



**SEWANEE**  
THE UNIVERSITY OF THE SOUTH



**Strategic Enrollment Plan**

**Summary Overview  
and Initiatives**

**June 2021**



“If you do not change your direction, you may end up  
where you are headed.”

*—attributed to Chinese philosopher Lao Tzu.*



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## **A world-class liberal arts college is a sticky pathway to changing the world.**

At a world-class liberal arts college like Sewanee, we provide an education that develops cognitive, rhetorical, and range of life skills to power up students who go on to become leaders in their communities. As the leaders of Sewanee's academic, co-curricular, and career-preparation offerings, we are attentive to the quickly changing world around us, and we're invested in providing a pathway for students that is contemporary and relevant. Continuous improvement of the quality of this educational pathway is an institutional imperative. This pathway begins before the students enroll when they are prospective students. When prospective students are admitted, we want them to stick to the pathway and enroll. After their first year, we want them to stick to the pathway and return as second-year students. Optimally, students stick to the path for four years, and then they go on to change the world for the better. The four-year pathway of enrolling, retaining, and graduating is a successful experience for the student and for the institution.

Over the past twenty years, other leading liberal arts colleges have innovated at a faster pace than Sewanee. Their pathways have become stickier than ours along the way. We have what it takes to catch up and succeed, and it all begins with strategic enrollment planning with a focus on student success.

### **Defining Student Success**

The result of effective strategic enrollment planning and management is student success. At its core, student success is enrolling, retaining, and graduating students who are empowered with the skills and values demonstrated to foster successful lives. When an institution aims to improve student success materially in a short period of time to the benefit of its students and society, the institution must develop a Strategic Enrollment Plan (SEP).

Sewanee has moved to a strategic enrollment management model by restructuring its administrative organization to include a Vice Provost for Student Success. This position has direct oversight of certain areas that are responsible for student success. This restructuring is a significant step forward to reinforce and improve Sewanee's overall quality in the face of increasingly dramatic changes to the landscape of higher education. For Sewanee to deliver student success at a level that will allow us to continue to claim authentically that we develop the whole person through a liberal arts education of the highest quality, everyone in the Sewanee community must cultivate a student success mindset. The time for this restructuring and community refocusing on student success is now, as we face significant headwinds in society, in higher education, and at Sewanee, in particular.



# I. INTRODUCTION TO STRATEGIC ENROLLMENT PLANNING

## What is strategic enrollment planning and why have we engaged this process?

SEP is “a data-informed process that aligns an institution’s fiscal, academic, co-curricular, and enrollment resources with its changing environment to accomplish the institution’s mission and ensure long-term enrollment success while focusing on organizational health and wellbeing of the institution.”<sup>1</sup>

A Strategic Enrollment Plan (SEP) identifies key performance indicators (KPIs), analyzes institutional strengths, weaknesses, opportunities and threats (SWOT) with regard to the KPIs, prioritizes strategies and tactics based on return on investment to address the SWOT analysis, and contains data-informed, fiscally-minded enrollment-related goals for a three- to five-year horizon with timelines to completion and individuals responsible. A SEP is produced by a broad-based SEP Council.

The purpose of a SEP is to strengthen enrollment management and align academic and co-curricular trends, demands, and capacities with post-graduate academic programs, graduate employment, and workforce needs. A distinguishing feature of a SEP is that it is an academic and co-curricular oriented process. Institutions often attempt to achieve desired enrollment outcomes and goals through some combination of marketing, recruitment, retention, and financial aid/discounts. SEP is a more comprehensive scope that includes academic and co-curricular programs as well as facilities and technology as necessary. Enrollment encompasses not only the recruitment of new students, but retention of current students.

Implementation of the SEP is by a strategic enrollment management steering committee, which typically overlaps the SEP Council in membership, along with a recruitment council and a retention council. Strategic enrollment management is an ongoing effort focused on ensuring that strategies and tactics of the SEP are implemented; that monitors performance indicators and key performance indicators; and that reviews data in an ongoing manner to ensure responsiveness to changes in competition, market share, or demand as appropriate in alignment with institutional mission, vision, goals, values, and resources.

The institutional strategic plan should establish vision, mission, and ways to ensure institutional effectiveness. Sewanee will initiate a new institutional strategic planning process that will elaborate and extend the SEP. For this planning process the Vice-Chancellor has articulated the following vision and mission:

- VISION: *The University of the South is a premier liberal arts institution committed to preparing its students to build The Beloved Community on the Mountain and in the World.*
- MISSION: *To develop adults of capacity, character and consequence dedicated to uplifting our shared humanity.*

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<sup>1</sup> Strategic Enrollment Planning: A dynamic Collaboration by Lewis W. Sanborne.



The SEP should determine KPIs, key strategies and enrollment goals to be achieved through the plan in support of this vision and mission. The SEM monitors progress toward enrollment goals. Other structures follow progress toward institutional goals.

A strategic approach to enrollment planning is now more important than ever for institutions like Sewanee. The number of high school graduates is projected to decrease dramatically in 2026 due to a decrease in fertility during the Great Recession of 2008 (Figure 1). Sewanee's main recruitment area for undergraduates is in the Southeast (Figure 2), and many of our top feeder states will experience significant decreases in high school graduates (Table 1).

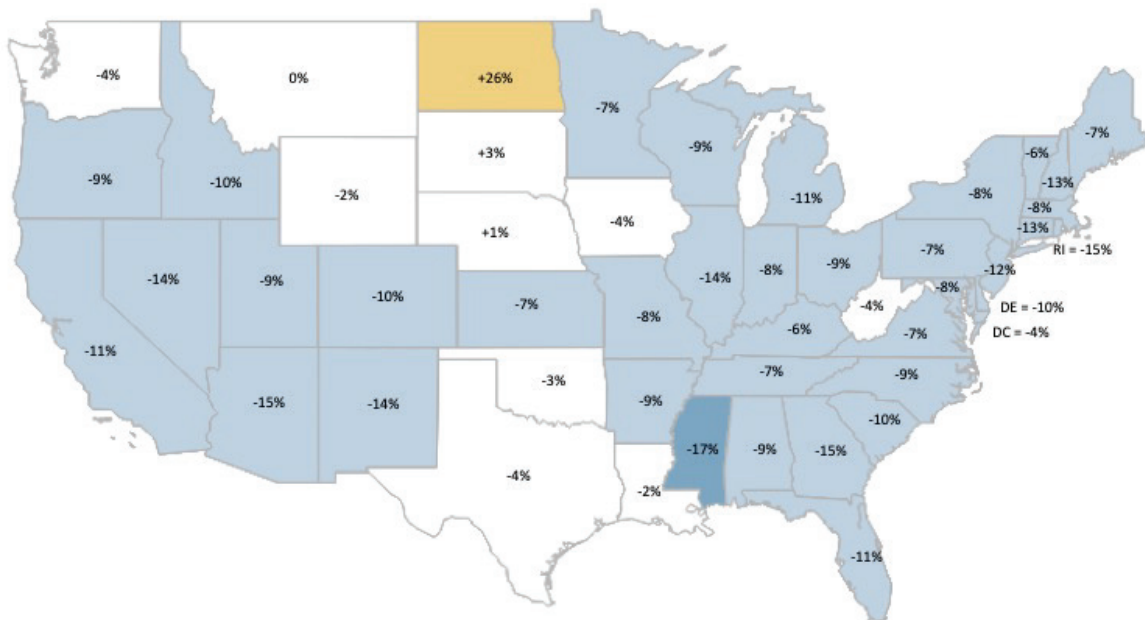


Figure 1: State by state projected changes in high school graduates. Data from the Western Interstate Commission for Higher Education, *Knocking at the College Door: Projections of High School Graduates 2016*. [www.knoocking.wiche.edu](http://www.knoocking.wiche.edu)



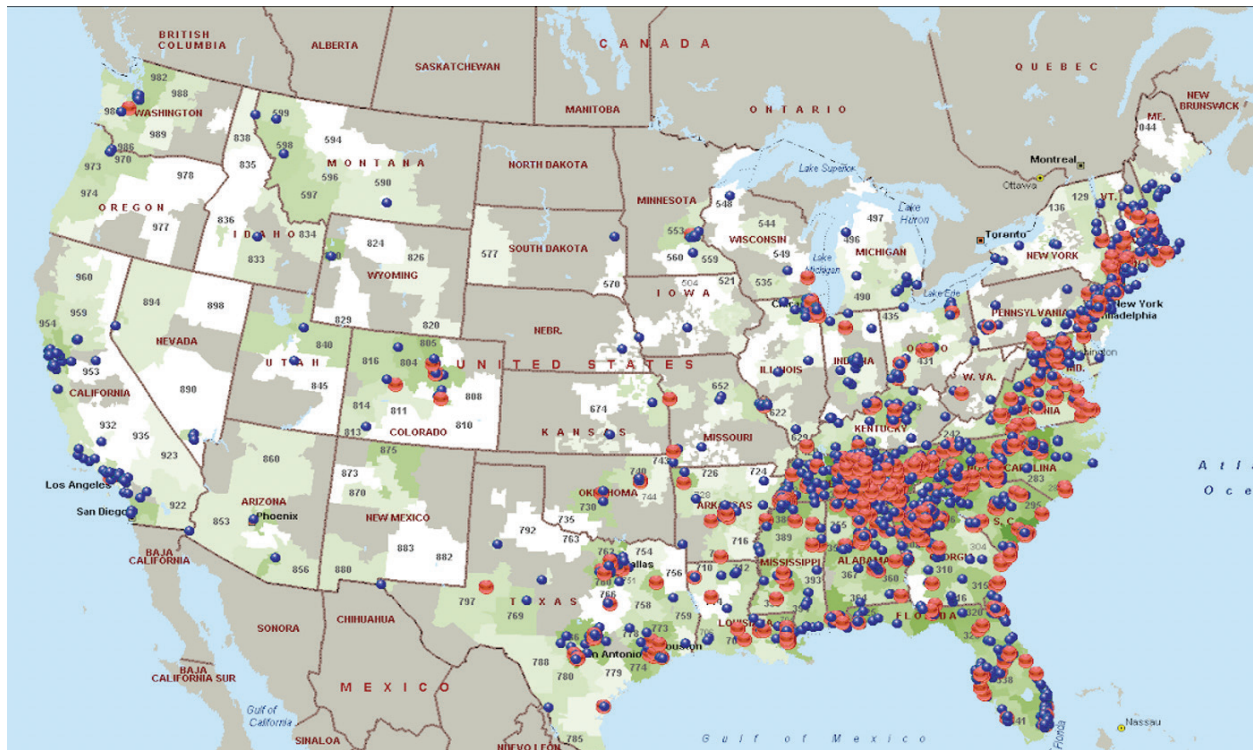


Figure 2: Sewanee's recruitment area. Red dots are top feeder schools (power group score = 10), blue dots are other significant feeder schools (power group score 8 and 9).



Table 1: Sewanee's highest feeder states for the College of Arts and Sciences based on Fall 2018 enrollment with the projected percent change in high school graduates 2025–2031 by state.

	Fall 2018 College Enrollment	% of those from U.S.	Projected percent change in HS graduates 2025–2031
Tennessee	380	23.2%	-7%
Georgia	188	11.5%	-19%
Texas	140	8.6%	-4%
Virginia	127	7.8%	-7%
Alabama	120	7.3%	-9%
North Carolina	116	7.1%	-9%
Florida	96	5.9%	-11%
South Carolina	56	3.4%	-10%
Maryland	48	2.9%	-8%
Louisiana	33	2.0%	-2%
New York	33	2.0%	-8%
Arkansas	26	1.6%	-9%
Massachusetts	25	1.5%	-8%
Illinois	24	1.5%	-14%
Pennsylvania	23	1.4%	-7%
Mississippi	22	1.3%	-17%
District of Columbia	21	1.3%	-10%
New Jersey	19	1.2%	-12%
Kentucky	18	1.1%	-6%

This approaching demographic cliff is well within sight. In addition to the decrease in the number of high school graduates, it also includes an unprecedented shift in racial diversity. An extensive research project by Dr. Nathan Grawe indicates that the top 50 liberal arts colleges are well-situated to flourish in this competitive environment.<sup>2</sup> Given that Sewanee's ranking in U.S. News & World Report was last in the high 30's in 2014, and we are currently ranked 47th, we are dangerously close to that break point. Sewanee has launched an SEP process to address 'headwinds' defined as fewer students seeking a traditional, residential liberal arts education within an increasingly more diverse and competitive recruitment environment.

<sup>2</sup> Grawe, Nathan, *Demographics and the Demand for Higher Education* (JHU Press, 2018).

The approaching demographic cliff speaks to our need to scrutinize both our recruitment strategies to become more competitive in a more diverse environment, and our strategies related to undergraduate retention. Sewanee's undergraduate first-year retention and six-year graduation rates have stagnated over the past twenty years (Figs. 3 and 4, resp.) compared to our peer institutions.

