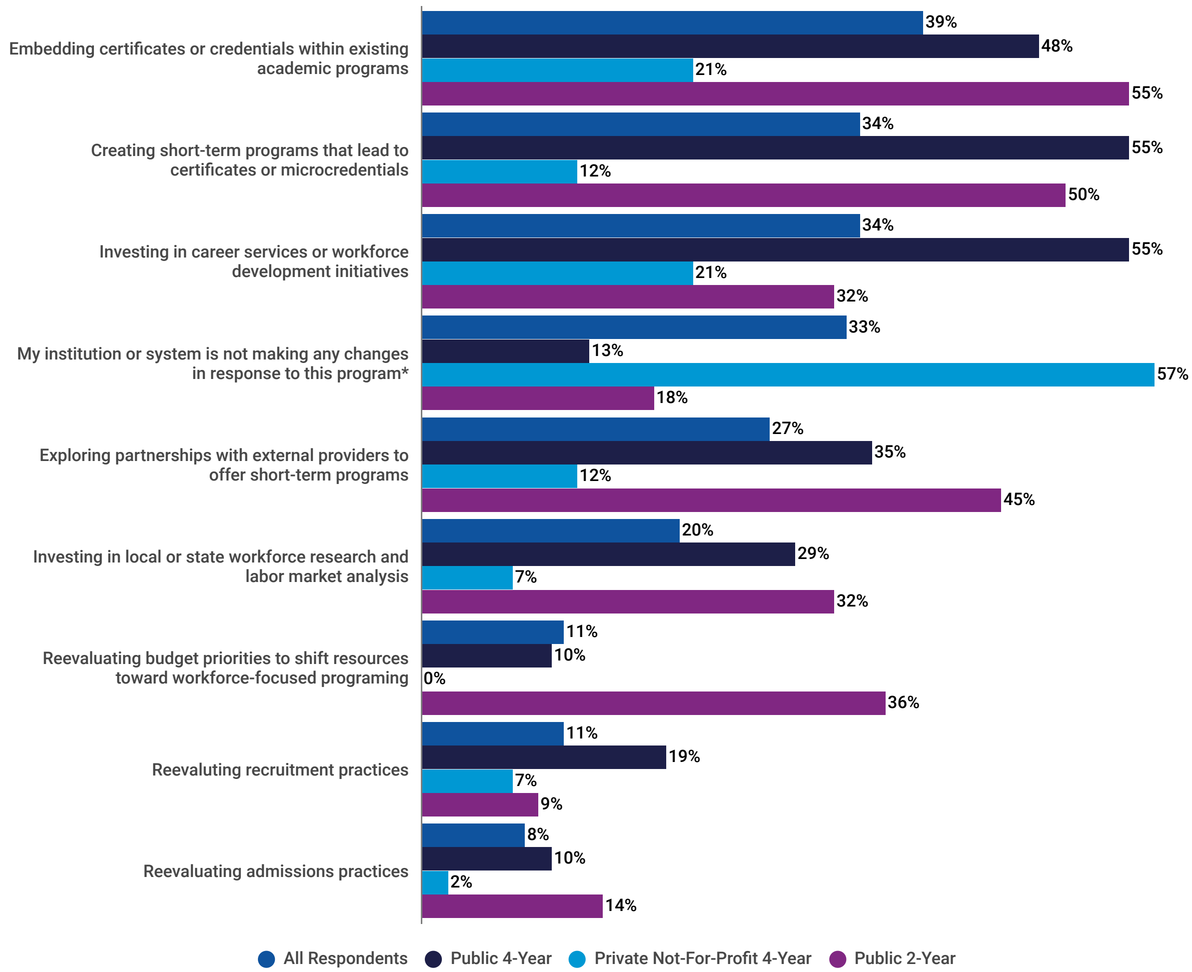
Financial Aid

Presidents were asked to what extent the current federal policy environment has affected their institution or system's ability to provide accurate and timely financial aid offers. Approximately 85 percent of presidents reported a reduced ability to provide accurate and timely financial aid offers, with over a third (36 percent) indicating their ability was moderately or significantly reduced.

Implementation of One Big Beautiful Bill Provisions

Following the passage of OBBB in 2025, the Department of Education initiated negotiated rule-making sessions to establish the framework for implementation. Presidents were asked about their institution or system's readiness to comply with the new federal reporting requirement associated with the new Earnings Accountability Framework. Nearly half of presidents (46 percent) reported being extremely or moderately prepared to comply with the new federal reporting requirements, while 7 percent indicated they were not prepared at all.

