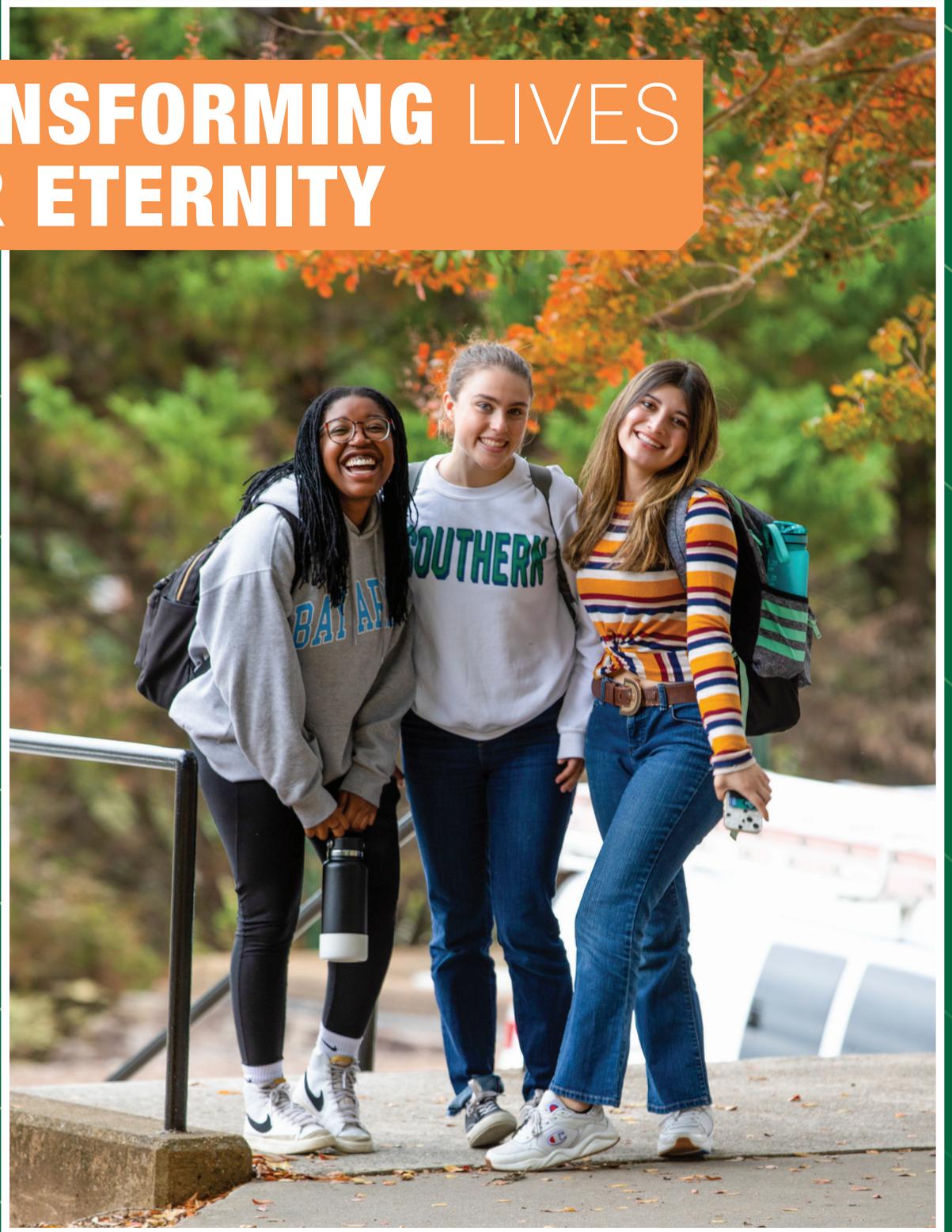


# TRANSFORMING LIVES FOR ETERNITY



Power for Mind & Soul

## 2023 - 2024 YEAR END SUMMARY

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## MESSAGE FROM PRESIDENT KEN SHAW

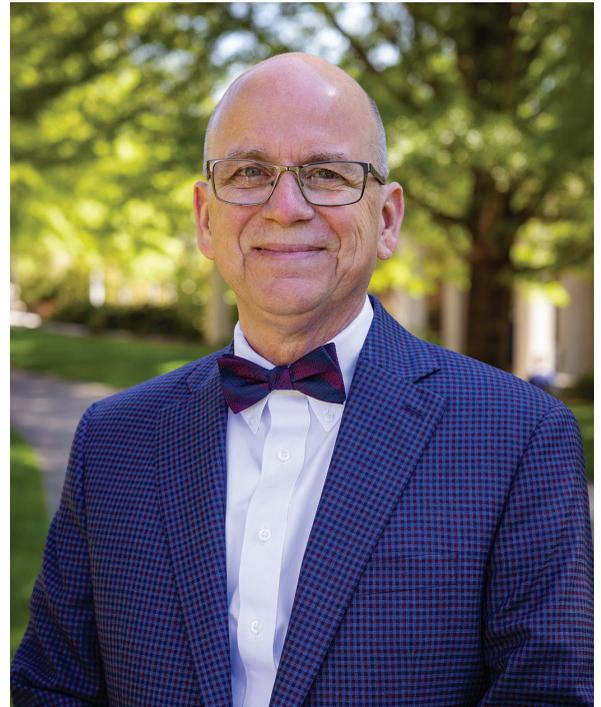
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I often reflect on the sage advice “where there is no vision, the people perish” (Proverbs 29:18), which I first encountered in my youth. This adage underscores the importance of imagination and careful planning for an organization’s success. Equally crucial are clear actions required to bring those plans to fruition. The year-end summary of Southern Adventist University’s strategic plan represents countless hours of dedicated work by many individuals. Deeply appreciative of the commitment each employee has shown in striving to enhance our university year after year, I am also delighted with the progress achieved during 2023-2024. Please join me in looking forward to continuing this journey of improvement together.



Ken Shaw, EdD

*President, Southern Adventist University*



# OUR FAITH

## SPIRITUAL GROWTH

► **Benchmark:** Each year, students will continue to grow spiritually.

1. Reach the goal that 45% of student survey respondents will experience spiritual growth along the discipleship continuum as a result of their engagement in **LifeGroups**.

+ Sixty two percent (62%) of student respondents across the Non-Believer, Beginner, and Believer segments of the Spiritual Continuum Profile reported spiritual growth. This includes 1 out of 2 Non-Believers, 6 out of 9 Beginners, and 46 out of 75 Believers.

2. Reach the goal that 65% of student survey respondents will experience spiritual growth along the discipleship continuum as a result of their service in **Student Missions**.

+ One hundred percent (100%) of student respondents across the Non-Believer, Beginner, and Believer segments of the Spiritual Continuum Profile reported spiritual growth. This includes four out of four beginners and four out of four believers.

3. Develop a survey instrument to assess volunteers' spiritual growth experience along the discipleship continuum while engaged in **Vision Trips**.

+ A survey instrument was developed and enables students to assess their spiritual growth before and after participating in the Vision Trip program and allows tracking of individual progress and the program's effectiveness.

4. Conduct a two-day Reasonable Faith event to help students process their doubts.

+ In lieu of a 2-day Reasonable Faith event, a preference was given to creating a four-part video series that will support students exploring doubts related to their faith. This is under development.

► **Benchmark:** Create a spiritually vibrant and connected community within Southern Adventist University by fostering a strong ministry partnership between the Collegedale Church of Seventh-day Adventists and the university, while serving the diverse spiritual needs of students, faculty, staff, and leadership.

1. Arrange for the senior church pastor and associate collegiate pastor to each preach for vespers at least once per school year, providing students with direct exposure to church leadership and fostering a deeper connection between the church and the university community.

+ Senior Pastor Ron Halvorsen delivered a sermon at vespers on April 12, focusing on community and the importance for graduating seniors to remain connected to a church after graduation. Additionally, Pastor Reginald Horton spoke at vespers on August 11, addressing the theme "Made for More," encouraging deeper engagement and purpose.

2. The university chaplains meet regularly with the Collegedale Church pastoral staff to facilitate collaborative planning and effective communication.

+ Both chaplains have successfully integrated into the weekly staff meetings at Collegedale Church. They have also taken on roles leading staff worship on a rotational basis. This collaboration has proven fruitful, facilitating the joint execution of two Friday night Vespers programs and enhancing the spiritual offerings on campus.

- Partner with the Southern Union Youth Department to host a Sabbath lunch encouraging interaction between students and the wider church family.

+ The goal to encourage interaction between students and the wider church family was achieved through a well-attended Sabbath luncheon on September 9, 2023, called "The Great Haystack", with over 1,200 attendees. The event was a collaboration of the Southern Union, Office of Ministry and Missions, and the Collegedale Seventh-day Adventist Church. It featured a meal prepared by Southern's cafeteria, complemented by desserts brought by church members for sharing with students, providing a platform for meaningful conversations. Positive feedback from students, the Southern Union, and church members highlighted the initiative's success.

- Continue to have the Student Association president serve as a board member at Collegedale Church, ensuring student representation and active involvement in church decisions.

+ The Student Association President has served on the Collegedale Church board during the academic year and has provided insightful input into meetings, including when the board was in the process of selecting a new Senior Pastor for the Church.

## CHARACTER DEVELOPMENT

- ▶ **Benchmark:** Implement five outside-the-class curriculum (OCC) modules that utilize the transformation process to aid students in developing Adventist Worldview, Empathy, Teamwork, Resilience and Calling, with assessment instruments to determine the modules' effectiveness and appropriate badging for students who complete the program.

- Continue the development of piloted modules #1 Adventist Worldview and #2 Vocational Calling (fall 2022 and winter 2023), modifying based on feedback and assessment provided by students and faculty.

+ Vocational Calling Badge (Modules 1-3) Online platform has been developed with an intended launch in Fall 2024. Positive student feedback was provided regarding clarity and ease of following the course design, integrating impactful stories, and effectively utilizing biblical content. Overall, feedback from students highlighted high satisfaction with the content.

