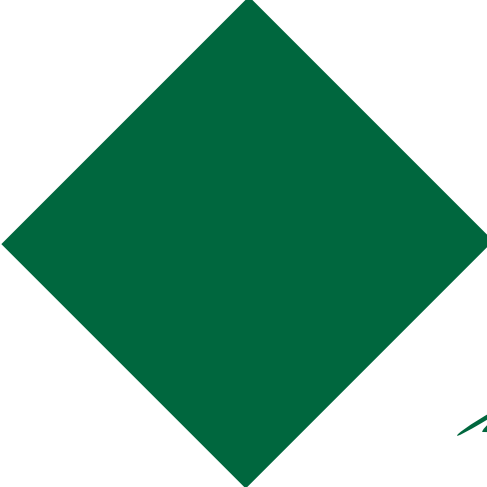
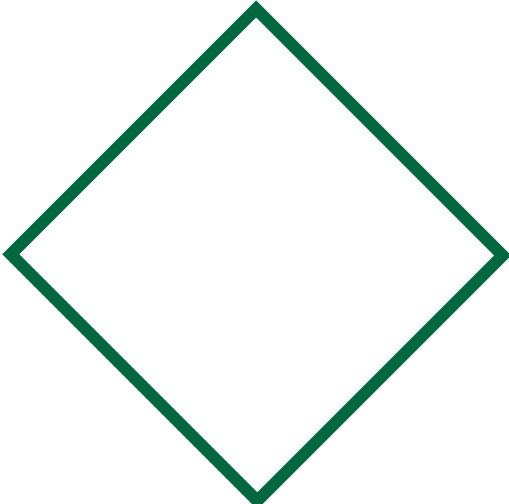


Transforming Lives for Eternity: **Strategic Plan 2021-2026**



SOUTHERN
ADVENTIST UNIVERSITY





Our Faith

◆ Students will grow spiritually

Benchmark: Each year, students will move upwards along the spiritual continuum profile from non-believer, beginner, believer, follower, to disciple

2021-2022

- a. Study factors that contribute to spiritual growth on the discipleship continuum
- b. Partner with local churches to help students feel connected to the local congregation through meaningful intergenerational relationships

2022-2023

- a. Reach goal of 80% of freshmen, sophomores, juniors, and seniors taking the spiritual life survey each year
- b. Discuss with the senior vice president for academic administration the possibility of having students take the spiritual life survey in core curriculum classes for all grades to accurately measure the spiritual growth of students within a cohort (survey length: 15-25 minutes)
- c. Study ways to increase scriptural engagement of students to improve their spiritual vitality; this is not merely to get students to read the Bible more, but to help students experience God through the Bible

2023-2024

- a. Create a Next Steps initiative that would be held during Vespers to help students take practical steps toward faith development
- b. Study the opportunity to develop a personalized spiritual growth plan for students based on data from the spiritual life survey

2024-2025

- a. Research prospective management systems to support a personalized student discipleship pathway for each profile in the spiritual continuum

◆ Create an outside-the-class curriculum (OCC) that utilizes the transformation process to aid students in developing character reflecting the fruit of the Spirit

Benchmark: Create eight modules along with assessment instruments to determine the modules' effectiveness and appropriate badging for students who complete the program

2021-2022

- a. Create the first OCC module to pilot on campus
- b. Develop a set of agreed-upon student outcomes with senior vice president for academic administration, vice president for student development, and vice president for spiritual life
- c. Ensure that OCC complements agreed-upon student outcomes created in collaboration with academics and student development

d. Work with financial administration on budget for future years

2022-2023

- a. Pilot first OCC module
- b. Study the potential of an OCC honors program to incentivize students
- c. Map student outcomes to OCC
- d. Update academic deans, department chairs, and staff about OCC
- e. Develop software tracking system and web page for OCC
- f. Create appropriate badging for each OCC module

2022-2023

- a. Launch eight OCC modules campus wide
- b. Reach 5% student participation within the first year

2024-2025

- Reach 10% student participation within the second year

2025-2026

- Reach 15% student participation within the third year

Increase small group ministries across campus

Benchmark: Increase student LifeGroup retention (consistent participation) by 10% each year

