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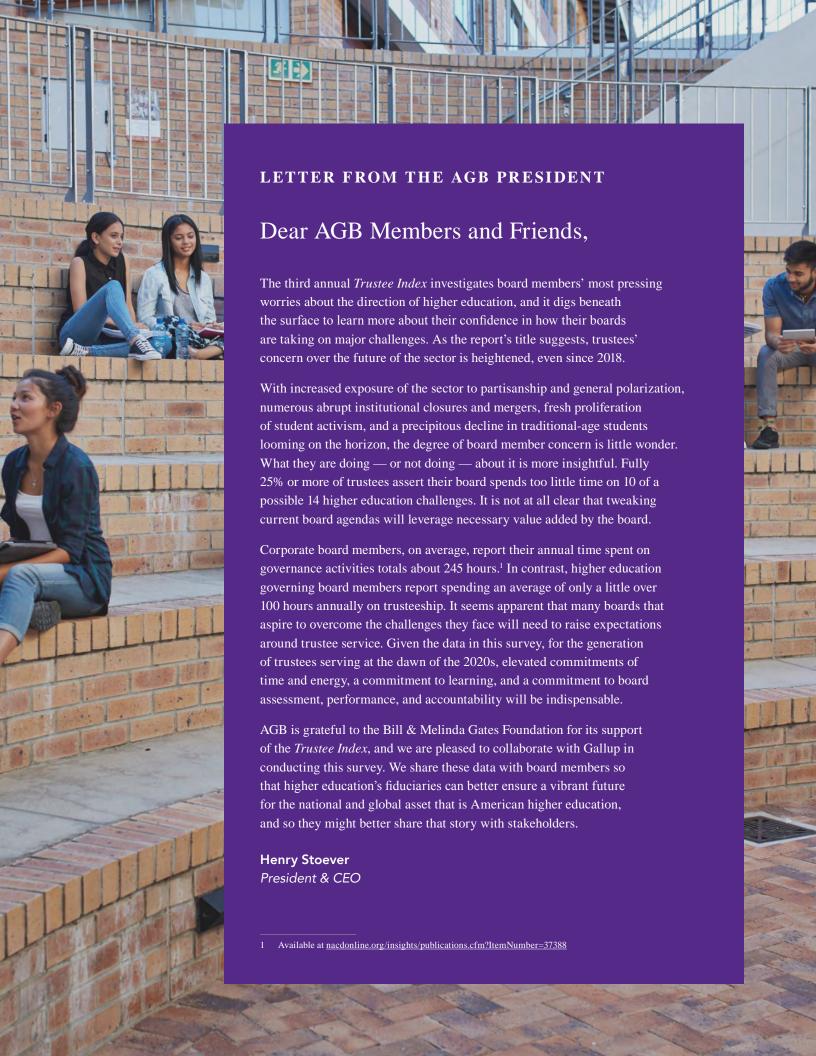
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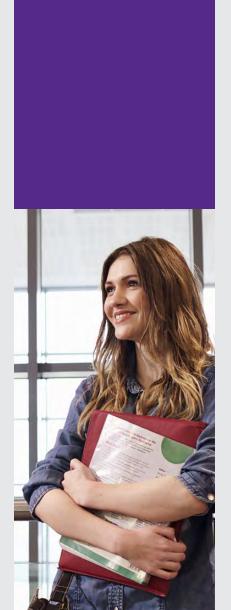
The Association of Governing Boards of Universities and Colleges (AGB) is grateful to the Bill & Melinda Gates Foundation for its support of this initiative.

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Executive Summary

The AGB 2020 Trustee Index* is the third annual survey of governing board members regarding matters imperative to the higher education sector, as well as to the colleges, universities, and multicampus systems they hold in trust. This AGB survey, conducted in collaboration with Gallup, engaged trustees from across the nation regarding topics such as diversity and inclusion initiatives, admissions practices, free speech regulations, and accreditation, as well as preparedness to address these emerging issues.

Additionally, this report provides new data on the following topics measured in 2017 and 2018: views on higher education's future, graduates' workforce preparedness, trustee advocacy, and the time boards invest on particular issues.^{2,3} Striking shifts in perceptions of higher education indicate board members are increasingly concerned about the sector's future. This report offers insights into how trustees may address fundamental issues that impact higher education's standing with stakeholders.

Key Findings

- The number of trustees showing concern about the future of the higher education sector over the next decade increased by 12 percentage points
 — from 73% in 2018 to 85% in 2019 with financial sustainability and price for students and their families as the top drivers of concern.
- The majority of respondents (59%) feel that trustees should help communicate information about the student debt situation. Few believe the general public, prospective students, or policymakers have an accurate understanding of this issue.
- Sixty-four percent of trustees overall "agree" or "strongly agree" that college applicants with wealthy parents are more likely than other applicants to be accepted at selective colleges and universities. However, when asked which factors should be considered important for admissions decisions at their institutions, relatively few trustees cite ability to pay (11%), legacy status (8%), or family donations (3%) as "very important."
- Only 35% of respondents agree that U.S. college graduates have the skills they need to be competitive in the global economy — down from 45% in 2017.
- Technology and cybersecurity as well as board evaluation, development, and succession planning are the top issues on which trustees report their boards spend too little time.

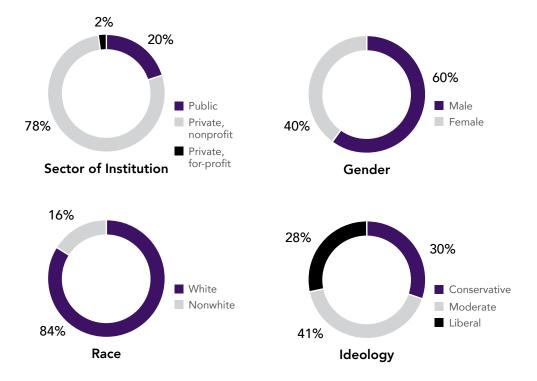
² Available at agb.org/reports-and-statements/the-agb-2017-trustee-index/

³ Available at agb.org/reports-and-statements/the-agb-2018-trustee-index/

^{*} Report data was gathered in the fall of 2019.