Figure 4. Workforce Pell



**Exclusive option—could not be chosen with rest of select-all-that-apply options*

Presidents were also asked how their institution or system was responding to the introduction of the Workforce Pell Program—a major policy change from OBBB that began implementation on July 1, 2026 (Figure 4). Embedding certificates or credentials within existing academic programs was the most selected response by presidents (39 percent), while more than one in three presidents said their institutions were responding by creating short-term programs that lead to certificates and investing in career services or workforce development initiatives (both 34 percent). Conversely, one-third of presidents reported making no changes in response to the program—a sentiment expressed more frequently at private not-for-profit institutions than at public two- and four-year institutions.

Federal Research Funding

Recent changes to federal research funding have created distinct institutional pressures. Among presidents at four-year public and not-for-profit institutions, 62 percent indicated that funding reductions have decreased institutional revenues, and more than one in three presidents (31 percent) reported a slowdown in research output. Other impacts include enrollment declines in graduate programs (24 percent), a decrease in academic program slots (16 percent), and departure of faculty related to cuts and research funding activities (12 percent). Notably, no presidents at four-year institutions reported the total elimination of academic programs due to these cuts, and 19 percent experienced no impact because the specific cuts did not affect their federal institutional funding portfolio.

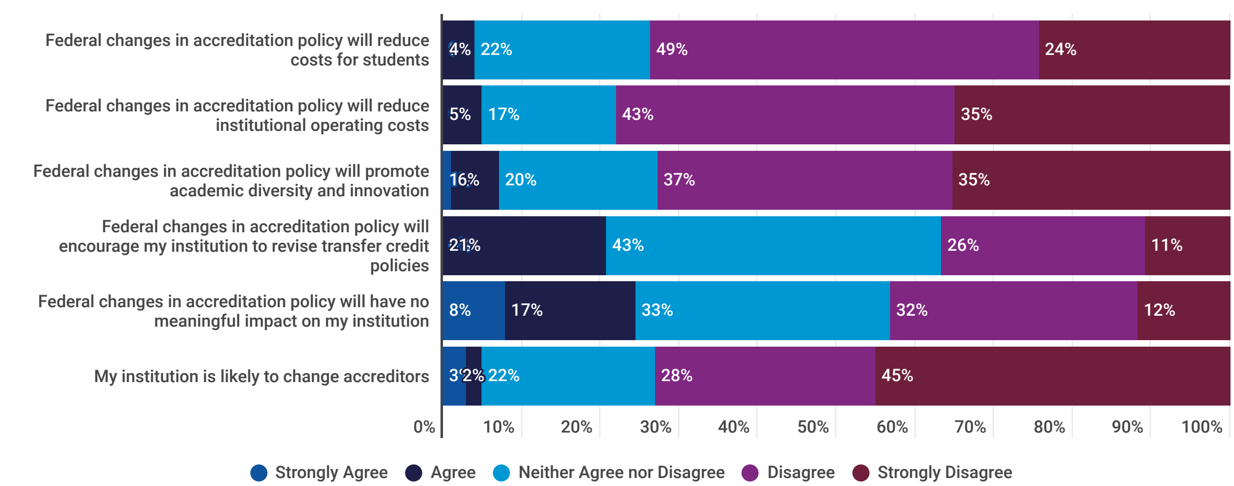
International Students

Presidents were asked in what ways their institutions or systems have been affected by declines in international student enrollment. Among presidents that enroll international students, the decline in enrollment has had a tangible fiscal impact, with nearly three-fourths (73 percent) of presidents reporting they had experienced a decrease in revenues due to a decline in international student enrollment. The functional consequences of this decline vary, with 23 percent of presidents reporting budget reductions in research or student support and 9 percent experiencing program closures or mergers. A little more than one in ten presidents (11 percent) also reported reduced institutional financial aid availability.

Accreditation

In May of 2026, the Department of Education reached consensus with a negotiating committee on proposed regulations to reform accreditation. The regulations included changes to transfer of credit policies, conflict of interest controls, formation of new accreditors, academic freedom, and student outcomes, among other items. The final rule has yet to be issued as of the publication of this report, but the Notice of Proposed Rulemaking (NPRM) titled "Accreditation, Innovation, and Modernization: The Secretary's Recognition of Accrediting Agencies: Institutional Eligibility Under the Higher Education Act of 1965, as Amended, Student Assistance General Provisions" was published in the *Federal Register* on August 20, 2026, after the closing of the survey. However, presidents were asked how they anticipated these changes would affect their institutions or systems.

Figure 5. Federal Changes in Accreditation Policy



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Survey responses from college presidents suggested that the impact of these changes would be minimal (Figure 5). Over three-quarters of surveyed presidents (78 percent) disagreed to any extent that changes would reduce operating costs for the institution. Only 5 percent agreed to any extent their institution was likely to change accreditors. The draft framework agreed to by the committee also seeks to increase transparency from institutions of how transfer credits are evaluated. However, only about one in five (21 percent) presidents expect these changes to encourage revisions to the transfer policies at their institutions.