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Number of LifeGroups	50	80	88	96	104

2021-2022

- Improve the quality of mentorship by decreasing the coach/director ratio from 9:1 to 5:1; this will require an increase in the student labor budget to add 2 additional student coaches and 2 additional student directors

2022-2023

- Maintain the quality of mentorship by providing a coach/director ratio of 5:1; add 2 additional student coaches through the student labor budget subject to 88 LifeGroups meeting on campus

2022-2023

- Maintain the quality of mentorship by providing a coach/director ratio of 5:1; add 2 additional student coaches through the student labor budget subject to 96 LifeGroups meeting on campus

2023-2024

- Maintain the quality of mentorship by providing a coach/director ratio of 5:1; add 2 additional student coaches through the student labor budget subject to 104 LifeGroups meeting on campus

Increase the number of students participating as student missionaries

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Number of Student Missionaries	38	42	46	51	56

2021-2022

- Study the benefits of using the General Conference's Vivid Faith digital student missionary processing platform to help streamline the registration process and free up resources in Student Missions
- Continue conversations with the Board of Trustees Spiritual Life Committee regarding subsidies to constituent students who serve as student missionaries
- Seek to have every conference in the Southern Union reserve funds in its budget to financially assist constituent student missionaries (as per the North Carolina Conference)
- Study offering graduate student mission opportunities through the General Conference Tentmaker program
- Study the expansion of missions by partnering with the General Conference Global Missions through the Tentmaker initiative, also known as Total Employment Tentmaking, and the Waldensian Student initiative

2022-2023

- Meet with Collegedale Church pastors to provide a "Mission Spotlight" opportunity during the worship service that would feature returning student missionaries
- Develop innovative methods that returning student missionaries can use to recruit their friends

2023-2024

- Pilot two General Conference Global Missions and Tentmaker mission programs using Total Employment Tentmaking and the Waldensian Students initiative
- Assess the impact each pilot program has on Southern and other North American Division universities in relation to efficiency and the student experience

2024-2025

- Measure the success of and adjust each pilot program through student feedback surveys and budget savings.
- Increase donor contributions by 15%

Increase the number of students participating in Vision Trips

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Number of Students Participating in Vision Trips	100	160	200	240	300

2021-2022

- Foster awareness of vision trips on campus through promotion in classrooms, Vespers, and digital platforms.
- Continue conversations with the Board of Trustees Spiritual Life Committee regarding subsidies to constituent students who serve on a vision trip
- Hold discussions with ERC on advertising trips using the total cost (versus the subsidized cost) to achieve parity when promoting trips to the same location

2022-2023

- a. Develop innovative methods that returning vision trip volunteers can use to recruit their friends
- b. Meet with Collegedale Church pastors to provide a “Mission Spotlight” opportunity during the worship service that would feature returning vision trip volunteers
- c. Seek to persuade every conference in the Southern Union to assist constituent students with vision trip costs

2023-2024

- a. Raise \$100,000 towards vision trips through the Advancement office
- b. Collaborate with the Southern Missions and Evangelism Committee to discuss strategic ways to promote missions at Southern to students to create synergy
- c. Partner with Alumni Relations to invite past trip volunteers and other alumni to join trips as professional volunteers (i.e., doctors, general contractors, educators, etc.)

2024-2025

- Increase donor contributions by 25%

Campus culture and environment have positive impact on students' spiritual life

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Percentage of students who indicate they agree with the “positive impact” statement on the Spiritual Life Survey	68%	72%	76%	80%	84%

2021-2022

- a. Study the key drivers that lead students toward a positive spiritual experience at Southern
- b. Facilitate a knowledge flow session with students, asking what they believe has the greatest impact on their spiritual lives on campus
- c. Study the ministries that positively impact a student’s spiritual life

2022-2023

- a. Identify at least three employee “spiritual connectors” to serve on the Spiritual Life Committee
- b. Identify and widely distribute resources for faculty and staff that nurture and equip for them to initiate meaningful conversations with students

2023-2024

- a. Arrange for a faculty or staff member to pray for each student on campus at least once during the school year
- b. Share real-life stories of students being impacted through Southern’s culture and environment – “A shared story of a future hope”