Comparison Groups

Trustees are organized into a series of comparison groups for reporting purposes. These groups include self-reported individual demographics and information about each trustee's institution. In addition to the groups below, respondent details such as age, years served on a board, and the role of liberal arts in a respondent's institution are included in the Methodology section.



Note: Percentages of respondents choosing to answer each question. Due to rounding, percentages may sum to 100% ±1%.



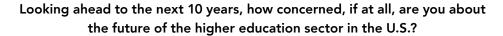
Concern Deepens for the Future of Higher Education

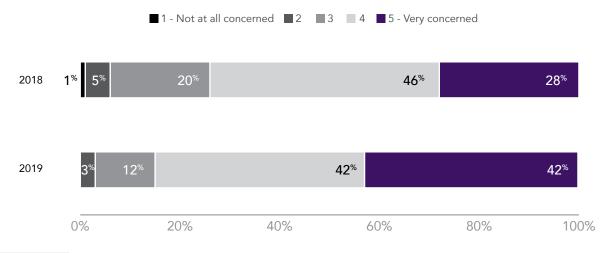
Higher education faces a number of emerging issues that have the potential to significantly disrupt the sector. For example, state lawmakers across the country are introducing "free college" bills, while over a dozen states — led by both political parties — already supplement other grants to cover two-year or four-year college tuition expenses. Such proposals have received enormous political attention. Several presidential hopefuls have suggested not only making public college tuition-free but even forgiving student loan debt in sweeping fashion. Other prominent voices, including elected leaders, have questioned the value of a traditional college education altogether.

Moreover, despite criticism that the proposed changes would detrimentally weaken accreditation standards, the U.S. Department of Education released new federal regulations to take effect in July 2020. Some of the changes announced allow for quicker approval of new academic programs and more flexibility in the amount of time required to sanction underperforming colleges and universities. Parallel to these discussions, an antitrust investigation by the U.S. Department of Justice forced the National Association for College Admissions Counseling (NACAC) to eliminate key provisions from the organization's Code of Ethics, marking a major departure in competitive student recruitment strategies for many institutions.

In the background of these national shifts, college closures and mergers are no longer projected to take place at only small liberal arts colleges.⁶ Public universities are experiencing systemwide consolidations in an effort to stay competitive in a rapidly changing market, and researchers predict current declines in traditional-age college students will take a sharp fall beginning in 2025.⁷ Already, population migration within the country, as well as international student entry, have persistently reshaped who is being served by higher education today.

Respondents in this study are no doubt sensitive to these various pressures. Between 2018 and 2019, the share of trustees who indicate they are "very concerned" about the future of the higher education sector in the next 10 years increased by 14 percentage points.





 $^{4 \}quad Retrieved \ from \ https://www2.ed.gov/admins/finaid/accred/rethinking-higher-education-accreditation-reform.pdf$

⁵ Retrieved from https://www.nacacnet.org/news--publications/newsroom/updates-from-nacacs-ceo/disruption-and-the-cepp-next-steps-for-the-association/

⁶ Retrieved from https://www.aacrao.org/research-publications/quarterly-journals/college-university-journal/article/c-u-vol.-94-no.-2-spring/a-review-of-consolidating-colleges-and-merging-universities-new-strategies-for-higher-education-leaders

⁷ Retrieved from https://www.cupahr.org/issue/feature/higher-ed-enrollment-cliff/

When asked what concerns them most about the future of higher education in the U.S., most respondents cite either financial sustainability (38% overall) or the price for students and families (25% overall).

Which of the following concerns you MOST about the future of higher education in the U.S.?								
Rank	Public	Private, nonprofit						
1	The financial sustainability of higher education institutions (25%)	The financial sustainability of higher education institutions (42%)						
2	Price of higher education for students and their families (24%)	Price of higher education for students and their families (25%)						
3	Decrease in state funding of higher education (10%)	Public perception of the value of a college degree (7%)						
4	Public perception of the value of a college degree (9%)	Student debt (7%)						
5	Relevance of higher education in helping graduates obtain a better job/career (8%)	Relevance of higher education in helping graduates obtain a better job/career (5%)						
6	Student debt (7%)	Other (5%)						
7	Incoming students' preparedness for college (6%)	Equal access to higher education among different demographic groups (4%)						
8	Other (6%)	Incoming students' preparedness for college (3%)						
9	Equal access to higher education among different demographic groups (5%)	Decrease in state funding of higher education (2%)						

Note: Due to rounding, percentages may sum to 100% ±1%.

Interestingly, trustees who consider their institution a "liberal arts institution" share less concern about the price of higher education than their counterparts — a 10 percentage-point difference. However, they are more likely to report the financial sustainability of higher education institutions as most concerning, a 15 percentage-point difference versus non-liberal arts respondents.

Trustees of doctoral-granting institutions are less likely to identify financial sustainability as their top concern (33%) than those institutions offering only undergraduate degrees (41%). However, the reverse is true where price is the top concern (30% for doctoral-granting institution trustees and 24% for those serving undergraduate-only institutions).

The apparent relationship between respondents' top concerns is worth noting. In many institutions, trustees may view pricing as the most dysfunctional element of a flawed business model; others may believe their institution's pricing structure simply reflects uncontrolled costs. Understanding the connectedness of these concerns in their institutions, in concert with presidents and chancellors, is likely a crucial objective for today's boards.

