CASES FROM THE FIELD

Presidential Leadership and Institutional Positioning Strategy Impacting Institutional Sustainability

By John Haller and Aaron Meis

The authors each conducted qualitative case-study research through interviews at higher education institutions facing financial crossroads. Each institution implemented decisions that positively influenced enrollment and increased financial stability. First, the authors found that presidential leadership, particularly decision-making aligned with institutional mission and strategic planning, influenced institutional sustainability. Next, within this context, actions were taken to broaden the pool of recruited students and to leverage the role of intercollegiate athletics. These combined actions positively impacted enrollment and enhanced institutional resilience. This article examines the roles of presidential planning, enrollment diversification, and intercollegiate athletics, providing case-study examples of institutions that successfully applied these strategies to increase enrollment and improve sustainability.

Demographic shifts resulting in a decline in the number of traditional college-age students are putting increased enrollment pressure on institutions working to generate sufficient tuition revenue to remain financially stable (Grawe 2018). In addition, as college costs continue to rise while public perception of the value of higher education wanes, these factors put further pressure on institutions to generate tuition revenue (College Board 2024 and Saad 2025).

This article presents case studies of institutions that overcame these macro-environmental headwinds in higher education, resulting in enrollment growth and greater financial sustainability. The institutions assessed for this study represent four private, nonprofit institutions—a National R2 selective university and three smaller, less-selective institutions. These institutions were selected based on broader case-study research. The research was tied to institutional transformation as the subject of two doctoral dissertations. The common themes that led to increased financial sustainability were present at each university.

Each institution researched was financially dependent on tuition revenue through enrollment and has small-to-medium endowment per-student ratios, an indicator of financial strength (Meis 2023) and institutional market position (Haller 2021). Each institution projected enrollment declines within its primary enrollment population. Thus, each was at a similar crossroads with implications for long-term sustainability.

The case-study research showed that presidential planning influenced financial sustainability. Also, each institution engaged in activities to diversify enrollment populations, resulting in increased enrollment and greater financial sustainability. Lastly, each institution leveraged the role of intercollegiate athletics to increase enrollment and tuition revenue, thereby strengthening its financial position.

Methodology

The research questions focused on leadership actions that strengthened each institution's financial sustainability, as well as the strategies and tactics each institution employed to enhance that sustainability (Haller 2021; Meis 2023). The authors conducted semi-structured interviews to collect data for the case studies, aiming to understand the phenomenon of organizational change at each institution (Haller 2021; Merriam 2001). Initial interviewees were chosen based on recommendations from leaders with long tenures and institutional knowledge. These individuals also recommended other individuals, as a means of snowball sampling, described by Ravitch and Carl (2016). The questions asked were informed by literature on organizational change. Questions asked also "included a number of customized follow-up questions that varied from institution to institution, depending on their leaders, leadership styles, and decision-making processes" (Meis 2023, 38).

As part of their dissertation work, the authors learned that "case studies are a good design for problems that are practical; specifically, those that involve situations, events, or phenomenon (Merriam 2001, 126). In addition, case studies can provide insight into how certain phenomena happen the way they do (Stake, as cited in Merriam 2001). Case studies can also provide a rich description of the actions and consequences being explored, thereby helping bring new meaning to a phenomenon (Merriam 2001). The authors also learned that "case study theory is appropriate when researching "'how' and 'why' questions" because they can be used in understanding phenomena for three purposes—"exploratory, descriptive, and explanatory" (Yin 2009, 7-9).

Presidential Planning and Decision Making

Research shows that leaders who focus on organizational change "value strategic and long-range planning" (Fisher and Koch 1996, 59-60). In addition, Kezar's research documents how successful organizational change efforts involve the deliberate and purposeful work of influential leaders who are more planned and managed (Kezar 2001). At each institution studied, the presidents engaged in intentional strategic planning efforts to determine how best to grow enrollment.

R2 Institution

According to research on R2 Institution dating back to the mid-1980s, the college president engaged in intentional, purposeful efforts to plan for the institution's future (Haller 2021). A 90,000-word document assessed "both academic programs and support services relative to effectiveness in the context of the mission that subsequently made recommendations for the future" (Haller 2021, 120). More specifically, the document recommended a meaningful reallocation of resources to leverage specific programs (Haller 2021). The document also worked "to reposition the institution from a fundraising, program offerings and physical plant perspective" (Haller 2021, 120). In addition, it emphasized the need to hire Ph.D.-credentialed faculty and influenced the creation of a committee to plan the future construction of residential facilities (Haller 2021).

