

SOUTHWESTERN UNIVERSITY
The Strategic Plan for 2010
Progress Report
For the period, January 2003 – December 2003
Compiled by the Office of Strategic Planning and Assessment

Southwestern University endeavors to provide a liberal arts and sciences experience that encourages an ethos of high intellectual standards while continuing to value the spiritual and moral dimensions of life.

The pursuit of such an important goal must begin with the individual undergraduate experience. Because the student is central to everything we do at Southwestern, it is our belief that the learning and living environment we envision building through the *Strategic Plan for 2010* will ignite in our students a passion for lifelong learning, a compassion for others, and a desire to accept civic responsibility. For this vision to succeed, our students, in turn, will inspire other people, organizations, and communities through their actions and decisions.

PROGRESS:

Effective July 1, 2002, President Schrum assigned responsibilities for institutional planning and assessment to the Senior Advisor to the President for Strategic Planning and Assessment. This new assignment includes supervision of the Institutional Research Unit. These organizational changes aim to improve the effectiveness of the University's planning and evaluation activities.

The President's Senior Staff is responsible for implementing the *Strategic Plan for 2010*. Members of the staff are responsible for developing, implementing, and evaluating annual operational plans based on the agreed-upon priorities for the year.

Finally, the President has appointed the University Assessment Committee to provide oversight for assessing the *Strategic Plan for 2010* and the institutional learning goals. The committee is responsible for creating and reviewing the institutional plan for assessment, reviewing outcomes of departmental assessment efforts, coordinating activities to ensure that the assessment results are used to make improvements annually, and evaluating the Institutional Research Unit. The Office of Strategic Planning and Assessment will prepare an annual progress report on the 2010 Plan.

Indeed, to be a "Graduate of Southwestern University" should represent an unparalleled liberal arts experience and should be understood by employers, graduate school deans, and leaders nationally by 2010.

Four strategic goals will serve as the guiding principles for Southwestern's 2010 Plan and will substantiate our work with our students throughout the next decade and beyond.

By 2010, Southwestern University will have:

- **Achieved the goal of fostering a liberal arts institution of the highest rank and quality.**
- **Developed a self-critical, tough-minded community of scholars that maintains rigorous academic standards.**

1. **Named Fellows Portfolio Program:** Establish a nationally recognized program whereby, in addition to their Southwestern diploma, all students would earn distinction in areas such as languages, international/cultural experience, collaborative learning, service, leadership, internships, the arts, athletics, and entrepreneurship that would mark their undergraduate, liberal arts and sciences experience as without peer nationally. Completion of optional distinction areas would guarantee each graduate a stipend to be used in whatever way he or she sees fit.

PROGRESS:

This initiative is being implemented as the “Paideia Program.” Initially funded by an \$8.5 million dollar gift from the Robert and Ruby Priddy Charitable Trust of Wichita Falls, Texas, the program was launched in the Fall of 2003 and continues to develop as one of the more distinctive Southwestern University programs. At its core is connecting the student’s experience out of the classroom with the rigorous curriculum inside the classroom. Through electronic journals, participants document and reflect on deliberate experiences in leadership, collaborative learning, inter-cultural learning, and service learning. Ten senior faculty have been appointed as Paideia Professors and interact with Paideia Scholars in small seminar groups throughout the Paideia Program.

2. **Center for Partnerships in Learning & Teaching:** Establish a center for the coordination of portfolio development, academic and career advising, and services that would provide a foundation for the lifelong learning aspirations of students and alumni.

PROGRESS:

This proposed building project has been named the “Center for Lifelong Learning.” Architectural renderings have been developed, and the Priddy Charitable Trust gift provides a challenge grant for the construction of the building. Fund raising efforts to bring the project to fruition are currently underway.

3. **Named Scholars Program:** Establish an academic/leadership tuition-free scholarship program that would select at least one student from each state each year to build a student body that is national in scope.

PROGRESS:

Emphasis on increasing out-of-state students will be balanced with a continuing focus on being the leading national liberal arts college in Texas. Southwestern’s

ability to recruit high achieving in-state and out-of-state students will significantly expand the existing Brown Scholars Program, which awards scholarships covering full tuition, room, and board annually to students of exceptional ability and motivation. Expansion of the Dixon Scholarship Program remains an institutional priority.

4. **New Faculty:** Add 25 permanent, tenure-track faculty and five visiting positions to increase student/faculty interaction and academic opportunities.

PROGRESS:

In total, Southwestern has added 13 new positions since the adoption of the *Strategic Plan* (the plan calls for the addition of 25 new tenure-track positions by the year 2010). Twelve of the new positions resulted from funding from the Luce Foundation (one), the Freeman Foundation (one), and the Priddy Charitable Trust (10). These positions will be absorbed into the operating budget over the next four to six years. Southwestern also added one internally funded tenure-track position as an element of the proposal to the Luce Foundation.

5. **Campus Governance:** Revise the faculty governance structure to reduce committee responsibilities and to increase the time available to teach, prepare for courses, advise students, and undertake research or other scholarly or professional activity.

