

2022 - 2023



# STRATEGIC PLAN

YEAR-END SUMMARY



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# OUR

# FAITH



## Spiritual Growth

**Benchmark:** Students continue to grow spiritually

1. Partner with the Collegedale Church's Connections Café (Sabbath meals, care packages, relationship building opportunities, and ministry involvement)

+ The SuCasa, Collegedale, & McDonald Road SDA Churches were churches in which we partnered. The three churches committed to 'The Growing Together' six core competencies (Key-Chain Leadership, Empathy, Taking Jesus' Message Seriously, Warm Relationships, Prioritizing Young People, & Being Best Neighbors in the Community) to support intergenerational ministry. The McDonald Road Church conducted the 'Growing Together' assessment in January 2023 to shed light on how well their church is positioned to engage young adults and identified both areas of strengths and growth where they intend on focusing attention.

2. Partner with three local churches to support student church engagement: invite senior pastors to Southern's campus for a meal and strategic conversation, offer Growing Young Assessment Tool through NAD/GCCSDA to provide insights on church's effectiveness with young people

+ During the fall and winter semesters, conversations occurred with the church pastors of the SuCasa, Collegedale and McDonald Road Churches to gain insight into their views on creating a space where students could experience acceptance and connection. The Growing Together Assessment tool was used to measure and support intergeneration ministry so students can continue to experience belonging and meaningful connections with local churches.

3. Invite every freshmen student to transfer their membership to local churches in order to benefit from mission trip subsidies offered by Southern Union conferences

Communicate local church leadership eligibility that accompanies membership transfer, and offer expanded spiritual care from local church members and pastors through signups at Ministry Expo.

+ Freshmen were invited to transfer their church membership through a multi-pronged approach: 1) Chaplains made announcements during Freshman orientation, 2) The Collegedale Church pastors were present at the Main Event and invited to transfer their membership, and 3) the advantages of church membership were shared with college students during the first sermon of the Fall semester at the University Church.

+ Ministry Expo occurred on August 26, 2022, and January 13, 2023 at the Collegedale Church right after Vespers. At ministry Expo we invite our community members, churches, and organizations to come to campus and to meet with hundreds of our students and invite them to serve in their ministries. Ministry Expo spreads awareness of ministries in the local area, while inviting our university students to volunteer and engage. The Vespers on August 26, 2022 had 969 students attend and the Vespers in January 13, 2023 had 989 students in attendance.

+ Next Vespers occurred on April 14, 2023 at the Collegedale Church. Churches and ministries invited to Next Vespers are those that seek to have ministries specifically aimed at young adults. The Vespers speaker emphasized the importance of student's involvement at the local church. At Vespers 592 students and soon-to-be graduates were then invited to meet with local church and Conference leaders at booths at the Collegedale Church. Church leaders encouraged students to start their spiritual journey with a local church when they graduate from Southern. Below is a list of local churches and ministries that setup a booth at Next Step Vespers:

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- Adventist Christian Fellowship – Georgia Cumberland Conference
- East Ridge – Tennessee
- Atlanta North Church – Georgia
- Orchard Park SDA Church. – Chattanooga
- WholeLife Church – Florida
- Hixson SDA Church – Tennessee
- Jellico / LaFollette – Tennessee
- Spring Meadows – Florida

4. The Spiritual Life Committee will study ways to increase scriptural engagement of students to improve their spiritual vitality and to experience God through the Bible by offering 100 free Bibles to those without, providing a Bible reading campaign, and offering a vespers program highlighting the power of God’s Word

+ On January 13, the vespers speaker preached on the Transforming Power of God’s Word with 989 students in attendance. Bibles were distributed to students during Ministry Expo and throughout the year at the Dorms. All 100 Bibles have been distributed.

5. The Spiritual Life Committee will explore additional assessment tools to evaluate students’ spiritual growth

+ An assessment tool was implemented in LifeGroups. LifeGroups students had the opportunity to designate where they stood on a spiritual life continuum, both before and after their participation in LifeGroups. The assessment revealed a correlation between spiritual growth and participation in small groups. The results of that survey are as follows:

- 61.7% (152/246) of students who responded to the survey during the Fall Semester experienced spiritual continuum growth within one semester. Specifically:
  - 50% of students who self-identified as a non-believer (n=2) experienced spiritual growth
  - 80% of students who self-identified as a beginner (n=25) experienced spiritual growth
  - 64% of students who self-identified as a believer (n=88) experienced spiritual growth
  - 30% of students who self-identified as a follower (n=81) experienced spiritual growth
  - 20% of students self-identified as a disciple (n=50)

6. The Spiritual Life Committee will monitor student cohort spiritual continuum data to evaluate spiritual growth from year to year along the spiritual continuum profile from non-believer, beginner, believer, follower, to disciple

+ The Spiritual Life Committee monitored student cohort spiritual continuum data. Our findings indicate that there has been a slight increase in growth in the Freshman 21/22 and Sophomores 21/22 class overall for the spiritual life continuum. To incentivize students to complete the Spiritual Life Survey in all four years, we will be providing extra enrichment credits.

	2021/2022					2022/2023				
	Non-Believer	Beginner	Believer	Follower	Disciple	Non-Believer	Beginner	Believer	Follower	Disciple
<b>Freshman</b>	2%	22%	62%	9%	6%	2%	22%	62%	9%	6%
<b>Sophomores</b>	3%	18%	60%	13%	6%	3%	18%	60%	13%	6%
<b>Juniors</b>	4%	20%	53%	17%	6%	4%	20%	53%	17%	6%
<b>Seniors</b>	3%	18%	52%	19%	7%	3%	18%	52%	19%	7%
Changes between 2021/2022 to 2022 2023			Non-Believer	Beginner	Believer	Follower	Disciple			
<b>Freshman (21/22) to Sophomore (22/23)</b>			1%	-4%	-2%	4%	0%			
<b>Sophomores (21/22) to Juniors (22/23)</b>			1%	2%	-7%	4%	0%			
<b>Juniors (21/22) to Seniors (22/23)</b>			-1%	-2%	-1%	2%	1%			

# Character Development

**Benchmark:** Implement five outside-the-class curriculum (OCC) modules that utilize the transformation process to aid students in developing character reflecting the fruit of the Spirit along with assessment instruments to determine the modules' effectiveness and appropriate badging for students who complete the program

1. Pilot module #1 and #2 of five modules in fall 2022 and winter 2023, respectively, with 30 student participants each semester

## + Pilot Module #1 Adventist Worldview

- The fall semester pilot of the Adventist Worldview module with 30 students was a milestone in our effort to align Adventist education in the classroom with co-curricular programs outside the classroom. Students were assessed before the pilot was taken and after the pilot was completed to measure the pilot's effectiveness.
- 95% of students agreed that the pilot helped them examine various worldviews through comparative analysis.
- 95% of students agreed that the pilot helped them understand the "value added/benefit" of having an Adventist Worldview.
- 100% of the students agreed that the pilot helped them integrate knowledge from analyzing and evaluating biblical stories and spiritual concepts, in considerable depth.
- 100% of students agreed that the pilot helped them develop the skills to extrapolate others' perspectives by analyzing multiple possible interpretations and respond with insight, in order to justify their personal, biblical position.

## + Pilot Module #2 Vocational Calling

- All modules of Vocational calling have been written and are being uploaded by Online Campus staff.
- We were unable to pilot the modules in the winter semester due to the difficulty of finding a curriculum writer who was contracted later than expected. We are working with Online Campus to have student feedback opportunities embedded into the online modules.