2024-2025

- a. Celebrate acts by employees that highlight spiritual connection with students
- b. Create a book that highlights faculty and staff stories of spiritual connection with students



Our Students

◆ Support emotional development

Benchmark: Decrease the number of students who drop out due to mental health issues

2021-2022

- Increase access for students to mental health services
- Strengthen content on social media platforms to increase awareness of the mental health resources available on campus as well as added psychoeducational content
- Increase self-serve resources on Counseling Services' website
- Develop QEP

2022-2023

- Review student wait times for seeing a counselor, and if time consistently exceeds five working days, consider adding part-time or full-time counselor; consider budget adjustment
- Monitor Counseling Services' social media platforms/website and adjust as necessary
- Roll out QEP
- Hire professor(s) with expertise in these areas, as needed

◆ Increase academic programs offered in high-demand areas

Benchmark: Begin BS/BBA economics in F22, MAT in F22, EdD/PhD education in F23, BSE in F23, BS/MS/AuD in audiology/speech pathology in F25, DPT in F26. As a result of new program launches, expect an increase in enrollment

2021-2022

- Seek approval from Undergraduate/Graduate Council, Strategic Planning and Budgeting Committee, Board of Trustees, and SACS COC for BS in Engineering and Masters of Art in Teaching
- Hire economics professor to support the program
- Get an estimate of engineering laboratory costs for fundraising efforts of the president, senior vice president for Academic Administration, and vice president for Advancement; the latter will be part of the BSE proposal for Strategic Planning and Budget Committee review

2022-2023

- Begin writing prospectus for DPT program and EdD program and seek approval for the same from Graduate Council, Strategic Planning and Budget Committee, and Board of Trustees
- Begin hiring engineering faculty members based on prospectus to develop the program; guide development of office, teaching, and laboratory space on campus; and develop an equipment list for the program
- Add BS/BBA in Economics to curriculum (dependent on hiring economics professor in year one)
- Begin process of writing curriculum and documents necessary to seek initial accreditation of DPT program

2023-2024

- a. Set up a team to investigate audiology/speech pathology (AuD/MS/BS) program requirements and lay out an initial process for developing the necessary prospectuses and approvals to begin these programs of study
- b. Hire first DPT professor to continue program development

2024-2025

- a. Hire second DPT instructor (and perhaps others based on prospectus and work in prior years); submit initial application to CAPTE for initial approval to being program
- b. Build out DPT offices, classrooms, and laboratory spaces
- c. Write prospectuses for audiology/speech pathology (AuD/MS/BS) programs and take through university and SACS-COC approval processes

2025-2026

- a. Hire remaining faculty members required for DPT startup and begin first class (Note: this may be delayed by one year, depending on what happens in prior years)
- b. Develop necessary program information to seek initial accreditation of audiology/speech pathology (AuD/MS/BS) programs
- c. Hire professor(s) with expertise in these areas, as needed

◆ Ensure graduates possess durable skills that employers identify as most important for workplace success

Benchmark:

2021-2022

- Complete curriculum map of durable development in current curriculum

2022-2023

- a. Work with faculty leadership to identify ways to fill any gaps found in year one
- b. Test badging system and finalize co-curricular transcript process; work with Information Technology

2023-2024

- Implement system developed in prior-year work with faculty and test badging and co-curricular transcript concept

2024-2025

- Provide graduates with badges and co-curricular transcript for durable skills demonstrated at Southern



Improve graduation rates: four-year rate to 40% and six-year rate to 55%

Benchmark: Improve ability to determine graduation rates by student type, whether seeking AS or BS degrees and whether enrolled full- or part-time

2021-2022

- a. Develop better graduation rate tracking ability through comprehensive coding of cohorts, and report development

2022-2023

- a. Identify sub-cohort members (race, need, etc.) who are not succeeding as well as others, and focus more attention there to get students into years 2, 3, and 4
- b. Develop faculty training for improved and effective academic advising

2023-2024

- Evaluate what is learned in year 1 and year 2



◇ Improve retention rates: 1st-to-2nd-year retention to 80% and 2nd-to-3rd-year retention to 90%

Benchmark:

