LAUNCHING
SMU'S SECOND CENTURY

Shaping Leaders for a Changing World

2016–2025

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PROGRESS REPORT

2022–2023

SMU

Progress Report 2022–2023

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INTRODUCTION

This is the seventh annual progress report on the SMU strategic plan titled *Launching SMU's Second Century: Shaping Leaders for a Changing World 2016–2025.* This report focuses primarily on the progress made from June 2022 through May 2023 toward strategic plan goals and objectives set forth in the updated version of the SMU strategic plan presented to the Board of Trustees at the May 2020 meeting.

The COVID-19 pandemic arose in spring 2020, greatly affecting the world of higher education, SMU included. The spring semester in 2020 and the 2020, 2021, and 2022 academic years were shaped by the pandemic. Even so, commendable progress was made on many of SMU's strategic objectives as this annual report documents.

In line with SMU's mission statement, SMU's strategic plan sets forth goals and objectives and the means to measure progress toward each. These are invaluable in a success-oriented institution, setting priorities and providing focus.

For ease of reference, goals, objectives, and bulleted points are numbered. For example, 3.2.2 refers to Goal Three, Objective Two, second bulleted point. Time spans are typically fiscal year or academic year. The SMU fiscal year starts June 1 and ends the following May 31. The academic year begins with the fall term and goes through the August summer term.

This *Progress Report 2022–2023* is being presented to the Board of Trustees at its September 15, 2023, meeting and then will be distributed to the broader University community. This annual update is intended not only to underscore our aspirations, but also to help ensure that incremental progress will be made throughout the years. The goals are ambitious, but the progress toward achieving them will reinforce to the entire SMU community the remarkable opportunities that exist for the University.

EXECUTIVE SUMMARY

This executive summary provides a means to telegraph the status of progress made on each item in the 2022–2023 progress report on the SMU strategic plan titled *Launching SMU's Second Century: Shaping Leaders for a Changing World 2016–2025.*

This annual progress report covers six goals, 35 objectives, and 133 metrics. Progress reported for 2022–2023 is contrasted with that reported in the three previous annual progress reports. The executive summary conveys the status of progress on each measured item as follows:

- ✓ for achieved,

- ↑ for progress,

- ⇔ for neither progress nor slippage ("no progress"), and

- ↓ for slippage.

The executive summary is organized as follows:

- o Progress overview for the six goals, page iv

- o Progress detail for metrics and subcategories, pages v-xi

Since metrics may contain more than one item, metrics can have subcategories with progress indicated on each. Thus, 133 metrics contain 163 items reported on here.
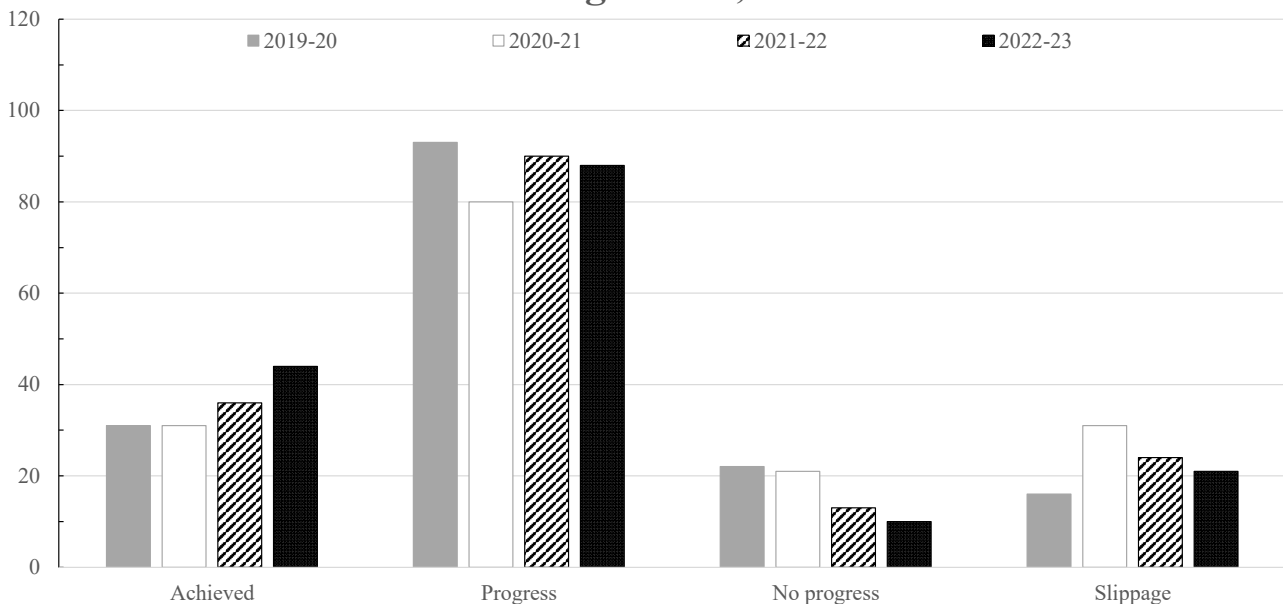
SMU Strategic Plan
Annual Progress Reports, 2019-2020 through 2022-2023: Summary by Goals