2. Work with Financial Administration on estimated budget costs for OCC digital management and training system

+ In working with Financial Administration, it was decided to use the in-house platform developed by Southern's Online Campus team to keep costs down. Online campus is developing a digital management system for badges/co-curricular events and programs on campus.

3. Finalize and develop metrics for agreed upon student outcomes with Senior Vice President for Academic Administration and Vice Presidents for Student Development and Spiritual Life

+ Metrics and outcomes have been developed based on the five growth areas outlined in the student catalog: intellectual, spiritual, personal & social/cultural, physical, and vocational.

# Small Group Ministries

**Benchmark:** Increase student LifeGroups for further student engagement in spiritual activities and character development

	Goal	Actual
<b>Number of LifeGroups</b>	<b>80</b>	Fall 2022 had <b>82</b> LifeGroups with a total of 975 students and 482 consistent attendees (consistent attendees is at a higher percentage than previous years).  Winter 2023 had <b>84</b> LifeGroup with a total of 976 students and 513 consistent attendees.

**Benchmark:** Increase students' sense of belonging through transformational LifeGroups

1. Maintain the quality of mentorship by providing a coach/director and adding two additional student coaches through the student labor budget subject to 80 LifeGroups meeting on campus

- + 98% of students surveyed stated that they experienced a meaningful sense of belonging. Based on student surveys completed in November 28, 2022 (n=246) and April 10, 2023 (n=186)
- + The goal was met through the addition of two student coaches who were funded by our student labor budget to provide support to our 80 LifeGroup leaders and maintain mentorship quality. This measure has not only ensured that all students LifeGroup leaders have access to the same level of spiritual support, but also allowed us to expand our reach and evangelism to students seeking spiritual growth. We believe that this measure has been an invaluable resource and by God's grace has led to the following responses being made by students in the Fall 2022 and Winter 2023 semester:
  - + **Fall 2022**
    - Join a LifeGroup: 193
    - Lead a LifeGroup: 72
    - Bible Study: 99
    - Baptism: 13
    - Second Conversion: 53
  - + **Winter 2023**
    - Join a LifeGroup: 131
    - Lead a LifeGroup: 55
    - Bible Study: 61
    - Baptism: 4
    - Second Conversion: 32

2. Pilot transformational learning framework with 10 LifeGroups by utilizing the four steps of disruption, reflective analysis, verify and act, and integration

- + The framework used has been reviewed. For organizational alignment, we plan to incorporate the durable skills rubric that was developed through Academics to highlight demonstrable skills of LifeGroup Leaders. The rubric will be implemented in the 2023/2024 year to highlight how co-curricular activities provide opportunities for students to demonstrate durable skills.

# Student Missionaries

**Benchmark:** Increase the number of students participating as student missionaries

	Goal	Actual
Number of Student Missionaries	42	64

1. Student Missions director to study pairing graduate students' major with mission opportunities as offered by the General Conference World Mission Tentmaker program

- + The Student Missions Director connected with churches that had alumni from Southern, such as Apison, Standifer Gap, and Hickson. The purpose was to engage alumni and encourage their involvement in overseas service through the General Conference (GC) World Missions Tentmaker program that is geared towards the 10/40 window.
- + The responses to the invitation was met with a level of hesitancy from alumni. One significant factor contributing to their reluctance was the nature of the proposed mission field, namely the 10/40 window, which is a challenging region for missions.
- + The study revealed that recent graduates are hesitant to participate in the World Missions Tentmaker program offered by the GC. Student Missions will be reassessing this strategic goal moving forward.

2. Study mission expansion opportunities through the Waldensian Student initiative housed in the General Conference Global Missions, which offers the opportunity for Adventist students to study on an overseas public university/college campus for missional purposes, such as the opportunity to make spiritual friendships, hold small group meetings, and share the invitation to follow Christ

- + The study of mission expansion opportunities through the Waldensian Student initiative have led to the following:
  - Creating promotional materials such as posters and handouts,
  - Conducting a cost analysis with the East Mediterranean region director pastor Darron Boyd to launch a recruiting program.
  - Having guest speakers for classes, such as Gabriella Phillips from the NAD, and
  - Working on a dedicated training track for Student Missionaries seeking to participate in the Waldensian program.
  - As a result, 3 students have been recruited with another 2 giving consideration.

3. Develop innovative methods that returning student missionaries can use to recruit their friends

- + During the last afterglow returned students set up a total of 16 tables promoting various locations they have served. As a result, 197 students have expressed interest in doing student missions. Out of the 197 students, 80 of them were students who came forward during the altar call during our missions vespers on Friday, September 23, 2022.

4. Seek opportunity at the Collegedale SDA Church one time per semester for a "Mission Spotlight" worship service to highlight student missions

- + Southern's student missionaries promoted the Student Missions program at Renewal, Adoration, Merge and Connect worship services at the Collegedale Church in Winter 2023. They highlighted student missions on February 18 for both Renewal and Adoration church services.

## Vision Trips

**Benchmark:** Increase the number of students participating in vision trips

	Goal	Actual
Number of Students Participating in Vision Trips	60	78

Three trips were launched during the year, with 39 students to Florida, 14 students to Alaska, and 25 students to Brazil.

1. Bring awareness of vision trip opportunities through Southern Connections' classrooms visits, highlight short-term mission trips during one worship service per semester, and digital/social media platforms

+ The Christian Service team visited 22 of 26 Southern Connections fall semester, introducing students to opportunities for community service in our local area as well as on vision trips both domestic and abroad. Students who served on the W22 semester Nome, Alaska trip and S22 semester Bucharest, Romania trip shared testimonies during the Alumni Sabbath School in October. Opportunities were advertised via [southern.edu/visiontrips](http://southern.edu/visiontrips), [southern.edu/serve](http://southern.edu/serve), and service was documented on Instagram @southernerves.

2. 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

+ It was agreed that ERC trips would be advertised at parity with Vision Trips when going to the same destination.

3. Give study to having various departments/schools lead a vision trip

+ Study revealed that there are opportunities to partner with departments/schools to lead a Vision Trip including the School of Journalism and Communication and Gym-Masters. For example, the School of Journalism and Communication is partnering with the Hope Channel to carry out a Vision Trip to the Philippines during Spring Break of 2024.

## Spiritual Culture

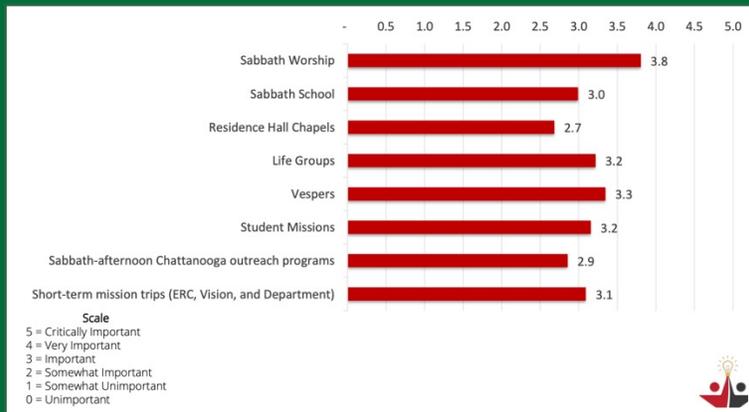
**Benchmark:** Increase the number of students who indicate they agree on the Spiritual Life Survey that Southern's campus culture and environment have a positive impact on their spiritual life

1. Facilitate a knowledge flow session with students, asking what they believe has the greatest impact on their spiritual lives on campus

+ For 1-3, a student focus group meeting was held in August 2022 to fulfill our strategic goal of understanding the spiritual culture at Southern University. Over 30 students took part in the focus group, providing 16 meaningful points that the Office of Ministry and Missions has recorded. Most of those who were part of the focus groups would self-identify as a follower or disciple on the spiritual life continuum.