PROGRESS:

In the 2001–2002 academic year, a committee was formed to examine the governance structure and responsibilities for faculty at Southwestern University. A proposal was developed. The division/school chairs are reviewing the proposal and engaging in an examination of the overall governance structure of the University. The University Council has charged the Provost with drafting clarification of the procedures and guidelines for council functions. During the fall semester of 2003, the position of Senior Faculty Representative for the Brown College of Arts and Sciences was created on a trial basis as a means of exploring the need for greater representation of the Brown College in matters of university-wide concern. The person chosen to fill this position will work with the Provost and the Dean of the Sarofim School of Fine Arts to examine council functions and campus governance.

6. **Curriculum:** Annually review the curriculum to support our mission as a liberal arts institution of the highest rank and quality and reflect these initiatives.

PROGRESS:

In the spring semester of 2001, the Academic Affairs Council charged a Curriculum Review Committee with the task of reviewing the curriculum. The Andrew Mellon Foundation of New York approved a grant request to fund faculty “working groups” for the summer 2003 to focus on evaluation of teaching,

curriculum review, and Paideia Program components. The committee developed a proposal that was submitted to the Academic Affairs Council in January, 2003. The Council reviewed the recommendations put forth in the proposal and charged the Provost, the Dean of the Sarofim School of Fine Arts, and the Senior Faculty Representative of the Brown College of Arts and Sciences with drafting a report to the council on the curricular revisions. In January, 2004, this report was developed and is currently under review by the Academic Affairs Council.

7. **Course Hours/Student Course Load/Faculty Course Load:** Initiate comprehensive study to determine optimum student course load and hours per course with respect to each department and program; provide equity in terms of each existing faculty course load and offer faculty the option of teaching a varied course load, including documentation of the resultant benefits to students, the individual faculty member, the contribution to knowledge in the field, and Southwestern.

PROGRESS:

Notably, the new faculty positions allowed for a one-course release per year for department chairs. However, this is still to be addressed through the current curricular review process. To date, equity in course load for faculty has been improved with the addition of new tenure-track faculty positions in the departments of Chemistry and Biology.

8. **Taproots Program:** Immerse students in the local and regional cultural, artistic, political, and ecological environments in conjunction with course work.

PROGRESS:

At the time of this report, the Taproots Program has not been implemented as a formal program. However, involvement in the local and regional cultural, artistic, political, and ecological environments continue to emerge on an informal basis through individual courses and the Paideia Program.

9. **Technology:** Establish a teaching and learning initiative to put Southwestern at the forefront of liberal arts colleges in terms of equipment, software, and pedagogy.

PROGRESS:

Upgrades and improvements have been under consideration and review during fiscal year 2004. The Information Technology Advisory Committee (ITAC) was formed and has reviewed current and emerging need assessments.

A “Technological Infrastructure Assessment & Design” review by the independent, third-party consulting firm, CRConsulting, reflected current recommendations for technology upgrades and improvements. These recommendations were approved by ITAC and presented/approved by the Executive Committee of the Board of Trustees at its January 2004 meeting.

The scope of the CRConsulting report defined technological infrastructure and resources as data, video and voice network components, as well as traditional academic and administrative computing systems and services and the technology support personnel in the University's Information Technology Services department. Course management systems, library systems, SMART classrooms, data communications systems, voice communications systems, video communications systems, wireless systems and computing servers comprised the data, video and voice network components.

The University is continuing to evaluate other ongoing ITS operation needs and space requirements.

10. **Library:** Build programming, a superior collection, technological resources to support the intellectual and cultural life of a preeminent college.

PROGRESS:

Enhancement of library resources through larger acquisition funds and technology upgrades are among the University's highest priorities from new funding sources. The library was the first campus facility to be made a total wireless environment.

11. **University Press:** Establish a university press appropriate for our Core Purpose.

PROGRESS:

None planned because of the low priority status of this initiative.

By 2010, Southwestern University will have:

- **Actualized our core values at both a personal and institutional level.**
- **Developed an increasingly diverse community of scholars that fosters perspectives which enrich the well-being of humanity.**

1. **Diversity:** Initiate a comprehensive program to further diversify the faculty, staff, and student body to maximize the educational experience of students.

PROGRESS:

In response to the Hopwood legal decision, Southwestern introduced the Dixon Scholar Program through the Texas Methodist Foundation — to attract and enroll, in particular, more African American and Hispanic students. Overall, African American and Hispanic enrollment since 2001 has improved significantly. Of note, Southwestern is enrolling the largest number of Hispanic students in its history and the highest ever percentage at 14.4%. The 2003–2004 minority population reached 21.8%. This is the highest in the institution’s history.

Faculty diversity has increased through a commitment from the President, the Provost, and the Faculty Search Committees. The faculty searches conducted in 2002-2003 resulted in 8 of 13 appointments that brought either domestic or international diversity to the campus. The latest statistics indicate that 24.4% of the faculty at the assistant professor rank are persons from historically underrepresented groups.

With funds from the Presidential Discretionary Grant from the Andrew W. Mellon Foundation the University conducted a climate assessment. In addition to recommendations on ways to increase faculty of color, the report suggested activities to enhance the overall campus environment.