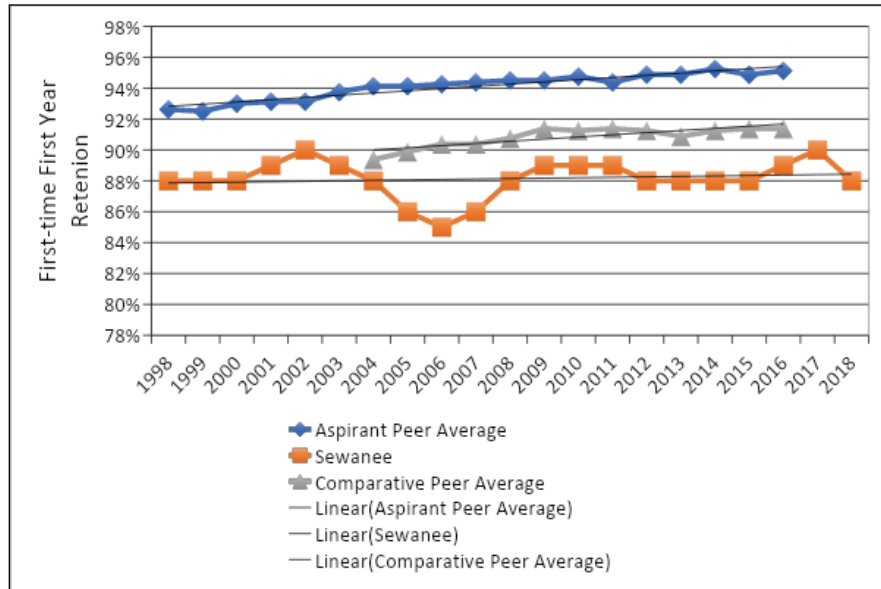


Figure 3. Sewanee's retention of first-time first-year students for the past 20 years. Aspirant and comparative peer schools are given in Table 2.

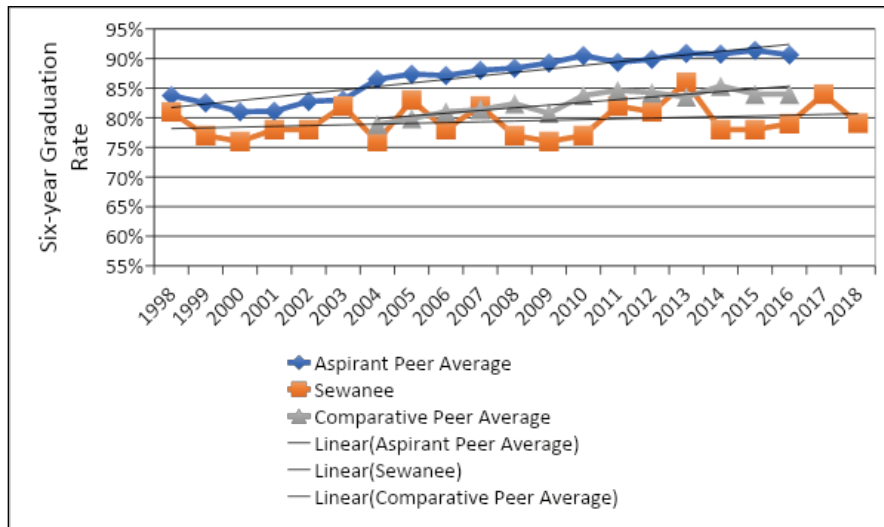


Figure 4. Sewanee's six-year graduation rate for the past 20 years. Aspirant and comparative peer schools are given in Table 2.



Table 2. Sewanee's aspirant and comparative peer institutions.

Aspirant Peers	Comparative Peers
Bates	Centre
Carleton	Denison
Colby	Dickenson
Colgate	Furman
Davidson	Gettysburg
Hamilton	Kenyon
Macalester	Rhodes
Washington and Lee	Whitman

Importantly, improving undergraduate retention will signal that Sewanee is providing the student support services necessary to enable success both in college and beyond. That is, retention should be seen through the lens of what Sewanee can do to provide students with the creativity, resilience, and softer skills they will need in order to pivot when our rapidly changing world takes them in another direction. Higher retention will also reduce the pressure to recruit new students, and reduce losses in undergraduate tuition and fees as cohorts move through Sewanee. Given that 80% of the University's revenue comes from comprehensive fees, and the demographic and financial realities that Higher Education is facing as a sector, it is imperative that the University is intentional about how it will face rapidly approaching headwinds.

## II. OPERATIONAL STRUCTURE AND PROCESS

The group tasked with managing the strategic enrollment planning process is the SEP Council. Se-wanee's SEP Council is made up of key Cabinet members, staff and college faculty. Oversight of the SEP Council is provided by the Executive Leadership Council and the Vice-Chancellor's Cabinet.

### **Current SEP Council members:**

Lee Ann Backlund, *undergraduate admission and financial aid*

Nancy Berner, *provost, chair*

Josh King, *undergraduate admission*

Nicole Noffsinger-Frazier, *student affairs*

Parker Oliver, *marketing and communications*

Terry Papillon, *academic affairs*

Mark Preslar, *college faculty*

Karen Proctor, *educational development*

David Shipps, *college faculty and economic development*

Alyssa Summers, *college faculty*

Paul Wiley, *institutional research*

Doug Williams, *fiscal affairs*

### **Past participating council members:**

Ryan Cassell, *undergraduate admission*

Marichal Gentry, *student affairs*

Eric Hartman, *institutional effectiveness, co-chair*

Mark Hopwood, *college faculty*

Tammy Schlosky, *college faculty*

The SEP Council is organized into three internal operations groups to provide internal council support and four externally-facing working teams to engage a broad base of constituents in the planning process.

### **Internal Operational Groups**

Three groups were focused on supporting council task management, ensuring that there were adequate planning and resource supports for the process and council members.



PROJECT MANAGEMENT. The project management team was charged with mapping out the process and timing for plan development, and training members of the council and working teams on the SEP process. The team met between regular Council meetings to organize the Council's work flow and to design and send out meeting agendas.

COMMUNICATIONS. The communications team's role is to support the SEP process by providing compelling, persuasive, and measurable strategies and tactics to communicate with University stakeholders throughout each phase of the project.

DATA. The data team is asked to support working team requests for data that IR or Admissions do not have. The team identifies who has the data and approaches those groups with requests. Where there are data that we do not have, this group works with appropriate groups to start gathering and curating the data, assessing the resource needs to do so and determining whether or not to prioritize gathering these data.

### **SEP Working Teams**

The SEP working teams support specific aspects of strategic enrollment plan content development. The teams, consisting of faculty and staff members, met over a six-month period to generate strategies designed to help Sewanee achieve the key performance indicator (KPI) goals that have been identified. Each team spent time working to understand their issue areas by reviewing data, current programs and practices; they generated strategies and ideas aligned with the institutional goals and key performance indicators; and developed comprehensive proposals for each strategy. Working teams delivered their strategic proposals to the council for review and decision-making in November 2020. Table 3 outlines the scope of work for each working team.

Table 3: Working Team Scopes

<b>Marketing &amp; Recruitment</b>	Create a comprehensive marketing awareness, messaging and student recruitment program informed by competitive market analyses and specific directed strategies to: 1) Meet/exceed Admissions KPIs attached to each component of the student acquisition funnel beginning with inquiry and ending with deposits; 2) Unlock access to engage with relevant, incremental audiences; 3) Acquire sufficient applicant volume possessing desired demographic, economic and academic profiles to yield new entering classes comfortably and regularly.
<b>Student Success &amp; Co-Curricular Programs</b>	Work toward identifying key indicators through assessment and institutional research that will result in the identification and implementation of institutional strategies, goals, and programs geared toward impacting the student college experience, not as a set of siloed and disparate experiences, but as one holistic, measurable college experience.
<b>Academic Programs</b>	Consider adjustments to the academic program that prepares us for a new world of students and our students for a new world in front of them. In the process, make sure to value student demand, employer trends, peer school offerings, HIPs, potential job placement impact, facilities, and the ways in which we configure and deliver the curriculum.
<b>Finance &amp; Financial Aid</b>	Explore financial strategies that advance enrollment and retention in consultation with external consultants to ensure affordability, sustainability, and selectivity. Explore additional revenue possibilities.

Table 4: Working Team Focus Areas

<b>Marketing and Recruitment/Admission</b>	<b>Student Success and co-curricular program</b>	<b>Academic Programs</b>	<b>Finance and Financial Aid</b>
Creating Awareness: Branding, positioning, targeted messaging, intentional communication. Inventory of messaging techniques and tools.	Persistence (grit and resilience progression (moving from year to year, contextualized by student needs/interests), retention and graduation rate analysis by key student sub-populations, why students transfer/where do they go, analytics	Prospective student demand trends and new program opportunities (including graduate)	Pricing: tuition, fees and cost of attendance
Creating Demand: vehicles for inbound inquiry. Techniques to fill funnel. Pipeline assembly. Unique tactics for different customer segments (parents, students, legacies, geographic targets, counselors etc.)	Student support program; support (academic + student affairs programming/residential life, student experiences), disability issues, wellness, impact studies and analyses	Occupation and employer trends and projections	Student ability to pay
Ongoing Competitive Analysis: 1. Regional competitive landscape 2. Peer and aspirant analysis 3. In-market branding and acquisition trends 4. Non-US trends 5. Emerging trends 6. Sunsetting priorities that should be retired	Gateway course completion and success; gateway (pathways into majors, pre-professional studies, student discernment), analytics	Competitor program strengths, weaknesses and voids	Family willingness to pay (price elasticity)



Table 4: Working Team Focus Areas (continued)

Marketing and Recruitment/Admission	Student Success and co-curricular program	Academic Programs	Finance and Financial Aid
Website KPIs, measurement and effectiveness to (i) generate inquiry (ii) drive demand	On/off campus recreational experiences	Quality educational experiences and outcomes	Financial literacy
M&C and outreach strategies (including comm flows) & impact studies	Co-curricular programs and initiatives inventory, participation rates, learning and development outcomes, evaluation, analytics	Job and graduate school placement overall and by major	Payment plans
The annual Admissions strategic Plan: unique goals, KPIs and required resources	Academic and career advising	Academic and career advising	Default management
Pre-college program design; gap analysis on Sewanee offerings vs contemporary programs in high demand; expected participation rates; outcomes	Student engagement measures and results; engagement (civic engagement + student involvement, sense of belonging, intergenerational support)	Program platform and audience development	Financial systems and processes
Transfers strategy: acquisition and awareness programs; desired outcomes	Athletics inventory, student retention on teams	Pre-professional program inventory, participation rates and outcomes evaluation	Gross and net operating revenues
New strategic partnerships to drive demand beyond markets where awareness is already high.	Infrastructure (student spaces residential halls, commons, athletic facilities)		Auxiliary revenue streams

Table 5: Working Team Members

Marketing and Recruitment/Admission	Student Success and co-curricular program	Academic Programs	Finance and Financial Aid
Lee Ann Backlund, <i>Lead</i>	Nicole Noffsinger-Frazier, <i>Lead</i> Marichal Gentry, <i>Lead</i>	Terry Papillon, <i>Lead</i>	Doug Williams, <i>Lead</i>
Parker Oliver, <i>Co-lead</i> Josh King, <i>Co-lead</i> Andrea del Balso Nicky Hamilton Kim Heitzenrater Tony Pacella Bethel Seballos Mila Dragojevic Chris McDonough	Karen Proctor Alyssa Summers Lucia Garcia-Santana Robert Black Lauren Goodpaster Bobby Silk Matt Brown Betsy Sandlin Mark Webb	Mark Preslar Karen Yu Kerry Ginger Sean O'Rourke Vicki Sells Alex Bruce Catherine Cavagnaro Christian Shushok Mandy Tu	Beth Cragar Sam McNair Marc St. Pierre
Also: Ryan Cassell, <i>Co-lead</i> Tammy Schlosky	Lisa Burns Jim Peterman Julian Ledford	Also: Mark Hopwood	

## Process, Review of Previous Studies and Plans

The SEP working teams met over a six-month period to generate strategies designed to help Sewanee bolster its strengths, address its weaknesses, and prepare the institution to leverage opportunities and mitigate threats. Each team spent time working to understand their issue areas by examining the Environmental Scan and conducting SWOT analyses for their particular domains. Working teams generated strategies and ideas aligned with the key performance indicators, in many cases using prior university studies and research as resources (see Appendix 3). They developed comprehensive proposals for each strategy. Working teams delivered their strategic proposals to the council for review in November 2020.

The SEP Council reviewed and scored the proposals using the rubric below. The SEP Council discussed each proposal in January 2021. Early in the process, some proposals were returned to the working team for refinement. Others were given the green light and fast-tracked.