2. Study the ministries that positively impact a students' spiritual life based on the annual Spiritual Life Survey results

+ Survey results from Fall 2022 that asked students to rate the importance of the following worship and service opportunities for their spiritual growth



3. Conduct a more comprehensive study on the spiritual campus culture by holding student focus groups comprised of students that completed the Spiritual Life Survey

+ Survey conducted in Fall 2022. The question in the survey was refined based on feedback received from students. The question now reads, "My interactions with other SAU students have a positive impact on my spiritual life." This year, there was an increase of 2% who stated that "campus culture and environment have a positive impact on their spiritual life"

# OUR

# STUDENTS

## Emotional Support

**Benchmark:** Students will report higher levels of well-being and lower levels of psychological distress

1. Implement pilot Quality Enhancement Program (QEP) in fall of 2022 that focuses on mental wellness; the QEP reflects and affirms a commitment to enhance overall institutional quality and effectiveness by focusing on an issue important to improving student learning outcomes and/or student success

a. Create curricular content for courses taken by freshmen: Southern Connections (NOND 101), Fitness for Collegiate Life (PEAC 125), Developmental Psychology (PSYC 128)

+ Created and included modules in the following classes: NOND 101, PEAC 125, PSYC 128, PEAC 425

b. Pilot Mental Wellness Week programming (fall)

+ As a result of piloting Mental Wellness Week, Alicia Patterson, expert on grief recovery, conducted a series on grief, which will be added in the future as well as adding new on-campus and off-campus partners to our daily booths.

c. Address mental wellness through a *Southern Accent* column

+ The *Southern Accent* is publishing a weekly column addressing mental wellness. Articles are written by various authors.

d. Pilot "Stress Out" Week programming (winter)

+ Over 200 students were involved in the various activities during the week. One event was extremely popular: students adopted succulents to care for.

2. Increase access for students to mental health services by increasing the number of counseling hours available to students and continue mental wellness awareness through events, programming, social media, and online information accessibility

+ Counseling Services added two part-time counselors to the staff. Each is provided hours after 5 pm on the campus. Minor adjustment to winter adjustment, we have now included telehealth therapists for 5pm-8am weekdays & 12 noon Friday to Monday 8 am.

Year	2017 - 18	2018 - 19	2019 - 20	2020 - 21	2021 - 22	2022 - 23
Individuals	2,122	2,356	2,010	2,157	2,117	2,192
Couples					9	3

## Other Pertinent Statistics

Females	Males
367	152
Race	
White	189
Hispanic	155
Black	55
Asian	109
Other	12

+ Parkridge Valley Behavioral Health Care: 43 students were transported by residence hall deans to Valley this past academic year. That number is a 400% increase from the year previous and does not include the number of students who were transported by family or friends.

## UHC Mental Health Visits

Year	Number of Visits (Unique)
2018	486 (134)
2019	520 (157)
2020	502 (139)
2021	433 (130)
2022	538 (245)

+ The internal goal was to have 1,500 followers on Instagram by the end 2022-23. We started the academic year at 535 followers. We ended the year with 714 followers, a 34% increase. The Instagram account featured new content on a biweekly basis and included material on stress, anxiety, time management, and other topics of mental wellness. Also included were announcements of QEP events.

+ The Counseling Services webpage includes a ULifeline link to a wealth of mental health resources. It is underutilized, which suggests we do not do a good job at promoting it.

## Academic Programs

**Benchmark:** Increase academic programs offered in high-demand areas: begin BS/BBA Economics/Econometrics in fall 2023, EdD/PhD Education in fall 2024, BS in Engineering (BSE) in fall 2023, BS/MS/AuD in Audiology/Speech Pathology in fall 2026, Doctorate in Physical Therapy (DPT) in fall 2027, and Criminal Justice in Adult Degree Completion in fall 2027, Chemical Engineering fall 2027, Medical Laboratory Science (MLS) degree fall 2027 if feasibility study from prior years shows demand and likely program success; as a result of new program launches, expect an increase in enrollment

1. Actively seeking SACSCOC approval for the Bachelor's of Science in Engineering

+ BS prospectus submitted to SACSCOC December 2022. The university is waiting for the official response to the prospectus.

2. 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

+ Hiring of engineering faculty members is on track with the prospectus (n=3) and is sufficient to begin the program on time in Fall 2023.  
+ Lab space and equipment should be ready for fall 2023 classes.

3. Hire economics professor to support the program

+ The university has hired two professors qualified to teach economics at both the undergraduate level and graduate level one of which has a PhD in Economics from the University of California, Riverside. The minor will continue in the 2023-2024 academic year and an area of emphasis or major will be developed for release in the 2023-2024 academic year.

4. Begin writing prospectus for DPT program and seek approval for the same from Graduate Council, Strategic Planning and Budget Committee, and Board of Trustees

+ The prospectus for the DPT program has been prepared and approved through the graduate council and the Board of Trustees. The prospectus will be submitted to SACSCOC along with a substantive change request to add the degree in June 2023. The program director position has been posted and the university is receiving curriculum vitae documents from those interested in being considered for the director role.

## Credential Durable Skills

**Benchmark:** Ensure graduates possess durable skills that employers identify as most important for workplace success

1. Complete curriculum map of durable development in current curriculum

+ First round of mapping completed in the 2021-2022 academic year.

2. Set up taskforces to develop rubrics for each durable skill area that defines introduction, reinforcement, and master

+ Taskforces led by Matt Tolbert completed durable skill rubric development this year (2022-2023). Rubrics redefined and reorganized durable skill areas requiring a second round of curriculum mapping. In addition, there are significant concerns among faculty about how much additional work may be needed to evaluate durable skills although there appears to be good support for the idea. Given the changes that occurred during rubric development a second curriculum map will need to be completed in the 2023-2024 academic year.

## Graduation Rates

**Benchmark:** Improve ability to determine graduation rates by student type, whether seeking AS or BS degrees and whether enrolled full- or part-time; move four-year rate to 40% and six-year rate to 55%

1. Develop better graduation rate tracking ability through comprehensive coding of cohorts and report development

+ Cohorts assigned W23. Reporting against cohorts is in development for 2023-2024.

2. 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 two, three, and four

+ Graduation rate by race, ethnicity, and Pell eligibility by AS, BS, or both, and whether part-time for full-time or both, now reported and a Power BI report for public viewing is in development by the Office of Institutional Research and Planning. Overall data for the institution are trending up. Males complete degrees at rates approximately 10% less than females. Black or African American males complete degrees at approximately 14% less than students overall. In the 2023-2024 year a slicer for first generation status will be added to the Power BI report so that this group can also be analyzed for graduation rate success.

3. Evaluate degree completion patterns for 4- and 6-year completions to see if certain degree types are dragging the 4-year rates; based on this analysis, we will consider evaluating this benchmark

+ This work was not completed in the 2022-2023 academic year. It will be added to the work to be completed in the 2023-2024 academic year.

4. Revise PUB4001 to no longer double count graduates and accurately provide retention reporting

+ Rates shown on this report now match other reports.

5. Reports showing graduation rates of various types to be available May 2023

+ See above.

## Student Retention

**Benchmark:** 1st-to-2nd-year retention rate goal 80%, 2nd-to-3rd-year retention rate goal 90%

+ Retention to second year now meets the 80% goal. The data for the last five cohort years are F17: 74.1%, F18: 79.1%, F20: 79.5%, F21: 81.4%.