2021-2022

- a. Develop and apply a system to assign a unique cohort to all incoming students no matter if first-time, transfer, fall term, winter term, or summer term
- b. Apply this system to all prior, new, and transfer students
- c. Develop reports that accurately show retention rates by term by student type

◇ Increase enrollment

Benchmark: Identify and recruit every Adventist high school student in the Southern Union, including those not in the academy system

2021-2022

- a. Create alumni ambassador program in churches and public schools within Southern Union
- b. Deploy non-academy focused recruiter to identify, contact, and encourage every Adventist high school senior in Southern Union to enroll
- c. Develop online inquiry portal/form for pastors to enter prospective high school-aged member information for Southern to add to communication flow and recruit
- d. Collect date of birth data point from e-Adventist list in Southern Union to cross reference
- e. Provide Southern Union pastors with contact information for recent (<5 years) alumni who live in their area
- f. Complete value proposition research and train recruiters on agreed-upon messaging for conversations

2022-2023

- a. Deliver processes and systems that make it easy for prospective students to apply and enroll
- b. Implement new awarding and pricing strategies that prioritize enrollment growth and overall net tuition revenue
- c. Evaluate peer-to-peer initiative (WISR) success rate of increasing non-academy applications and yield rate
- d. Implement a redesigned leadership scholarship model that is inclusive and designed to increase yield
- e. Evaluate efficacy of digital marketing initiative for identifying prospective students who visit southern.edu

2023-2024

- a. Execute additional memorandums of understanding with Adventist colleges and universities outside the NAD (i.e., Antillean Adventist University) to increase non-academy transfer enrollment
- b. Coordinate non-academy events in Southern Union with churches and (virtual/in-person) college fairs

Benchmark: Increase by 20% the number of applications from non-academy Adventist students in Chattanooga region

2021-2022

- a. Research approximate number of public school and homeschooled high school Adventist students in the Southern Union
- b. Attend and collect inquiries at college fairs in Southern Union that Adventist non-academy high school students attend

2022-2023

- Attend conference ministerial meetings within Southern Union to bring awareness as well as offer partnerships with recent alumni to help grow church membership

Benchmark: Increase recruitment and promotion to non-academy Adventist students in the greater Chattanooga region in order to achieve a 20% enrollment increase

2021-2022

- a. Establish value proposition and adapt messaging for prospective Generation Z students
- b. Create outline of possible content and schedule for launching a new non-academy campus visit day program
- c. Research additional advertising opportunities (digital/social media, local print media, TV, radio ads) targeted to reach local non-academy high school students; create promotional plan and schedule
- d. Identify existing (or create new) campus programming (i.e., concerts, convocations, special events) that can be provided online or in person to local non-academy high school students
- e. Determine budget and needs for additional resources; plans will be contingent on funding

2022-2023

- a. Finalize content and schedule for local high school campus visit days and begin promoting campus visit days to constituents
- b. Implement advertising plan targeted to local non-academy high school students
- c. Create a schedule and promotion plan for inviting non-academy high school students to campus events
- d. Create surveys that can be used for campus visit days and for campus events to assess their effectiveness on influencing a prospective student to enroll

2023-2024

- a. Launch non-academy high school campus visit day program and execute survey to assess effectiveness of visit on influencing likelihood to enroll
- b. Review advertising strategy and adjust annually as needed
- c. Begin offering campus event programming to non-academy high school students and execute survey to assess effectiveness of visit on influencing likelihood to enroll
- d. Coordinate with the School of Education and Psychology to request classroom time from alumni who teach in public high schools in both the Chattanooga region and the Southern Union
- e. Operationalize these strategies to become yearly programs

Benchmark: Increase adult degree completion (ADC) enrollment

2021-2022

- Increase memorandums of understanding with businesses

2022-2023

- Phase in delivery modes/options, as feasible and affordable.