- Pilot module #3 Empathy and #4 Teamwork (fall 2023 and winter 2024)

+ The recent pilot of our badge program has successfully awarded nearly 350 badges across four strategic areas—Empathy and three facets of Teamwork (Diverse Perspectives, Conflict Resolution, and Building Cohesiveness). The empathy badge was earned during Spring Break Vision Trips by demonstrating active listening and understanding of diverse perspectives. The Teamwork badges, each awarded to students who led a LifeGroup, recognized skills in fostering inclusivity, resolving conflicts constructively, and building cohesive team environments.

- Give study to co-curricular rubrics to identify which durable skills are naturally cultivated within LifeGroups, Vision Trips, and Student Missions.

+ During fall the Spiritual Life Council identified teamwork, empathy, and resiliency as the durable skills for LifeGroups, Vision Trips, and Student Missions, respectively.

- Create and pilot mechanisms to assess durable skills being cultivated within LifeGroups, Vision Trips, and Student Missions participants and leaders.

+ During fall, the Spiritual Life Council explored assessment methods for teamwork, empathy, and resiliency within LifeGroups, Vision Trips, and Student Missions. LifeGroup coaches facilitated the assessment process. Student Missions collaborated with partner organizations and utilized existing NOND courses for this purpose. Further study is ongoing to refine these mechanisms.

- Determine the feasibility of the digital management and training system.

+ During fall, a meeting occurred with the company Suitable. They create co-curricular transcripts and maintain real-time records of the entire college experience. They have collaborated with Abilene Christian University, Pittsburgh University, and the University of Alabama. The annual cost of their service is approximately \$20,000. After careful assessment, it was decided to continue using the internal Online Campus version to keep track of badges awarded to students.

# SMALL GROUP MINISTRIES

- ▶ **Benchmark:** Increase the number of student LifeGroups, where participants can experience transformation along the discipleship continuum as a result of their engagement.

The goal this year was to have 88 LifeGroups. The actual number of LifeGroups was 92.

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

- + In a survey conducted in December with 199 respondents, 92% reported experiencing a meaningful sense of belonging in their LifeGroups. Students defined belonging as feeling comfortable, accepted, and valued within a group, being able to express themselves freely without fear of judgment, and forming deep relationships based on shared interests and beliefs.
- + Further insights revealed that LifeGroups fostered a sense of belonging by:
  - a. Encouraging the creation of lasting friendships and deeper emotional and spiritual connections.
  - b. Positively impacting participants' relationships with God and enhancing their sense of purpose within a community of shared beliefs.
  - c. Promoting spiritual growth through discussions on Bible stories and teachings about God and facilitating connections with like-minded believers.
  - d. Extending the sense of community beyond scheduled meetings, with members supporting each other throughout the week, thus creating a nurturing network.

1. Maintain the quality of mentorship by maintaining the coach/director ratio by adding two additional student coaches through the student labor budget subject to 88 LifeGroups meeting on campus.

- + Two additional coaches were added to LifeGroup teams, enabling 92 students to volunteer as LifeGroup leaders. These leaders benefit from quality mentorship through weekly meetings with a LifeGroup Coach, enhancing their ability to facilitate and guide their groups effectively.

2. Evaluate the transformational learning process implemented previously with the 10 LifeGroups and determine if it met expectations and goals.

- + Achieving a 94% student satisfaction score (n = 12: 11/12) and a recommendation rate of 92%. Students expressed that the course has changed their perspective on work, teaching them to view their daily routines and professional activities as opportunities to advance the kingdom of God. They appreciated the in-depth discussions on the biblical worldview of work, its benefits, and how God can use them in various professional settings.

3. Create a training resource specific for LifeGroup coaches to elevate the LifeGroup leader mentorship experience.

- + A training resource was developed for LifeGroup Directors to provide a practical guide for LifeGroup Coaches as they seek to provide a spiritually transformative mentorship experience for each LifeGroup Leader. This guide will undergo ongoing development and serves as an additional resource to the training materials provided to LifeGroup Coaches Online.

4. Give study to co-curricular rubrics to identify which durable skills are naturally cultivated within LifeGroups.

- + Study has been given to the co-curricular rubrics to identify how *Teamwork* is a durable skill naturally cultivated within LifeGroups. Most LifeGroup experiences afford students the opportunity to build cohesiveness, resolve conflict, and experience diverse perspectives. Continued study is needed to explore what would be required for implementation.

5. Create strategies for increasing number of consistent LifeGroup participants.

- + There were 1,175 total participants during fall 2023 or 41.56% of fall 2023 undergraduate population. Of those 1,175 total participants, 580 were consistent participants (meaning they engaged in 6 weeks of LifeGroups) which amounts to 20.5% of undergraduate students. LifeGroup leaders were equipped with template “covenant agreements” to encourage group members to commit to a LifeGroup throughout the semester.
- + Posted monthly promenade events sought to encourage students to continue to engage with their selected LifeGroup or to join a LifeGroup if not having done so previously.
- + A LifeGroup Coach guidebook was created with resources for leaders to maintain their LifeGroup membership throughout the semester.

6. Encourage a more representative demographic of student LifeGroup coaches and leaders in order for LifeGroups to be more reflective of the demographics of the entire student population.

- + New hiring methods were implemented for the LifeGroup team of student leaders, resulting in one of our most diverse teams to date. Future hiring strategies will include posting positions on targeted platforms, conducting targeted outreach, setting specific diversity goals, and intentionally selecting candidates to reflect the diversity of our student population.

## STUDENT MISSIONARIES

► **Benchmark:** Increase the number of students participating as student missionaries, helping them experience transformation along the discipleship continuum because of their engagement.

- + The goal this year was to have 46 Student Missionaries. The actual number of Student Missionaries was 69.

1. Provide additional mental health and spiritual well-being support to enhance students’ exit and reentry experience, following the example of the General Conference missions’ initiative.

- + This was successfully accomplished through the implementation of two new sessions during the re-entry retreat held at Booker T. Washington State Park from September 8-11, 2023. The retreat included 42 students, and the two sessions, Sharing Hope and Tracing Your Spiritual Journey, were designed to address both the spiritual and mental aspects of the students’ experiences in the mission field.

2. Pilot two General Conference Global Missions mission programs through Tentmaker and Global Missions Initiative to provide greater range of mission opportunities to students.

- + The Tent Maker Program, designed by the General Conference to integrate professional careers with missionary work, has attracted moderate interest. Despite difficulties of graduates and alumni securing overseas employment and the financial burden of repaying U.S. student loans in weaker currencies, the program has seen successes, including graduate planning to develop agricultural skills in Bolivia for missionary work. The Tent Maker initiative will remain an option for interested graduates committed to long-term missionary service.
- + Through the General Conference’s program, the SM initiative has placed two students in front-line ministries in Amman, Jordan. Currently studying Arabic at a local university, these students employ friendship evangelism to effectively share the message of Jesus within the community.

3. Assess the impact each pilot program has on Southern in relation to efficiency and the student experience through the exit and reentry surveys completed by student missionaries.

- + The two pilot cases indicate that it is likely worth investing in more frontline ministry opportunities for student missionaries to engage. This pilot study indicates that frontline ministries for student missionaries is not only possible, but also can be generative for students’ spiritual walk, engagement with evangelism and outreach, intentionality in building relationships for God’s kingdom, and in impacting their communities. It has increased the participating students’ awareness of what frontline ministry involves and the needs of those around them. While these students were already demonstrating a strong devotional life prior to their mission experience, their field experience has only served to encourage their relationship with God as they find new ways to reach out to those around them and expand their definitions of what it means to be a follower of Jesus.

4. The Student Missions director will partner with the Evangelistic Resource Center (ERC) and Christian Service directors to integrate public evangelism or VBS programs in 10% of student mission locations.

- + Out of 31 locations across 19 countries, four students (13%) had intentional evangelistic efforts. The Student Missions Director partnered with the ERC Director and created the following program enhancements:
  - a. **Training Integration:** Evangelism training will be incorporated into the NOND 099 class, the Student Missions Orientation, focusing specifically on public evangelism.
  - b. **Location-Specific Training:** For locations with clusters of three or more students, we will conduct online evangelism training in collaboration with local pastors to facilitate public evangelism efforts.
  - c. **Resource Support:** Each mission team will receive a suitcase filled with evangelism or VBS resources, with funding allocated to cover baggage fees. These resources typically include arts and crafts materials.
- + The following is a summary of the evangelistic efforts conducted by the four students:
  - a. **Hong Kong:** The student missionary engaged in friendship evangelism at Hong Kong Adventist University, interacting with students from diverse religious backgrounds.
  - b. **Kyrgyzstan:** Despite restrictions on public evangelism, a student contributed to community engagement through English and soccer programs, and a café, sharing Jesus through friendship.
  - c. **South Korea:** The student missionary served at Sahmyook University and fostered deep relationships and started a small group with non-Adventists through friendship evangelism.
  - d. **Zambia:** The student missionary participated in a local crusade, leading a three-week evangelism series, hosting VBS in three villages weekly, and contributing to over 50 baptisms.

## VISION TRIPS

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

- + The goal this year was to have 75 students participate in vision trips. The actual number was 84.

1. Develop newsletter to serve as impact report for donors.

- + A newsletter template has been developed for use in the 2024-2025 academic year. Additionally, an impact report was produced and distributed during Alumni Weekend in October.

2. Develop innovative methods that returning vision trip volunteers can use to recruit their friends.

- + In October, Student Association President discussed his vision trip experience during the Christian Service Vespers. Additionally, testimonials from former vision trip participants were filmed and shared on Instagram for Giving Tuesday.
- + While not all were former vision trip participants, previous Student Missionaries (SMs) were encouraged to lead groups back to their SM locations. This initiative has successfully led to former SMs recruiting students for vision trips to Familia Feliz in Bolivia and Kendu Adventist Hospital in Kenya.

3. Seek opportunities at the Collegedale Church once per semester for a "mission spotlight" worship service to highlight vision trips.