# Enrollment

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

## Budgeted Enrollment goals for current and upcoming fiscal years

	FY23	FY24	FY25	FY25
<b>Freshman</b>	630	650	650	650
	FY23	FY24	FY25	FY25
<b>Transfers</b>	140	135	140	145

1. Create alumni ambassador program in churches and public schools within Southern Union

+ For the 2023-2024 school year, the Enrollment Council will identify at least three individuals to serve as ambassadors in the Southern Union. They will participate during weeks of prayer and weekend programming throughout the Southern Union to collect inquiries and schedule campus visits.

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

1. Develop online inquiry portal/form for pastors to enter prospective high school-aged member information for Southern to add to communication flow and recruit; utilize ambassadors in this effort

+ To boost its recruitment efforts, a board referral program was meticulously crafted and executed by the admissions team, replete with the purpose of enlisting and leveraging board members as ambassadors. The program's main goal centered on the board members' ability to channel top-tier candidates to the admissions team for follow-up and recruitment. An overall goal of 100 prospective student names has been communicated to the board of trustees to be obtained by February 2024. The board referral program was launched in March 2023, marking a significant milestone for the institution's outreach efforts, and opening up exciting opportunities for discovery and exploration of top talent.

2. Collect birth data from e-Adventist list in Southern Union to cross reference with enrollment funnel data

+ Progress update: Gulf States Conference has granted full access to member contacts. Finalizing contact list by summer 2023. Recruiting for fall 2024 to commence.

3. Provide Southern Union pastors with contact information for recent (<5 years) alumni who live in their area

+ Sent list of 2022 graduates to all Southern Union pastors in summer 2022. Will complete 2nd year of this initiative in summer 2023.

4. Increase awareness of Southern in Asia, Caribbean, and Latin American areas

+ We are currently expanding partnerships with academies in the Philippines and Macao, China. Building relationships in the Caribbean, specifically targeting the U.S. Virgin Islands for their citizenship benefits and access to FAFSA.

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

1. Recruit public school and homeschooled high school Adventist students in the greater Chattanooga region

+ Outcomes to be determined by fall census date in September 2023.

2. Attend and collect inquiries at college fairs in the greater Chattanooga region that Adventist non-academy high school students attend

+ This task is currently in progress. Outcomes to be evaluated and analyzed by August 2023.

3. Conduct financial aid workshops in the Hamilton County high school system

+ Completed Financial Aid workshops for both Ooltewah High school and East Hamilton High school. Recent grant funding will allow for additional workshops with dedicated individuals to host workshops in Hamilton County High Schools.

4. Showcase Southern to rising ninth graders through summer camp programming

+ The Summer camps are underway for June 2023. The final 9th grade numbers will be reported to Southern's cabinet and updated in strategic plan in July 2023.

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

+ Attended departmental meetings for the Southern union and established relationships with all k-12 principals and superintendents for the Southern Union. Planning to attend the NAD Education convention in Phoenix, Arizona to continue building relationships and partnerships in summer 2023.

**Benchmark:** Increase recruitment and promotion to public schools and homeschools in the greater Chattanooga region in order to achieve a 20% enrollment increase

1. Establish value proposition for local non-Adventist students and adapt messaging for prospective GenZ students

+ Two value propositions have been completed, one for Adventist audiences and one for local non-Adventists. These are now being used in messaging by Enrollment, Marketing and University Relations, and hopefully, others on campus when speaking with prospective audiences.

2. Implement new non-academy campus visit day program

+ At least 2 Hamilton County high schools have conducted campus visits for a full day of programming. The plan will be to increase by 100% for the 2023-24 recruitment cycle.

3. 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

+ Extensive additional advertising opportunities have been implemented and are covered under Our Community; Christian University of Choice; Benchmark: Increase advertising.

4. Identify existing or create new campus programming such as concerts, convocations, and special events that can be provided online or in person to local non-academy high school students

+ Coordinated schedules with Student Development to allow prospective families to attend special guest speakers at convocations. Created special programming at Engage God event for parents to highlight the spiritual emphasis on the campus of Southern Adventist University.

5. Determine budget and needs for additional resources

+ Duties have been assigned to an Admissions Counselor.

**Benchmark:** Students will identify convocation programming as beneficial to their education experience at Southern

1. Increase attendance at convocation by 20% of the fall 2021 total which would be a minimum of 33,670 students

+ Attendance at Convocations during the 2022-23 year totaled 13,293 students. This number is 52% of pre-COVID-19 years. Convocations continue to feel the effect of the decision to make them optional for the two years that COVID-19 significantly impacted this campus.

2. Evaluate the capacity of the current system to meet the demands of higher enrollments, especially those who are non-Adventists

+ Current attendance numbers do not challenge occupancy capacities in either Iles Gymnasium or the Collegedale Church.

3. Promote to campus that the convocation hour is a no-committee, no student employment hour

+ The promotion was not done and the effects of not doing so continue to affect Convocations as many departments are hiring students during the Convocation hour. Students who work desk jobs in the residence halls, in Food Service, in the library receive reductions from their requirements

4. Create more synergy between academic schools and departments and convocation so as to emphasize the co-curricular element of convocation

+ This year marked the successful launch of two prestigious lecture series - the Del Schutte Lecture Series on Medicine and the Lynn Sauls Lecture Series on Journalism. These captivating events have played a vital role in fostering a stronger bond between Convocations and Academic Administration, paving the way for enhanced collaboration and interaction.

- Put together student focus groups to identify what specifically students approve of and disapprove of in convocation programming

+ Not accomplished.

- Identify or create inventory that measures students' feelings towards convocation

+ Not accomplished

**Benchmark:** Complete the revamping of career services, transitioning it fully to a life-calling center (VP Student Development)

- Hire a Human Resources and Internship Specialist

+ The task of hiring an Employer Relations and Internship Specialist has been completed.

- Meet with all academic schools and departments to determine internship gaps on campus

+ All schools and departments met with, except for Social Work, Engineering/Physics, Music, and Education/Psychology/Counseling

- Develop a scaffolding approach to life-calling/vocational counseling

+ The plan for the freshman and sophomore years is complete.

Freshman year: All students

- are mentored through First Year Experience,
- take a Southern Connections class,
- receive life-calling advice through PathwayU.

**PATHWAYU USAGE**

Total accounts created in 2022-23	354
Total accounts on campus	1683
Completed assessments in 2022-23	212
Completed assessments on campus	1683

Sophomore year: Students

- involved in the Southern Sophomore Success (3S) program,
- Take CliftonStrengths Inventory.

4. Relaunch the Sophomore Success Program

**Relaunch completed:**

- 1) Meetings occurred once a month,
- 2) 31 sophomores signed up for the program at the beginning of the academic year.
- 3) During Fall 2022: attendance averaged 24 a meeting.
- 4) During Winter 2023, attendance averaged 14 a meeting

5. Promote the use of Handshake among all academic schools and departments

+ Promotion of Handshake is currently occurring. Students make their appointments with Life Calling and Career Services using Handshake. Vendors for Meet the Firms and Graduate Fair use Handshake to reserve tables at event. Peace Corp found Southern through Handshake and was a vendor for the first time this Spring.