The subsequent college president at R2 Institution worked to build on the prior president's plan by hiring more faculty with terminal degrees, who increased research productivity while expanding residential capacity to enhance the student experience (Haller 2021). Similarly, as part of purposeful planning, the institution constructed additional academic and student facilities that improved the student experience, thereby enhancing student persistence (Haller 2021). More broadly, the president was described as an excellent communicator who naturally engaged people and stressed the importance of the institutional mission in planning efforts (Haller 2021). For instance, first-year seminars and service-learning initiatives were launched, incorporating the institution's faith-based mission (Haller 2021). The focus on planning led to the development of more than 40 academic and co-curricular sub-plans (Haller 2021). Among these, four doctoral and several interdisciplinary programs were launched, leading to the institution's reclassification as a research university by the Carnegie Commission Classification (Haller 2021). According to accreditation documents, "the plan also included twenty-one performance indicators that were monitored through quantitative comparison with selected peer institutions" (Haller 2021, 137). Accreditation reports also documented that the strategic planning process at the institution played a meaningful role in enhancements to academic life and technological, fiscal, and physical resources (Middle States Association of Colleges and Schools 2001).

The current president, like his predecessor, worked to build on existing plans. Broadly, the president continued to leverage the institutional mission in the planning process (Haller 2021). More specifically, the most recent institutional strategic plan emphasized meaningful fundraising goals while working to engage a greater percentage of alumni (Haller 2021). Leveraging the implementation of the prior presidents' plans, the institution continued to increase its national presence, such that it is now recognized as a national, rather than regional, institution by *U.S. News* (Haller 2021). The president is credited with spearheading the planning process and engaging the campus community as "part of making the plan happen" (Haller 2021, 146). Ultimately, over the three presidents' tenures, enhancements to the student experience led to an increase in the five-year graduation rate from 76 percent in 1990 to 90 percent in 2018 (U.S. News Academic Insights 2019).

Small Institution One

At Small Institution One, the president, through purposeful planning, helped the university regain a secure financial position by eliminating low-enrollment branch campuses and programs, as well as implementing faculty and staff reductions (Meis 2023). As part of course correction, the president also revamped the budget planning process, resulting in a more timely and regular approach to revenue analysis and spending, as well as debt control by reducing borrowing costs for the construction and renovation of campus facilities (Meis 2023). Additionally, the president's enhanced budgeting process incentivized revenue-generating enrollment programs and emphasized fundraising (Meis 2023). As part of this process, the institution took a different approach to evaluating academic programs for continuation, assessing associated revenues after financial aid and operational expenses. Financial aid allocations were also more strategically deployed (Meis 2023). A meaningful component of the planning process that helped establish financial stability involved community engagement, such that the president shared, "ideas can come from anywhere" (Meis 2023, 55). Overall, as a result of the purposeful planning process, enrollment at the institution nearly doubled from just over 1,000 students in 2015 to 1,900 students in 2022 (Meis 2023).

Small Institution Two

Similar to Small Institution One, at Small Institution Two, the president faced an uncertain financial standing upon his arrival. Also, like Small Institution One, Small Institution Two engaged in a staffing reduction to control expenses (Meis 2023). The institution also engaged in a more purposeful and intentional financial planning process (Meis 2023). For example, the institution implemented a term referred to as "student revenue coverage" that focused on student-associated revenues to cover operating budgets and regular, monthly budgeting models to understand and control revenues and expenses (Meis 2023, 96). Upon the president's arrival, he implemented what he described as an "Objectives, Goals, Strategies, Measures (OGSM)" planning process that served as the foundational business model for all activities on campus (Meis 2023, 103). This planning and operational approach was implemented at both the institutional and program level and served as the guidepost for all strategic decision-making (Meis 2023). As part of the OGSM process, all programs were evaluated transparently to assess their contribution to the institution's bottom line (Meis 2023). The intentional planning process resulted in the development of five primary institutional objectives, totaling nineteen quantitative measures (Meis 2023). As will be discussed in a subsequent section, the OGSM planning process led to the initiation of new student recruitment populations and influenced a meaningful campus expansion and facility improvement initiative to support new regional student enrollment (Meis 2023). This included launching academic and co-curricular programs that generated additional student demand, facilitating enrollment growth (Meis 2023). While the OGSM planning process and model brought to Small Institution Two drove decision-making at the university, like small institution one, the planning process fully involved and engaged the community to capture buy-in and support for activities that established financial strength (Meis 2023). This is evidenced by the fact that financial reserves increased from $300,000 to $11.2 million between 2017 and 2021 (Meis 2023).