Criteria	Description
KPI Alignment	Aligned to KPI(s), with clearly articulated rationale
Strategy	Clearly defined strategy
Scope Proposal	Proposal scope is sufficient to address the stated needs/achieve the desired results/outcomes
Tactics	Proposed course of action is sufficient to advance strategy and desired outcomes
Outcomes	Measurable outcomes, address targeted issues
Innovation/ Preeminence	Novel idea, leads to level of distinction
Cost	Detailed financials/feasibility



### III. SITUATION ANALYSIS

Environmental scans are assessments of the “internal and external issues and factors which potentially may affect” the mission and performance of the institution.<sup>3</sup> Sewanee’s scan presents a look at what’s happening outside of—and within—our gates, and considers a range of issues that serve as context for the institution’s strategic enrollment planning work. Derived from qualitative assessment exercises looking at the school’s strengths, weaknesses, opportunities and threats (SWOT), it notes issues that need to be addressed through forward thinking strategies. The situation analysis is the narrative resulting from the scan. The following is a brief situation analysis resulting from the scan. (For the full results of the SWOT analysis, please see Appendices I - 4. A summary of results is given below.)

#### **Headwinds for Student Success at Sewanee (Environmental Scan Summary)**

##### ENROLLMENT

The landscape of higher education is shifting rapidly. Private selective colleges are facing the combined challenges of higher competition for undergraduate students and lower confidence in the return on investment of a high sticker price liberal arts education as middle incomes fail to increase faster than the cost of living. Less public trust in the value of a college education in general, and in the liberal arts specifically, means families, even those who are able to pay, are less willing to pay. In response, schools are providing more non-need aid, leaving fewer institutional dollars for those who lack adequate resources, thus reducing access to a high quality liberal arts education for those for whom it would make the greatest difference. Today’s college-seeking families, Gen Z students with Gen X parents, prioritize applied learning and a career-focused curriculum that they perceive to be important in getting a job, while employers prioritize skills such as creativity, critical thinking, and oral and written communication skills. Finally, the demographics of the country are changing. Not only will the number of traditional college age students decrease dramatically (12–15%) in 2026, a higher proportion of those remaining will be from groups traditionally underrepresented in higher education.

For decades, higher education was implicitly valued by a public that viewed the college experience as an essential gateway to the American dream. Many in higher education grew complacent, and today we are paying the price for that complacency. Having seen their families struggle through the Great Recession, Gen Z students feel the need to jump straight from college to career. What higher education has failed to communicate adequately is that over the course of their lifetimes they need to be prepared to succeed in careers and workplaces that do not yet exist. We need to convey that this generation needs not only to be prepared for their first career, but that a high quality liberal arts college education will equip them with the creativity, resilience, and interpersonal skills they will need in order to pivot when our rapidly changing world takes them in another direction. The fulfillment of our mission and expression of our values must be reflected in the achievements and ongoing successes of our students.

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<sup>3</sup>American Society for Engineering Education, <http://se.asee.org/proceedings/ASEE2008/papers/RP2008106FOR.doc>

## RETENTION AND GRADUATION

Nationally, institutions are making strides in improving retention and graduation. The 2019 National Student Clearinghouse enrollment data showed an increase of 1.5 percent in the overall national six-year graduation rate for both two- and four-year colleges in the Fall 2012 cohort, rising to 58.3 percent overall. At Sewanee, the six-year graduation rate is 79%, which significantly exceeds the performance of colleges overall, but falls behind the institution's comparative and aspirant peers. Comparative peers' six-year graduation rate is 84%; aspirant peers' six-year graduation rate is 91%. For the past twenty years, Sewanee's retention and graduation rates have stagnated even as our comparative and aspirant peers have improved.

### **Sewanee's SWOT**

#### STRENGTHS

Our qualitative assessment found that the University has some key strengths to build on and leverage in order to attract and retain students and to ensure student success. In addition to providing a quality liberal arts education, our strengths cut across the areas of institutional identity and culture, academic and co-curricular offerings, as well as general student experiences.

#### **Quality Academic Programs and Student Experiences**

Sewanee has dedicated faculty who use effective teaching methods. Students report being satisfied with Sewanee's academic majors. They also report having personalized attention from—and relationships with—faculty, as well as quality interactions with student services staff and academic advisors. The institution offers solid co-curricular offerings through well implemented programs such as the Bonner, Canale, and Carey fellowships.

Sewanee graduates students with skills and competencies that enable them to succeed in their careers and the workplace. According to an alumni survey conducted by The Thompson Group, the Sewanee curriculum and educational experiences “gave alumni solid reading, writing, communications, and critical thinking skills that are transferable to a wide range of careers.”

Sewanee is moving to sustainable “green” practices. The institution has integrated academic courses, Domain activities with environmental and sustainability programs. The Office of Environmental Stew-

ardship and Sustainability champions awareness about stewardship and sustainability and catalyzes action throughout the campus.

Our students are actively participating in community-based projects and service learning as our faculty and offices like the Office of Civic Engagement involve students in meaningful, impact-oriented endeavors.

### **Fiscal Health**

Sewanee provides competitive healthcare, educational, and retirement benefits that enable it to attract faculty, staff, and administrators. The advancement department recently conducted a successful capital campaign that has enabled the institution to advance new building and student service support projects.

### **Location**

Sewanee is situated in a rural, pristine natural environment and it has proximity to major southern commerce, technology, and cultural centers (Chattanooga, Nashville, Huntsville, and Atlanta).

### **Weaknesses**

Sewanee's areas for improvement require immediate attention as they have current and long-term impact on institutional effectiveness and key performance indicators.

### **Vision, Mission, and Leadership**

The COACHE (Collaborative on Academic Careers in Higher Education) report notes colleagues' contention that the Sewanee lacks a clear institutional vision. Faculty cite the lack of a galvanizing mission to rally around, one that guides institutional priorities and decision making, and non-faculty staff agree. The lack of vision is related to overall concerns about a range of management issues including a lack of institutional identity, a perceived lack of transparency around administration decision making, challenges with shared governance, and confusing institutional policies. COACHE also evidenced low levels of faculty morale, high burnout, and a lack of trusting relationships between the faculty and administration, and among the faculty themselves. These issues, along with the fact that it is not institutional practice to use assessment to drive continuous improvement, impact Sewanee's ability to meet the current and future needs of students, employees, and the institution overall.



## **Academic Programs and Performance**

As competition for students grows more intense, Sewanee's limited number of nationally recognized programs of distinction is a critical weakness as is student performance. There are a number of key NSSE (National Survey of Student Engagement) indicators that point to our students lagging behind their peers when it comes to academic performance, specifically in high impact practices such as working with faculty on a research project, participating in an internship/field experience, course-based service-learning, quantitative analysis, and studying abroad. Aspirant peer institutions are offering multiple courses around a theme, like immigration, helping draw connections between disciplines and complex problem solving, which creates a coherence to the liberal arts general education program.

Technology is a driving force in every sector. Poor use of teaching technologies across the institution and lack of IT support and innovation in and outside of the classroom is a serious challenge for the institution.

## **Student Experience/Campus Climate**

Sewanee has a serious set of challenges with regard to student experience. The Healthy Minds data illustrate that the campus climate and environment are having negative impacts on student well-being. Some students perceive the campus to be unsafe and hostile. On campus criminal behavior, as well as above national average rates of binge drinking and drug use contribute to this perception. NSSE data show that a reason students consider transferring is campus climate and culture. A lack of healthy student social areas and limited resources for student support services hinder our ability to address these critical issues.

## **Institutional Infrastructure**

Most of Sewanee's buildings are old with many in need of repair. This is exacerbated by the sheer number of buildings that the University owns. The increasing expense of maintaining buildings and old equipment, and the practice of deferred maintenance erode the value and appeal of the University's built environment assets.

## **Financial Challenges**

The institution's financial security is threatened due to a relatively modest endowment and special draws on the endowment. A lack of budget increases hinders the University's ability to keep up with rising

operational costs. While staff are grateful for the good benefits the University provides, they are unhappy with low pay and low wage increases. There has also been recent attention given to the starting wage for hourly workers.

### **Recruitment**

Eighty percent of Sewanee students come from a small percentage (20%) of high school feeders. This leaves the University exposed to any number of risks related to the viability of those feeder schools.

### **Diversity**

Sewanee's general lack of diversity among its students, staff, and faculty is a general weakness as the institution does not reflect the diversity of the state, the country or the world. Our ability to attract and retain students, particularly students and faculty of color, is more challenging given the institution's demographic make-up.

### **Opportunities**

A number of external environmental trends serve as opportunities for Sewanee to design strategies for bolstering our recruitment and enrollment efforts.

### **Academic Programs**

The emergence of international programs and partnerships available to Sewanee present opportunities to develop distinctive, academic and co-curricular programs that may interest prospective students and address the needs of current students looking for quality international learning experiences.

There is an increasing demand for credentials such as badges and mini certificates which can be combined with existing Sewanee courses. Again, this is an opportunity to elevate the appeal of our academic programs. Sewanee alumni report an interest in engagement opportunities and an appetite to return to the Mountain, which could be an emerging life-long learning market.

Sewanee will need to devise an answer to the growing demand for online and blended programs. Technology trends tend to accelerate not reverse. It remains to be seen how the prevalence of virtual learning as a result of the pandemic will affect student demand or expectations regarding technology.

## **Enrollment**

While the changing demographics are often viewed as a challenge for the higher education sector, institutions that embrace the reality of the changing demographics, and prepare their institutions in every way with a focus on equity (inclusion, financial support, etc.), will gain a serious competitive advantage.

Demographers predict that the southeastern part of the United States will see an uptick in population growth for the next five years. Sewanee will need to be poised to capture a share of that population growth for future posterity.

## **Threats**

Sewanee will have no control over certain environmental threats that present a risk to institutional viability. During the strategic enrollment planning process, strategies must be developed to mitigate against these potentially harmful phenomena.

## **The Economy**

There are a number of economic factors that could present a problem for Sewanee in the near and distant futures. The long-term economic impact of the pandemic remains to be seen. Prior to the pandemic, according to the Accepted Student Questionnaire, there was already growing student and family concerns about incurred debt and an aversion to borrowing resources for a college diploma. This concern is coupled with mixed public signals about the value of a liberal arts education and the demand for proof of student outcomes.

With a modest endowment, the institution is vulnerable to any prolonged, downward national economic shocks such as a sharp drop in the stock market or persistently declining economic indicators.

## **Competition**

Sewanee faces competition from new and disruptive entities. University competitors include other universities that are offering lower tuition and/or higher discounts; less expensive large public institutions; and the expanding, low cost online offerings from “big name” schools. All of these market forces impact demand for Sewanee’s educational offerings. Larger institutions also offer an array of professional programs aligned with predicted job growth vocations, for example healthcare and technology profes-



sions, which attract larger numbers of prospective students drawn toward vocational training. Sewanee's strategic positioning in the marketplace is determined by its placement among its peer and aspirant institutions, and its bona fide competitors.

**PEER INSTITUTIONS:** These represent the type of institution with which we identify. Recommended by IR and faculty members from the strategic planning committee, and adopted in 2013 by the Executive Staff (earlier version of the Vice-Chancellor's Cabinet).

- *Centre College (KY)*
- *Denison College (OH)*
- *Dickinson College (PA)*
- *Furman University (SC)*
- *Gettysburg College (PA)*
- *Kenyon College (OH)*
- *Rhodes College (TN)*
- *Whitman College (WA)*

**ASPIRANT INSTITUTIONS:** These represent the type of institution we hope to be like in 5 – 10 years on one or more specific attributes. Recommended by IR and faculty members from the strategic planning committee, and adopted in 2013 by the Executive Staff (earlier version of the Vice-Chancellor's Cabinet).

- *Bates College (ME)*
- *Carleton College (MN)*
- *Colby College (ME)*
- *Colgate College (NY)*
- *Davidson College (NC)*
- *Hamilton College (NY)*
- *Macalester College (MN)*
- *Washington and Lee University (VA)*

COMPETITOR INSTITUTIONS: These are defined by the market as students move through the enrollment process. They can be identified by: ACT and SAT overlap, FAFSA overlap (may not continue to be available), cross applications, and National Student Clearinghouse lost-admit research. These were identified using National Student Clearinghouse lost-admit data:

- *Rhodes College*
- *University of Tennessee—Knoxville*
- *University of Georgia*
- *University of Virginia*
- *University of North Carolina—Chapel Hill*
- *Furman University*
- *Washington and Lee University*
- *University of Alabama*
- *Southern Methodist University*
- *Clemson University*

## **Political**

Changes in federal support for loans and grants, along with policy changes regarding ethical practices in recruiting students, are just two policy-related challenges the institution must address.