	2019-2020 vs. 2018-2019*				2020-2021 vs. 2019-2020*				2021-2022 vs. 2020-2021*				2022-2023 vs. 2021-2022*			
	✓	↑	⇔	↓	✓	↑	⇔	↓	✓	↑	⇔	↓	✓	↑	⇔	↓
Goal One: To Enhance the Academic Quality and Stature of the University	4	40	9	5	4	32	8	14	5	40	5	8	7	36	4	11
Goal Two: To Improve Teaching and Learning	6	7	3	1	6	9	1	1	5	9	1	2	5	9		3
Goal Three: Strengthen Scholarly Research, Creative Achievement, and Opportunities for Innovation	4	12	1	1	4	11	1	2	4	10	1	3	5	10	1	2
Goal Four: To Expand Opportunities for Student Development through an Engaging and Supportive Campus Experience	7	17	4	1	7	15	5	3	11	17	1	1	14	13	2	1
Goal Five: To Broaden Global Perspectives	3	8	5	7	3	4	6	10	4	4	5	10	4	13	3	3
Goal Six: To Increase Revenue Generation and Promote Responsible Stewardship of Resources	7	9		1	7	9		1	7	10			9	7		1
Total for Goals One through Six	31	93	22	16	31	80	21	31	36	90	13	24	44	88	10	21
Percentage (%)	19.1	57.4	13.6	9.9	19.0	49.1	12.9	19.0	22.1	55.2	8.0	14.7	27.0	54.0	6.1	12.9

Note: ✓ for achieved, ↑ for progress, ⇔ for neither progress nor slippage ("no progress"), and ↓ for slippage.
"*" Except when the latest available data is for earlier years.

SMU Strategic Plan, 2016-2025

SMU Strategic Plan - Annual Progress Reports, 2019–2020 through 2022–2023:
Progress Detail for Metrics and Subcategories