Small Institution Three

Similar to the prior two institutions, soon after the president arrived at Small Institution Three, he learned of the university's financial challenges. Leveraging the institution's faith-based mission, the president engaged in planning activities that worked to improve the university's financial position. First, the president engaged stakeholders connected to the institution's faith-based mission who could provide a line of financial credit to ensure the university's solvency (Meis 2023). In addition, like Small Institution Two, the president adopted a more fiscally disciplined financial planning approach, allocating fundraising dollars to grow resources through investment income while managing reserves and borrowing at lower interest rates to expand facilities. This gave the institution the capacity to grow revenues and assets (Meis 2023). This also involved assessing and closing low-enrollment academic programs. From a planning perspective, the president began developing academic programs to drive enrollment growth. Specifically, the president worked to launch a medical school, along with graduate programs that offered greater tuition margins than at the undergraduate level (Meis 2023). Adding a medical school and a nursing school also bolstered enrollment in undergraduate science-based programs. Similarly, launching a medical school led to the development of other health-based graduate programs, furthering enrollment growth (Meis 2023). As enrollment at the institution grew, the planning process enhanced the campus footprint by adding a two-year branch campus (Meis 2023). In keeping with the institutional mission, the university also purchased another faith-based school with uncertain financial standing and established a two-year college on the main campus (Meis 2023). The planning process was more centralized at Small Institution Three, relative to Institutions One and Two, as well as R2 University. Here, there was a clear leadership team that established and assessed strategic decisions, market demand, and the institution's ability to execute a quality mission-driven program, resulting in greater financial sustainability (Meis 2023). Ultimately, enrollment at Small Institution Three quadrupled in the time after the president arrived (Meis 2023).

Alternate Population Recruitment to Grow Enrollment

The literature states that demographic shifts, economic changes, and competition can all have adverse effects on higher education institutions (Kezar 2001; Burke 2002; Kotler 1999; Collins and Porras 2002). Specifically, Elon University and The College of New Jersey responded to demographic shifts by working to grow enrollment at their respective institutions (Keller 2004; Perry 2003). As part of the authors' research, each institution implemented an intentional plan to recruit an alternative student population to increase enrollment.

Given each institution's financial stability and presidents' forward-looking mindsets, exploring alternative revenue streams to diversify enrollment was part of their strategic plans.

R2 Institution

At R2 Institution, historically, a meaningful percentage of students enrolled have come from local Catholic high schools, given the institution's faith-based nature. As part of the strategic planning process, the president recognized that Catholic high school enrollment would decline in the local and regional markets. Thus, within the university plan, the decision was made to begin recruiting a student body from throughout the nation (Haller 2021). Also, more than 50 percent of enrolled students commuted to the institution. Hence, as part of the planning process, the university began investing in the construction of residence hall facilities to house students enrolling from across the country (Haller 2021). Today, only 17 percent of undergraduate students are from the state, an indicator of the strategy's success in recruiting and enrolling a more nationally diverse student body (College Factual 2025). Also, the institution's admissions selectivity improved from nearly 80 percent in the 1980s to below 50 percent in 2019 (R2 Institution 2025).

Small Institution One

At Small Institution One, as part of the planning process, given the institutional financial instability, the president accelerated the decision to move from a women's college to a coeducational college (Meis 2023). As part of the plan in working to open the door to male enrollment, the president communicated the overall national decline in the number of women's colleges and the enrollment gains at institutions that had become coeducational (Meis 2023). Once this decision was made, it paved the way for the growth in the number of academic programs. Also, the institution repackaged academic programs that already had existing faculty and curricular infrastructure, reducing overall launch costs (Meis 2023). Similarly, as part of the plan to enroll male students, the process involved assessing market-driven niche programs based on the institution's geographic location to stimulate additional student demand (Meis 2023). The plan to move to coeducation led to seven years of enrollment growth at the institution, nearly doubling total enrollment (Meis 2023).

Small Institution Two

Small Institution Two had historically enrolled more graduate, online, and post traditional undergraduate students. As part of the intentional planning process to diversify enrollment streams and grow overall enrollment, the institution decided to invest in more traditional undergraduate enrollment. As referenced in the prior section, this involved a commitment to campus expansion—from academic facilities to residence halls that appealed to traditional-age students (Meis 2023). Part of the overall strategic approach to growing traditional undergraduate enrollment involved growing institutional visibility (Meis 2023). Growing traditional undergraduate enrollment also served as a pipeline to increasing traditional graduate enrollment upon an undergraduate student's completion of a bachelor's degree. The initiative to grow traditional undergraduate enrollment was tied to the purposeful plan to increase the number of academic programs, specifically in the sciences, that were more popular and would also drive overall student demand (Meis 2023). As part of the overall enrollment diversification plan, Small Institution Two also cultivated and leveraged international student enrollment (Meis 2023). Specifically, the institution focused on M.B.A. programs in China and Vietnam, resulting in an additional 500 students (Meis 2023). Coupled with the OGSM planning model, diversifying revenue streams by venturing into the traditional undergraduate student market, as well as traditional graduate and international student populations, enhanced financial stability. Between 2017 and 2021, the institution's endowment grew from $18 million to $28 million (Meis 2023).