## **Summary**

Sewanee has a solid reputation and a variety of assets that the University can leverage in the years ahead to ensure its viability. It is critical, however, for the institution not to rest on historical laurels. Given Sewanee's current situation and future trends, all members of the University community are needed to think and act strategically in ways that enable the institution to be more strongly positioned as one of the top small liberal arts schools in the nation. This goes beyond merely having anecdotal narratives about top notch faculty and staff and high quality academic and co-curricular programs and services. Sewanee has to provide proof of its quality, and consistently offer programs of distinction that are aligned to our most unique assets and that can be validated by data and external recognition by accepted national and international criteria.

Stellar academic programming and teaching are not the only areas of priority for the institution. Sewanee's student experience data reflect a foreboding threat to our institutional integrity and viability.

Student flourishing and well-being should be Sewanee's number one concern. The Healthy Minds data indicate that the institution needs to prioritize investments in the built environment and the development of dynamic programs and services to increase students' mental health supports, reduce social isolation, increase positive academic and social dynamics and curtail criminal and substance abuse behaviors. Improvement of student life is an essential aspect of recruitment and retention and ensuring our students graduate on time and have the support and resources available to flourish socially.

Sewanee must create incremental demand for a Sewanee education and significantly improve retention of students once they enroll in order to stay viable. To drive the needed increases in demand and retention, the strategic enrollment plan must contain a clear and compelling vision of Sewanee's future, along with bold, new ideas that fully leverage the talents of our faculty and staff, our uniqueness of place and proximity, prepare us for diversity, and enable all of our students to thrive as they prepare for their lives beyond the gates.<sup>4</sup>

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<sup>4</sup> The Thompson Group, 2019

## IV. KEY PERFORMANCE INDICATORS

As part of the strategic planning process, following a deep analysis of the external environment institutional capacities, and deliberations over what is possible, the council determined a set of goals for the college to meet. The key performance indicators (KPIs) are the measurable values—or metrics—by which the institution will track the institution's progress toward its stated, specific goals. KPIs enable institutions to know how well they are doing and are critical to being able to continually monitor and evaluate performance. Like clearly articulated goals, clearly articulated KPIs help an institution advance its mission and secure its fiscal health.<sup>5</sup> Performance indicators (PIs) are benchmarks along the way to achieving KPIs.

Table 6: Sewanee's Key Performance Indicators (KPIs)

Category	Key Performance Indicator	Performance Indicator	Feeder Information
Enrollment	New student enrollment	First time first year enrollment Transfer enrollment Number of prospective students participating in explicit recruitment pipeline programming Number and percent of students matriculating from recruitment pipeline programs	Prospects Inquiries Capture rate Applications total Applications completed Inquiry to app conversion rate Campus visits Admits Admit rate Deposits Enrolled Enrollment yield rate Summer Melt
Student Profile	Student academic profile (Average HCRC ACRK)	High school GPA (normalized) Standardized test scores % test optional	HCRC high school quality rating Time of application
(Campus Culture/ Climate)	Diversity	Student input demographic information  • <i>Retention of groups of interest to at least the average for the majority population</i>	Expected family contribution (EFC) Pell-eligible Religious affiliation First generation International Anticipated major Distance from campus Racial diversity Recruited athlete

<sup>5</sup> Grant Thornton, [www.grantthornton.com/library/whitepapers/nfp/2016/SoHE-2016/Higher-ed-KPIs-scorecards.aspx](http://www.grantthornton.com/library/whitepapers/nfp/2016/SoHE-2016/Higher-ed-KPIs-scorecards.aspx)



Table 6: Sewanee's Key Performance Indicators (KPIs)

Category	Key Performance Indicator	Performance Indicator	Feeder Information
Experience Quality	Continuing student enrollment	FTFY retention Soph-Jr retention Transfer retention Four-year graduation rate Six-year graduation rate	First year average GPA Average credits attempted vs. earned NSSE scores (connected to campus, advising) High Impact Practices <ul style="list-style-type: none"> <li>· Study Away (# and % of students)</li> <li>· Internships (# and % of students)</li> <li>· Research with faculty (# and % of students)</li> <li>· On-campus employment</li> <li>· Civic engagement</li> </ul> Healthy Minds Survey Data Greek affiliation + retention Varsity athlete + retention Perception of facilities Technology resources Alumni engagement
Program Quality	(Outcomes; ROI, cost, debt, salary)	Fulbright, Watson, Rhodes, etc. 6 month placement Grad/other school placement Alumni income Notable programs like Teach for America Career mobility Nationally recognized academic program excellence	Final GPAs GRE, LSAT, MCAT Career competencies (critical thinking, leadership skills) Student debt Loan default rate
Market Position	US News rank · Top 35 by 2026 report (through 2025)	Selectivity HCRC high school feeder quality rating First destination income	Social media activity including YouTube Gateway programs (SEI, SUMMA, SYWC)
Fiscal	Revenue per Student (NTR per student plus funded institutional aid per student)	NTR per student Funded institutional aid per student Needy student share of enrollment Discount rate needy students Discount rate non-need students % Full Pay Students	Gifts to endowment Total giving Annual/Sewanee fund

## V. GOALS, STRATEGIES, AND TACTICS SUMMARY

### Goal 1: Ensure a healthy funnel and shape the funnel to achieve admission objectives

#### KPI: NEW STUDENT ENROLLMENT

##### PIs:

- *First time first year student enrollment 445*
- *Number of fall semester transfer students increased to 30 from 15 by 2025*
- *Number of spring semester transfer students increased to 15 from 7 by 2025*
- *Number of prospective students participating in explicit recruitment pipeline programming increases to 300 from 150 by 2025*
- *Number and percent of students matriculating from recruitment pipeline programs increases from 10% to 20% (total # of students matriculating from these programs would increase from 15 to 60)*

**Strategy 1**—Improve the health of the top of the admission funnel to ensure incoming classes meet the NTR goal (45% need / 55% no-need requirement) that will sustain the Meeting Full Need initiative.

*Tactic—MARKETView*

**Strategy 2**—Expand Sewanee’s recruitment efforts to state and regional community college students in order to increase the number of community college transfer students to 30 in the fall semester and 15 in the spring semester by fall 2025.

*Tactic—Transfer Package*

**Strategy 3**—Expand student pipeline with targeted gap and gateway programs tailored to Sewanee’s unique strengths (location, focus on social justice, focus on environmental science) with programs such as:

##### *Tactics*

- *Summer and gap year gateway programs*
- *University of the South Partnership Strategy (outside SEP)*

**Strategy 4**—Mitigate financial barriers to enrollment.

##### *Tactics*

- *Sewanee Pledge*
- *Meeting 100% need (outside SEP)*

**Strategy 5**—Increase awareness of the institution’s brand and value

*Tactic—Digital Marketing efforts (outside SEP)*

**Goal 2: Increase the academic profile of newly matriculated students as measured by the percentage of matriculants in each HCRC ACRK rank by fall 2025.**

KPI: DECREASE THE PERCENT OF NEW STUDENTS ENROLLED IN THE HUMAN CAPITAL (HCRC OUR ADMISSION CONSULTANTS) ACADEMIC RANKS (ACRK) 1-3 AND INCREASE THE PERCENTAGE OF NEW STUDENTS ENROLLED IN ACRK 4 – 7.

PIS: HCRC USES A PROPRIETARY FORMULA TO PLACE STUDENTS INTO SEVEN RANKS. ELEMENTS OF THE FORMULA INCLUDE NORMALIZED HIGH SCHOOL GPA, STANDARDIZED TEST SCORES, % TEST OPTIONAL, HIGH SCHOOL QUALITY

- ACRK 1 decreased from 17.4 % to 6.4 %
- ACRK 7 increased from 9.0 % to 20.1 %.

**Strategy 1**—Identify and yield students with demonstrated high levels of academic achievement

*Tactics*

- MARKETView
- The Chancellor’s Excellence Program
- Transfer Package

**Goal 3: Shift campus culture and climate through employment of comprehensive, evidence-based approaches targeted at positive community building around values, positive school identity, community engagement, and community citizenship (sense of responsibility and accountability)**

KPI: CONTINUING STUDENT ENROLLMENT FROM 1220 TO 1260 BY FALL 2025

PIs:

- Retention of first year students increase from 88 % to 90 % by fall 2025 (students entering fall 2024)
- Retention to the junior year increase from 82.3 % to 85.9 % by fall 2025
- Four-year graduation rate increase from 75.2 % to 80 % by May 2026
- Lower rates of drug and alcohol abuse, sexual assault, bias reports, etc.
- Lower rates of suspension and withdrawals due to conduct issues.

## OVERALL STRATEGY

**Strategy I**—Redesign the student experience to leverage structured pathway approaches and improve institutional quality across the domains of instruction, advising, student support services

Tactic—Establish the Center for Student Success and Flourishing that designs comprehensive, integrated, structured pathways focused on promoting student success and mitigates student barriers to navigating institutional resources by offering seamless channels for accessing campus services

Strategy 2—Enhance overall student well-being and flourishing, shifting culture toward positive values and realizing The Beloved Community.

### *Tactics*

- *Wellness curriculum: integrate a four-year, developmental course into the college's curriculum or co-curricular requirements*
- *Co-curricular EQB requirements*
- *Multicultural Center*
- *Drug and alcohol policy/initiative (outside SEP)*
- *Wellness Commons completed (outside SEP)*
- *Biehl Commons (outside SEP)*

## **Goal 4: Increase revenue per student**

KPI: REVENUE PER STUDENT (= TUITION/FEEs REVENUE MINUS UNFUNDED AID)

PI's:

- *NTR per student*
- *Funded institutional aid per student*
- *Proportion of entering students with demonstrated financial need (45%)*
- *Discount rate of students with demonstrated financial need [defined as those with an EFC (expected family contribution) lower than COA (cost of attendance)]*
- *Discount rate of students with no demonstrated financial need (30%) [defined as those with an EFC higher than COA]*
- *% Students receiving no institutional aid (20%)*

**Strategy I**—Improve Sewanee's market position so that families are willing to pay for a Sewanee education

### *Tactics*

- *Meeting 100% of demonstrated need (outside SEP)*
- *MARKETView*



## VI. EXPECTED RETURN ON INVESTMENT

Table 7 provides a summary of expenses for proposed programs. Each is structured to meet numerous KPIs previously detailed, the most common of which related to student acquisition and retention. Off-setting those expenses are anticipated financial benefits associated with increasing retention both in an expected manner and incremental manner.

Table 7. Summary of SEP Budget

<b>Program Expenses (000's)</b>	<b>Yr. 1</b>	<b>Yr. 2</b>	<b>Yr. 3</b>	<b>Yr. 4</b>	<b>Total</b>
<b><i>Expand Pipeline Programs</i></b>					
ESL Writing Program	\$30	\$30	\$30	\$30	<b>\$0</b>
Go Forward	\$60	\$60	\$59	\$59	<b>\$0</b>
Social Change Summer Program	\$39	\$54	\$65	\$65	<b>\$0</b>
Assumed to be self-sustaining: Net = \$0					
<b><i>Expand Funnel</i></b>					
MARKETView	-\$59	-\$59	-\$59	-\$59	<b>-\$236</b>
Chancellor's Excellence Program	-\$241	-\$241	-\$241	-\$241	<b>-\$964</b>
Transfer Package	-\$68	-\$68	-\$68	-\$68	<b>-\$272</b>
<b><i>Student Success and Flourishing Center</i></b>					
Domain All Access	-\$68	-\$68	-\$68	-\$68	<b>-\$272</b>
Integrated Advising	-\$200	-\$200	-\$200	-\$200	<b>-\$800</b>
Wellness Curricular Proposal	-\$182	-\$182	-\$182	-\$182	<b>-\$728</b>
Career Readiness & Mobility	-\$120	-\$121	-\$121	-\$121	<b>-\$483</b>
<b><i>Diversity and Campus Culture</i></b>					
Multicultural Center	-\$288	-\$288	-\$288	-\$288	<b>-\$1,152</b>
Student Transportation					
<b>Totals (without Net = \$0 programs)</b>	<b>-\$1,226</b>	<b>-\$1,227</b>	<b>-\$1,227</b>	<b>-\$1,227</b>	<b>-\$4,907</b>
Expected Benefit to Retention	\$78	\$225	\$394	\$576	<b>\$1,273</b>
<b>Net Expenses</b>	<b>-\$1,148</b>	<b>-\$1,002</b>	<b>-\$833</b>	<b>-\$651</b>	<b>-\$3,634</b>
Incremental Benefit to Retention	\$70	\$226	\$473	\$760	<b>\$1,529</b>
<b>Net Expenses</b>	<b>-\$1,078</b>	<b>-\$776</b>	<b>-\$360</b>	<b>\$109</b>	<b>-\$2,105</b>
Expected Benefit to Transfer Students	\$78	\$312	\$802	\$1,397	<b>\$2,589</b>
<b>Net Expenses</b>	<b>-\$1,000</b>	<b>-\$464</b>	<b>\$442</b>	<b>\$1,506</b>	<b>\$484</b>
Expected Benefit to Reduced Merit Aid	\$544	\$1,645	\$3,428	\$5,821	<b>\$11,438</b>
<b>Net Expenses</b>	<b>-\$456</b>	<b>\$1,181</b>	<b>\$3,870</b>	<b>\$7,327</b>	<b>\$11,922</b>