On the Year's Top Issues

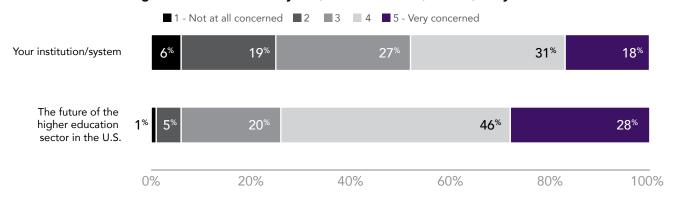
Over the past year, higher education has confronted a number of high-profile issues, such as occurrences of unfair admissions decisions, ethically compromised donors, claims of mishandled sexual misconduct investigations, college closures, and more. While the emergence of these issues has no doubt impacted public perceptions of higher education, fiduciary governing boards hold U.S. colleges and universities in trust on behalf of the public, students, and other beneficiaries. The *AGB Trustee Index* is the only survey to inquire about trustees' concerns.

Financial Stability Is the Top Cause for Concern

The 2018 *Trustee Index* found 73% of respondents expressed concern broadly about the future of U.S. higher education, whereas only 49% expressed concern about the future of their own institutions. In the current survey, when asked specifically about their institution's financial sustainability, more than half of all board members express concern (public: 54%; private, nonprofit: 60%).

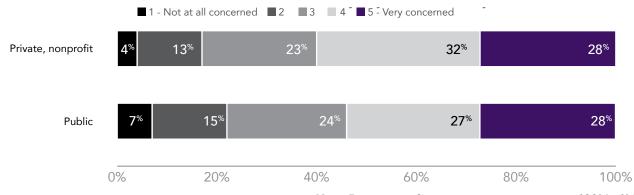
2018 Measures of Trustee Concern

Looking ahead to the next 10 years, how concerned, if at all, are you about:



2019 Measures of Trustee Concern

Looking ahead to the next 10 years, how concerned, if at all, are you about the future financial sustainability of your institution/system?



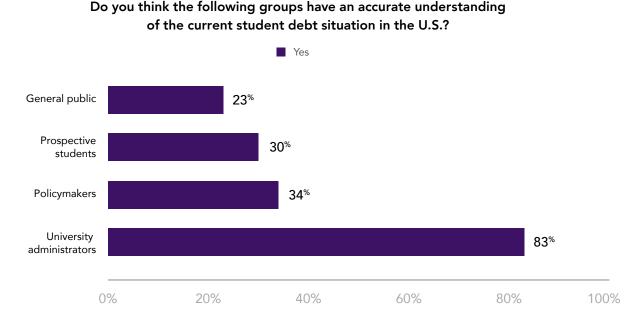
Note: Due to rounding, percentages may sum to 100% ±1%.

The alignment of survey questions from year to year is imperfect in this case, but the data are strongly suggestive: trustees' concerns for the future of their institutions have grown alongside their concerns for the sector overall, and financial sustainability for their institutions — as for the sector — is weighing on many.

Student Debt Is an Issue on Which Boards Can Help Provide Clarity

According to the Center for Microeconomic Data, total higher education debt in the U.S. exceeds credit card and auto debt.⁸ However, the percentage of students who borrow is not increasing rapidly, and undergraduate debt levels have remained largely flat in recent years. Overall increases in student debt levels can be attributed mainly to the rise in debt from graduate programs and students enrolling in the for-profit sector (who are typically older and of lower-income).⁹

A topic as complex as it is significant, most trustees report university administrators have the most accurate understanding of the current student debt situation in the U.S., while fewer believe the general public has a good understanding of the issue.



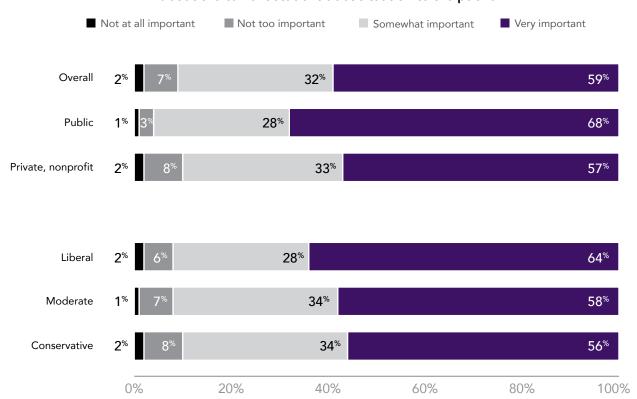
While 59% of trustee respondents feel it is important to communicate accurate information about the current student debt situation to the public themselves, those from public institutions perceive a higher responsibility in this area than those from private institutions. Although not a statistically significant difference, responses suggest that those who self-identify as politically liberal may be more likely than conservatives to believe that it is "very important" for trustees to inform public awareness on this front.

As higher education's citizen leaders, trustees of public and private institutions alike hold legal fiduciary responsibility for their institutions on behalf of an array of beneficiaries or publics. With some justification, a clear majority of all board members believe they have a role to play in informing public understanding of the student debt situation. Boards whose members feel this sense of duty should consider ways in which trustees can and should go about this work, and how the board's responsibilities must dovetail with the president's.

⁸ Retrieved from https://www.newyorkfed.org/medialibrary/interactives/householdcredit/data/pdf/HHDC_2019Q3.pdf

⁹ Retrieved from brookings.edu/research/headwinds-for-graduate-student-borrowers-rising-balances-and-slowing-repayment-rates/

How important is it for trustees to communicate accurate information about the current student debt situation to the public?