2023-2024

- Enroll minimum of 60 students by fiscal year 2024; overall goal is 150 at program maturity

Benchmark: Increase the number of graduate students to 500 by fiscal year 2025

2021-2022

- a. Study areas of growth
- b. Implement website optimization
- c. Implement revised MBA delivery modality

2022-2023

- Begin Master of Arts in teaching degree in Fall 2022

2023-2024

- a. Study doctoral program possibilities in education
- b. Begin doctorate in physical therapy by end of year 5



Our Faculty

◆ **Adopt an equitable and market-based wage approach for positions identified as most out of line with similar positions at peer institutions**

Benchmark:

2021-2022

- a. Develop a model for this initiative using Council of Independent's Colleges (CIC) Key Indicator Tools and the College and University Professional Association's Human Resources data
- b. Develop a plan for implementation following approval by the Board of Trustees. The goal is to have all academic ranks between the 40th and 60th percentile for the average of CIC southeast region on four comparisons (Carnegie Class, CIC enrollment size 2,001-3000, financial resources, and southeast region all institutions); estimated cost for full implementation not accounting for cost of living increases: \$1,031,862

2022-2023

- Phase in salary increases over four years, beginning with year 2 (year 1 of implementation cost: ~\$258,000)

2023-2024

- Add second year of salary increase (year 2 implementation cost: ~\$516,000)

2024-2025

- Add third year of salary increase (year 3 implementation cost: ~\$774,000)

2025-2026

- Add fourth year of salary increase (year 4 implementation cost: ~\$1,032,000)

◆ **Create a structure to support more research, creative, and professional endeavors (faculty assignments, university promotion and recruitment, etc.)**

Benchmark:

2021-2022

- Study how to create better structure for supporting research, professional and creative endeavors

◆ **Increase funding available for research**

Benchmark: Increase level of funding for stipends by \$50,000; increase number of faculty participating in paid research

2021-2022

- Study how Advancement's grant writer can best collaborate with academic areas to assist in funding research

Our Employees



◆ Create a robust Christian culture where love and kindness emanate through every interaction with students, colleagues, and guests

Benchmark:

2021-2022

- Study how to best proceed with this effort and determine who will lead it; complete this groundwork by May 31, 2022

◆ Attract, develop, and retain a highly talented and diverse workforce

Benchmark:

2021-2022

- Develop a plan, implementation timeline, and benchmarks by December 20, 2022; this initial work will include defining what is meant by a diverse workforce and how this objective would best be measured

◆ Implement innovative solutions to make operations more efficient and effective

Benchmark:

2021-2022

- a. Work with Credo to complete recommendations on a more efficient and effective governance structure
- b. Complete the academic cost and margin analysis and determine how this data can best be used

2022-2023

- a. Utilize academic cost and margin analysis and consultant's evaluation of cost, fit, and employability metrics to grow, reduce, or sunset existing academic programs and adjust degree and course offerings as appropriate
- b. Perform non-academic program and department review to determine areas where efficiencies may be gained

2023-2026

- Implement non-academic program and department adjustments as deemed appropriate



Promote a continuous learning culture by delivering strategies focused on motivating, engaging, and educating a high-performing workforce

Benchmark:

2021-2022

- Study how to promote a continuous learning culture

2022-2023

- Develop a plan, implementation timeline, and benchmarks by December 20, 2022

Increase number of employees financially giving back to the university

Benchmark: (2021 fiscal year employee giving was 70%)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Goals for Employee Giving	73%	75%	77%	80%	83%

Develop meaningful experiences between employees and students (Sabbath lunches, service projects, mission projects/trips, advising, etc.)

Benchmark:

2021-2022

- Develop a plan, implementation timeline, and benchmarks by May 31, 2022

Adopt an equitable and market-based wage approach for positions identified as most out of line with similar positions at peer institutions

Benchmark:

2021-2022

- Finalize a preliminary compensation study of faculty and administrative/staff wages by October 31, 2021; senior administration will review then recommend a preferred path forward as outlined below
- Conduct meeting by November 15, 2021, of university’s senior administration and Southern Union senior administration to discuss the process for addressing the compensation issues that have been verbalized by the Board of Trustees
- Present to Board Finance Committee a phased proposal for rolling out the compensation plan; by January 31, 2022, the committee will make its recommendation to the Board of Trustees
- Present the recommendation from the Finance Committee to the Board of Trustees at its February 2022 meeting; the Board will then vote as deemed appropriate; this vote might include a request of the NAD for authorization to implement a compensation plan in accordance with NAD policy Y 05 05 6 (c) (Alternate Remuneration Plans)