- + Vision Trips partnered with ERC to present a Sabbath School at the Collegedale Church during Alumni weekend in October. Vision Trips also shared a mission spotlight for both services at Collegedale Church on 4/27/2024.

4. Launch one vision trip led by an academic area.

- + In May, the Enactus Club and the School of Business collaborated with OurGanda in the Bundibugyo district of Uganda to help create a pathway from poverty to prosperity. The team's pre-work included the facilitation of financial literacy training. Prior to their trip, the team members assessed local businesses and gathered data in order to build modules for further training. The vision trips provide valuable experiences for our students.

+ Simultaneously, the Computing Club and the School of Computing served at Kendu Adventist Hospital in Kenya as well as two area schools. Their projects included building websites for the hospital, medical school, and primary school, upgrading a server, fixing a wireless network, and providing training for 500 students and hospital staff on cyber security & computer literacy.

5. Give study to co-curricular rubrics to identify which durable skills are naturally developed in Vision Trips.

+ The rubric currently being used is Empathy for Vision Trips.

6. Create and pilot mechanisms to assess durable skills being cultivated in the area of empathy.

+ A mechanism has been developed and will be piloted in the winter and summer 2024 Vision Trips.

7. Launch Go Method Trips platform for Vision Trips.

+ This will be deferred to 2025-2026.

8. Measure transformation by modifying and implementing a survey for vision trips.

+ The survey was implemented in May 2024. Twenty six students responded. Based on responses, greater resources will be given to sponsors to nurture student transformation on future trips.

## SPIRITUAL CULTURE

► **Benchmark:** Support a robust Christian culture through Faculty and Staff LifeGroups that encourage love and kindness to 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. Collaborate with a core group of LifeGroup leaders from various schools and departments and academic areas, aiming to have at least 9% (45 faculty and staff) involved in LifeGroups by the end of the year.

+ This goal was achieved with 75 employees involved in LifeGroups. During the fall 69 employees were involved in 10 LifeGroups. In the winter semester this grew to 75 employees participating. This puts us two years ahead of schedule and has us at approximately 15% of employees involved. Each of the 24 employees who responded to a survey at the end of the fall 2023 semester indicated they had a very positive experience and feel this initiative should continue.

2. Partner with the Spiritual Life Committee, Marketing and University Relations, and Human Resources to develop marketing materials, including brochures, posters, and online promotions, to raise awareness about the LifeGroup program.

+ During the Colloquium in August, promotional materials such as PowerPoint slides and signup sheets were displayed and distributed to faculty and staff to encourage participation. Also, an online platform allowed employees to easily sign up and for LifeGroup leaders to take attendance and send automated reminders to LifeGroup members.

3. Utilize the university's communication channels (such as email listservs and staff meetings) to share information about LifeGroups and encourage participation.

+ An email campaign was executed in August and again in January, inviting faculty and staff to join or lead a Faculty Staff LifeGroup, further fostering community engagement.

4. Encourage Spiritual Life Committee members to lead or participate in a LifeGroup.

+ During the Spiritual Life Committee meetings in September, October, and January, members were encouraged to participate in or lead a LifeGroup. The committee chair shared stories and reports and offered verbal encouragement to motivate members to join a LifeGroup.

5. Integrate LifeGroup promotion into Colloquium, through a biblical devotional and sharing testimonials from faculty and staff who have benefited from participating in LifeGroups.

+ During colloquium, LifeGroups for faculty and staff were promoted via signup sheets placed on each table, allowing attendees to lead or join a group. More than 20 faculty and staff members expressed their interest by completing the signup forms.

6. Present information during New Employee Orientation for faculty and staff, emphasizing the impact and value of LifeGroups in fostering community, support, and spiritual growth.

+ New employees have been informed of the impact of LifeGroups on campus, how they help create a sense of belonging and spiritual culture on campus, and how they can start or sign up for a group.  
+ Presentations were made in October and February at the New Employee Orientation (NEO) meetings.

7. Continue to provide incentives to LifeGroups through lunch meal vouchers and resources for each participant.

+ All LifeGroups received meal vouchers and resources they requested throughout the year.

8. Establish regular feedback mechanisms, such as surveys and focus groups, to gather input from faculty and staff regarding their LifeGroup experiences and suggestions for improvement.

+ During the winter semester, feedback from faculty and staff was collected via a survey. The vast majority of respondents reported a positive overall experience, highlighting benefits such as meeting new colleagues, deepening relationships, engaging in meaningful discussions about faith, and a sense of increased community and spiritual growth. Suggestions for improvement included offering LifeGroups during the summer, formalizing the application process, enhancing communication, and clarifying policies regarding meeting times. Additional feedback was largely appreciative of the initiative.

# OUR STUDENTS

## EMOTIONAL SUPPORT

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

+ Recent trends indicate a rise in the severity of mental health challenges among incoming students, a pattern observed not only at Southern but also widely noted in higher education literature nationwide.

1. Operationalize the Quality Enhancement Plan (QEP)

a. Implement curricular content in NOND 101 (Southern Connections), PEAC 125 (Fitness for Collegiate Life), and PSYC 128 (Developmental Psychology).

+ These classes are complete and include modules dedicated to mental health and emotional wellbeing.

b. Launch the QEP webpage, giving students content on resiliency skills, resources on where and how to access help, links to past events, and advertisement of future events.

+ This has been completed.

c. Launch “Step Forward” event (fall 2023).

+ The Step Forward campaign solicits commitments from the students and employees to make changes in one of several areas—nutrition, water intake, sleep, physical activity—that impact mental wellness. Over 500 students and employees made commitments during this fall’s event.

d. Launch Normalizing Failure video campaign with “Stories of Failure” event (winter 2024).

+ The first video launched at a Tuesday night chapel during the winter semester was dedicated specifically for the viewing of the video. As part of the QEP, Tuesday night chapels occasionally highlight an aspect of mental wellness.

2. 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.

+ Wait times continue to be approximately 2 weeks to secure an appointment. This does not factor into how emergency situations are handled as a counselor is made available when a student must see a professional immediately. We have yet to see virtual counseling impact wait times; however, virtual counseling opened to 10 hours of face-to-face counseling per week during the fall semester. These counseling sessions would not have fit in with the schedule of our current team of counselors. During the winter semester, 294 students had active registrations with Virtual Care (VCG), the online counseling service. Of that number, 32 students used the service on a regular basis. Their appointments with VCG opened up 10.5 hours of face-to-face counseling during the winter semester, a slight increase in usage.

3. Monitor Counseling Services’ social media platforms/website and adjust as necessary.

+ The webpage and social media accounts are updated regularly with material for both employees and students. The Instagram account currently has 716 followers, which is just over a 40% increase in traffic from May of 2023, when the account had just over 500 followers.

4. Hire professors(s) with expertise in these areas, as needed.

+ The consensus is that there is not a need to hire external experts. The QEP, the addition of telecounseling, and a larger number of full- and part-time counselors in Counseling Services is sufficient for this campus.

5. Begin annually assessing levels of well-being, stress, and psychological distress using three different scales: the PANAS-GEN (Watson, 1988), the Perceived Stress Scale (Cohen et al., 1988), and the Kessler Psychological Distress Scale, (Kessler and Mroczek, 1992).

+ After one year, we are meeting one part of our benchmark but not the other. Students are indicating higher levels of mental well-being; however, they are not expressing lower levels of psychological distress.

## ACADEMIC PROGRAMS

- **Benchmark:** Increase academic programs offered in high-demand areas: begin BS in Engineering (BSE) in fall 2023, BS/BBA Economics/Econometrics in fall 2024, EdD/PhD Education in fall 2026, , BS/MS/AuD in Audiology/Speech Pathology in fall 2027, Doctorate in Physical Therapy (DPT) in fall 2028, and Criminal Justice in Adult Degree Completion in fall 2027, Chemical Engineering in fall 2027, Medical Laboratory Science (MLS) degree in 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. BSE: Launch program (fall 2023)

+ The BSE launched in fall. The initial enrollment in year one (2023-2024 n=44) matched up with the second-year enrollment projections (2024-2025 n=45).

2. BSE: Hire additional Engineering faculty members based on prospectus to continue program development.

+ Funding for new positions is in the fiscal year 25 budget.

3. DPT: Based on preliminary university board approval, hire DPT program director (summer 2023).

+ Although advertising the position for some time we have been unable to identify a qualified program director. Faith Search Partners was hired in September to help with the search process. Given the difficulty locating a qualified candidate we have initiated conversations with AdventHealth University (AHU) to explore the idea of AHU operating a second DPT site located on the SAU campus.

4. DPT: Develop DPT prospectus (summer 2023).

+ This DPT prospectus has been completed.

5. DPT: Submit Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) prospectus for DPT program (summer 2023).

+ SACSCOC was notified of our intent to start the program.

6. DPT: Seek admission to the Commission on Accreditation in Physical Therapy Education (CAPTE) developing program agenda through submission of "Developing Program Information Form (fall 2023).

+ This step cannot occur until a qualified DPT program director is hired.

7. DPT: Begin process of writing curriculum and documents necessary to seek initial accreditation of DPT program.

+ This step is on hold pending hiring a DPT program director.

8. Economics: Develop BS/BBA in Economics and gain approval through university processes.

+ The BBA in economics program has been approved by the Undergraduate Curriculum Committee. The program will commence fall 2024.

9. Business Analytics: Develop MS/Certificate curriculum for business analytics (fall 2023).

+ We are negotiating a curriculum between computing and business for the 2025-2026 catalog for a fall 2025 launch.

10. Business Analytics: SACSCOC notification/substantive change (December 2023).

+ This may not be necessary if an emphasis area is added rather than an entirely new degree program.

11. Technical/Trade Certifications and Certificates: explore financially viable models for technical/trade programming, develop program prospectus if warranted.

+ This item will be moved to 2024-2025.

## CREDENTIAL DURABLE SKILLS

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

1. Develop curriculum map and data visualization based on rubrics completed in the past year.

+ Curriculum map based on updated rubrics is completed and incorporated into the data visualization system developed by a graduate class in computing.