Career Preparation for Graduates Is Not Meeting Workforce Demands

According to the 2017 *Trustee Index*, when asked about the most important role of higher education institutions in the 21st century, trustees were less likely to prioritize preparing graduates "for the workforce" than preparing graduates "to be engaged citizens" and producing graduates "who lead meaningful lives" (22%, 29%, and 39%, respectively). In contrast, other national data gathered through the CIRP Freshman Survey show getting a "good job" is the primary reason why incoming college students have chosen to pursue a degree.¹⁰

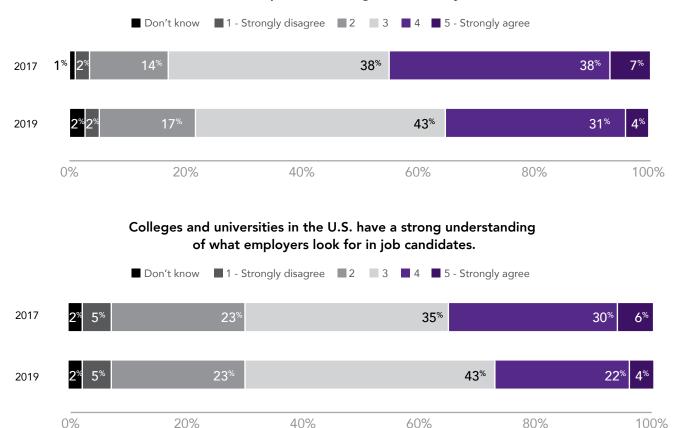
The current *Trustee Index* survey reveals relatively few trustees are sure that higher education is adequately preparing students for the workforce. Only 35% of respondents overall agree that U.S. college graduates have the skills they need to be competitive in the global economy, representing a 10 percentage-point decline since 2017. This finding aligns with previous Gallup research showing that about one-third of business leaders disagree with the statement "higher education institutions in this country are graduating students with the skills and competencies that my business needs" — including 17% who "strongly disagree." Perhaps, given these data, it is not surprising that only 26% of respondents to the current survey feel colleges and universities have a strong understanding of what employers look for in job candidates — a decline of 10 percentage points since 2017.

¹⁰ Retrieved from https://www.newsroom.ucla.edu/releases/heri-freshman-survey-242619?utm_source=link_newsv9&utm_campaign=item_225446&utm_medium=copy

 $^{11 \}quad Retrieved \ from \ news. gallup.com/poll/167630/business-leaders-doubt-colleges-prepare-students. as pxing the property of the property$



U.S. college graduates have the skills they need to be competitive in the global economy.



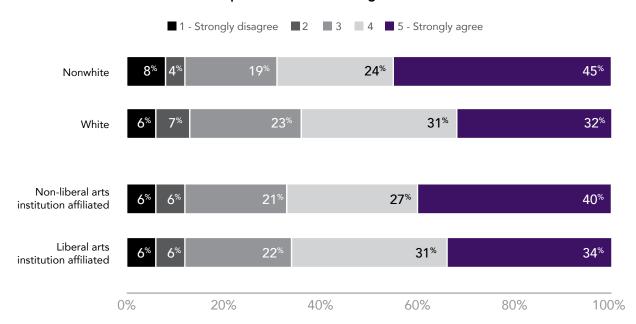
While governing board members and business leaders are more likely to question the alignment of higher education with employer needs than to express confidence in it, AGB research consistently shows the top occupations of governing board members themselves to be business and professional services. ¹² While boards should not direct the curriculum, they are accountable for educational quality and student outcomes. They have a responsibility to satisfy their concerns about the employment readiness of graduates. These data suggest colleges and universities need to do more to prepare students for employment and to demonstrate graduates' employment readiness to the board, employers, and the public.



Most Trustees Say Wealth and Privilege Should Not Be Important Admissions Factors in Their Institutions

Over 50 people are alleged to have been part of the "Operation Varsity Blues" conspiracy, with accused celebrities, tycoons, and coaches filling a substantial part of the 2019 news cycle.¹³ How has this fraud impacted perceptions of the landscape of higher education admissions more broadly? Sixty-four percent of trustees overall "agree" or "strongly agree" that college applicants with wealthy parents are more likely than other applicants to be accepted at selective colleges and universities. Additionally, trustees of color and non-liberal arts institution trustees are more likely to agree that the college admissions process favors the wealthy than are white and liberal arts institution board members, respectively.

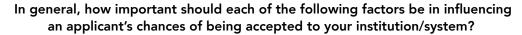
College applicants with wealthy parents are more likely than other applicants to be accepted at selective colleges and universities.

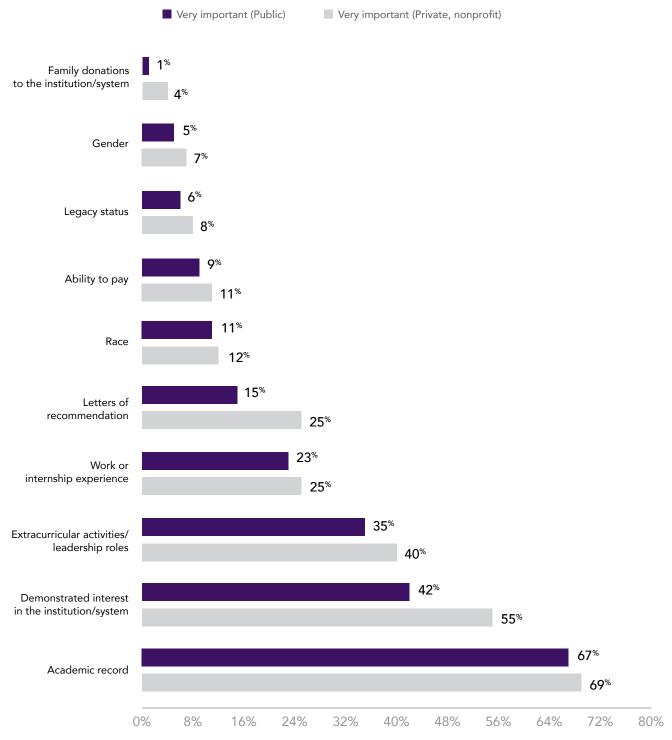


Note: Due to rounding, percentages may sum to 100% ±1%.

When asked how important it is to consider different student factors during the college admissions process, attitudes from public and private, nonprofit institution trustees are split, especially regarding letters of recommendation and demonstrated interest in the institution itself, which private institution trustees are more likely to view as important (differences of 12 and 8 percentage points, respectively).