**Life Calling Appointments**

<b>Appointments</b>	423 (+18)
<b>Total accounts on campus</b>	1683
<b>Completed assessments in 2022-23</b>	212
<b>Completed assessments on campus</b>	1683

*\*Numbers in parentheses indicate the difference from year previous.*

**Fall 2022 Meet the Firms/Graduate Fair**

<b>Student Participants</b>	200
<b>Employer/Graduate School Vendors</b>	40

**Winter 2023 Meet the Firms/Graduate Fair**

<b>Student Participants</b>	250
<b>Employer/Graduate School Vendors</b>	65

**Benchmark:** Increase Adult Degree Completion (ADC) enrollment

1. Increase memorandums of understanding with businesses

- + One additional MOUs was signed in 2022-2023 – Cleveland State Community College.
- + ADC financial performance to meet prospectus net revenue
  - For the 2022-2023 academic year financial performance for the program was to net (\$142,704) in FY23. For the coming year (FY24) the program goal is to net (\$56,380) and for FY25 the program goal is to net \$47,106. In the current year (FY23) the program netted (\$163,960), \$21,256 worse than projected.
- + ADC Enrollment to meet prospectus enrolment projections
  - For the 2022-2023 academic year, projected unduplicated ADC enrollment was 21 in the fall semester and 32 in the winter semester. Actual F22 enrollment was 21 and actual W23 enrollment was 29.

## 2. Launch BS Psychology in ADC program

+ The program was released for use, as planned, in the 2022-2023 academic year.

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

### 1. Begin Master of Arts in Teaching (MAT) degree in fall 2022 with goal of five students for fall 2022 and eight students for winter 2023

+ The MAT program began in the Fall of 2022 with three enrollees. The Winter 2023 enrollment enrolled 3 students. The dean reported that fall 23 enrollment numbers are looking better with 14 projected enrollees to date.

### 2. Continue development of graduate program digital inbound marketing strategies to include write and publish 20 blog posts, execute 24 paid social media ad campaigns, create three premium content pieces, and execute eight content marketing campaigns

+ During the 2022-2023 academic year 17 blogs were delivered and four are currently in draft, 23 paid media campaigns were executed, 2 premium content pieces were developed and a third is in development, and 7 content marketing campaigns were executed with the eighth scheduled to begin July 1, 2023. In addition, DD Agency completed three event marketing campaigns and a website redesign (lead gen pages) that were not part of the original plan, but were deemed important and were implemented during the year.

### 3. Expand in-person recruiting opportunities with a goal of 16 graduate recruiting event-days

+ The director of graduate marketing personally attended 23 in-person graduate recruiting events and graduate coordinators attended another eight for a total of 31 in-person events attended during the 2022-2023 academic year.

### 4. Develop and seek Board of Trustees approval of DPT program by February 2023

+ Board approval received. A prospectus will be submitted to SACSCOC in May 2023. Advertisements for a program director are in place.

## Student Philanthropy

**Benchmark:** Facilitate a culture of philanthropy among our students

	Goal	Actual
Number of Students Giving	290	340

# OUR FACULTY



## Wage Scale

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

1. Implement the first phase of the pay increase plan by adjusting the deans and chairs bonus structure

+ The first phase of the plan (chair bonus structure) was implemented in the 2022-2023 academic year.

2. Phase in salary increases over four years, beginning with year two

+ Professors are currently at 88% of the 20th percentile. Given this, the plan for the coming year is to move all positions that are below the 88% of the 20th percentile to the 88% level. Following this, the plan is to increase all positions up over three to five years to the full 20th percentile.

## Research and Creative Endeavors

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

1. A university senate taskforce is working on this and will bring back recommendations to administration by May 2023

+ The senate taskforce completed its work. Major recommendations are:

1. Focus on hiring faculty who have a desire and training to conduct research.
2. Provide increased support and training for current faculty in regard to research.
3. Require involvement in research, professional and creative endeavors as part of the promotion process.
4. Create a university research center.
5. Revise and clarify policies.
6. Provide a central webpage that consolidates all research-related resources in one location.

2. Consider using a portion of income from endowed chairs to purchase release time for research, research-related travel, and publication

+ This was not implemented during the 2022-2023 academic year and will be considered in the 2023-2024 academic year.

3. Explore the developing and expanding of research centers on campus to increase research capacity

+ A proposal from the School of Education, Psychology, and Counseling to form a Center for Innovation in Learning and Research (CLIR) has been approved. The center will begin operations in the 2023-2024 academic year.

## Research Funding

**Benchmark:** Increase level of funding for stipends by \$50,000 to \$115,000

1. Increase level of internal funding from \$65,000 to \$75,000

+ The increase was not made in the FY23 budget as planned. Actual expenditures in this area for the year were \$49,992. No proposed research that met university standards went unfunded.

2. Advancement's grant writer to help identify grants that are available that may be germane to various academic areas to assist in funding research

+ A contract was signed with McAlister and Quinn to help identify and write grants, including research grants in academic areas.

3. Increase adjunct support to allow for an increase in faculty paid research participation

+ Not done and may not be necessary.

4. Provide within current loading policy provision for release time for research which should be paid from internal or external funding

+ Will work in FY24 to revise policies including the loading policy to accommodate research.

# OUR

# EMPLOYEES



## Christian Culture

**Benchmark:** Create a robust Christian culture where love and kindness emanate through every interaction with students, colleagues, and guests; Southern's culture will be defined by our positive and healthy interactions and relationships so that we may collectively "transform lives for eternity"

### 1. Increase employees hosting students in their home (includes home vespers and Adopt-a-Student)

- + 2018-19 / 32 employees participated / \$4317.50 reimbursed/ 864 students
- + 2019-20 / 56 employees participated / \$5495 reimbursed/ 1100 students.
- + 2020-21 / No activity due to Covid
- + 2021-22 / 114 employees participated / \$2340 reimbursed/ 468 students.
- + 2022-23 / 25 employees participated / \$3382.50 reimbursed/ 688 students – Larger groups.
- + As noted in the data above, in 2022-23 the university had an increase in the number of students being hosted (with likely duplication) and the amount that was reimbursed to employees. Despite promoting this during colloquium 2022, the number of employees hosting students has gone down considerably. We basically have a small number of employees who are regularly hosting a large number of students. We will need to explore other ways to get higher participation in this area.

### 2. Implement free lunches for employees on campus; this was a highly appreciated benefit in years past that helped to naturally build relationships among employees and between employees and students (dependent on sufficient Food Service staff to implement)

- + This was on hold until Food Services became adequately staffed. In late January we were informed by the Food Services Director that they could accommodate this program for employees. We issued 4 meal tickets for free lunches to each employee to be used in April 2023. Though anecdotal, the feedback received indicates this initiative was successful in promoting the desired relationship and community building across campus that was intended with both employees and students.

### 3. Fund additional departmental gatherings with students not in the home (vespers, socials, etc.)

- + Academic departments were encouraged to hold mid-semester events in both the fall 2022 and winter 2023 semesters. The feedback during a debriefing meeting that was held in May 2023 was very positive from those who participated, with the feeling that positive connections with students occurred. One improvement that has been made to this process is to give the departments more advance notice regarding this initiative. An email message was sent to all Deans and Chairs in May 2023 indicating that this program will continue for the 2023-24 school year. We believe the extra planning time will promote greater participation.

### 4. Promote employee LifeGroups during lunch or outside of work times; these are to be spiritual or relationally based discussions with an estimate of 50 participating employees for 12 weeks per semester

- + This is the first year employee LifeGroups have been encouraged on campus. The number of employees participating was 35 in the fall (4 groups) and 30 in the winter semester (3 groups). Though less than the 50 participants targeted, we feel this is a good start to this initiative. At the end of the fall 2022 semester participants were surveyed and there was a 100% satisfaction rate with the groups. The biggest challenge is attracting leaders for groups. Financial Administration and the Office of Ministry and Missions are discussing how best to address this for next year. We feel this initiative is one of the best ways to promote the Christian culture we are striving for on campus.