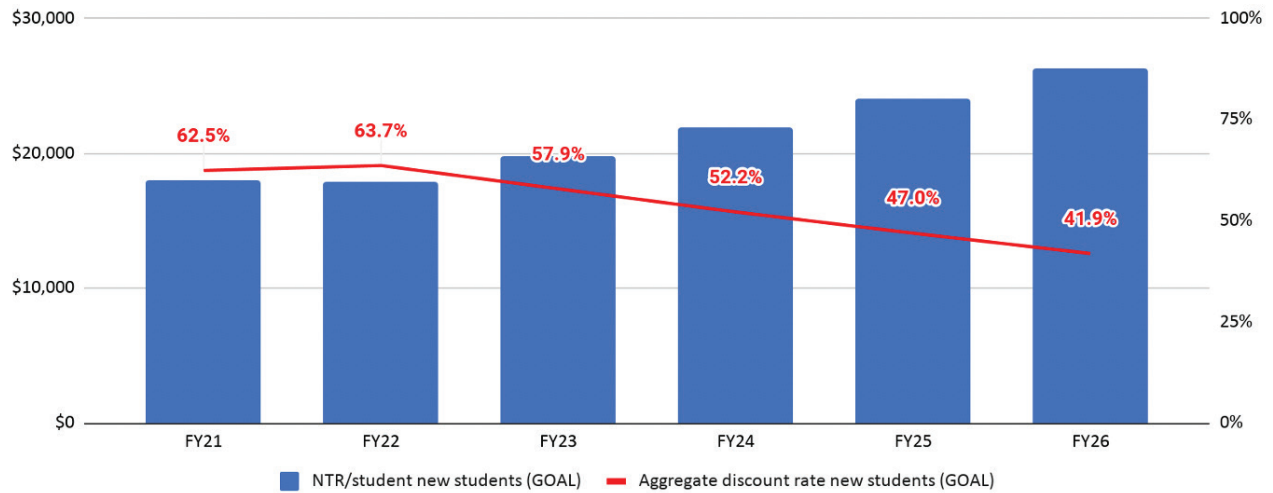
Table 8 provides an evaluation of the benefits of each proposed program with 1 being low impact and 5 being extremely significant. The colors indicate the areas where each program score is at least 3 (somewhat significant). The “Retention Breakeven Percentage Points Needed” column indicates the increase in student retention that would need to result from the program in order for the cost to be offset by the additional revenue resulting from the increase in retention. For these calculations, a 1% increase in retention by FY26 is valued at \$1.4 million.

Table 8. Evaluation of the Benefits of Proposed Programs

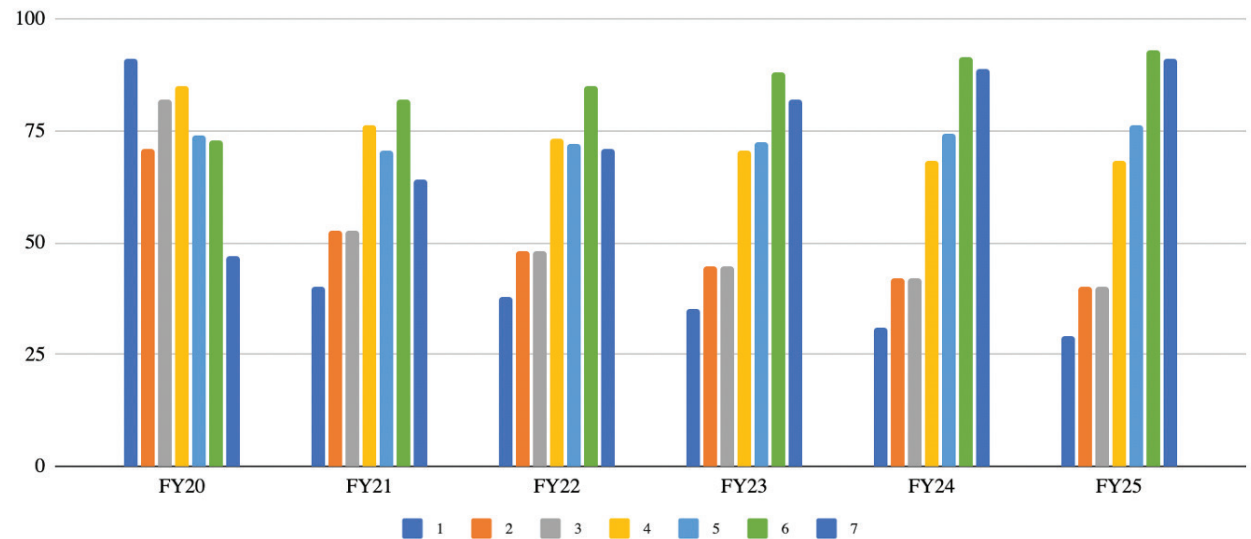
Program Expenses	Retention	Perceived Value of Sewanee Education	Enrollment Generally	Enrollment Diversity	Enrollment High Academic	Five Year Cost	Retention Breakeven Percentage Points Needed
<b>Expanded Pipeline Programs</b>							
ESL Writing Program	3.5	2.5	3.0	3.8	2.3	\$120,000	0.09%
Go Forward	1.5	1.5	2.5	1.5	1.5	\$237,800	
Social Change Summer Program	1.5	2.0	3.0	2.5	2.5	\$223,000	
<b>Expand Funnel</b>							
MARKETView	1.0	1.0	3.0	3.0	4.5	\$236,000	
Vice-Chancellor's Excellence Program	3.5	3.5	2.3	2.3	4.0	\$964,300	0.69%
Transfer Package	1.0	1.0	3.0	4.0	4.0	\$270,000	
<b>Student Success and Flourishing Center</b>							
Domain All Access	2.8	2.0	2.0	2.3	1.8	\$270,000	
Integrated Advising	4.0	3.3	3.3	2.8	2.0	\$800,000	0.57%
Wellness Curricular Proposal	3.5	2.0	2.3	2.0	2.0	\$726,400	0.52%
Career Readiness & Mobility	3.3	3.0	3.0	2.3	1.3	\$482,400	
<b>Diversity and Campus Culture</b>							
Multicultural Center	3.0	2.0	2.0	3.5	1.5	\$1,152,000	0.82%
Student Transportation	3.3	1.5	3.5	3.3	2.0		
<b>Totals*</b>						<b>\$4,901,100</b>	
*Pipeline programs Net = \$0							
<b>Impact</b>	<b>Average score of 3 or Greater</b>						
5=Extremely Significant	Retention						
4= Very Significant	Value						
3=Somewhat Significant	Enrollment						
2=Not Very Significant	Diversity						
1=Insignificant	Selectivity						

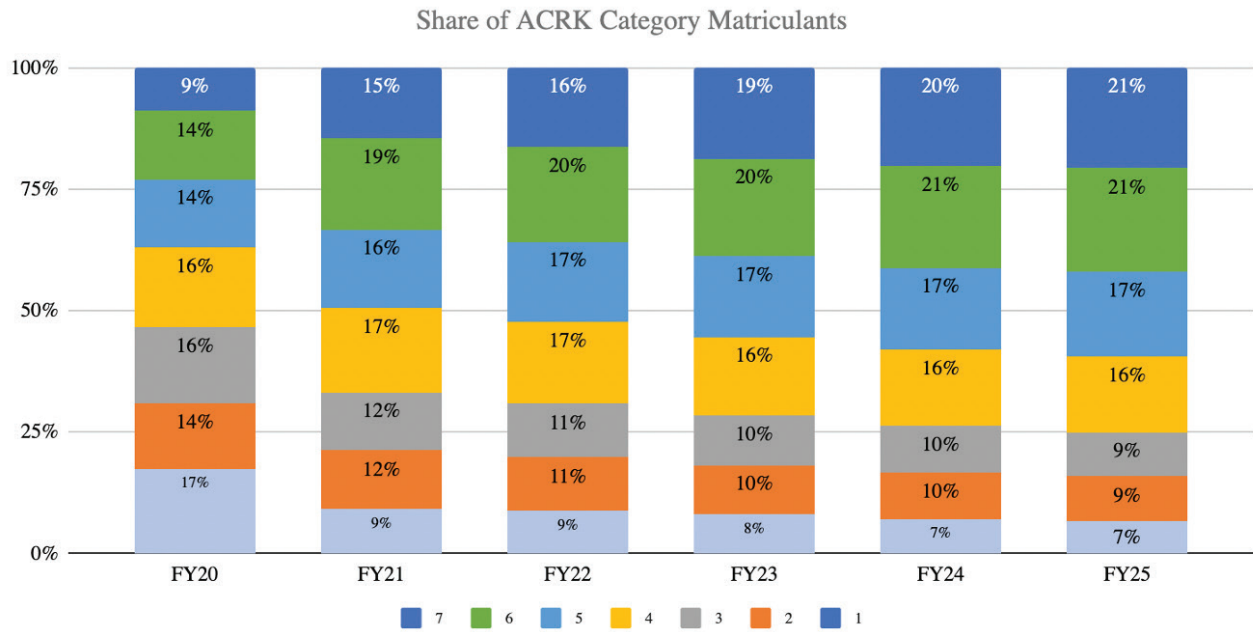
## VII. ENROLLMENT MULTIYEAR KPI GOALS

NTR vs. Aggregate Discount Rate (new students)

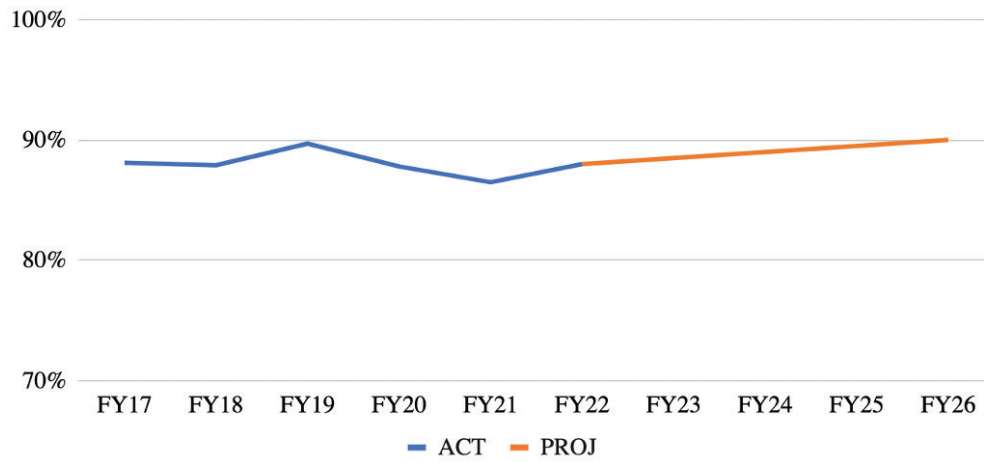


ACRK Matriculant Category Totals

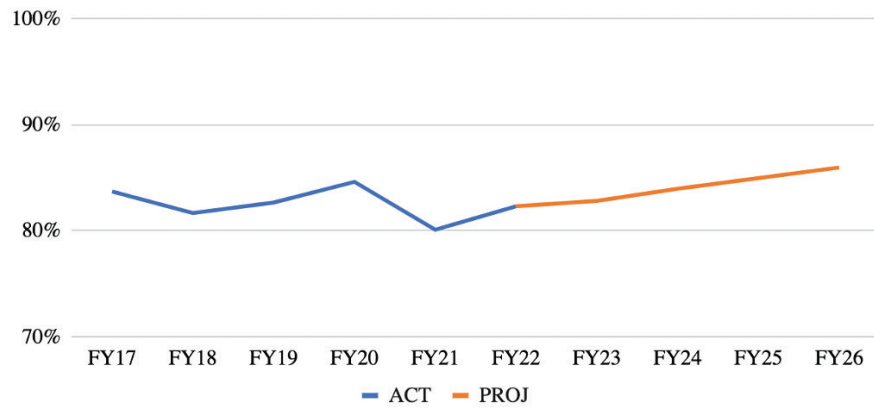




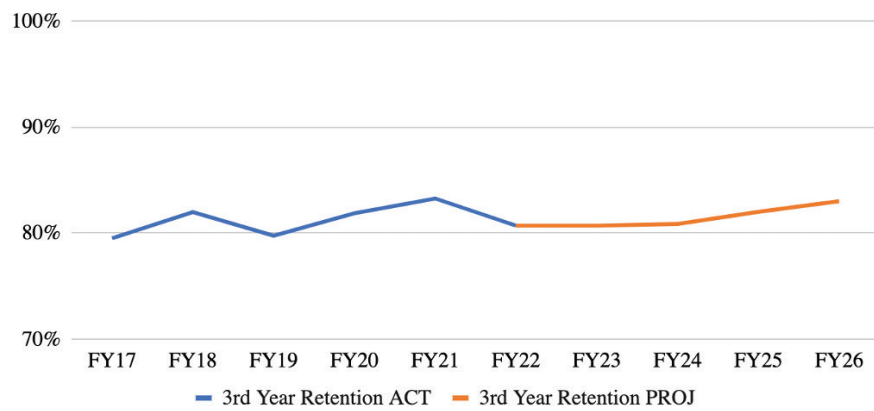
1st Year Retention (ACT, PROJ)