¹³ Retrieved from https://www.nytimes.com/2019/03/12/us/college-admissions-cheating-scandal.html





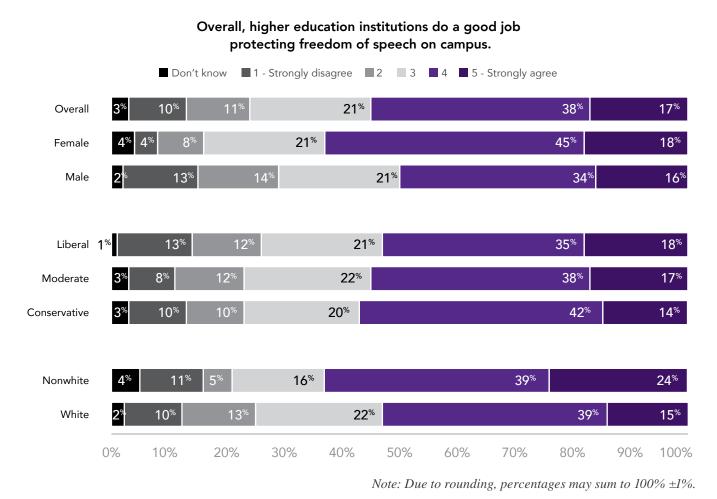
Given respondents' perceptions about the role of wealth in selective institution admissions, relatively few trustees believe ability to pay and family donations should be "very important" in their institutions. Also, while 10% of white respondents think considering race should be "very important," nonwhite individuals are much more likely to say the same, at 22%.

Overall, trustees generally view the college admissions process as fair for all applicants (59%). However, female respondents are less likely to "agree" or "strongly agree" that the process is fair for applicants than their male counterparts (52% versus 64%). This difference is apparently not explained by higher perceived gender bias by female trustees: the survey found no significant difference between male and female responses regarding how much importance should be placed on gender in admissions decisions.

Another topic gaining attention in regards to college admissions is the stagnation of international student enrollments over the past couple of years. About a quarter of private, nonprofit board members say "too little time" is spent recruiting international students, compared to 20% for public institution trustees. Additionally, over two-thirds of trustees report that recent changes to U.S. immigration laws and enforcement have had some impact on the number of international students enrolled at their institution or system. Twenty-two percent report a "major impact," while about half of trustees report a "minor impact" of these policy shifts on international student enrollment.

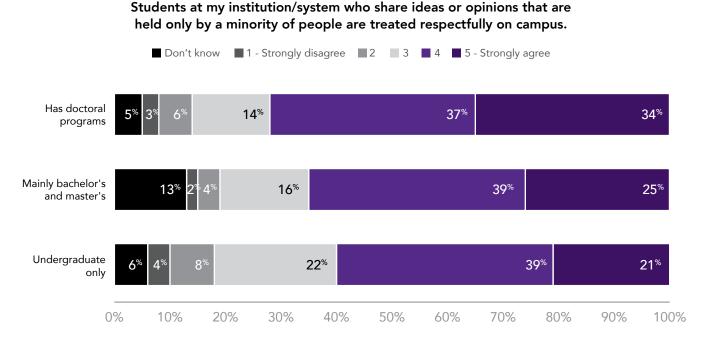
Freedom of Speech Is Secure

For years, higher education has experienced speaker controversies and student protests, student complaints about bias in the classroom, and outside provocateurs suggesting campuses are not intellectually diverse. President Trump announced in March of 2019 that he would make federal funding for universities contingent on assurances of free speech, ¹⁴ adding to the debate. Overall, just over half of trustees agree that higher education institutions do a good job protecting freedom of speech on campus, including 17% who "strongly agree."



¹⁴ Retrieved from https://www.nytimes.com/2019/03/21/us/politics/trump-free-speech-executive-order.html

About 65% of trustees overall feel their institution or system is a place where ideas or opinions that are held only by a minority of people are treated respectfully on campus. However, the data show a disparity in opinion between trustees serving institutions with doctoral programs versus those offering only undergraduate degrees: 34% versus 21% "strongly agree" that minority viewpoints are treated respectfully at their institutions. The reasons for this distinction are not clear, but research university settings may plausibly hold advantages for accommodating diverse perspectives. In all cases, discussing together as a board what it means to be a community with appropriate standards of respectful conduct, while upholding personal freedoms of expression, can provide valuable leadership.



Note: Due to rounding, percentages may sum to 100% ±1%.





Diversity Commitments Start at the Board Level

Issues of personal identity have been at the heart of several recent conflicts between students and the higher education institutions they attend. Governing boards have a responsibility on behalf of all students to ensure colleges and universities serve these beneficiaries well. Previous Gallup research has shown that more than two-thirds (68%) of college graduates nationally who obtained their degree between 1990 and 2016 say that their university was a good place for racial and ethnic minorities, while significantly fewer say the same for lesbian, gay, bisexual, or transgender students (42%). This trend is similar for trustee respondents, as 89% say their institution or system is a good place for students of minority racial and ethnic backgrounds, but only 70% report the same for LGBT students (the survey did not find notable differences on this item by respondent race or gender). The magnitude of difference between trustees' views and graduates' views is also important to recognize. The charts below reflect trustee responses.

Is your institution/system a good place or not a good place for members of racial and ethnic minorities?