### 5. Develop appropriate measurement tools (e.g. surveys) for measuring campus Christian culture

+ We worked with CCCU on a survey conducted in spring 2023. We added questions to the survey to specifically evaluate the spiritual environment on campus and have determined the appropriate departmental designations to make this information as useful as possible. The survey was conducted between February 27 and March 24. We are awaiting the results, which will be received in late May 2023, and reviewed in June and July 2023. This will serve as a source of information regarding areas to target our efforts, as well as establishing a baseline against which we can measure to determine the effectiveness of future efforts regarding the culture on campus.

**Benchmark:** Improve and increase Southern's campus service orientation

1. Begin study of journey map website: Test/optimize pathways used in the application process, including using data to personalize messages to encourage prospects to take next step in enrollment process

+ This item will be carried forward to 23-24. Journey mapping of the website will begin in 23-24 year.

2. Begin study of journey map enrollment experience: Select key processes such as the Enrollment Checklist to test/optimize the path a student or parent takes to enrollment

+ In consultation with VP for Enrollment, the Enrollment Checklist process was selected. Journey mapping for the Checklist will begin in 2023-2024

## Workforce

**Benchmark:** Attract, develop, and retain a highly talented and diverse workforce

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

+ The Associate Vice-President for Human Resources has submitted a plan to senior administration which will be reviewed during the summer of 2023. Part of this proposal includes better communication to employment applicants, and a more centralized oversight of the employee application, interview, and follow-up process, as well as automation of the application process. This will allow for a stronger process for hiring for missional fit. In addition, initiatives are being proposed to promote better retention of employees.

## Efficient, Effective, and Rightsized Operations

**Benchmark:** Implement innovative solutions to make university operations more efficient, effective, and right-sized

1. Implement more efficient and effective governance structure as recommended by Credo

+ A revised governance structure was approved by the University Assembly after extensive work by the University Senate and University administration.

2. Complete and report the academic cost and margin analysis and determine how these data can best be used

+ This work will be completed once Credo's work is completed in Fall 2023.

3. Perform non-academic program and department review to determine areas where efficiencies may be gained

+ This review will be conducted between May and August 2023 with the assistance of Credo. We have provided considerable data to Credo, established a Task Force, conducted the first Credo Workshop on March 30, and created a rubric for departments being evaluated to complete. This rubric will be issued to departments to be completed in May and June 2023. In addition, departmental interviews will be conducted by Credo beginning in May. This data will be processed by the Task Force during the second workshop with Credo Scheduled for late July 2023.

4. Review the AACU 2021 Annual Financial Comparisons and Benchmarking Report and the 2021 Adventist Higher Education (departmental) Benchmarking Report as prepared by BKD CPAs and Advisors and address any determined areas of deficiency; this will include the high percentage of payroll and benefits to net tuition revenue

+ This information has been provided to Credo and will be part of the Administrative Efficiency Assessment process outlined above.

**Benchmark:** University Health Center (UHC) will be an income-generating service to Southern's campus

1. Give study to implementing a UHC general fee

+ The Director of the UHC, has presented to Student Development Committee of Board of Trustees on the merits of a health fee and its impact on the UHC budget.

2. Conduct a UHC efficiency study to explore what size staff is appropriate for our size campus population

+ This task is currently in progress with the help of Credo.

3. Reconnect with McKee Foods Corporation to explore health center partnership

+ McKee has chosen to build its own facility. This idea is no longer viable.

## Employee Development

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

1. Study how to promote a continuous learning culture; preliminary work available for review in September 2022

+ The Senior Vice President for Financial Administration and the Associate Vice President for Human Resources over several months discussed possible strategies for promoting a continuous learning culture on campus. During these months the Associate Vice President for Human Resources developed versions of a plan which the two discussed and modified as deemed appropriate. The end result was the plan that is referenced in #2 below.

2. Develop a plan, implementation timeline, and benchmarks by December 2022

+ The Associate Vice-President for Human Resources has submitted a plan to senior administration which will be reviewed during the summer of 2023. This plan includes regular training in areas such as responding to workplace emergencies, diversity, avoiding workplace harassment, and cybersecurity, as well as optional development opportunities for employees.

## Employee Giving

**Benchmark:** Encourage existing culture of philanthropy among employees to maintain 70-75% annual giving

+ 72% of the employees provided financial support during the year.

1. Advancement work with Human Resources to plan and implement activities during employee appreciation week

+ This has been done successfully for two years running.

2. Articulate affinity-based employee giving opportunities

+ The most effective approach to fostering employee giving through affinity is by organizing Giving Day events, where departments actively engage their own alumni. To enhance this process, there are new strategies being implemented, such as the establishment of an Advancement Committee task force focused on academic areas, which aims to create more intentional initiatives.

3. Evaluate existing employee stewardship program and adjust as needed

+ This was done in conjunction with HR related to employee appreciation week and in Advancement regarding increasing giving from non-academic area through pantry drive

4. Give study to higher education employees' giving metrics across North American Division (NAD) institutions

+ This was completed but institutions were either unwilling to share or did not know.

## Employee/Student Interactions

**Benchmark:** Develop meaningful experiences between employees and students through Sabbath lunches, service projects, mission projects/trips, advising, etc.

1. Develop a plan, implementation timeline, and benchmarks

+ We have worked with CCCU on a survey that was conducted in the spring of 2023. We have added questions to the survey to specifically evaluate the spiritual environment on campus, and have determined the appropriate departmental designations to make this information as useful as possible. The survey was conducted between February 27 and March 24. We are awaiting the results, which will be received in May 2023, and will be reviewed in June and July 2023. This will serve as a source of information regarding areas to target our efforts, as well as establishing a baseline against which we can measure to determine the effectiveness of future efforts regarding the culture on campus.

2. Increase employees hosting students in their home (includes home vespers and Adopt-a-Student)

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## Wage Scale

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

1. Implement the first phase of the pay increase plan by adjusting the administrative and perk packages

- + In 2022-23 we implemented the first phase of the pay increase plan by adjusting the administrative/perk packages. Beginning June 1, 2023 we will begin implementing the next phases of the multi-year plan for compensation enhancement for all applicable employees.



# OUR

# ALUMNI

## Alumni Engagement

**Benchmark:** Increase alumni engagement by providing opportunities for alumni to participate in communication, experiences/events, financial giving, and volunteer opportunities

1. Create alumni chapters in strategic areas

+ One attempted but did not materialize. New alumni in place and this objective is on target for completion in the next year.

2. Restart the Lights Volunteer program under Alumni Relations

+ Program restarted formally with updates to handbook, increased training, campus card access and renewed benefit.

3. Provide affinity-based opportunities for giving financially

+ Done through Giving Day but additional projects underway in the next fiscal year including engineering, nursing, business plus Advancement Committee initiatives.

4. Help each academic area to tell their stories to alumni through multimedia channels

+ The social media alumni page was very active and two videos were completed that focused on culinary and the farm.

5. Give study to CASE engagement metrics/goals

+ CASE is a pilot measuring program, new alumni director needed to understand measurement definitions, this was completed and metric goals adjusted. Accurate capturing is still an area for improvement.

	Goal	Actual
Alumni Participating in Interactive Communications	590	429
Alumni Participating in Experiences/Events	1,952	1693
Alumni Volunteering	295	226
Percentage of Alumni Giving Financially	9%	7.1%

# OUR COMMUNITY

## Christian University of Choice

**Benchmark:** Increase general print, radio, and online advertising in Chattanooga/Cleveland area in effort to become the Christian university of choice for our region

1. Launch full promotional plan for increasing local advertising; radio and online advertising

+ Local advertising significantly increased this fiscal year, including introduction of radio, television, and streaming commercials.