Small Institution Three

At Small Institution Three, as referenced above, the institution decided to invest in developing a medical school. Given the institution's financial instability, the deliberate decision to begin recruiting graduate medical students provided a new source of enrollment revenue. Faculty and staff acknowledged the financial margins generated from medical student enrollment compared to those of traditional undergraduate students in need of financial aid (Meis 2023). Tied to this, enrolling graduate medical students served as a foundation for expanding undergraduate and graduate health science programs, resulting in additional enrollment growth (Meis 2023). Specifically, faculty noted that enrollment in undergraduate biology, chemistry, and psychology was positively influenced by the launch of a medical school. In addition, graduate and post traditional undergraduate health science programs were added, as were new nursing programs that further diversified the program offerings and increased enrollment (Meis 2023). Lastly, as part of the planning process, the president decided to enroll two-year associate-degree students, further diversifying enrollment revenue streams (Meis 2023). The programs developed were market-driven, allowing graduates to enter the workforce in trades they had trained for; however, some students continued to bachelor's degree programs, resulting in further continuing student enrollment at the institution (Meis 2023). Ultimately, enrollment at Small Institution Three increased from more than 1,700 students to more than 3,100 students as part of the enrollment diversification efforts, with annual revenues increasing exponentially (Meis 2023).

At each institution researched, enrollment diversification efforts as part of the institutional planning process played a meaningful role in increased financial sustainability. Some of these efforts involved recruiting new traditional undergraduate students; others involved graduate students, international students, and associate-degree-seeking students. As part of the intentional planning process, the president at each institution was purposeful in assessing student demand and the associated market in considering which population to target and which academic programs to launch.

Leveraging Intercollegiate Athletics

Research shows that intercollegiate athletic success can positively influence additional student demand (Toma and Cross 1998; Pope and Pope 2009). For example, both Boston College and Texas Christian University experienced a 30 percent increase and an over 100 percent increase, respectively, in student demand following athletic success (Chung 2013). In addition, both Adrian College and Fairleigh Dickinson University added varsity athletic teams, resulting in increased student enrollment and overall financial stability (Selingo 2025). At each institution the authors researched, intercollegiate athletics was leveraged in different ways to stimulate student demand to grow enrollment.

R2 Institution

At R2 Institution, the university joined a new national athletic conference, resulting in the men's basketball team receiving national television viewing exposure. Five years later, the institution, as an underdog, won the NCAA Division I men's basketball championship, vaulting the university into the national spotlight (Haller 2021). The president at the time, who believed in the importance of intercollegiate athletics, worked to invest in and capitalize on the university's success in men's basketball (Haller 2021). The athletic success led to increased national student demand and enhanced the institution's academic profile (Haller 2021). Between 1988 and 2018, the number of applications received increased from approximately 10,000 to nearly 23,000 (U.S. News Academic Insights 2019). Also, the 50th percentile SAT score increased from 1106 in 1992 to 1360 in 2019 (Haller 2021).

Small Institution One

After the president decided to diversify revenue streams by becoming a coeducational institution, he absorbed the athletic teams of a nearby university that closed (Meis 2023). This served as an immediate increase in student enrollment, nearly doubling it virtually overnight. Adding to this, Small Institution One chose to accept all credits from student-athletes transferring from the closing university, ensuring a positive and smooth student transition (Meis 2023). The decision to increase the number of athletic programs also drove future student demand (Meis 2023). For example, expanding athletic programs attracted prospective student-athletes who otherwise were not interested in Small Institution One (Meis 2023). Institutional leadership reported that adding intercollegiate athletic programs influenced the largest new student class in university history (Meis 2023).

Small Institution Two

At Small Institution Two, as part of the planning process to grow academic programs, additional co-curricular programs were added to stimulate additional student demand. One institutional leader reported that offering an e-sports program led to an increase in enrollment from eight to nearly 20 students (Meis 2023). In relation to this, the institution started a marching band to stimulate additional student demand (Meis 2023). Expanding these athletics-related co-curricular offerings helped strengthen Small Institution Two's financial position; since 2016, no positions have been eliminated (Meis 2023).