■ Don't know ■ Good place ■ Not a good place

6%									89%	5%
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

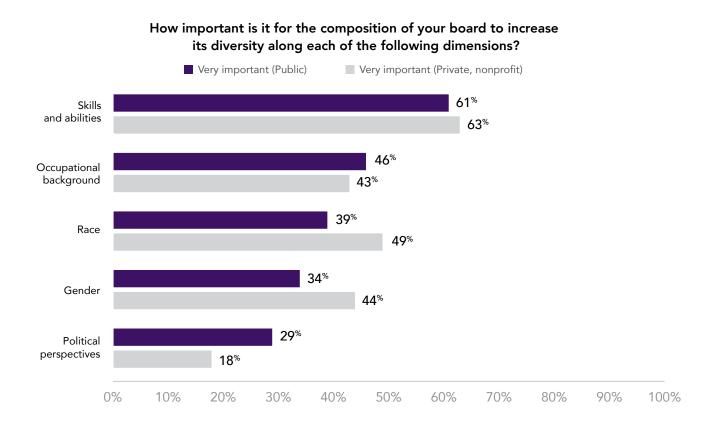
Is your institution/system a good place or not a good place for lesbian, gay, bisexual, or transgender students?

■ Don't know ■ Good place ■ Not a good place

		23%							70%	7%
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

 $^{15 \}quad Retrieved \ from \ news. gallup.com/reports/199229/gallup-purdue-index-report-2016. aspx$

One tangible way for trustees to become more in tune with those they serve is to increase diversity on their boards. Overall, respondents feel it is more important for the compositions of their boards to increase in diversity in individual skills and abilities than in terms of race, gender, or political perspectives. However, private institution trustees are more likely to report diversity of race and gender as "very important" than their public counterparts. Board members of public institutions are more likely to cite diversity of political perspectives as "very important."



AGB member research shows women's membership on both public and private, nonprofit governing boards is about 30%. Public boards achieved this level of inclusion about 20 years ago, while private institution boards have taken longer. Setting aside the boards of minority-serving institutions, 17% of public governing board members and 11% of private governing board members were people of color as of 2015. While there is no surefire solution to the challenges of inequitable college attendance, retention, graduation, and satisfaction rates by race and gender, diversifying the board is one avenue by which boards can become more receptive and anticipatory toward the views and needs of diverse stakeholders, constituents, and beneficiaries.

Accreditation Is Seen as Helpful

Accrediting bodies have been on the front lines of both state and federal political controversies, often directly related to governance and the independent fiduciary status of governing boards. Only 35% of trustees "strongly agree" that they have a full understanding of their institution's or system's accreditation process. However, when those who report they understand accreditation are asked if the process improves financial integrity, education quality, and institutional governance, respectively, most trustees "agree" or "strongly agree." In this way, accreditation seems to be widely considered beneficial.

Broadly speaking, two mechanisms ensure the unique degree of autonomy from direct governmental control afforded to U.S. colleges and universities. One is the fiduciary status of governing boards, and the other is peer accreditation. Every governing board member should have a basic understanding of the accreditation process, and every board member should become familiar with the findings of their institution's most recent reaccreditation review.



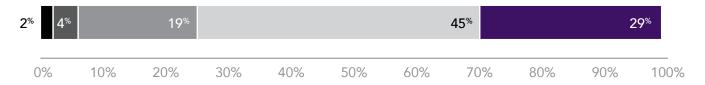
The accreditation process improves financial integrity.



The accreditation process improves educational quality.



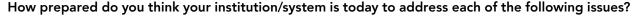
The accreditation process improves institutional governance.

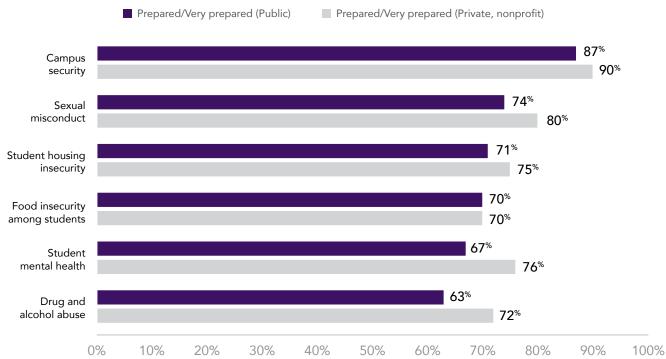


Note: Due to rounding, percentages may sum to 100% ±1%.

Being Prepared for What's Next

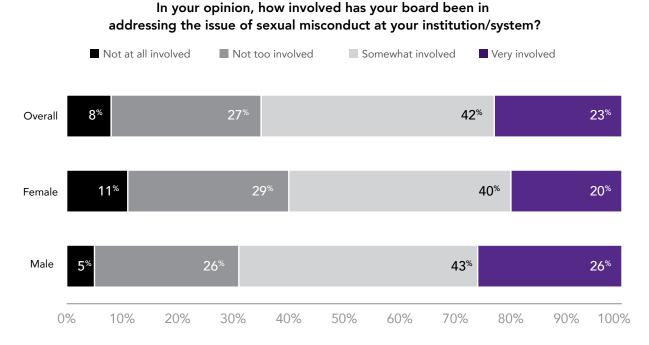
A majority of trustees overall think their institution or system is "prepared" or "very prepared" to meet today's most challenging student health and safety issues. However, student mental health and drug and alcohol abuse are issues for which over 20% of all respondents report their institutions are "unprepared" or "very unprepared."





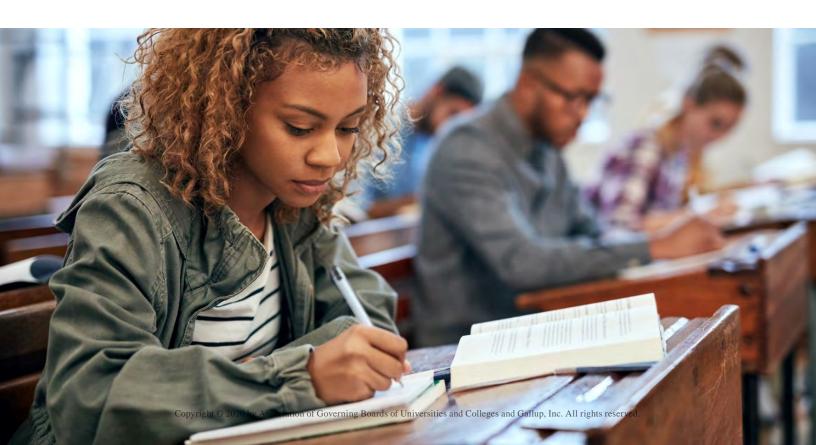


Regarding sexual misconduct, in particular, 65% of respondents overall characterize their board as being "somewhat involved" or "very involved" in addressing the issue at their institution/system. However, while 69% of male trustees report their board has been "very" or "somewhat" involved, only 60% of female trustees say the same.