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

+ In progress. Hosted first visit day in the fall of 2022 with a group of Hamilton County school counselors and administrators in addition to students from the Howard High school. This is in conjunction with the Equal Chance for Education (ECE) which supports undocumented students within the Hispanic community.

3. Based on research, create outline of themes and schedule for campus visit days

+ Created outline and presentation explaining the SDA beliefs, Southern Adventist University's history and overview.

4. Determine budget and needs for additional resources

+ The budget is not fully established. Currently, visit day is structured similarly to preview events.

**Benchmark:** 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

1. Establish an ad hoc group to work on increasing ranking

+ Task #1: Established an ad hoc group to work on increasing ranking: In Fall 2022, an ad hoc group of data experts from Enrollment, Graduate Studies, and Institutional Research and Planning began researching the methodology and metrics for US News rankings. The task force worked to better understand the rankings methodology and identify the areas most likely to have the ability to affect the rankings.

2. Review methodology and current baseline for ranking (Success of increasing ranking is contingent on campus areas improving statistics used in methodology)

+ Working group completed extensive research on the methodology for US News rankings and what areas of focus have the ability to bring about the most improvement for Southern in the rankings.

3. Utilize subscription to “Academic Insights” to identify Southern rankings, including breakdown of peer assessment

+ Task #3 Update: Leveraging ‘Academic Insights’ for rankings enhancement: The Academic Insights database was used to better understand Southern’s competitors within the Regional Universities in the South category. The tool gave the task force the ability to see Southern’s standing in comparison with competitors on specific US News rankings metrics.

4. Schedule and roll out plan to effect increase in ranking

+ Effort to increase “peer assessment” ranking began in 22-23 through communication campaign to peer presidents, provosts, and enrollment vice presidents. Recommendations were made to President’s Cabinet in May 2023 in two other areas: class sizes over 50 and Pell / First-Gen student enrollment and graduation rates. These items need more review by Presidents Cabinet.

5. Determine budget and needs for additional resources

+ This item needs to move to next year and will be based on the level that recommendations are accepted by President’s Cabinet for implementation.

### **Benchmark:** Increase Southern awareness through existing venues and events

1. Determine what community-invite efforts might be better used to promote Southern; examples to research: group swim lessons, musical performances, trails, museums, Village Market, Guest Services and Lodging, high school sports groups visiting Collegedale Academy, etc.

+ Initial contact has been made with various areas. Working on identifying which areas to focus on.

2. Create promotion plans for each identified area

+ These will be created as areas of focus are identified in 23-24.

### **Benchmark:** Utilize campus call center to market campus and university initiatives to community, current and prospective students, and alumni

1. Vice Presidents for Advancement and Enrollment Management collaborate to create a campus call center

+ Collaboration between Advancement and enrollment complete, call centers merged.

2. Grow call center staffing up to 10 student employees

# OUR FACILITIES

+ The student team grew to 16 student workers during the school year and six during the summer.

3. Develop metrics for call center growth

+ A dashboard for metrics has been created for both enrollment and advancement

## Facility Master Plan

**Benchmark:** Update the facility master plan

1. By September 2022, finalize with Board Facilities Committee a comprehensive, in-house facility master plan

+ This was completed in preparation for the October Board of Trustees meeting

2. Board of Trustees vote approval of finalized facility master plan in October 2022

+ The facility master plan was approved at the October Board of Trustees meeting.

3. Finalize facility master plan funding sources and timeline by December 31, 2022

+ This was accomplished during the Winter 2023 Board of Trustees Meetings

## Student Housing Capacity

**Benchmark:** Give study to increasing student housing capacity

1. By September 15, 2022, senior administration and the Vice President for Student Development assess updated student housing projections to determine if additional student housing is needed – If it is, then see “2” and “3” below

+ In the summer of 2022 administration reviewed the enrollment projections and student housing capacity and determined additional student housing was necessary.

2. By September 30, 2022, present plans to Board Finance Committee to vote a recommendation to the Board of Trustees

+ On August 29, 2022 the Board Facilities Committee and on September 7, 2022 the Board Finance Committee voted to recommend to the BOT that we build three Southern Village apartment buildings at an estimated cost of \$6 to \$6.75 million in total.

3. By October 2022, Board of Trustees vote authorization to proceed as deemed appropriate

+ On October 2, 2022, the Board of Trustees voted to build three Southern Village apartment buildings at an estimated cost of \$6 to \$6.75 million in total. The BOT voted to purchase 4 new duplexes for an additional 24 beds during the winter 2023 meeting. These duplexes would replace one of the three previously voted Southern Village buildings.

## School of Business Facility

**Benchmark:** Build a new School of Business facility with funds raised

1. By September 30, 2022, have single line/floor plan of building

+ This was completed.

2. By June 2023, have detailed drawings and cost estimates for the building

+ We have engaged outside architects and are on track to have detailed construction drawings by September 2023 and preliminary cost estimates by June 2023. In addition, we are at 80% of the fundraising goals of commitments and funds received.

## Building Backfill Opportunities

**Benchmark:** With vacancies created by the Bietz Center for Student Life, the new Spanish-American Church, a new School of Business building, and potentially the Collegedale Academy elementary school building, we need to maximize building backfill opportunities

1. Summer 2022 complete area in Lynn Wood Hall for Modern Languages

+ The area for Modern Languages in Lynn Wood Hall has been successfully completed as of Summer 2022.

2. By December 31, 2022, complete renovations of 4th floor of Wright Hall for Advancement

+ The 4th floor of Wright Hall for Advancement has been completed and the employees have moved into their new offices.

3. In December 31, 2022, complete Wright Hall 1st and 2nd floor restrooms

+ The 1st floor of Wright Hall restrooms were completed in February 2023. The second-floor restrooms were completed in April 2023.

4. By January 31, 2023, complete top floor McKee Library

+ The top floor of McKee Library was completed in April. The expected completion date for the front entrance of McKee Library is October 2023.

**Benchmark:** Maintain a beautiful and safe campus

1. Complete replacement of sidewalks in front of Thatcher Hall, railroad ties between Wright Hall and Thatcher Hall, and stairs in front of Thatcher Hall

+ The sidewalks and stairs in front of Thatcher Hall are completed. The sidewalks in front of Wright Hall are expected to be completed by July 2023 (before Smart Start).

2. Complete Erhard patio project by December 31, 2022

+ This project is expected to be completed by early June 2023.

## University Health Center

**Benchmark:** University Health Center (UHC) will be located on campus at a venue more convenient to students and employees

1. Explore and eventually identify a new home for the UHC closer to campus with possible locations being the old Spanish-American SDA church, Collegedale Academy Elementary, or Fleming Plaza

+ We are currently looking at options for the location of the UHC, with the old Spanish-American Church currently being our first option

# OUR

# FINANCES

## Cash on Hand

**Benchmark:** Obtain 180 days of cash on hand dependent on enrollment, debt liquidation, and capital allocations

+ The goal was to have 140 days of cash by May 2023 , but due to spending levels and the budgetary shortfall, we ended the year at 93 days of cash.

## Endowment

**Benchmark:** Grow Endowment to \$74 million—based on \$10 million in contributions and 2% net annual investment growth (after distributions)

	Goal	Actual
Beginning Balance:	57,795,000	57,795,000
Funds Raised	2,000,000	2,489,309
Growth	1,156,500	-2,489,309
Total Increase	3,156,500	107,662
Ending Balance:	60,950,900	57,688,904

## Debt

**Benchmark:** Be debt free by December 2025 (fiscal year 2026) which assumes not taking on additional debt in the next five years and making a double payment in December 2025

	Goal	Actual
Beginning Balance:	6,815,000	6,815,000
Payments	-1,365,000	-1,365,000
New Debt	- 0 -	2,850,000
Ending Balance	5,450,000	8,300,000

+ The Board of Trustees approved borrowing \$20M to fund currently planned facilities projects, so this benchmark will be deleted in the future.