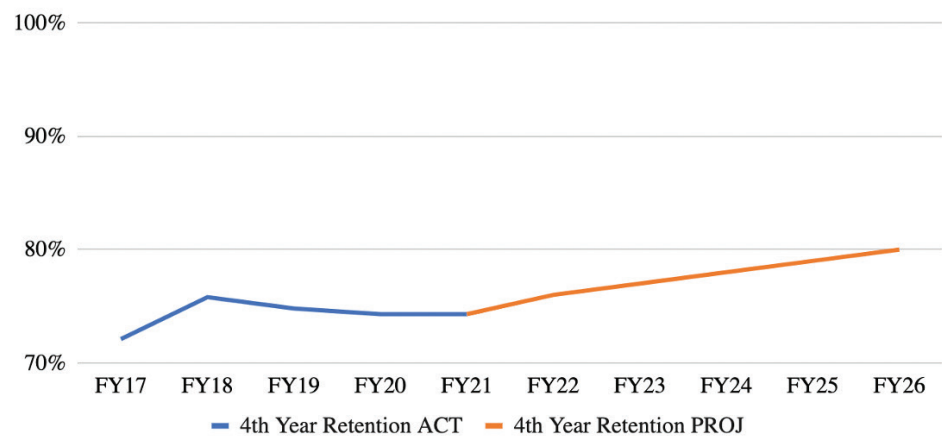
2nd Year Retention (ACT, PROJ)



3rd Year Retention (ACT, PROJ)



4th Year Graduation (ACT, PROJ)





## VIII. STEPS FOR MONITORING, EVALUATING, AND UPDATING THE PLAN

Create a Strategic Enrollment Governance Committee. The Committee exists to enable the successful implementation of SEP goals. The Committee will need to be aware of, vet, and collectively decide amongst options for initiatives related to the strategic goals for university-wide enrollment and student success. The Committee will provide strategic direction, serve as advocates and leaders for the SEP vision and resultant changes. The Committee will review data, information, and recommendations presented by the Task Forces and make required decisions.

Possible task forces: Data, Systems and Technology Task Force, Financial Aid and Scholarships Task Force, Marketing and Communications Task Force, Underrepresented Enrollment Student (Transfer, First Gen, Students of Color), Student Success Task Force

The governance committee will review actuals compared to goals as the data become available. They will have meetings with those involved in meeting the goals to discuss results and potential changes in tactics.

## IX. PLANNING TOPICS IN THE PROCESS OF ANALYSIS, STRATEGY DEVELOPMENT, OR EVALUATION

**Goal: Improved institutional performance with regard to closing racial equity gaps and establishing a more inclusive campus.**

NOTE: While the SEP Council articulated this goal and outlined some KPIs and strategies, we recognize that the person who takes on the new role of chief diversity officer for the University will have expertise in these areas. We therefore submit this work for their review and refinement without wanting to tie them down to anything specific, and look forward to assisting the new vice provost for diversity, equity, and inclusion with this work.

KPIs:

- *Continued student enrollment in target demographics (BIPOC students)*
- *Improved equitable outcomes for underrepresented students as measured by the closure of racial equity opportunity and attainment gaps*
- *Increased campus equity*
- *Continuing student enrollment in target demographics*

PIs:

- *Improved campus climate with regard to DEI issues*
- *Increased community understanding of racial inequity issues*
- *Goals set by race and ethnicity including indices and routine reporting of rarity equity outcomes*
- *Plan for institutional transformation*
- *Systemic assessment of policies, practices, and initiatives*
- *Implementation of racial equity educational initiatives*

### OVERALL STRATEGY

Develop a comprehensive strategy and institutional tools to mobilize institutional stakeholders around racial equity attainment by implementing evidence-based equity practices.

**Strategy I**—Increase institutional capacity to structurally review and address equity issues through dedicated operational resources (human and financial resources) and accelerated activities.

- Establish an office of diversity, equity, and inclusion focused on DEI issues. The office will have integrated authority and responsibility with departments across the institution in order to help drive institutional transformation. Led by a chief diversity officer working across departments with senior administrators, the office would be chiefly responsible for leading institutional efforts to:

1. *Develop a process to identify barriers to equity in educational outcomes among students of different racial and ethnic groups.*
2. *Develop comprehensive strategies and tools to mobilize institutional stakeholders around racial equity attainment.*
3. *Set specific goals by race and ethnicity regarding (recruitment and retention) for students, faculty, and staff).*
4. *Increase institutional/community knowledge about structural racial inequity and develop tools to dismantle structural barriers.*
5. *Conduct institutional equity assessments of current policies and initiatives and recommendations to embed racial equity.*

**Strategy 2**—Design and implement equity-focused initiatives that 1) establish equitable systems, structures, policies, and practices aimed at reducing barriers to matriculation, fostering student success and creating a culture of equity and inclusion

*Tactic—Develop a comprehensive, co-curricular resource that integrates educational and social programming focused on engendering inclusion and equity.*

- **Multicultural Center**—The Sewanee Multicultural Center<sup>6</sup> will be established to advance equity, intercultural understanding, and an inclusive campus at the University of the South. Center programming and services support and enhance the academic, social and overall flourishing of students as well as faculty and staff. The core goals of the center focus on advocacy, connection, celebration and education. The center will offer educational and social programming that fosters belonging and provides opportunities for personal growth and advocacy with regard to underrepresented student issues as well as constructive intercultural dialogue. The center is an intellectual and social space that advances community efforts to positively shift cultural dynamics and proactively mitigate exclusion on the basis of race, ethnicity, gender, religion, sexual orientation, ability, socioeconomic status, citizenship or other identities. In sum, the center is a welcoming campus resource that enables exploration, intercultural learning and collaboration. It embodies full inclusion and the community value of EQB.

*Tactic—Establish a comprehensive off-campus transportation system*

- **Transportation**—Significant investment in transportation services holds the potential to renegotiate Sewanee’s geographical position in the Southeast and to open equitable pathways for meeting students’ personal needs. The proposal calls for a comprehensive set of transportation services that provides safe and reliable transportation to various spaces within a 170-mile radius of Sewanee to enable students to have access to environmental and cultural diversity and as well as access to resources needed for cultural enrichment, development of positive social relationships, personal grooming and health.

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<sup>6</sup> The Multicultural Center name is the name we’re using as a placeholder. There are several names being considered, such as the *Equity and Inclusion Center*, the *EQB Center*, or the *Potential Donor’s Name Center for Social Justice*, and several other variations on this theme. We believe that the center should get its name after there is a thorough engagement process with the Sewanee community and its primary stakeholders, including alumni of color.

# X. APPENDICES

## Appendix 1: SWOT Charts

### INTERNAL STRENGTHS

STRENGTHS	Priority	How are we / who is capitalizing?
Strengthening our brick-and-mortar "niche" to stand against the inevitable move towards online as the primary means of education	5	marketing, 100% and funnel initiatives
Campus/community relationships (local authorities, community orgs., etc.)	5	chip, david, nicky, OCE
Dedicated, qualified staff/faculty	5	CfL, HR, deans, cabinet
Educational leader - graduating students with skills to meet needs	5	marketing
Health Science continued expansion	5	academic
Promote the new emphasis on excellence in teaching and learning	5	academic
Large pool of excellent faculty can improve courses if incentivized	5	deans
International programs	5	OGC
We have the knowledge and instructors to be a consistent leader in the	5	preeminence, marketing?
Dedicated Faculty and Staff	5	marketing
Major programs	5	academic
Student learning focus	5	academic
Array of programs	5	academic
Envrionmental and sustainability	5	SIPE and ESS
Personalized attention available from faculty and staff	5	student success initiatives
Ability to provide personalized educational services	5	student success initiatives
Reputation, in the state, in the region	4	marketing, 100% and funnel initiatives
Location in the region (south, proximity to CHA, Nashville, ATL, etc.)	4	diversity initiatives
Moving forward to true sustainable and "green" practices	4	diversity initiatives
150 year old heritage, history, legacy	4	diversity initiatives
Many of its people	4	cabinet
Sewanee traditions	4	diversity initiatives
Relationships of faculty and students, especially in traditional format	4	academic
Enhanced program offerings in health sciences	4	academic
Reinvigorating Liberal Arts education	4	academic
Synergies that build strength and reputation in areas like Health Science	4	academic
Great Benefits	4	hr, Cabinet
Expanding athletics to include new sports provides opportunities to get		
Sewanee's name out there	4	Cabinet
Multiple opportunities for success	4	student success initiatives
It's reputation for quality education	4	marketing
Relationships/partnership with local vendors	3	marketing?
Small campus geographically	3	marketing
We offer a great education at a great price for most programs	3	marketing
New construction/structural repairs/elevators	3	?
Competitive salaries and excellent fringe benefits that attract a well-qualified and dedicated faculty, staff, and administration	3	Treasurer / provost
Good community relationships with local authorities	3	chip, david, nicky, jim
Offering quality education with great international connections	2	OGC
Talent of Staff/Ability to React quickly	2	COVID!
Flexibility in college education delivery	1	academic
Fairly good online	1	academic and IT
First year student discussions with people with political views other than their own	NSSE	diversity initiatives
First year student quality of interactions with student services staff	NSSE	student success initiatives
First year student quality of interactions with academic advisors	NSSE	student success initiatives
First year students asked another student to help you understand course material	NSSE	student success initiatives
First year students discussions with people from an economic background	NSSE	diversity initiatives
Senior discussions with people with political views other than their own	NSSE	diversity initiatives
Seniors explained course material to one or more students	NSSE	student success initiatives
Seniors reached conclusions based on your own analysis of numerical information	NSSE	academic
Senior taking a number of courses which have included a community-based project/service-learning	NSSE	academic
Senior discussions with people with religious beliefs other than your own	NSSE	diversity initiatives
Healthcare and retirement benefits	COACHE	HR, Cabinet

## INTERNAL WEAKNESSES

WEAKNESS	Priority	How are we / who should address?
Ability to be nimble and infuse technology across all courses	5	academic and IT
Trying to define itself as Southern Episcopal college while adapting to changing	5	diversity initiatives
Rising student loan debt and potential increases in default rates that could have an impact on Title IV eligibility.	5	100% need, funnel initiatives
Varied programs	5	academic
Ability to adapt quickly to changing demands of student populations	5	academic
Established academic majors and future offerings	5	academic
Low enrollment in some majors	5	academic
Retaining current students	5	student success initiatives
Deferred maintenance	5	Treasurer / FM
ADA Access/Limit Egress	5	Treasurer / FM
Lack of resources	5	Treasurer
Cost of maintaining the buildings	5	Treasurer / FM
Upward spiraling costs	5	Treasurer / Provost - budgeting
Small size makes any change in student numbers more significant	5	Treasurer / Provost - budgeting
Financial insecurity, endowment is insufficient to float the school very long in the case of a revenue freeze and might causes the need to gamble	5	Treasurer / Provost - budgeting
Lack of funding for faculty development	5	Treasurer / Provost - budgeting
Inability to offer pay raises to deserving faculty and staff, which makes it difficult to	5	Treasurer / Provost - budgeting
Lack of funding for operations	5	Treasurer / Provost - budgeting
Perceived high cost contrary to reality of actual cost	5	100% need, funnel initiatives
Financial loss	5	Treasurer
Uncertainty in ability to enroll sufficient #'s of students	5	100% need, funnel initiatives
Concentration of enrolled students from small number of high schools	5	100% need, funnel initiatives
We tend to be reactive and unable to anticipate trends in higher education marketing	5	Cabinet
Lack of resources to expand ahead of the curve	5	Cabinet
Gaps in communicating vision and mission all along the hierarchy	5	Cabinet
Not focused enough on a plan to grow and evolve	5	Cabinet
Connection between divisions and meeting a common goal	5	Cabinet
Disconnectedness	5	Cabinet
Student-centeredness	5	student success initiatives
Diversity of students	5	diversity initiatives
The need of a Student Center for student gathering	5	Treasurer / Provost - budgeting
Liberal arts-infused professional curriculum	5	academic?
Much better website	5	?
Ability to start competitive programs and end those that aren't	5	academic
Diversity	5	diversity initiatives
Willingness of faculty and staff to try new ideas	4	Cabinet
Campus safety	4	chip