2023-2025

- Implement by fiscal year 2024 (proposed October 2023) the first phase of a multi-year plan for compensation enhancement, as is feasible based on the budget

Our Alumni

- ◆ **Increase alumni giving financially to Southern by involving the Alumni Council in reaching goals, targeting an appeal campaign to alumni, and engaging current students in a giving campaign**

Benchmark: (2021 fiscal year alumni giving was 7.6%)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Targets for Alumni Giving	8%	8.5%	9%	10%	11%

- ◆ **Increase alumni participation in Southern projects by developing and promoting an active alumni-owned business directory, involving the Alumni Council in reaching goals, increasing alumni-to-student mentorship, increasing future alumni program participants, re-establishing in-person regional alumni chapters, restarting the Lights Volunteer program, and increasing alumni presence at on-campus events**

Benchmark: (2021 fiscal year alumni participation was 9.5%)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Targets for Alumni Participation	10.5%	11.5%	13%	14%	15%



Our Board of Trustees

◆ Be “thought partners” to administration

Benchmark: During and between board meetings, share relevant ideas to foster and promote strategic visioning and operational success

◆ Increase giving of board members to 100% each year

Benchmark: Each year 100% of board members will contribute financially to Southern

◆ Increase the frequency of board committee meetings to focus on strategic initiatives

Benchmark: Board of Trustees will meet at least four times per year to consider strategic outcomes





Our Community

◇ Create a speaker's bureau for our Adventist and non-Adventist communities

Benchmark: Expand the existing Resource Guide into audience-specific communications: (1) Southern Union schools, conference offices, churches, (2) local public schools, (3) local media, and (4) local civic groups; distribute and promote the revised guides

2021-2022

- a. Gather new speakers/topics and update the existing guide on Southern's website
- b. Create schedule for distributing all guides
- c. Mail printed guides to Southern Union schools, conference offices, and churches
- d. Increase advertising promotion of guides
- e. Email guides to the above four groups

2022-2023

- a. Begin annual standardized process to update, distribute, and promote guides
- b. Mail printed guides to local schools, media outlets, and civic groups

2023-2024

- a. Conduct survey of guide recipients to determine usefulness and suggestions; apply the recommendations in updates to guide
- b. Begin bi-annual rotation for print mailings, alternating between Adventist and local community guides

◇ Become the Christian university of choice for our region

Benchmark: Increase general print, radio, and online advertising in Chattanooga/Cleveland area

2021-2022

- a. Establish a promotional plan for increasing local advertising
- b. Determine budget and needs for additional resources; plans will be contingent on funding
- c. Begin creating and placing advertising where funds/resources are available

2022-2023

- Launch full promotional plan

2023-2024

- d. Continue the promotion plan.
- e. Evaluate ad relevance and update promotional strategy as appropriate

Benchmark: Create visit days for local Adventist/non-Adventist educators and pastors

2021-2022

- a. Research interest among local Adventist/non-Adventist pastors and local Adventist/non-Adventist teachers

- b. Based on research, create outline of themes and schedule for campus visit days
- c. Determine budget and needs for additional resources; plans will be contingent on funding

2022-2023

- a. Establish the general content for campus visit days
- b. Create schedule for rotating visit days between groups, one or two groups per year
- c. Begin promoting campus visit days to various groups
- d. Create survey that can be used after visit to assess effectiveness of the visit on influencing each guest's likelihood to recommend Southern to young people

2023-2024

- a. Launch campus visit day rotations
- b. Implement and track annual survey
- c. Assess data and increase frequency of events if found impactful

Benchmarks: Become a top 25% regional university in the South, as ranked by US News; be in the top 10 in social mobility of regional universities in the South, as ranked by US News

2021-2022

- a. Establish ad hoc group to work on increasing ranking
- b. Review methodology and current baseline for ranking (Success of increasing ranking is contingent on campus areas improving statistics used in methodology)
- c. Acquire subscription to "Academic Insights" to study Southern rankings, including breakdown of peer assessment.
- d. Schedule and roll out plan to effect increase in ranking
- e. Determine budget and needs for additional resources; plans will be contingent on funding