Small Institution Three

At Small Institution Three, as part of the planning process, the president leaned heavily into intercollegiate athletics by starting a football program (Meis 2023). The football team quickly won a national championship, further enhancing institutional visibility in the region. Competitive cheer and e-sports programs were also launched, contributing to undergraduate enrollment growth (Meis 2023). Institutional leaders also noted that expanding the intercollegiate athletic program became a primary source of school spirit and alumni pride, positively influencing the student and post-graduate experiences (Meis 2023). As of 2022, 41 percent of Small Institution Three's 1,800 full-time degree-seeking undergraduate students competed in intercollegiate athletics—an influx of more than 700 students (Meis 2023).

At each institution researched, leveraging intercollegiate athletics stimulated additional student demand, resulting in enrollment growth. At some institutions, investing in athletic programs to ensure success led to increased institutional visibility, which in turn stimulated student demand. At other institutions, launching additional athletic programs helped grow undergraduate enrollment and enhance student demand. Ultimately, institutional athletics played a meaningful role at the institutions researched in helping solidify their respective financial positions.

Analysis

An analysis of the author's findings revealed that both external environmental factors and internal factors can influence an institution's sustainability. Within the internal environment, "influential leaders, purposeful and adaptive change, and organizational culture" were found to be factors that impacted each institution's financial stability (Haller 2021, 4). For example, the presidents' deliberate planning efforts at R2 University resulted in a fourteen-percentage point increase in the institution's five-year graduation rate that enhanced current student enrollment revenue. Tied to this, each R2 president purposefully engaged the community in strategic initiatives that enhanced institutional support for planning efforts. Similarly, at Small Institution One, the president's philosophy that "ideas can come from anywhere" facilitated campus-wide planning efforts that resulted in enrollment gains of more than 1,000 students and helped achieve Cabinet and stakeholder buy-in for changes (Meis 2023, 55). Specifically, at each institution, the plans involved leveraging the institutional mission, investing in campus infrastructure through academic and student facilities, and initiating new academic programs that influenced both new student demand and current student persistence.

Also, an analysis of the authors' research found that the "external environment has been demonstrated to be a factor" influencing an institution's financial stability (Kezar 2001, 83). In analyzing the factors that influenced institutional financial stability at each institution, the authors found that specific responses to the external environment events did have a positive impact. For example, at R2 University, efforts to recruit and enroll a more national student body, in response to the external environment's decline in the local Catholic school market, resulted in enrolling 83 percent of new students from outside the state and a 33-percentage-point improvement in admissions selectivity. At Small Institution One, after assessing the external environment's impact on enrollment at other single-gender institutions, becoming coeducational led to seven years of enrollment growth (Meis 2023). Also, at Small Institution Three, the decision to open a medical school after assessing the positive financial margins associated with enrolling this population contributed to the university's enrollment growth of more than 1,000 students.

Another external environment factor that has been shown to influence an institution's financial stability is the role of intercollegiate athletics. The authors' research found that each college president leveraged intercollegiate athletics to stimulate additional student demand, thereby influencing enrollment growth and the institution's bottom line. For example, at R2 Institution and Small Institution Three, investing in and committing to athletic success raised the visibility of their respective institutions, which subsequently increased student demand. At Small Institutions One, Two, and Three, each president launched new athletic programs, resulting in increased student enrollment. Each of these athletically-related initiatives, as part of the intentional planning process, served to enhance the financial stability of the universities.

Conclusion

Institutions of higher education face several external environmental headwinds that potentially impact enrollment and threaten revenue streams and financial sustainability. As mentioned above, some of these include demographic shifts, increased college costs, and a more negative public perception of the value of higher education.

This case-study research documented several institutions that engaged in efforts to help ensure their university's financial stability. Among these involved presidents who engaged in a deliberate planning process that involved the campus community to secure buy-in for the plans being developed. Specifically, the plans aligned with the institutional mission and worked to improve the campus's physical plant and academic offerings, resulting in increased enrollment among new and continuing students. In addition, the plans included working to diversify student enrollment streams by recruiting a new and different population of students—some at the undergraduate level, as well as in the graduate and online spaces. Last, leveraging intercollegiate athletics by investing in programs to ensure success or growing the number of athletic programs served to both stimulate new student demand and increase enrollment. Each of these activities successfully influenced enrollment at the respective institutions, thereby increasing student tuition revenue and resulting in greater overall financial stability.

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