2. Test the badging system and finalize co-curricular transcript process; work with Information Technology.

+ The system is up-and-running. We are now finalizing the marketplace platform to offer professional development opportunities to people outside of Southern using the same badging system. Our final step is to work with Records on how to issue the co-curricular transcript.

## GRADUATION RATES

▶ **Benchmark:** Maintain a four-year graduation rate of 40% and six-year graduation rate of 55%

+ This benchmark was achieved with four-year graduation rates being 40.8% and six-year graduation rates being 56.6%, as reflected in the table below.

Cohort Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
4 Year Rate (Goal 40%)	31.3	32.7	31.8	37.1	41.3	37.8	35.7	36.7	37.4	40.8
6 Year Rate (Goal 55%)	51.6	51.8	52.0	56.7	63.3	57.0	55.8	56.6		

1. Implement changes necessary to improve overall male graduation rates to female rates.

- + This initiative is actively progressing. In October, targeted discussions with male students were conducted to identify retention challenges, reinforcing our broader strategy through the Office of the President to enhance student retention. Currently, a comprehensive literature review is underway to pinpoint best practices and successful strategies.
- + Furthering these efforts, task groups convened in March and April to delve deeper into these strategies. Utilizing insights from these meetings, as well as previous discussions with students, data are currently being analyzed. Updates will be provided in July of 2024, which will include plans for visits and discussions with similar institutions. An executive summary will be prepared, reflecting our ongoing commitment to enhancing student success as this initiative continues to develop.

2. Identify other disaggregated groups needing analysis for graduation success such as African American students.

- + Other disaggregated groups that need to be studied are Hispanics, African Americans, and the Pell recipient population. These will be taken in turn as the work with males comes to an end. Our DHSI grant has a specific component directed at improving Hispanic success. It is anticipated that this initiative will have a positive effect on Hispanic graduation rates generally. In the future, a literature review will be completed to help identify strategies that have been successful in supporting student success in peer institutions. Also, in the future, peer institutions will be contacted to determine how they have supported less successful student populations to identify strategies that may be introduced at Southern.

## STUDENT RETENTION

**Benchmark:** Maintain 1<sup>st</sup>-to-2<sup>nd</sup>-year retention rate goal of 80%, 2<sup>nd</sup>-to-3<sup>rd</sup>-year retention rate goal 90%.

- + This benchmark was achieved for first-year retention (80.3%), but not in the second-year retention (88.4%) as reflected in the table below.

Cohort Year	2015	2016	2017	2018	2019	2020	2021	2022
<b>1st Year Retention Goal 80%</b>	79.2	74.1	74.1	79.1	80.3	79.5	81.4	80.3
<b>2nd Year Retention Goal 90%</b>	80.8	86.8	86.9	87.4	89.3	87.5	88.4	

1. Use the cohorting system developed in the prior year to develop reporting on retention rates of all cohorts (prior, new, and transfer).

- + The cohorting system is ready for use. Retention reporting on all cohorts are in development (winter-term first-time freshmen, fall semester transfer students, winter semester transfer students, graduate students by term). These data will be used to determine if specific work is needed with any cohort.

## ENROLLMENT

- ▶ **Benchmark:** Identify and recruit every Adventist high school student in the Southern Union, including approximately 2,300+ academy students and 8,800+ Adventist high school students who are not enrolled in the Southern Union Academy system.

1. Finalize the content, schedule and promotion for local high school campus visit days and events.

- + Scheduled and completed 5 local high school campus visits during the spring semester. The plan is to increase this number to 10 high schools visit days for 2025-2026 recruitment cycle.

2. Implement targeted communication plans for local non-academy high school students.

- + Communication plan started with public high school counselors in both Hamilton and Bradley counties with offering FAFSA support as well as attend college fairs, and present scholarships at senior award ceremonies. During the summer 2024 months there will be additional plans to increase communications with the local Chattanooga non-SDA High schools to encourage campus visits in the fall and spring.

3. Continue collaborating with the associate vice president for Academic Administration and the special advisor to the president to build inclusive strategies and conduct a feasibility study for campus visit programs.

- + Successfully completed the third men's town hall in November, with ongoing data analysis to determine future actions in collaboration with the senior vice president for Academic Administration, associate vice president for Academic Administration, and the special advisor to the president.
- + The Retention Task Group convened in March and April to explore best practices and inclusive strategies. Plans for campus visits are currently being developed through the President's Office.

4. Implement new awarding and pricing strategies that prioritize enrollment growth and overall net tuition revenue.

- + Awarding policy changes have been presented and approved by senior administration prior to the February awarding cycle to account for FAFSA changes.

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

- + As of the end of May, the non-academy application totals have increased by 78.9% in the Chattanooga region for F24 vs. F23.

1. Finalize the content and schedule for local high school campus visit days and begin promoting campus visit days to constituents.

- + This has been completed. Southern hosted 5 local public high schools.

2. Implement an updated communication plan targeted to local non-academy high school students.

- + This was also completed and utilized.

3. Start a new pathway for prospective students to interact with academic areas and faculty. Obtain agreement from 2-3 faculty members in strategic academic programs, to teach in Hamilton County Public schools with the goal of promoting Southern's value proposition and added benefits.

- + This is in process for the 2024-25 academic year. Preliminary conversations have occurred with Ooltewah High School in having the host 2-3 guest lectures per semester in 2024-2025.

4. Implement financial aid strategies to leverage grant funding as a Hispanic Serving Institution (HSI) to support underserved students.

- + Current HSI Outreach specialist partners with Tennessee Student Assistance Corporation (TSAC) provided financial literacy and FAFSA workshops throughout Hamilton County.

► **Benchmark:** Students will identify convocation programming as beneficial to their educational experience at Southern (VP for Student Development).

1. Increase student convocation attendance to a minimum of 40,000.

+ The goal of reaching 40,000 attendees represented the total attendance across all worship and cultural events. This goal was nearly met in the fall, with a total of 39,855 students attending Chapels, Vespers, and Convocations—just 145 attendees short of the target. This reflects a significant increase from Fall 2022, which saw 32,492 attendees, marking a 23% year-to-year growth. Notably, attendance at Convocation events alone rose by 57%, from 6,773 in fall 2022 to 10,655 in fall 2023. The attached chart provides a detailed overview of attendance figures for all worship programming in fall 2022 and fall 2023 as well as winter 2023 and winter 2024.

Fall Programming	Fall 2023 Attendance	Fall 2022 Attendance	Increase (% Change)
Sunday Night Hall Worship	4,427	4,140	+287 (7%)
Morning Meditations	7,201	7,196	+5 (0%)
Tuesday Night Chapel	1,697	1,349	+348 (26%)
Convocation (Thursday and Alternative options)	10,655	6,773	+3,882 (57%)
Vespers (Friday and Alternative options)	12,733	10,332	+2,401 (23%)
Evensong	1,067	916	+141 (17%)
LifeGroups	2,075	1,786	+289 (16%)

Winter Programming	Winter 2024 Attendance	Winter 2023 Attendance	Increase (% Change)
Sunday Night Hall Worship	3,437	2,915	+522 (18%)
Morning Meditations	6,635	3,211	+ 3424 (106%)
Tuesday Night Chapel	863	1,537	-674 (-44%)
Convocation (Thursday and Alternative options)	9,943	7,705	+2,238 (29%)
Vespers (Friday and Alternative options)	12,945	10,738	+2,207 (21%)
Evensong	782	531	+251 (47%)
LifeGroups	1,144	972	+172 (18%)

2. Launch an inventory that measures students' feelings towards convocation.

- + Focus groups consisting of 30 students shared sentiments towards convocations during the winter semester. Focus groups consisting of 30 students shared sentiments towards convocations during the winter semester. The focus group facilitator met with a total of 30 students. Fourteen sophomores, 12 juniors, 3 freshmen, and 3 seniors made up the 30 students. making up 7% each of the total.
- + Some of the more important takeaways from the report:
  - a. Seventy-two percent (72%) of our students rated their appreciation of Convocations as a 3, 4, or 5 on a 5-point Likert Scale.
  - b. Despite their enjoyment and appreciation of the event, 75% would not attend if credit was not attached to it.
  - c. Elements that students observed as making a presentation enjoyable and appreciable: personal stories, interaction, relevance, and departmental.
  - d. Elements that students observed as making a presentation unenjoyable and unappreciable: length; didacticism; attitudes of speakers (noted by several students: "I do not like when a speaker says, 'I know you're here just for credit'"; and relatableness.
  - e. 70% appreciate the 50:50 balance between spiritual and secular topics covered by Convocation.
  - f. The 2 greatest obstacles to having full appreciation of Convocation are time and engageable topics; the credit system was mentioned but the least often—although one comment about how strict we are about being on time in order to get credit was mentioned.
  - g. Most students appreciate the consistency of knowing Convocation occurs at the same hour every Thursday although a small number would appreciate evening Convocations.

► **Benchmark:** Complete the revamping of Career Services, transitioning it fully to a life-calling center (VP for Student Development).

1. Evaluate the information learned regarding internship gaps to begin filling them.

- + Using the roster of graduates during the fall 2022 and winter 2023 graduations, 71.3% of those students graduated with an independent learning experience (internship, externship, practicum, clinical, or student teaching). The largest gap remains with the science disciplines: biology (0 of 39 graduates), chemistry (1 of 10 graduates), physics (0 of 2 graduates), and health science (0 of 13 graduates).

a. Insert the Clifton Strengths Inventory into the sophomore curriculum as part of the Sophomore Success Program (SSP).

- + The Inventory has become a part of SSP. During the November meeting below, the topic of highlighting one's strengths, as revealed by CliftonStrengths, was the topic.
- + The chart reveals all the topics that the SSP covered during the course of the 2023-24 academic year.

Month	Topic	Sophomore Attendance
September	"Tips to Interview Well"	15
October	"Resume Reviews"	16
November	"What to Say and What Not to Say to Future Employees"	18
"Boundaries in the Workplace"	Tiffany Bartell, LPC	16
"How To Network as a College Student"	Angelina Jones, senior social work major	19
"How To Make LinkedIn Work For You"	Daniel Olson	11

b. Develop the life-calling initiative for juniors.