Goals for Diversity Education programs in 2003-2004 are three-fold: to provide a welcoming and affirming environment at SU for students of all backgrounds, to engage students in experiences that will extend their horizons beyond their own backgrounds, and to facilitate communication among students about differences in a way that sows the seeds of mutual understanding and respect. To these ends, staff members have initiated consultation/liaison relationships with several key student organizations.

2. **Cross-cultural Experiences:** Provide significant cross-cultural study opportunities, including study abroad. All students will have a substantial cross-cultural study experience, and at least 50% will study abroad.

PROGRESS:

The Study Abroad Office has been renamed the Office of Intercultural Programs to emphasize the range of activities of Southwestern University students beyond study abroad. Already 50% of Southwestern students spend time abroad during their Southwestern University years. The addition of the Paideia Program brings universal emphasis to inter-cultural experiences as one of the requirements for Paideia Scholars.

3. **Keep Everyone Engaged Program (KEEP):** Establish a program for first-year students whereby faculty and staff contact students weekly to aid retention and make certain they are assimilating on campus and accessing University resources.

PROGRESS:

The SU Connections Program was implemented in 2002 and focuses on supportive connections between staff and students. Future plans for SU Connections include emphasis on relationship-building in order to involve more students and staff volunteers. The Student Success Task Force will submit a report in May 2004 with recommendations to enhance student engagement at Southwestern.

4. **Residential College System:** Using existing facilities, initiate a residential college system that creates “communities of learning” outside the classroom.

PROGRESS:

Southwestern University’s objective of an enhanced residential college system is currently under study by the Student Success Task Force, with a report due by the end of the 2004 spring semester.

5. **Conference Center/Institutes:** Build an on-campus conference center that will host University events; become a center for national conversations on topics essential to our Core Purpose; and house academic institutes established by Southwestern.

PROGRESS:

The University is still looking for a viable partner in order to pursue this initiative.

6. **Alliances with Historically Black Colleges & Universities (HBCUs):** Initiate formal alliances and exchange programs for faculty and students for the mutual benefit and enhancement of students and institutions.

PROGRESS:

Initial discussions with a number of HBCUs were conducted at a diversity conference held on the Southwestern University campus in the fall of 2001. Southwestern University and Huston-Tillotson College in Austin have formed a partnership and continue to examine ways in which the two schools may collaborate. A program that will allow Huston-Tillotson students to participate in Southwestern study abroad programs is being developed and implemented. Follow-up discussions continue with Clark-Atlanta and Dillard Universities, and Morehouse and Spelman Colleges. A proposal to the Mellon Foundation is being developed to request funding that will facilitate faculty and student exchanges.

7. **Local Initiatives:** Develop comprehensive local community initiatives to foster better relations with the citizens of Georgetown. Establish a formal relationship with the residents of Sun City Texas retirement community for the mutual benefit of both communities.

PROGRESS:

The University is a lead participant and Southwestern students volunteer in the Partners in Education Program with the Georgetown Independent School District. In addition, the University coordinates local Upward Bound and Operation Achievement Programs, and Southwestern students participate in mentoring and encouraging local students to continue education. Southwestern students serve as interns at a number of area businesses and organizations.

In addition, officers of the University, as well as individual faculty and staff, serve in community leadership roles. Selected University facilities and programs are also open to area citizens. Southwestern is an active partner with Senior University, which provides educational and enrichment experiences for citizens of Georgetown who are, for all practical purposes, fifty years of age and older.

8. **Rockwell Fund Initiatives:** Enable annual staff access to \$50,000 of the Rockwell Fund to improve Southwestern through innovative ideas. Enable annual faculty access to \$50,000 of the Rockwell Fund for innovative start-up projects and ideas.

PROGRESS:

Due to the economic conditions in recent years, a much more limited amount of funds have been available for use to support this initiative. However, two successful programs to date include:

- The Staff Enrichment Program, which offers continuing education opportunities.
- The Student Success Task Force, which is analyzing various ways in which the University can enrich the student experience at Southwestern

Pending further improvement of endowment income as the economic recovery continues, more opportunities will be available from the Rockwell Fund.

9. **Global Leadership Initiative:** Integrate students into the development and implementation of Southwestern's global service program.

PROGRESS:

This initiative has been implemented primarily in Honduras as service learning and inter-cultural immersion summer experiences. Additional opportunities will be developed as Paideia Scholars are required to fulfill inter-cultural and service learning requirements.

10. **Faculty & Staff Salaries:** Move to the 95th percentile of schools of our type for faculty and to the 95th percentile of the Austin market for staff.

PROGRESS:

During the recent economic downturn, Southwestern has strived to maintain overall faculty salaries at the 90th percentile level. Overall compensation for faculty and staff will be within the context of rising healthcare costs. The University will continue to monitor these conditions and place a high priority on compensation.

11. **Enrollment:** Maintain an annual full-time equivalent (FTE) enrollment of 1250 students.

PROGRESS:

The enrollment objective remains at 1250 FTE. The Student Success Task Force Report, due in May 2004, will contain recommendations and strategies to improve student retention and persistence to graduation. For the past three years, first-year student applications have risen over 20%.