## Composite Financial Index (CFI)

**Benchmark:** Maintain a composite financial index (CFI) greater than 5 each year

1. May 31, 2023 to May 31, 2027 goal: 5.0 or higher

+ Due to the operating loss, the year-end CFI was 4.5.

## Legacy Society

**Benchmark:** Add new members to the Legacy Society annually

	Goal	Actual
New Member Added to Legacy Society	13	13

1. Increase diversity of attorney and advisor pool for Legacy members

+ Two women added; attempt to add cultural diversity but was unable (so far) to find individuals with estate planning expertise and or credentials.

2. Give study to criteria for Legacy Society membership

+ This was done to determine if endowment donors should be included in LS. Decision was made not to include them as LS members but to intentionally target them to join at LS events and communication.

3. Complete 100 visits and or two-way substantive with members or prospects

+ 115 meetings occurred.

4. Annually plan and execute seven to ten targeted events for Legacy Society membership recruitment and retention

+ Seven events completed including four "ask the attorney" with high community interest and attendance and three "ask an advisor" with somewhat less interest.

5. Develop plan for intentional follow-up with prospects who show interest via Pantera website

+ Intentional cards and personal communication to website visitors

## Donation Income to Endowments

**Benchmark:** Increase endowment gifts annually

	Goal	Actual
Number of New Endowment (Scholarships, programs)	13	7
Donation Income to Endowments	\$2M	2,489,309

### 1. Solicit gifts to existing endowments

+ \$1.3M came in for existing endowments.

### 2. Create online presence for active endowment gifts

+ The site was implemented, [southern.edu/endowments](https://southern.edu/endowments); It now needs promotion.

### 3. Solicit new endowment gifts

+ \$1M received for School of Business, another \$1M pledged. A new endowment was created for Engineering and Hefferlin Research

### 4. Create academy alumni endowment program to fund scholarships for academy graduates at Southern

+ A pilot endowment started for Little Creek Academy ([southern.edu/littlecreek](https://southern.edu/littlecreek)); online presence for endowments had to be completed before program could be expanded.

### 5. Research new endowment opportunities and funding instruments

+ This has been done informally as affinity projects have been identified (business, engineering, etc) and endowments can be added to existing projects.

## Major Gifts (\$10,000+)

**Benchmark:** Retain existing and renew former major donors while growing annual donors into major givers

	Goal	Actual
Number of repeat major donors	36	28
Number of renewed major donors	20	17
Number of new major donors	35	20

1. Work with Alumni Relations to tell missional stories from academic departments and communicate affinity needs

+ This was done with annual appeals, annual report, but will be more intentional in the future.

2. Major gift officers complete 220 unique visits with donors or donor prospects

+ 299 visits were conducted

3. Structure major giving proposals around affinity need

+ This is going well for the School of Business. Engineering, nursing, and biology will be a major focus in the coming year.

4. Give study to additional major gift staffing

+ This was resolved by hiring a major gift officer

## Foundations and Grants

**Benchmark:** Develop new and maintain existing foundation and local business relationships and make annual grant applications

	Goal	Actual
<b>Number of Federal, National, Community Grant Proposals</b>	10	7
<b>Grant Dollars Raised</b>	\$750 K	\$239,780 and \$3M grant awarded over for the next 5 fiscal years.
<b>Number of Community Strategic Events</b>	6	6

1. Coordinate with campus leadership, departments on grant needs

+ Coordination occurred with Social Work, Nursing, Business, Physics, Education

2. Identify and apply for federal, national, and community grants

+ There were two federal grant applications.

3. Assist with SDA or alumni grant applications as needed

+ This was not an emphasis this year due to focus on federal funding. The usual SDA and alumni grants were applied for (Ardmore Institute of Health, for example) but new ones were not actively solicited this year.

4. Oversee and ensure stewardship of grants awarded

+ This is done mainly by the departments receiving the grants (Social Work – Chattanooga Foundation; Culinary – Ardmore; Student Development – NetView; however, Advancement provides support as needed and follows up routinely. If there are stewardship opportunities, Advancement participates in those as well. This past year, Advancement and the Culinary department hosted a lunch for the Ardmore team who visited to assess the progress in the program. The new federal reporting process has not yet begun but our office will be more involved in the coming months as we learn that process and work with the program coordinator to complete the reporting.

5. Facilitate or help facilitate community events (gala, concert, speakers, etc.) for the purpose of strengthening local business partnerships

+ Community Engagement Committee started with monthly meetings and cross department involvement (marketing, president’s office, student development, advancement, alumni), six successful events leveraged for community involvement such as R Lynn Sauls Lecture Series, Nathan Greene Creation Art unveiling, Honors lecture series.

## Repeat, Renewed, and New Donors

**Benchmark:** Increase the number of donors who give annually and retain existing donors

	Goal	Actual
Number of repeat major donors	1,474	1,448
Number of renewed	571	438
Number of new	1,472	1,882
<b>Total Donors:</b>	<b>3,517</b>	<b>3,768</b>

1. Solicit segmented groups based on affinities

+ This was accomplished through usual channels with Giving Day, Giving Tuesday, and appeals. Special affinity appeal done for Hefferlin Research Endowment and legacy society members. Increased focus on this area is planned and needed for next year to include the following areas: Business, Engineering, Biology, and Nursing.

2. Examine acquisition methods, strategies, and frequencies

+ Discussed by major gift officers, alumni, annual giving and plans show success in acquisition areas but repeat/renewed numbers indicate that a more formal analysis is required and is planned for next fiscal year.

3. Evaluate and adjust stewardship methods

+ This has been discussed and reviewed by major gift officers, alumni giving, and annual giving. Processes implemented for more active partnership for alumni events with major gift officers, presidential circle plan restarted, but needs expansion and further development.

## Overall Giving

**Benchmark:** Increase the overall giving each year to the university

	Goal	Actual
Overall Giving	\$10.5M	\$11,014,746

1. Execute annual giving solicitation including Giving Day and affinity-based appeals
2. Align major gifts and capital asks around university funding needs
3. Intentionally grow new donors through acquisition, prospecting, and solicitation
4. Formalize President Circle plan

+ Welcome packet prepared, routine and unique President snapshot email sent. However, program development lagged due to loss of Advancement Director. This will be picked back up by new Major Gift officer with targeted plans for next fiscal year.

5. Increase Legacy Society membership and deferred gifts

+ Items 1-3, 5 are addressed in previous benchmarks. Next FY, this metric will be included with benchmark above (repeat, renewed, and new donors).

## Capital Funding

**Benchmark:** Continue \$20M capital campaign for School of Business (\$15M for bricks and mortar, \$5M for endowments)

1. Achieve capital campaign commitments of \$5-10M during silent phase

Department	Goal	Actual
School of Business	\$5 - \$10M commitments and gifts	\$16.1 gifts and pledges of which \$2M have been received or pledged for the endowment

**Benchmark:** Continue \$1.5M capital funding solicitation for School of Nursing simulation lab

1. Secure capital funding commitments of \$1.5M

Department	Goal	Actual
School of Nursing	\$1.5M	\$38,000 plus gift-in-kind of three new exam tables

**Benchmark:** Solicit capital funding for School of Engineering

Department	Goal	Actual
School of Engineering	Finalize financial needs for project	Case for Support completed, naming opportunity identified- new exam tables
	Complete initial asks	\$1.7M received/committed (\$800K from federal grant)

1. Finalize financial needs for project
2. Complete initial asks





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