- + This initiative currently focuses on funneling students into the class Meet the Firms while emphasizing resources such as Big Interview.

c. Integrate Handshake fully among all academic schools and departments.

+ Handshake contract ends in August 2024. 12Twenty is currently in its first phase of implementation on campus with a transfer of data from Handshake to 12Twenty occurring now. The new platform will be in use for fall 2024.

► **Benchmark:** Increase Adult Degree Completion (ADC) enrollment.  
(SR VP for Academic Administration)

1. Reach goal of 46 (fall 2023) and 60 (winter 2024) part-time students enrolled.

+ Actual enrollments for fall and winter terms were 41 and 35 respectively. Because the enrollment goals were not met due to internal programmatic factors that have been addressed, the 2023-2024 goal has been reassigned to the 2024-2025 academic year.

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

+ Delivery modality has been established as high flex. This allows students who want a face-to-face experience to attend class in person and it allows those who desire asynchronous learning to take classes online.

3. Explore certificate, AS, and BS programs (e.g. Criminal Justice, Information Technology, or Pharmacy Tech) for possible inclusion in ADC using Gray Associates Program Evaluation Services to determine program demand and to determine if we should do any additional work.

+ This was not done and will be completed in the next academic year

4. Hire ADC academic advisor to support program enrollment

+ An ADC academic advisor was hired and then discontinued when enrollment in the program declined in the winter term. A reconfigured position with academic advising and recruiting support will be developed for fall 2024.

► **Benchmark:** Increase the number of graduate students to 500 by fiscal year 2028  
(SR VP for Academic Administration).

1. DPT: Hire qualified DPT Program Director (summer 2023).

+ As described in the Academic Programs sections, we have been unable to find and hire a qualified program director.

2. DPT: Develop DPT prospectus and submit to SACSCOC (summer 2023).

+ This has been completed

3. DPT: Seek admission to CAPTE developing program agenda through submission of "Developing Program Information Form" (fall 2023).

+ This cannot occur until a DPT program director is hired.

4. DPT: Begin process of writing curriculum and document necessary to seek initial accreditation of DPT program.

+ This process is pending hiring a DPT program director.

5. Business Analytics: develop MS/Certificate curriculum for business analytics (fall 2023).

+ We are negotiating a curriculum between computing and business for the 2025-2026 catalog for a fall 2025 launch.

6. Explore doctoral program possibilities in School of Education and Psychology.

+ The PhD and EdD programs are under consideration for launch in fall 2026.

7. Explore master's and doctoral program possibilities in the areas of speech pathology and audiology

+ Preliminary demand research has been conducted. Their research will be completed by the end of the next academic year.

8. Develop explicit plans for enrollment growth for each existing graduate program.

+ An analysis of the graduate enrollment process from inquiry to enrollment was completed.

+ This work included secret shopping each graduate program. Any identified barriers to enrollment including communication plans, methods of marketing, and length of process will be addressed.

+ A Counseling marketing plan including enrollment goals for the next five years has been completed. Marketing plans for remaining graduate programs with five-year enrollment goals will be developed by fall 2024.

## STUDENT PHILANTHROPY

► **Benchmark:** Maintain a culture of philanthropy among students at 10% annual giving.

+ Current student giving achieved 9.9% at end of fiscal year 2023-2024.

1. Sponsor a student club to gain more understanding of their needs and processes.

+ Completed, the Annual Giving Director is an assistant sponsor of the Latin American Club.

2. Intentionally message philanthropy to students throughout the year related to Southern and community.

+ Messaging occurred during Giving Tuesday with signs around campus and events in the Bietz Center in Nov 2023. This occurred again in April 2024 for the Annual Giving Day. It also occurs in smaller ways with Advancement conversations with students who want to fundraise for a program and through education of Student Association and Senate of their scholarship responsibilities. This will be operationalized in fiscal year 2024-2025.

3. Research student led philanthropic initiatives on campus.

+ The fundraising form was updated to electronic format and put on the Student Development website. The student-led mission initiative occurred during Giving Tuesday in Nov 2023. This will be operationalized in fiscal year 2024-2025.

4. Research new process for senior class giving/project.

+ The research has been completed. The class gift was led by class officers; a designation that no longer exists on campus. The Annual Giving Director is formalizing a new plan to encourage senior class philanthropy opportunities.

# OUR FACULTY

## RESEARCH AND CREATIVE ENDEAVORS

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

1. Increase the level of internal funding from \$75,000 to \$85,000.

+ The associate VP for Financial Administration has incorporated changes in funding for this area into budget planning for current and future years. The FY25 budget is \$95,000.

2. Revise the following policies to clarify the expectation for research in faculty work and how this interacts with faculty loads and faculty evaluation:

a. Policy 5120 - Assignment and Documentation of Faculty Loads

b. Policy 5130 - Guidelines for Faculty Loads

c. Policy 5150 - Job Description for Full-Time Faculty

d. Policy 5170 - Evaluation of Faculty

e. Policy 5300 - Research and Policy

+ The Senior VP for Academic Administration has drafted changes across nine academic policies including the 5 listed. These have been reviewed by the Academic Administration Council and the Faculty Senate. The Faculty Senate has established a taskforce to work with the Senior VPAA to finalize policy changes for the Employee Handbook.

3. Establish guidelines for deans and chairs to use when reviewing/approving research-based teaching load reduction requests from faculty members.

+ This item is in process.

# 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. Communicate and implement an "Open Our Eyes" campaign on campus as approved by administration. Some version of this will be the theme of the August 2023 colloquium:
  - a. VP for Spiritual Life will provide worship thought with this focus.
  - b. Guest speaker Charity Johansson will present and lead discussion on Relationship Rich Education.
  - c. All employees will receive shirts with the message "God is using me to Transform Lives for Eternity" to reinforce the idea that fulfilling this goal requires all employees.
- 2. Identify/develop more employee LifeGroup leaders, with the goal of increasing employee participation from 35 in 2022-23 (the launch year) to at least 45 in 2023-24. The ultimate goal would be to have at least 20% of our regular employees (approximately 500), or 100 employees participating in a LifeGroup in 5 years.

+ We completed this item during colloquium. A few faculty have used "Relationship Rich Education" in their Wednesday faculty lunch meetings. This indicates the material is continuing to be reviewed and utilized across campus.

- + During the fall semester 69 employees were involved in 10 LifeGroups. In the winter semester the number of employee participants grew to 75. This is a 114% increase over the prior year. This puts us two years ahead of schedule and has us at approximately 15% of employees involved. Each of the 24 employees who responded to a survey at the end of the fall semester indicated they had a very positive experience and feel this initiative should continue.
- + The Council of Christian Colleges and Universities Employee Thriving Survey results have been received and reviewed by a small task force. A preliminary report was given to the President's Council on January 22, 2024. The task force working on this item have begun discussions regarding other initiatives that could be implemented to improve the Christian culture on campus.

# CUSTOMER SERVICE

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

1. Launch the new Customer Service Committee and engage the committee in identifying broad areas for service improvement and making recommendations for improvement.

+ **Committee membership has been established and the launch meeting occurred. The committee focused first on improving internal communications with students—an issue identified in the annual customer service survey to students. The committee used the winners of the President's Award for Customer Service to inform the selection of the rotating members.**

2. Reinstate secret shopping of prospective student processes.

+ **A freelancer was hired to conduct a full secret shopper assessment. The results were sent to Enrollment Management.**

3. Begin journey map for university website, testing/optimizing pathways used in the application process, including using data to personalize messages to encourage prospects to take the next step in the enrollment process.

+ **A freelancer was hired to conduct journey mapping of the website. Personas representing the types of individuals to be mapped were developed based on traits representing the most common interests and demography of prospective students. Very initial analysis has begun to compare the journey map to the ideal experience expected by each persona.**

4. Begin journey map for the Enrollment Checklist, testing/optimizing the path a student and parent takes in working through the process through to the first day of class.

+ **This work has not begun other than that it will use personas and follow the same process being established for #3. This is being carried over to 2024-2025 for completion.**

# WORKFORCE

► **Benchmark:** Attract and retain a highly talented and diverse workforce.

1. Senior administration reviews the proposal submitted by the associate vice president for Human Resources and approves implementation as deemed appropriate.

+ **Senior administration reviewed and approved much of the proposal submitted by the AVP for Human Resources, particularly the sections on hiring for missional fit outlined below.**

2. Implement the proposal approved by President's Council regarding hiring for missional fit, which included:

a. automating the employee application process,

+ **Implemented fall 2023.**

b. requiring assent by applicants to the university's Mission, Vision, Values, Code of Ethics, and Christian Standards of Conduct as part of the application process,

+ **Implemented fall 2023.**

c. improving communication with applicants through the application, interview, and hiring process,

+ **Implemented fall 2023.**

d. providing a “welcome box” to newly hired employees highlighting Southern’s Christ centered Mission,

+ Implemented winter 2024.

e. having new employees meet with President’s Council when first on campus to be introduced and receive a talk by the president and a shirt that reinforces their role in fulfilling the university’s vision to Transform Lives for Eternity, and

+ Implemented winter 2024. Consideration is being given to a different process for this, as this process has not worked as well as was hoped.

f. including in a Financial Administration/Human Resources employee’s job description stewarding this whole process.

+ Implemented fall 2023.

## EFFICIENT, EFFECTIVE, AND RIGHTSIZED OPERATIONS

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

1. 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.

+ This has been completed and is in process with annual evaluations of deans and chairs.

2. Under the direction and oversight of Credo, complete the Administrative Efficiency Assessment of selected non-academic programs/departments, develop and review recommendations, and implement strategies as deemed appropriate by administration.

+ The Administrative Efficiency Assessment Task Force has completed much of its work, though some of the tasks will take several more months to complete and be fully implemented. The Task Force and Credo recommendations were presented to the President’s Council on 12-11-23 for consideration and next steps. Recommendations will continue to move forward. A follow up progress report will be presented to the President’s Council in September 2024.