2022-2023

- a. Create specific targets for improving each area of methodology to affect increase in rankings in years 3-5
- b. Enact any changes identified as immediately possible to implement

2023-2024

- a. Implement changes as scheduled
- b. Track methodology and institution assessment data against yearly goals; adapt plan accordingly

Increase the number of student internships in the region

Benchmark:

2021-2022

- Complete survey of the number of internships finished by graduates; ascertain which academic areas need to implement internships

2022-2023

- a. Implement full use of Handshake app for better coordination with area and out-of-area internship providers
- b. Implement internships in majors that currently do not require them but need to

2023-2024

- a. Consider adding help in the career advising area to oversee internships and help increase number of internships available for students

Increase the number of community events in the region

Benchmark:

2021-2022

- Conduct a review of current university programming that could be made available to public audiences such as (1) at least one ensemble concert each year at a large venue downtown, (2) E.A. Anderson Lecture series and E.O. Grundset Lecture series events at larger venues on campus and promote them locally, (3) Archaeology Lecture series events are already open to the public and advertised, as is the Archaeological Museum, (4) Add resources to Marketing and University Relations so that the university is able to advertise these events and resources in local media on an ongoing basis

Conduct and share results of an economic impact study

Benchmark:

2021-2022

- Identify firm to conduct study

2022-2023

- Conduct and begin use of study



Our Facilities

◆ Update Facility Master Plan

Benchmark:

2021-2022

- Share with Board Facilities Committee a comprehensive, in-house facility master plan by May 31, 2022

2022-2023

- Achieve approval of finalized, formal facility master plan document from the Board Facilities Committee, including proposed funding sources and timeline, by December 31, 2022

◆ Give study to increasing student housing capacity

Benchmark:

2021-2022

- a. Determine timing of a potential student housing shortage and strategies to mitigate a shortage; complete by December 20, 2021
- b. Determine the preferred location and style of student housing that would best meet Southern's future needs; complete by January 31, 2022
- c. Determine a timeline for building new student housing (if needed) and proposed funding source(s) by March 31, 2022

2022-2023

- a. Present housing plans to the Board Finance Committee by August 31, 2022, and vote a recommendation that will go to the Board of Trustees
- b. Vote at October 2022 Board of Trustees meeting on authorization to proceed with housing plan as appropriate

◆ Give study to building a School of Business facility

Benchmark:

- a. Establish an ad hoc committee by November 30, 2021
- b. Determine the need for a School of Business building and, as appropriate based on that determination, develop a general plan for type of structure (i.e. stand-alone building or addition/annex to Brock Hall); if a stand-alone building, determine the proposed location for the building; complete this work by March 31, 2022
- c. Develop rough plans for what would be needed, including approximate size and initial cost for the building, by May 31, 2022
- d. Develop more formal, preliminary, architectural drawings by October 31, 2022, for consideration by the Board Facilities Committee
- e. Determine by October 31, 2022, the feasibility of fundraising for the building
- f. Determine by December 20, 2022, a fundraising and building timeline

- g. Vote at February 2023 Board of Trustees meeting on authorization to proceed with fundraising and a building based on appropriate criteria/parameters

◇ Maximize backfill opportunities created by the Bietz Center for Student Life, the new Hispanic Church, and (potentially) a new School of Business building

Benchmark:

- a. Determine by December 20, 2021, the priorities for departmental location in Wright Hall based on administrative needs and space constraints
- b. Determine by January 31, 2022, the space needs for new academic programs that are being developed
- c. Determine by March 31, 2022, the proposed uses for the following (in order of priority):
 1. Vacated spaces in Lynn Wood Hall and the fourth floor of Wright Hall resulting from the move of departments to the Bietz Center for Student Life
 2. To-be-vacated Hispanic-American Church building on Colcord Drive
 3. Potentially vacated space in Brock Hall, if a new School of Business building is built

◇ Maintain a beautiful and safe campus

Benchmark:

2021-2022

- a. Determine by February 28, 2022, the areas in greatest need of campus beautification
- b. Develop a timeline for implementation of campus beautification projects, with appropriate budgets, to be presented to President's Cabinet for consideration and approval by April 30, 2022