Opening opportunities for the less advantaged	4	100% need
Faculty and staff, and their ability to attract and retain excellent students	4	funnel initiatives
Inability to be competitive in the faculty hiring market leads to lower quality faculty	4	Treasurer / Provost - budgeting
Legacy program impacting budget without students	4	academic
Become known for something more specific (English, Environmental Studies, etc.)	4	academic
Physical campus not on par with peer institutions	4	Treasurer / FM
Over-pricing	4	100% need
Spreading resources too thin trying to create opportunities instead of investing more heavily in existing infrastructure/campuses/programs could ultimately leave Sewanee weak to unforeseen downturns	4	Treasurer / Provost - budgeting
Too low pay for faculty, especially adjuncts, compared to other colleges and	4	
Management diversity	4	diversity initiatives, VP DEI, REB, HR
Low pay for adjunct faculty	4	
With decision to meet need, our endowment is insufficient for long haul	4	Treasurer / Regents
Not utilizing assessment to drive continuous improvement	4	Cabinet
Confusion between various offices with respect to published and unpublished policies	4	Cabinet
Lack of sufficient manpower to handle emergencies on campus	4	chip
Lack of IT support as it relates to education and dissemination of important information	4	academic and IT
Student burnout	3	student success initiatives
Reputation as party school or nothing to do but party	3	campus culture initiatives
Few faculty superstars	3	academic
Lack of clear support for arts programs	3	academic
Poor use of teaching technologies across all programs	3	academic and IT
Unclear policies	3	Cabinet
Recruitment	3	HR, 100% and funnel initiatives
Unified messaging/ branding	3	marketing
Support Services (Academic and Student Life)	3	student success initiatives
Lack of web presence	3	marketing
Loss of competitive programming in the marketplace	2	academic
Diversity of students	2	diversity initiatives
Accepting students less capable of college work and our lack of support in online	2	100% need, funnel initiatives
Working through conflict and reassuring students in a competent and graceful manner.	2	diversity initiatives
Placing resources in the wrong locations	2	Cabinet
Loss of identity in an attempt to diversify	1	VC
Degree offerings in health services fields; high demand areas	1	academic
Flexibility of programs	1	academic
Performance based learning	1	academic
High demand and reputation in health sciences	1	academic
I worry given the interest in business yet we have not adapted with new program	1	academic
Nimbleness and willingness to change	1	Cabinet
Poor quality students will cause good ones to leave thus lowering the overall	1	100% need, funnel initiatives
Too diffuse - need to focus offerings more	1	academic
Not marketing nationally due to budgets	1	100% need, funnel initiatives
First year student participation in Quantitative Reasoning	NSSE	academic
First year students using numerical information to examine a real-world problem or	NSSE	academic
First year students spending more than 10 hours per week on assigned reading	NSSE	academic
First year students evaluated what others have concluded from numerical information	NSSE	academic
First year student impression of institution emphasis on providing support for overall	NSSE	student wellbeing initiative
First year students assigned more than 50 pages or writing	NSSE	academic
Seniors worked with other students on course projects or assignments	NSSE	academic
Seniors spent more than 15 hours per week preparing for class	NSSE	academic
Seniors assigned more than 50 pages or writing	NSSE	academic
Senior's impression of institution emphasis on providing support to help students	NSSE	student success initiatives
Seniors participated in a study abroad program	NSSE	OGC, Pledge

## EXTERNAL OPPORTUNITIES

OPPORTUNITY	Priority	How are we / who is capitalizing?
Our location in state and the southeast	5	campus culture and diversity initiatives
Location in a major healthcare hub	5	academic
Expansion of health science programs	5	academic
Growing international programs that recruit students	5	academic
International partnerships.	5	academic / provost
Increasing international connections and opportunities	5	academic / provost
International student agreements to boost enrollment	5	academic / provost
Expansion of online programs.	5	academic
Excellent locations given population growth trends in southeast	4	funnel initiatives
Enhance the reputation of our graduates = enhance the reputation of the University	4	communications?
Explore different types of credentials such as badges, mini certificates which can be combined with Sewanee courses.	4	academic
Location/regional connections	3	campus culture and diversity initiatives
Expansion of online programs	1	academic
increase online program and online student population	1	academic
To be a superior, innovative, online provider	1	academic
Regarding topic of discussion with diverse others, there is discrepancy between how much faculty perceive this to be going on vs. student perception. Students perceive this to be happening at much higher rate.	FSSE	diversity initiatives
Regarding topic of how accessible, helpful, and supportive faculty members are, there is discrepancy between faculty and student perceptions. Faculty report higher levels than what students are perceiving.	FSSE	student support initiatives
Regarding topic of how helpful academic advisors sense their role to be, there is discrepancy with what students are experiencing and what	FSSE	student support initiatives
Increase quality of teaching spaces	COACHE	deans / treasurer / provost

## EXTERNAL THREATS

THREAT	Priority	How are we / who should address?
Competition from other universities offering lower or free tuition	5	100% need
Uncertainty in ability of enrolled students to pay increasing tuition	5	100% need
Tuition costs, pricing ourselves out of the market	5	100% need, funnel initiatives
Fewer students	5	100% need, funnel initiatives
Downturn in economy impacting admission	5	100% need, funnel initiatives
reduction of public view of value of higher education	5	marketing
Mixed signals about liberal education's values	5	marketing
A downward turn of the stock market	5	financial initiatives?
Competition from public institutions through aggressive growth	5	100% need, funnel initiatives
Competition from consolidations of institutions in the public sector	5	100% need, funnel initiatives
Changes in federal support for loans and grants	5	100% need
Expansion of low cost online opportunities by big name schools could affect demand for our programs	4.25	academic
Reputation decline	4	campus culture initiatives
Changing demographics	4	100% need, funnel initiatives
Online education vs. brick-and-mortar institutions and what that could mean for Sewanee's tradition	4	academic
Increased competition for online students from out of state institutions	3	academic
Catastrophic Event	3	COVID!!!
Reason for considering transferring: Unsafe or hostile environment	NSSE	campus culture initiatives
Reason for considering transferring: Too much emphasis on partying	NSSE	campus culture initiatives
Reason for considering transferring: Difficulty managing demands of work and school	NSSE	funnel initiatives and academiic?
Reason for considering transferring: Campus climate,	NSSE	campus culture initiatives
Culture of sewanee: faculty not trusting each other	COACHE	
Culture of sewanee: student drinking/drug culture	COACHE	campus culture initiatives

## Appendix 2: Tactics and Proposals

### Within SEP

#### MARKETView

MARKETview is a partnership with a team of data analysts and education experts that collaborate with Sewanee to achieve our admission objectives. The partnership provides real-time benchmarking against national, cohort and campus funnel metrics, providing 24/7 access to an interactive and dynamic data warehouse and web platform. Currently, the weakest part of our process in building the funnel assessment. The platform provides point-in-time vision into how the admission inquiry pool is building. It will allow us to detect softness in specific prospect pool metrics in time to act.

In addition to allowing Sewanee to better manage the admission funnel, the partnership will help us tackle summer melt, the phenomenon of deposited students deciding over the summer to go elsewhere for college. MARKETView assesses the characteristics of students who melted in previous years and identifies students who are most likely to melt in the current admission cycle. This allows us to take proactive steps with specific students in order to ensure that they enroll in the fall.

We anticipate that MARKETView will address Goals 1, 2 and 4, with impacts on enrollment in general, enrollment diversity, enrollment of high academic achieving students and family wealth profile.

#### TRANSFER PACKAGE PROPOSAL

Prior to the pandemic, enrollment at community colleges was booming, even as competition for students at small, private, residential liberal arts colleges has become more intense. Post-pandemic, there is an opportunity for Sewanee, and we should intentionally increase the number of transfer students coming from community colleges. We have outlined ways to mitigate barriers to enrollment for community college students. By expanding our recruitment to CC students, and removing barriers to enrollment, we will address the following weaknesses outlined in the SWOT: over reliance on feeder schools; expanding brand awareness; lack of diversity; and potentially reputation as a party school, assuming that transfer students would enroll at a later age than first-year students and bring greater knowledge, wisdom and experience to model life choices).

Our data show that transfer students from community colleges persist and succeed: since 2011, 76% of such transfer students received their degrees from Sewanee with an average GPA of 3.3. However, the

data also show that the number of students is very limited: since 2011, we have graduated only 13 students who transferred to us from a community college, and moreover, the number of transfer hours among those students ranges very widely.

In addition to marketing efforts targeted at changing the perception that Sewanee is not the “right” fit for them, we have identified other changes that designed to mitigate barriers to transfer. These initiatives include developing articulation agreements with specific CCs that clarify and guarantee specific credit transfer pathways; expanding the website specifically for transfer students; developing a more robust transfer student orientation and enhance transfer student advising; house transfer students as cohorts to enhance group cohesion and identity; and exploring the possibility of extending the Sewanee Pledge and meeting 100% of need initiatives to transfer students. The Office of Admission has initiated contact with Motlow State, Chattanooga State, Nashville State, and Cleveland State concerning recruitment and to understand the process for developing articulation agreements.

We anticipate that implementation of the Transfer Package will address Goals 1 and 2, impacting new student enrollment in general and enrollment diversity. While they will not impact our HCRC ACRK profile, enrollment of high academic achieving students from community colleges will enhance the overall academic student profile and classroom experience.

## SUMMER AND GAP YEAR PROGRAMS

We know through the admission data that visiting Sewanee is a key component to yielding admitted students. Pre-college summer programs should be great way to introduce Sewanee to prospective student early to ensure that Sewanee is among the schools that they will consider when looking for a college. The University currently has four pre-college summer programs: the Sewanee Young Writers’ Conference, the Sewanee Environmental Institute, SUMMA (a theological debate camp at the School of Theology) and the Choral Institute. Altogether these programs bring about 160 participants to Sewanee each summer, and about 10% eventually matriculate in the College. We wish to increase both the number of pre-college students who are brought to the Mountain each summer and the proportion of these students who choose to matriculate in the College.

New summer and gap year gateway programs will be designed to appeal to diverse interests and needs. Potential programs put forward through the SEP process are outlined below; others are possible. Each program would be expected to pay for itself and contribute to college admissions by attracting additional students to Sewanee.



- I. The Social Change Leadership summer program would provide motivated high school students the opportunity to live and learn as students at Sewanee. The program will focus on exposing students to a rich and rewarding college experience through the framework of Social Change Leadership with coursework, extracurricular activities, and time for reflection around two main topics –Environmental Sustainability and Race and Reconciliation. Built into the programs are activities that help to prepare students for their transition into college life.

Data from our admitted student questionnaire shows that social justice, equality and environmental sustainability are important to high school student today and they feel the clock ticking on these issues! The summer program would be designed as a three-week program for 12 – 24 rising juniors or rising seniors.

2. The ESL (English as a second language) Programs. The proportion of the student body from international and ESL households has grown, and these students encounter unique and significant challenges adjusting to the academic culture at Sewanee. Among the most difficult challenges that they face is improving their writing skills. Currently, the Writing Center has no peer tutors trained in ESL writing mentoring, yet ESL student (mostly international students) visits to the Writing Center comprise twelve percent of the number of visitors to the Writing Center. As we approach the demographic cliff in 2026, this proposal addresses two opportunities. First, as the number of domestic college-age students declines, Sewanee will likely seek to expand its international student population. In fact, we already are actively increasing our recruitment of international students. Second, even as the population of U.S. college-age students decreases, the percentage of Hispanic students will grow.

This proposal offers a two-pronged approach to address ESL writing challenges. First, the Office of Global Citizenship would operate a four-week academic English summer program for high school students. The program will assist students in all areas of ESL training and introduce students to academic life at Sewanee. We believe that this will be a useful recruitment tool for international students and domestic students who come from families that speak a language other than English in the household. The second prong proposes that the College offer ESL writing studios, one-hour courses, to be taken on a voluntary basis by ESL students in conjunction with their foundational writing intensive course.

The Office of Global Citizenship plans to pilot the summer program during summer of 2021, if possible, specifically for Chinese students.



3. GoForward is a different type of program. Designed as a gap year program, its mission would be to help students find meaning, explore contemporary issues, and build a plan to solve problems and lead in society through an innovative online and in-person gap/purpose year experience.

Successful pre-college programs would support Goal I and enrollment generally. Pre-college programs that target BIPOC and international students such as the ESL program and others being supported by the office of economic development and community relations (see below) should also help us to address diversity goals.