Note: Due to rounding, percentages may sum to 100% $\pm 1\%$.

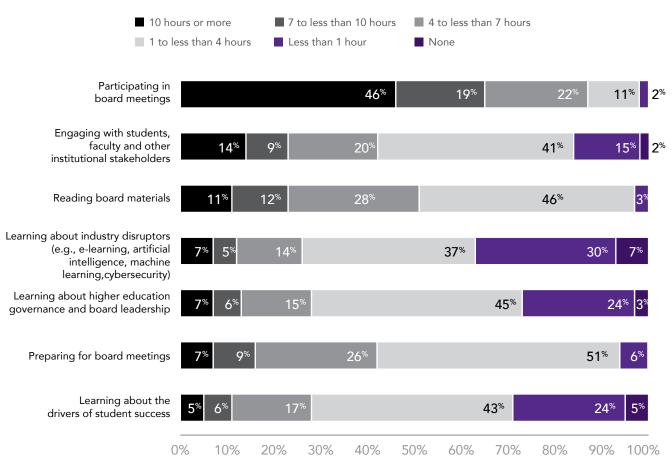
Sexual misconduct comprises an important ethical, legal, and reputational risk, and boards should ensure that their institution is bringing appropriate resources and effort to bear in this area.



Time and Effort Devoted to Trusteeship Should Be Reexamined

Trustees spend their time on a variety of tasks, ranging from attending and preparing for board meetings to learning and development. Board meeting activities take up the majority of this time (46% spend "10 hours or more" participating in meetings each quarter), while activities such as learning about industry disruptors, higher education governance and board leadership, and the drivers of student success receive less attention. In sum, the typical board member reports they contribute between 16 and 37 hours of effort to these volunteer roles each quarter, resulting in between 64 and 148 hours per year. Public institution board members appear to spend more time on their trusteeship, on average, than their privately affiliated counterparts; they report spending at least nine more hours each quarter on reading board materials, preparing for board meetings, and engaging with stakeholders.

In a typical fiscal quarter, about how many total hours do you spend on each of the following?

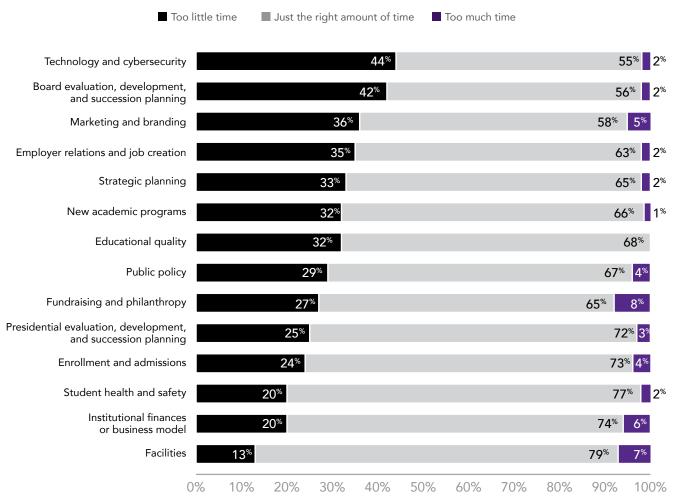


Note: Due to rounding, percentages may sum to 100% $\pm 1\%$.

An effort analysis reveals that emphasis on learning about technological industry disruptors is not just an individual issue, as 44% of trustees believe that their boards spend "too little time" on the topic of technology and cybersecurity. Also, many trustees (42%) believe that "too little time" is spent on board evaluation, development, and succession planning. This finding contrasts with presidential evaluation, development, and succession planning — on which 25% of board members believe their board spends "too little time."

When asked how they become aware of emerging board-related issues, most trustees are looking for information from outside organizations or experts, with 87% reporting seeing, reading, or learning something from these sources over the past 12 months. While consideration of outside organizations or experts is high, only 34% of respondents have attended a higher education-related conference, workshop, or seminar in the past 12 months, which suggests many trustees are missing in-depth professional development opportunities.

Overall, do you believe your board spends too much, too little, or just the right amount of time on the following topics at your institution/system?



Note: Due to rounding, percentages may sum to 100% $\pm 1\%$.

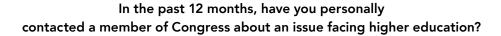
Notably, about one in every three trustees reports their board spends "too little time" on educational quality — an area essential to the central mission of every U.S. college and university. This data point is consistent from 2018 to 2019, with nearly 70% of trustees reporting their board spends "just the right amount of time."

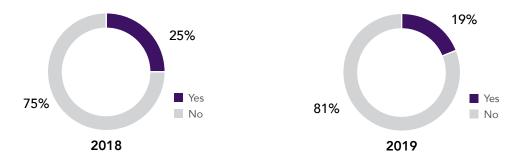
Overall, the variety of areas for which substantial numbers of board members feel additional attention is necessary seems to suggest board governance in the coming years will require a greater time commitment than in the past. If true, an important question going forward will be how boards respond to new time demands — and to what extent additional time spent is associated with anticipatory and preparatory activities versus reactionary and corrective ones.