2022-2025

- Complete the campus beautification and safety projects, based on highest to lowest priority



Our Finances

SOUTHERN ADVENTIST UNIVERSITY

◆ Obtain 200 days of cash on hand (dependent on enrollment, debt liquidation, and capital allocations)

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
Days of Cash on Hand (by end of fiscal year)	160	155	160	170	180	200

◆ Grow Endowment to \$80 million—based on \$15 million in contributions and 2% net annual investment growth (after distributions)

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	Total
Beginning Balance	\$60,719,730	\$63,934,125	\$68,212,807	\$73,577,063	\$60,719,730
Funds Raised	\$2,000,000	\$3,000,000	\$4,000,000	\$6,000,000	\$15,000,000
Growth (2%)	\$1,214,395	\$1,278,682	\$1,364,256	\$1,471,541	\$5,328,874
Total Increase	\$3,214,395	\$4,278,682	\$5,364,256	\$7,471,541	\$20,328,874
Ending Balance	\$63,934,125	\$68,212,807	\$73,577,063	\$81,048,604	\$81,048,604

◆ Be debt free by December 2025 (fiscal year 2026) – Assumes taking on no additional debt in the next five years and making a double payment in December 2025

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Beginning Balance	\$8,180,000	\$6,815,000	\$5,450,000	\$4,085,000	\$2,720,000
Payments (Dec.)	(1,365,000)	(1,365,000)	(1,365,000)	(1,365,000)	(2,720,000)
Ending Balance	\$6,815,000	\$5,450,000	\$4,085,000	\$2,720,000	-

◆ Maintain a composite financial index (CFI) each year greater than 6

Benchmark: May 31, 2021 score: 6.91. May 31, 2022 to May 31, 2025 goal: 6.0 or higher

Increase Legacy Society membership each year by involving the Planned Giving Committee in meeting this goal, establishing a new promotion program, conducting visits with prospective members, increasing alumni and employee awareness of university programs, and recruiting additional attorneys and financial planners affiliated with the university

Benchmark: (fiscal year 2021 membership was 736)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Goal for total Legacy Society Members	756	776	796	816	836

Add new endowed scholarships each year by soliciting individuals, developing academy endowments, articulating specific program needs, partnering with specific schools and departments, and pitching need at annual gala

Benchmark: (fiscal year 2021 number of scholarships was 278)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Goal for total Endowed Scholarships	286	294	302	310	318

Submit new grant proposals each year by meeting with schools and departments on a set schedule to stay abreast of current needs and opportunities, researching available and corresponding grants, and working with each school and or department to complete application and follow-up reporting

Benchmark:

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
New Grant Proposals Goal	10	10	10	10	10

◆ **Increase the number of annual donors each year by including philanthropy as campus-wide philosophy, developing menu of giving options, telling impact and need stories to constituents, revamping call center process, involving Advancement Committee in reaching annual goals, increasing board member annual giving, increasing alumni annual giving, increasing employee annual giving, and hosting an annual gala**

Benchmark: (fiscal year 2021 total number of annual donors was 2,286)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Number of Annual Donors	2,332	2,379	2,426	2,475	2,525

◆ **Increase the overall giving each year (excluding future capital project goals to be determined) by including philanthropy as campus-wide philosophy, using missional messaging for asks, and articulating university needs to donors**

Benchmark: (fiscal year 2021 total giving was \$6,121,019)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Annual Giving Goals	\$6.2 million	\$6.4 million	\$6.75 million	\$7.1 million	\$7.5 million



Endow professors/chairs each year by soliciting individuals, articulating specific program needs, partnering with specific schools and departments, and pitching need at first annual gala

Benchmark: (No endowed professors/chairs were endowed in fiscal year 2021)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Number of annual professor/chairs added	2	2	2	2	2

Launch a new campaign by identifying project scope and feasibility, securing initial commitments for campaign, and creating stewardship opportunities

Benchmark: (Last campaign ended fiscal year 2021, calendar year 2020)

2021-2022

- Launch campaign for fiscal year 2022

2022-2023

- Campaign phases well developed and in process

2023-2024

- Campaign continuation and/or completion per plan





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