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

1. As appropriate, implement UHC general fee

+ A general fee for UHC has been implemented and the UHC has met its budgeted income.

2. Right size the UHC staff if Credo study recommends doing so

+ The internal study conducted indicates that the UHC staffing level is, to a large degree, at the appropriate level. Additional evaluation will occur over the coming months to determine if there is opportunity for greater efficiency, particularly as we are able to evaluate the financial and utilization data of this first year when students are not being charged for standard office visits.

3. Utilize partnerships as appropriate to support the UHC

+ The university is continuing to dialogue with AdventHealth regarding the potential use of its EPIC system in place of the current Mediat system. In addition, the university is in the process of reaching out to local healthcare providers to determine if other partnerships would be advantageous.

## EMPLOYEE DEVELOPMENT

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

1. Senior administration to review the proposal submitted by the associate vice president for Human Resources and approve implementation as deemed appropriate.

+ The review by senior administration was completed in August and the AVP for Human Resources is proceeding with this plan. This includes development opportunities in the following areas:

- a. Workplace Ergonomics
- b. Customer Service
- c. Managers' Skills Building: Interviewing/Hiring for Optimal Success and Missional Alignment
- d. An employee's overview of Mental Health and importance of Self Care
- e. Lunch and Learn for Hourly Employees on Emotional Intelligence
- f. Manager's Skills Building: Conducting Performance Evaluations
- g. Financial Management Guides for Budget Managers
- h. Avoiding Sexual Harassment in the Workplace (required of all employees)
- i. Policy Highlights and Handbook Overview lunch and learn (April 2024)

## EMPLOYEE GIVING

▶ **Benchmark:** Maintain the existing culture of philanthropy among employees at 70% annual giving.

+ Philanthropy among employees is at 64%, about 50 less than in the prior year due in part to retiring employees who were donors being replaced by new employees who have not yet begun that tradition. Increased attention is being paid to this area for fiscal year 2024-2025 to ensure needs and opportunities are correctly communicated.

1. Advancement/Human Resources to host employee appreciation week.

+ This event occurred and was well received with a few special events and prizes occurring.

2. Articulate affinity-based employee giving opportunities.

+ Completed with unique appeals, Giving Tuesday and Giving Day opportunities.

3. Invite and provide learning opportunities for planned giving.

+ Occurred during seminars at homecoming, faculty luncheons, and special "ask an attorney" events.

## EMPLOYEE/STUDENT INTERACTIONS

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

1. Develop additional strategies to increase the number of employees who are regularly hosting students in their homes.

- + The number of employees hosting students showed a modest increase in 2023-24 compared to the previous two years.
- + 797 students were hosted (including possible duplicates) at 45 events organized by 30 employees, with total reimbursements amounting to \$3,985. In contrast, the 2022-23 period saw 666 students hosted by 22 employees across 35 events. This represents a 20% increase. The peak year for student hosting was 2016-17, with 1,634 students attending 85 events, facilitated by 43 employees. Currently, the tracking of students hosted by employees without financial reimbursement remains a challenge. Each semester notices are sent to employees encouraging them to host students in their homes.

2. Continue and expand the periodic offering of free lunches to employees to promote greater interaction and community building with other employees and students from across campus.

- + Four meal tickets were distributed to employees for use in the fall semester and again in the winter semester.

3. Increase the number of departments that participate in holding mid-semester social events with students in their department, with funding coming from administration.

- + This was communicated to Deans and Chairs in May 2023, and again in September 2023. Four academic departments requested reimbursement under this initiative for fall 2023, with approximately 440 students participating. This has been effective and appreciated for those departments which have participated. A second opportunity was provided to departments for March/April. Another message was sent to Deans and Chairs in January again encouraging participation in this initiative. Six academic departments requested reimbursement for the winter 2024 semester, with approximately 405 individuals participating.

4. Increase the number of employees who utilize the "Give 'em the Pickle" fund for acts of kindness and support to students.

- + \$1,221.26 was reimbursed to employees in fiscal year 2023-24. A total of \$1,598.02 was reimbursed for all of last year. A message to all employees was sent in January reminding them of this program and encouraging their participation. Though not exactly this program, in November and December Financial Administration hosted an "Angel Tree" where students could indicate needs they have, and employees could take the cards and seek to meet the needs. 50 cards were completed by students, and each of the cards were taken by an employee and addressed in some way.

## 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 phase II, phase III, and phase IV of the multi-year plan for compensation enhancement for all applicable employees.

- + Phase II was implemented for the 2023-2024 academic year and Phase III and has been incorporated into the budget for future years.

# OURALUMNI

## ALUMNI ENGAGEMENT

- ▶ **Benchmark:** Increase alumni engagement by creating meaningful experiences/events, offering value-added communications, strategically supporting giving opportunities, and creating deeper engagement and more opportunities for volunteers.

+ We met the goal of 11% alumni engagement with 12.1% of our alumni engaged.

1. Establish one regional alumni chapter and identify and begin to develop a second.

+ The Chattanooga Area Chapter was established under the Alumni Council leadership in the fall. Its inaugural meeting coincided with the Christmas Pops Concert. Additionally, a dedicated group for the chapter has been created on the alumni Facebook page. A second chapter has not yet been created. The Alumni Office is moving in the direction of creating Alumni led LifeGroups in 2024-2025 which may take the place of the traditional chapter.

2. Facilitate affinity-based connections through 10 or more events and specific communication.

+ Over ten events were held in 2023-2024. They included alumni events in Kettering OH, Phoenix AZ (NAD Teachers), Kansas City (ASI), Tampa FL, and KY/TN, Carolina, and TN Camp meetings in 2023 as well as five affinity workshops offered during Homecoming with rave reviews. Additional events took place in Orlando, FL, Asheville, NC, and Nashville, TN 2024.

3. Develop an alumni resource hub and populate it with at least 25 valuable resources (including but not limited to videos, webinars, white papers and books).

+ The southern.edu/promenade website, featuring resources produced by Southern, has been established. At the end of 2023-2024 fiscal year, ten resources had been added which included four videos, an alumni finder, access to library books, and alumni business directory. Plans are in place to increase users and resources to the page in the next fiscal year.

4. Establish a new alumni engagement platform with at least 250 alumni members.

+ Almbase was purchased in Summer 2023, and its modules are currently being built and tested with a select group of 75 alumni. The implementation phase took longer than anticipated and so a broad marketing campaign was not launched. That broader rollout is now planned for 2024-2025 with a goal of 400 users.

# OUR COMMUNITY

## CHRISTIAN UNIVERSITY OF CHOICE

► **Benchmark:** Create visit days for local Adventist/non-Adventist educators and pastors (VP for Enrollment Management).

1. Enhance campus visit days to connect with and yield more Adventist and non-Adventist students.

+ During fall 2023, we hosted an educational retreat for all guidance counselors, social workers, and college advisors in Hamilton County. Collaborating with the MSW Program Coordinator at the School of Social Work, we plan to host another event in Fall 2024. The aim is to position Southern as a key resource in preparing students for college, offering affordability workshops, and facilitating campus visits to enhance Southern's visibility in the Chattanooga area.

2. Create exit survey to assess effectiveness of campus visits, such as their likelihood to recommend Southern.

+ A Power BI survey report was developed to track the results of all campus visits, including those by educators and pastors, to assess their likelihood of recommending our institution.

► **Benchmark:** Become a top 25% regional university in the South, as ranked by US News and World Report; be in the top 10 in social mobility of regional universities in the South, as ranked by US News (VP for Marketing and University Relations).

+ Currently, Southern Adventist University ranks in the top 30% of regional universities in the South and ranked 49th out of 136 in social mobility among regional universities in the South.

1. Increase communication campaign to influence the peer assessment marker among presidents, provosts, and enrollment VPs for regional universities in the South.

+ The Peer Assessment marker is 20% of rankings and based on leader ranking overall academic quality of a university's undergrad program. Picked Asian Joro Spider research and only HSI in Tennessee as next messages to go out. Next steps: will be looking at ways for Southern to further make impressions on peers in our category—TICUA for example.

2. Determine if the institution wants to move forward with decreasing the percent of classes with 50 or more students to pull Southern in line with peer schools. If yes, establish a taskforce to begin assessing and planning how to improve this area.

+ This item will not be carried on to next year as the new US News methodology has removed this marker entirely.

3. Determine if the institution wants to move forward with increasing numbers of Pell and first-generation students enrolled and retaining to graduation. If yes, establish a taskforce to begin assessing and planning how to improve this area.

+ This area has two separate markers that together are weighted 11% of ranking factors. While not constituting the highest weighting of all ranking factors, Pell is the area that solely affects our social mobility ranking. VP for MUR has met with the vice president over each area that has a metric that influences the rankings and is working with vice presidents to make specific improvement recommendations for each factor in their area of supervision in which Southern is performing poorer than top 25%.

▶ **Benchmark:** Increase Southern awareness through existing venues and events (VP for Marketing and University Relations).

1. Create promotion plans for reaching those in the community using/attending: musical performances, group swim lessons, trail system, museums, Village Market, and high school students visiting Collegedale Academy for competitions.

+ VP for MUR is focusing this year on WSMC and Health and Kinesiology initiatives. More than 10 community programs managed by Health and Kinesiology (H&K) have been identified as having the capacity for more marketing benefit to the university. A meeting with the dean of Health and Kinesiology occurred in January. Initial conversations with the WSMC manager have also occurred and next steps are to put together the action plans. The goal is to capitalize on ways to get positive messaging to those that are already coming to our campus: campus tours, print and web materials, open house, etc., depending on the audience.

## HERITAGE AND LEGACY

▶ **Benchmark:** Improve and increase institutional focus on Southern's heritage through preservation of history, identification/creation of institutional traditions, and showcasing Southern's legacy.

1. Launch a taskforce to implement tactics to improve this area, including participants from marketing, advancement, history, and library

+ The taskforce launched and discussed/worked on advancing the tasks in this benchmark.