Conclusion

The contemporary trustee role is complicated. While it is clear that board members have become increasingly concerned about the challenges facing higher education in general, they continue to believe their institutions are doing a better job than others. Yet, many trustees report their board is not allocating sufficient time and attention to key issues — and this may further suggest boards need to expend greater time and effort overall carrying out their responsibilities.

Trustees are also expected to be agents for change, both internally and externally, but there is some indication that engagement in external advocacy activities is tepid. Self-reported advocacy — such as speaking to news media or press about an issue facing higher education, writing an op-ed about an issue facing higher education, or contacting a member of Congress about an issue facing higher education — has declined since 2018.



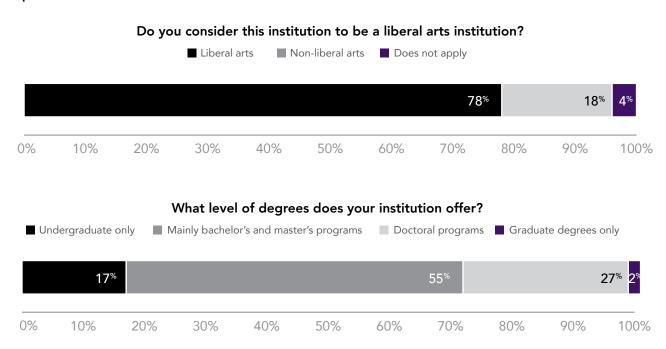


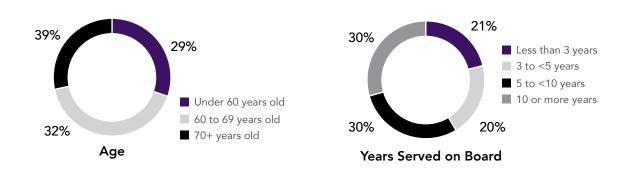
As this survey shows, at a time when board member concern about the future of U.S. higher education is deepening, and a majority of board members assert the importance of trustees communicating accurate information about critical issues, the pressure is on for board members to accept the mantle of societal leadership that has for several centuries distinguished American higher education trusteeship. This includes becoming well informed on issues ranging from educational quality and admissions standards to disruptive technologies and employer relations. It includes cultivating a heightened interest in engaging meaningfully with a full spectrum of stakeholders about the value one's institution adds and might yet add. Ultimately, it will include a habitual effort to assess the work of one's own board, develop board member knowledge and governance skills, and hold the board consistently accountable for making a constructive impact — an area in which 42% of board members believe their board spends "too little time."

Methodology

Results for the Association of Governing Boards (AGB) *Trustee Index* study are based on 10-minute web surveys conducted October 7-November 3, 2019. AGB provided a random selection of 10,000 members, representative of AGB's membership, to be included in the study. In total, 919 members completed the survey, yielding a 9% response rate. Gallup sent up to three reminders to nonresponders.

Respondent Profile

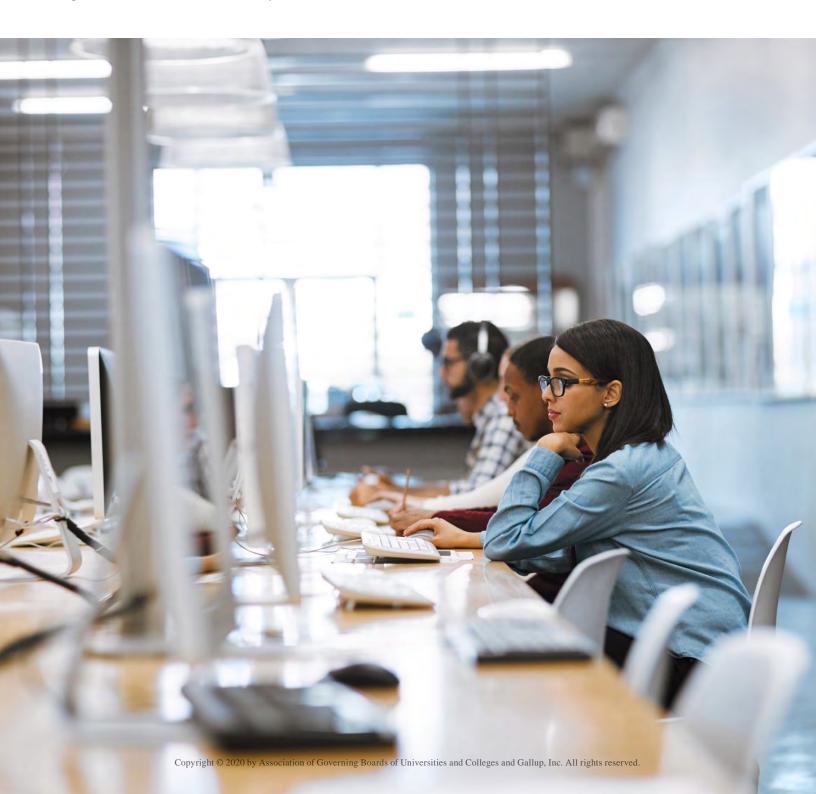




Note: Due to rounding, percentages may sum to 100% $\pm 1\%$.

About AGB

Since 1921, the Association of Governing Boards of Universities and Colleges (AGB) has had one mission: to strengthen and protect this country's unique form of institutional governance through its research, services, and advocacy. Serving more than 1,300 member boards, nearly 2,000 institutions, and over 35,000 board members, AGB is the only national organization providing university and college presidents, board chairs, trustees, and board professionals of both public and private institutions and institutionally related foundations with resources that enhance their effectiveness.



About Gallup

Gallup delivers forward-thinking research, analytics, and advice to help leaders solve their most pressing problems. Combining more than 80 years of experience with its global reach, Gallup knows more about the attitudes and behaviors of employees, customers, students, and citizens than any other organization in the world. Gallup consultants help private and public sector organizations boost organic growth through measurement tools, strategic advice, and education. Gallup's 2,000 professionals deliver services at client organizations, through the web, and in nearly 40 offices around the world.





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