#### VICE-CHANCELLOR'S EXCELLENCE PROGRAM

One strategy for increasing student retention targets increasing the retention of our best students. Often retention efforts focus on students deemed “at risk” for one reason or another. While this attention is needed, we must also be sure to retain our best students. The retention rate for top performers out of high school (HS GPA 3.69 and above) is only 92%. In order to raise the average retention to 90% and above, we need to attend not only at the bottom of the GPA scale, but also to the top. Evidence from the 2015-16 and 2016-17 academic years shows that 25% of the students who leave voluntarily have a Sewanee GPA over 3.50 with an average of 46 hours, and 50% of those who leave voluntarily have a Sewanee GPA over 3.0. We simply must do more to keep academically strong students if we are to maintain and increase the academic profile of the undergraduate population and increase retention overall.

The development of an honors program, titled here as the Chancellor's Excellence Program, would provide merit scholarships and a comprehensive sub-community (academic, living, social) for Sewanee's top academic students. These are students for whom even a full ride scholarship would not be sufficient inducement to attend Sewanee. The program would engage these top academic performers in innovative and personalized ways and fostering their intellectual growth through access to Oxbridge style tutorials; a travel stipend to attend cultural events in Nashville, Chattanooga, Birmingham and Atlanta; monthly formal dinners at Chen Hall with the VC and guests.

The cost of this program is related to the proposed programming for the students. The merit scholarships would simply be the regular merit scholarships that we already award, and for which we regularly have difficulty recruiting to fill.

An honors program would be expected to address Goals I and 2, with impacts on enrollment and retention in general, and enrollment of high academic achieving students.

## THE CENTER FOR STUDENT SUCCESS AND FLOURISHING (CSSF)

The Center is responsible for facilitating, coordinating, and leading the University of the South's efforts to help all Sewanee students flourish. The CSSF works to enhance the institution's persistence, retention and graduation rates. It does this by integrating advising, career readiness and student flourishing programs. It is an integrated and collaborative resource that simplifies access and improves consistency of knowledge on campus. It promotes student thriving and flourishing in the service of the cultivation of a holistic educational experience. Each student is assisted as they define and achieve their individual academic, professional, and personal goals. By empowering the individual, our team works with students to foster the knowledge and skill-sets required to reach their specific success.

The CSSF incorporates several SEP proposals: Domain All Access, Integrated Advising; Career Readiness and Mobility; and Wellness Curriculum.

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This center for student flourishing will be a differentiator for Sewanee. It will empower students to develop a success-oriented mindset in order to thrive, and will ensure that all students experience a strong sense of belonging in order to flourish. Students will be empowered to develop a success-oriented mindset in order to thrive.

The CSSF will operate with the mission of improving the understanding of how information is used on campus and advising departments on campus on how to improve information sharing. It will serve Sewanee's constituents including prospective/current students, alumni, employees, and guests of the university. The CSSF will provide students with a central location to seek assistance and trained staff to provide that assistance or make an appropriate referral. This type of attention to student-centered service is critical to supporting the changing needs of today's diverse learners, and is critical to schools shifting to an integrated, efficient, and pro-data infrastructure.

The Center houses integrated advising and career readiness. This partnership between student advising and career services offers students holistic support and resources and empowers them to make informed decisions as they create academic, co-curricular, extra-curricular, and career plans to achieve their goals. This program addresses critical issues and KPIs around recruitment, retention, and student experience. It supports students' preferred outcomes and first destinations, access and equity for all students including historically underrepresented students, flourishing, and eventually alumni engagement and affinity.

In addition to current Career Center staff, the CSSF will employ three student success coaches who will focus on retention and graduation. They will: 1) Strive to eliminate barriers that prevent students from continuous enrollment, tracking their progress by closely monitoring registration data in real time. 2) Put extra effort into resolving barriers that disproportionately affect populations that return at lower rates: students of color, first generation students, and students from low-income backgrounds. 3) Ensure that assigned cohorts of students have support and guidance. 4) Guide students on issues of academic performance, career planning, financial concerns, and other common issues in addition to academic planning. 5) Coordinate pre-major advising and oversee first-year registration.

Student success coaches will use data and technology to run proactive communication campaigns managing their students' needs. Examples of campaigns are: getting students to register for the next term, targeting financial aid issues or concerns, and social needs. Most students will receive a common baseline level of support, with a smaller group of higher-need students getting additional contact points. A small group of the highest-need students will be designated for intensive support and regular touch-points every few weeks during the term.

We plan to develop a peer mentor program in the future. Students will apply to be mentors, receive formal and ongoing training, and be compensated for their time. Successfully deployed peer mentors will give nearly every student multiple opportunities for formal peer-to-peer support. They will gain career skills and foster a sense of community, assist with orientation and in Flourishing courses, and be academic coaches and study-group facilitators. Peer mentors can also function as frontline support to address basic student questions and offer help navigating confusing institutional systems, and provide proactive outreach to students.

We also plan to develop a two-year curricular wellness requirement. The course will provide students with foundational skills, practices, and habits necessary to develop and sustain their mental and physical health and increase flourishing, as well as provide explicit education in the areas of: substance use and misuse, healthy relationships, cultivation of belonging, emotion regulation, development of resilience, stress management skills, and leadership development. The courses will be taught with a cross-cultural

competency framework and opportunities for intersectional identity exploration and examination of privilege will be provided, with a specific focus on diversity, equity, and inclusion throughout the course series. We'll also explore extending the course with a third and fourth year.

We anticipate that implementation of the CSSF through combining four proposals will address all of our SEP goals either directly or indirectly. Located in central campus with the Babson Center, the Wellness Commons, the Biehl Commons, McClurg Dining Hall and All Saints' Chapel, the Center for Student Success and Flourishing will unite these student-focused elements. Together they will communicate the intentional care we provide as part of the Sewanee experience, facilitating recruitment of all students, their retention, and their development into adults of capacity, character and consequence dedicated to uplifting our shared humanity.

## MULTICULTURAL CENTER

The Sewanee Multicultural Center will be established to advance equity, intercultural understanding, and an inclusive campus at the University of the South. Center programming and services support and enhance the academic, social and overall flourishing of students as well as faculty and staff. The core goals of the center focus on advocacy, connection, celebration and education. The center will offer educational and social programming that fosters belonging and provides opportunities for personal growth and advocacy with regard to underrepresented student issues as well as constructive intercultural dialogue. The center is an intellectual and social space that advances community efforts to positively shift cultural dynamics and proactivity mitigate exclusion on the basis of race, ethnicity, gender, religion, sexual orientation, ability, socioeconomic status, citizenship or other identities. In sum, the center is a welcoming campus resource that enables exploration, intercultural learning and collaboration. It embodies full inclusion and the community value of EQB.

Transportation—Significant investment in transportation services holds the potential to renegotiate Sewanee's geographical position in the Southeast and to open equitable pathways for meeting students' personal needs. The proposal calls for a comprehensive set of transportation services that provides safe and reliable transportation to various spaces within a 170-mile radius of Sewanee to enable students to have access to environmental and cultural diversity and as well as access to resources needed for cultural enrichment, development of positive social relationships, personal grooming and health.

## Outside SEP

MEETING 100% NEED: This initiative meets the full need of all admitted students who qualify for financial aid starting with the first-time first-year domestic and international undergraduate students

who arrived in fall 2020. Meeting full needs means that the will cover the difference between the cost of attendance at Sewanee and the expected family contribution as defined by the FAFSA financial aid form. Financial aid offers from include both federal student loans and work-study. This initiative is expected to attract higher ability students by meeting their full financial need. An increase in high academic ability students is meant to make Sewanee more desirable in the marketplace, and push our market position to the point where we can again have full-pay students, decreasing our need to provide merit gift aid to pay for meeting 100% of demonstrated need for other students.

**SEWANEE PLEDGE:** The Pledge guarantees that every student will have the opportunity to study abroad for a semester at no extra cost, will have a paid summer internship or research fellowship, and will graduate in four years. This initiative is expected to help recruit and retain students.

**DIGITAL MARKETING:** Sewanee is deploying targeted social media advertisements and remarketing to prospective students and parents in high potential markets. Digital marketing is expected to help recruit students.

**THE BIEHL COMMONS VISION STATEMENT:** Primarily a facility for students of the College and the School of Theology, a “student commons” will encourage healthy social engagement by offering a variety of amenities in lively, bright and inviting spaces for gathering, for seeing others and for being seen. Accessible 24 hours, the vibrant programming and events at night as well as during the day, along with food and beverages, will bring together the campus community by creating opportunities for meaningful engagement and casual conversation among students, faculty, staff, and families. While not necessarily an alcohol-free space, it will offer some alcohol-free programming. The flexible, multifunctional spaces will be designed intentionally to foster community. This facility is expected to help recruit and retain students.

**THE WELLNESS COMMONS:** The Wellness Commons provides students centralized access to the University Wellness Center (Counseling & Psychological Services, University Health Service, and Wellness Promotion and Outreach), Sewanee FitWell, Sewanee Outing Program, and the Bookstore Outpost. The Commons also includes the Peer Health Educator Suite and the Lay Chaplain’s office. Students have numerous opportunities to take advantage of programming, outreach, and individual services intentionally and thoughtfully designed to enhance their well-being and flourishing. This facility is expected to help recruit and retain students.

**UNIVERSITY OF THE SOUTH PARTNERSHIP STRATEGY:** These are programs spearheaded through the office of economic development and community relations to introduce new cohorts of students to Sewanee.

**Boy Scouts of America:** The Boy Scouts of America (BSA) is among the largest youth serving organizations in America. With a focus on character and leadership development through engagement in the outdoors, the BSA can be an effective partner to introduce Sewanee to a cohort of potential students who love what our University has to offer – challenging and enjoyable outdoor activities, an affinity for character development associated with our Episcopal roots, a strong sense of community, etc. The BSA already has partnerships with universities across the United States, which are largely used to host BSA events such as Merit Badge Universities, Order of the Arrow Conclaves, etc. Ideally, from the Sewanee perspective, an effective partnership between the University and the BSA would include an annual event that brings large numbers of Scouts (both boys and girls) from multiple states to Sewanee to participate in activities which will help them advance in Scouting (hiking, flying, orienteering, STEM activities, etc.) and also introduce them to the University of the South.

**“Divine Nine” Organizations:** The “Divine Nine” is the name of the collection of nine historically black fraternities and sororities. In addition to their chapters at college campuses across the country, the D9 also have local chapters and national organizations that engage their post-baccalaureate members in social service activities across the United States. These activities include a number of programs to support local youth academically and socially. A productive partnership with these organizations would include at least two elements. The first would be for them to establish chapters on the campus of the University of the South. The second would be to host some of their programs for high school youth at Sewanee to introduce them to the University.

**Latino Ministries, The Episcopal Church:** According to their website, “Latino Ministries guides the church in forming hospitable communities of faith that nourish, strengthen, and develop disciples of Christ in the Anglican tradition within Spanish-speaking communities.” In October, A productive partnership with Latino Ministries will include inviting youth who are within the orbit of Latino Ministries to existing Sewanee summer camps and to host existing Latino Ministries youth programs on the Domain for the purpose of encouraging them to apply to Sewanee.

**Osgood Center for International Studies:** The Osgood Center is one of America’s premier providers for international educational programs, including Model United Nations events. Its programs are offered to both high school and college students. Partnering with the Osgood Center should focus on bringing their high school programs to Sewanee to conduct regional and national Model UN conferences on the Domain to introduce these students to the University.

**The National Hispanic Institute** serves over 100,000 students and works with 80 colleges and universities. According to their website NHI’s mission is to provide high school age youth with opportunities to



develop their leadership skills in an environment that simultaneously builds assets in the Latino community. Recently the Admissions office became a member of NHI. A productive partnership is to host NHI summer leadership programs for high school students on Sewanee's campus.

### **Appendix 3: Prior University Studies and Research**

In recent years, numerous task forces and committees have been assembled to examine issues related to creating demand, student success, campus climate and certain other important topics. Below is a list of reports created by colleagues that have served as important inputs for the SEP process.

1. *Strategic Plan, 2012*
2. *Campus Sexual Climate Task Force, 2019*
3. *Enrollment Planning, 2019*
4. *Working Group on Integrated Advising, 2019*
5. *Report of the Research on Diversity and Inclusion Group, 2018*
6. *Review of Equity in Mental Health Framework, 2018*
7. *Combined Report from the Mission Fulfillment Working Groups, 2019*
8. *Creating Demand for a Sewanee Education, 2018*
9. *Focused Strategic Plan for Student Success, 2018*
10. *Working Group on Student Retention Report, 2018*

### **STRATEGIC THEMES**

The following macro themes emerge as those to which specific report recommendations can be associated. Following is an itemization assembling the material accordingly.

1. *Acquisition*
2. *Retention*
3. *Campus Life*
4. *Wellness*
5. *Student Success*