2. Create a presidential legacy video.

+ A videographer has been hired, outline created, and video sessions with presidents have begun. Goal to complete project summer 2024.

3. Create a draft of environmental brand guidelines that incorporate Southern tradition into a sense of place.

+ Conversations with those representing architectural, interior design, landscaping, plant, and campus signage. Original environmental brand draft is being considerably reworked after receiving input from these groups with goal of getting a draft with sign off from these groups before end of 2024.

4. Explore the feasibility of creating a physical location where Southern preserves and displays its legacy and create a timeline for implementation.

+ First location discussed is to utilize the old student center space with preference to identify in 24-25 a more front-facing, welcoming location.

5. Identify locations where institutional decisions and historic memory are being archived and determine if more is needed to create an actively known repository.

+ The committee is working on this item. Many concerns have been identified. Some issues have been addressed, but a bigger plan and philosophy still needs to be established.

## CALL CENTER

▶ **Benchmark:** Utilize the campus call center to market campus and university initiatives: enrollment, retention, giving, and stewardship.

+ This will be operationalized in the next fiscal year since Retention has been onboarded in 2023-2024.

1. Develop metrics for call center; including operational statistics and growth for three areas: enrollment, retention, and advancement.

+ A metrics dashboard for Advancement and Enrollment has been created. Additional metrics for Retention need to be integrated. A total of 44,230 touches by the call center (calls, emails, voicemails) occurred in 2023-2024; a 43% increase over the prior fiscal year.

2. Grow the call center staffing up to 16 student employees.

+ Fifteen employees were hired with a 100% retention rate from winter 2023, and evening-only students were also hired in fall 2023 to handle west coast calls.

3. Implement calls to parents for Enrollment and Alumni Relations.

+ A new call campaign, 1,287 calls to parents of freshmen, was completed fall 2023 with 340 responses (42.6% response rate).

4. Onboard incoming and outgoing calls in collaboration with the Retention Services Coordinator.

+ Onboarding of Retention began summer 2023 with over 1,000 interactions completed (calls, emails, voicemails). Complete onboarding required help from Enrollment (Slate integration) which was not expected and resulted in additional training and integration to complete. While this slowed the process, it is on target to be completed in 2024-2025.

5. Provide solicitation training for call center staff and create more solicitation campaigns.

+ Training provided and Giving Day, Giving Tuesday, and targeted end-of-fiscal year solicitation campaigns completed during day and evening calling hours. Over 25,000 calls, emails, and voicemails were completed for Advancement campaigns.

## COMMUNITY EVENTS, GUEST SERVICES, AND STRATEGIC PARTNERSHIPS

- **Benchmark:** Strategically align university mission and goals with on-campus and off-campus related events specifically related to fundraising. Intentionally seek, augment, and create opportunities to engage the community with campus and the campus in the community.

+ This was strategic when adding the Community Engagement Committee was new and during the transition of guest housing to a more guest services and event role. This metric will be operationalized in future years.

1. Develop a banquet event orders process for on-campus events.

+ Software options reviewed in 2024 but no final decision has been made. This has been rolled to the 2024-2025 plan for completion.

2. Operationalize summer-only guest housing / turnover / staffing / booking.

+ Summer-only process has been operationalized in summer 2024 with the addition of contract staffing for deep cleaning. Forty units in total. Rates were increased by 11% for 24 of the units.

3. Complete professional event management training.

+ Completed at conference in San Antonio TX.

4. Operationalize Community Engagement Committee goals and processes.

+ This is improving and ongoing with a multi-disciplinary team understanding possible connections and strategic alliances. Five events were completed in 2023-2024: R. Lynn Sauls Lecture, Taste of Southern gala, President's Honors Concert, McArthur Lecture Series, and Illuminate conference.

# OUR FACILITIES

## SCHOOL OF BUSINESS FACILITY

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

1. Begin construction subject to meeting fundraising goals.
2. Projected to open for use fall 2025.

+ The current projection is for the building to be completed by December 2025. Approximately 85% of the \$20 million budget, or \$17 million, has been committed or raised. Construction drawings are complete, the Land Disturbance Permit has been obtained, and site work is in progress.

## 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 the Collegedale Academy elementary school building, we need to maximize building backfill opportunities.

1. By August 15, 2023, complete renovation of conference room on 4th floor of Wright Hall.

+ Completed.

2. By July 31, 2023, complete phase one of Lynn Wood Hall area for Engineering.

+ Completed.

3. By October 31, 2023, complete entrances for McKee Library.

+ The main entrance was completed, and the south entrance was opened for the start of Winter semester. There will be significant landscaping changes installed on the north side of the main entrance during the winter 2024 semester and into summer 2024.

4. Continue Wright Hall renovations and transition.

+ This is on hold until the 2024-25 fiscal year.

## BEAUTIFUL AND SAFE CAMPUS

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

1. Complete the sidewalks in front of Wright Hall (summer 2023).

+ This has been completed.

2. Complete the sidewalk from the duck pond to Brock Hall in 2023-24.

- + The sidewalk installation project connecting Spalding Cove apartments to campus has been deferred due to difficulties in gaining access to the Greenway tunnel. This tunnel, crucial for the proposed pathway, was opened in December 2023.
- + In January, a transportation survey was conducted among Spalding Cove residents, achieving a nearly 50% response rate. The results indicated that 92% of residents own vehicles, 8% use the university shuttle or carpool, and none reported walking or cycling to campus.
- + The necessity of the sidewalk will continue to be evaluated. Meanwhile, planning is underway to determine how this sidewalk could integrate with paths leading to the new School of Business building.

3. Repair Jones Drive (summer 2024).

- + This item is under engineering design. The design is to go beyond merely repairing and securing this roadway and the retaining wall and will include the addition of parking spaces. This project will be deferred until summer 2025.

4. Complete the remainder of campus beautification projects over multiple years in accordance with administrative priorities.

- + Develop plans for continued campus beautification projects.

## UNIVERSITY HEALTH CENTER

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

1. Begin renovation of new home for UHC.

- + This goal is currently on hold until we can identify the new home for UHC: the old SuCasa Church, Fleming Plaza, or an area in the eventually vacated Collegedale Academy elementary school are being considered.

## ACCESSIBLE CAMPUS

▶ **Benchmark:** Make Southern Adventist University a more accessible campus.

1. Undertake a comprehensive campus-wide assessment to ensure all facilities, services, and programs are fully accessible and inclusive to every university stakeholder.

- + A campus-wide assessment was completed in 2021 by the Disability Support Services office. The Student Development Committee reviewed this assessment report and concluded that it was comprehensive enough not to embark upon another like project.

2. Analyze data from the accessibility assessment spearheaded by the Disability Support Services office in 2021.

- + Based on this report, the Student Development Committee has created a 5-year plan to have the campus fully accessible by 2029. Recommendations for 2024-25 are as follows:
  - a. Create an accessibility map
  - b. Assure that all renovations and buildings of new construction are ADA compliant.
  - c. Have tactile signs on all buildings
  - d. Install handicap push buttons on buildings, including bathrooms inside buildings built or renovated since 1992

**3.** Consider broadening the evaluation by collaborating with external accessibility groups for a comprehensive study.

+ **The Student Development Committee does not recommend using an outside consultant on this project. The sentiment is that the assessment conducted in 2021 is thorough enough.**

**4.** Collect feedback from the university community, encompassing students and employees, regarding accessibility needs.

+ **The Student Development Committee received a report from the student members of the committee who had interviewed two members of Southern's disabled community, one who uses a motorized wheelchair to transport herself around campus, and another, who is completely visually impaired. The plan was to expand this project to include other students and employees whose disabilities are less obvious. This part of the plan did not occur. Shared was the lack of ramps or the inappropriate steepness of those we do have and a concern for crosswalk safety.**

**5.** Compile a preliminary report outlining discoveries and recommendations, then have the Student Development Counsel review and submit recommendations to the President's Council.

+ **The Student Development Council's recommendation are incorporated in the Strategic Planning 2024-2029 Report.**

# OUR FINANCES

## CASH ON HAND

- ▶ **Benchmark:** Obtain 130 days of cash on hand, dependent on enrollment, changes in expenses, and capital allocations.

+ We experienced a positive bottom line and positive cash flow for 2023-24, which raised our adjusted days cash from about 93 days cash to 98 days 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	\$57,688,904	\$57,688,904
Funds Raised	\$2,000,000	\$1,376,503
Growth (2% net)	<u>\$1,153,778</u>	<u>\$5,668,638</u>
Total Increase	<u>\$3,153,778</u>	<u>\$7,045,141</u>
Ending Balance	\$60,842,682	\$64,734,045

+ The table above reflects the goals and actual numbers for the year. With funds raised of \$1,376,503 and market growth of \$5,668,638, the endowment saw an increase of \$7,045,638, with an ending balance of \$64,734,045.

## COMPOSITE FINANCIAL INDEX (CFI)

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

1. May 31, 2024 to May 31, 2028 goal: 5.0 or higher.

+ The university's CFI was 3.71 as of May 31, 2023. The CFI for May 31, 2024 is 6.89. The CFI is expected to drop to a little above 4.0 in FY 2025 due to the university taking on additional debt as voted by the Board of Trustees and bringing the School of Business building on line. Projections show the CFI improving again to about 4.8 in FY 2026 as revenues increase and debt is being paid down. It is projected that the CFI will increase to above 5 by FY 2027.

## LEGACY SOCIETY

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

1. Develop and implement marketing plan to include direct mail, email, and events targeting Planned Giving prospects.

- + Two newsletters were sent (mailed and emailed) regarding increases in Charitable Gift Annuity (CGA) rates with a focus on Individual Retirement Account (IRA) rollover to CGA (court ruling change awareness). Ask and Attorney event was held in fall 2023 as well as an event at Homecoming. These marketing endeavors will be operationalized in the next fiscal year.

2. Promote estate planning through Thompson and Associates.

- + Thompson and Associates was promoted at Homecoming (27 attended) in 2023 and Ask an Attorney (27 appointments) in 2023. That promotion has resulted in a full case load with a current waiting list for appointments. Twenty-three plans are in various stages of completion with Thompson and Associates. Just over \$1M has been earmarked to Southern in 2023-2024 through new plans. This will be operationalized in the next fiscal year.

3. Collaborate with major gift officers and the alumni office to increase blended and irrevocable gifts.

- + The director of planned giving attended a European tour, pop-up chapter events (started in the fall by Alumni), Homecoming, Campmeetings, and ongoing cross over meetings with Major Gift officers regarding gift plans. While specific gifts related to these efforts have not occurred yet, the relationships are being built for awareness of planned giving resources.

4. Complete 75 visits with new or established clients.

- + Seventy-seven (77) visits have been completed. The goal was to have 15 new Legacy Society members. Nineteen (19) individuals/families became new members of the Legacy Society.

## DONATION INCOME TO ENDOWMENTS

► **Benchmark:** Increase endowment gifts annually.

- + Gifts to endowments and new endowments fell below the annual goal this year. Four new endowments were established and a total of \$1,329,283 was donated to endowment funds.

1. Market online presence for endowment gifts.

- + Completed [southern.edu/endowments](https://southern.edu/endowments) which educates donors on endowments, gives an opportunity to submit inquiries, and provides a searchable database for existing endowments. The next step is to create custom pages with stories for each relevant endowment, including video, and then add apply button for students. Five custom pages have been completed. A mail and email campaign directing people to the new endowment page is scheduled for early fiscal year 2024-2025.

2. Create robust impact report process ("thank you" from students to donors).

- + This began in April 2024. An impact report was mailed to 280 endowment holders that included a customized story and a financial report on their endowment's performance in the past year. When available, a note and update from the student receiving the scholarship was included. Reports from recipients have been very positive.

3. Add program endowment opportunities to capital projects.

- + \$1M applied to School of Business; \$500k each applied to Nursing and Engineering goals. While this has been done in theory and an endowment account created for each, the reality of reaching those goals has been somewhat truncated by capital project creep as costs of the projects have increased.

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

+ Forward action on this has not yet moved past three endowments for Little Creek due to other endowment initiatives.

5. Identify endowment grant opportunities – create matching vehicles as needed.

+ This goal has been achieved with a \$400K scholarship from the Developing Hispanic-Serving Institution (DHSI) grant. Of the \$200K match required, \$164K has been received with the rest in pledges. Awarding of the matching funds has begun by the Federal Government. Another matching scholarship of \$538K was awarded this fiscal year from the Promoting Postbaccalaureate Opportunities for Hispanic Americans (PPOHA) grant. This requires the University to match grant \$269K. Work on vehicles for this match will be worked on in fiscal year 2024-2025.

## MAJOR GIFTS (\$10,000+)

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

+ The goal for 2023-2024 was to have 36 repeat major donors (donors who also gave in 2022-2023), 20 renewed major donors (donors who gave three to four years ago but not in 2022-2023), and 35 new major donors. Actual numbers were 39 repeat major donors, 11 renewed major donors, and 27 new major donors.

1. Advancement Committee will actively create affinity-based task forces; Biology to begin.

+ The Advancement Committee has taken on Biology as its first project. They analyzed alumni not giving who also had top level wealth ratings. Plans were formalized for about 90 asks in winter and execution began with Giving Day in April. Six gifts totaling \$2,000 resulted.

2. Facilitate Business, Engineering, and Nursing project asks.

- + Funding Updates:
  - a. \$8M contributed in 2023-2024 for School of Business.
  - b. \$595K contributed in 2023-2024 for School of Nursing Simulation Lab.
  - c. \$447K contributed in 2023-2024 for Engineering.
- + Development Efforts:
  - a. Solicitation brochures completed for the School of Engineering and the School of Nursing.
  - b. Partnership plans and relationship building are ongoing with engineering firms.
  - c. Specific ask plans in place for the Schools of Engineering and Nursing.
  - d. Naming opportunities and continued asks for the School of Business in 2024.

3. Include program endowments in project asks above.

+ Ongoing and completed based on donor's interest. While this has been done in theory and an endowment account created for each, the reality of reaching those goals has been somewhat truncated by capital project creep as costs of the projects have increased.

4. Partner with alumni on area events with planned group or personal asks.

+ Intentional collaboration on alumni and major gift visits in Ohio, Florida (Tampa), Tennessee (Chattanooga), and South Carolina in 2023. Continued that intentional collaboration in 2024 with visits to California, Tennessee (Nashville), North Carolina (Asheville), and Florida (Orlando). International collaboration resulted when major gift officer joined alumni tour to Holland, Belgium, France and Germany in May 2024.

# FOUNDATIONS AND GRANTS

► **Benchmark:** Increase campus emphasis on and application to federal and private grants.

+ There was a goal of submitting 14 federal, national, or community grant proposals. Twelve (12) were submitted but several of these were complex, multi month, and multi personnel collaborations.

1. Develop working process with McAllister and Quinn and Southern’s faculty.

+ This initiative is progressing well although there are challenges in identifying able individuals to collaborate on grant projects. Three grant applications were completed (NSF Noyce, NSF IUSE, and PPOHA) with the consultant and the indirect cost application was submitted in fiscal 2023-2024. Planning for fiscal year 2024-2025 applications occurred late last fiscal year and those plans are in place for the coming year.

2. Develop working knowledge of Federal grant reporting processes.

+ Evaluator hired for DHSI grant and positive report received on grant process so far. Processes put in place with Financial Administration for distribution of funds. Training occurred by evaluator with grant coordinator and Academic Administration, Financial Administration and Advancement on reporting and processes. Initial mid-year report submitted to federal government.

3. Apply for \$3-4M in grants annually (federal, corporate, foundational).

+ In 2023-2024, \$5.5M was applied for in grant funding. The goal was \$1M in federal dollars and \$300k in non-federal funds. Federal dollars raised was \$700k and \$1,067,000 was raised from non-federal funds.

# REPEAT, RENEWED, AND NEW DONORS

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

	Goal	Actual
Number of Repeat Donors	1,474	1,395
Number of Renewed Donors	571	459
Number of New Donors	1,472	2002
Total Number of Donors	3,517	3,856
Total Amount Given	\$10.5M	\$13.5M
Percentage of Alumni Giving	9%	7%

1. Analyze new donor affinity groups and implement retargeting plan.

+ Analysis revealed that new donors are giving primarily by affinity area of interest. Affinity targeting for Giving Day Lead gifts, PC Giving appeal, Engineering appeal, and scholarship appeals sent in the fall. This will be operationalized in 2024-2025.

2. Analyze renewed and repeat donor affinity groups and implement a retargeting plan.

+ Researched current processes and determined that this is being done well at each appeal. But research also revealed that some alumni are being missed when an appeal is sent by only one of email or mail (if that person has only one or the other). Annual Giving is developing a plan to appeal to each legally contactable alum each year. This will be operationalized in future years.

3. Develop a communication plan to donors without affinity designation (“SAU friend”).

- + This conversation has been started, groups are in place (SAU Friend and Giving Day only donor) but specific targeting depends on affinity area. For example, in 2024-2025, those supporting student missions will be contacted for the 150th anniversary of J. N. Andrews first missionary journey. Other groups, like local gala attendees, are contacted for speaker series or other events on campus depending on interest areas.

4. Operationalize President Circle plan.

- + Revamping in process with plans for welcome packets, renew packets, special benefits like SonRise tickets (150 tickets for were given in 2024), University produced calendar, and special VIP event opportunities are in process. Intro letter sent in fall as well as a special appeal letter for Giving Day lead gifts.

5. Increase affinity appeals.

- + There were two additional targeted appeals (Giving Day Lead/PC and Engineering).

6. Increase appeals at group events such as homecoming and lecture series.

- + There was an appeal made and opportunities to give at R. Lynn Sauls Lecture, McArthur Lecture Series, Oral History project contained appeal (resulted in over 142 gifts, many new), Taste of Southern gala, and at the President’s Honors Concert. There are plans for more overt opportunities to give at Homecoming in 2024-2025.

## CAPITAL FUNDING

► **Benchmark:** Solicit funding for capital projects (capital campaigns and projects).

1. School of Business: Complete targeted appeals by alumni for naming opportunities.

- + Plan in process for named space appeals for founding School of Business dean and well-known professors for 2024-2025.

2. School of Business: Complete goal of \$20M in pledges and gifts in hand.

- + The School of Business Campaign have commitments and cash totaling \$17.3M. Cash received in 2023-2024 totaled \$8M, prior years’ gifts was \$5.6M and current outstanding pledges total \$3.7M.

3. School of Engineering and Physics: Complete targeted appeal by alumni for naming opportunities.

- + Naming space associated appeal and general appeal with brochure sent in fall. Individual asks and corporate asks are still in process to complete. Toward the \$3.5 million goal, \$450k was raised in FY 2023-2024, \$900k in the prior year. An additional \$800k has been awarded to this project through a DHSI grant.

4. School of Engineering and Physics: Invite the local engineering firms to partner financially.

- + Relationships began with five firms (four local, one national with local office), several tours on campus were given, preliminary ask (\$15K gift-in-kind) made to one firm.

5. School of Engineering and Physics: Reach \$2.5M in pledges and gifts in hand.

- + Toward the \$3.5 million goal, \$2.2 has been raised: \$450k was raised in FY 2023-2024, \$900k in the prior year. An additional \$800k has been awarded to this project through a DHSI grant.

**6.** Nursing: Identify departmental partners and create appeal and naming opportunities.

- + Multiple meetings with nursing and retired nursing faculty were held to review potential donors within alumni. Brochure created, a luncheon and appeal made. Major asks began. Of the \$2.5 million dollar goal, \$1.4M has been raised: \$600K has been received in FY 2023-2024, \$440K in prior years, and \$360K has been raised in pledges.

**7.** Nursing: Reach \$800K in pledges and gifts in hand.

- + Of the \$2.5 million dollar goal, \$1.4M has been raised: \$600K has been received in FY 2023-2024, \$440K in prior years, and \$360K has been raised in pledges.





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Power for Mind & Soul