Strategic Plan - Goal, Objective, Metric	✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage				Subcategory of metric
	2019–20 versus 2018–19*	2020–21 versus 2019–20*	2021–22 versus 2020–21*	2022–23 versus 2021–22*	
1.0 **GOAL ONE: TO ENHANCE THE ACADEMIC QUALITY AND STATURE OF THE UNIVERSITY**	--	--	--	--	
1.1 *Strengthen the University's ability to recruit, promote, and retain a distinguished, gifted, and diverse faculty.*	--	--	--	--	
1.1.1 Increase the number of substantially funded endowed chairs and academic positions to 160 by 2025.	↑	⇔	↑	↑	
1.1.2 To increase externally funded research, encourage schools to recruit exceptional faculty researchers with start-up funding informed by strategic priorities and assessment of return on previous investments.	↑	↑	✓	✓	
1.1.3 Reconfigure current faculty positions to further interdisciplinary research, creative works, external funding opportunities, innovative teaching, and nationally recognized programs.	↑	↑	✓	✓	
1.1.4 Make promotion and tenure procedures for University faculty more uniform across all schools and departments; develop college- and school-based applications of terms in the University Policy promotion standards.	↑	↑	↑	✓	
1.1.5 Review determinations of cohort aspirational peer institutions for continued use as guidelines for salaries, benefits, faculty support, and student support. Seek to keep SMU competitive in each area with the midpoint of cohort and aspirational averages as the minimal standard.	✓	✓	✓	✓	
1.1.6 Strengthen efforts to add women and minorities to the faculty at all ranks with the goal to exceed the average percentages for each at cohort and aspirational institutions. Continue progress toward gender parity at the full professor rank.	↑	↓	↓	↑	minorities, aspirational
	↑	↓	↓	↑	minorities, cohort
	↑	↓	↑	↓	women, aspirational
	↓	↓	↑	↓	women, cohort
	↑	↑	↑	↑	women, full professor
1.1.7 Develop University policies to facilitate spousal and partner hires.	⇔	⇔	⇔	⇔	
1.2 *Enhance the University's ability to recruit, retain, and graduate academically and creatively gifted undergraduate and graduate students from diverse backgrounds.*	--	--	--	--	
1.2.1 Continue to support, as a top priority, the recruiting, admission, and enrollment of high-achieving undergraduate first-year and transfer students who contribute to the intellectual life of the University.	↑	↑	↑	↓	
1.2.2 Demonstrate ongoing improvements in the academic quality of students in undergraduate and graduate programs through measurable metrics such as national testing, external fellowships, publications, post-docs, and graduate placements with research doctorates in tenure-track academic positions.	↑	↑	↑	↑	national awards
	↓	↑	↑	↑	GMAT
	↑	↑	↑	↑	LSAT
	↑	↑	↑	↑	job placement
1.2.3 Increase the number of undergraduate applications to 20,000 by 2025, maintain an admit rate below 50% of total applications, and improve the yield rate.	↑	↑	↑	↓	applications
	↓	↓	↑	↓	admit rate
	↓	↓	↑	↓	yield rate
1.2.4 Exceed the average percentages, as reported by cohort and aspirational peer institutions, of total enrollment of individual racial and ethnic undergraduate minorities by 2025.	↓	↓	↓	↑	aspirational
	↑	↓	↓	↑	cohort
1.2.5 Engage in strategic relationships with community, educational, and religious organizations that foster access to college for racially, ethnically, and socioeconomically diverse high-achieving students.	↑	↑	↑	↑	
1.2.6 Leverage the number, scope, and influence of alumni to promote SMU to prospective students in the United States and around the world.	↑	⇔	↑	↑	
1.2.7 Increase marketing and relationship-building with high school counselors, higher education colleagues, and other publics to strengthen the local and national reputation of SMU.	⇔	⇔	↑	↑	
1.2.8 Increase the retention rate from first to second year for undergraduate students to 94% by 2025.	↑	↓	↑	↓	
1.2.9 Increase the four-year and six-year graduation rates for undergraduate students to 80% (prior to 2022: 74%) and 84%, respectively, by 2025.	✓	✓	↓	↓	4-year rate
	↑	↓	⇔	↓	6-year rate

Strategic Plan - Goal, Objective, Metric		✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage				
		2019–20 versus 2018–19*	*2020–21 versus 2019–20**	*2021–22 versus 2020–21**	*2022–23 versus 2021–22**	*Subcategory of metric*
1.2.10	Enhance recruitment, scholarship support, and retention initiatives designed to increase the racial, ethnic, and socioeconomic diversity of the student body as well as the retention and four- and six-year graduation rates of diverse students.	↑	↑	↑	↑	recruitment
		↑	↑	↑	↑	scholarships
		↑	↓	↓	↓	retention
		↑	↑	↑	↑	4-year rate
		↑	↓	↑	↑	6-year rate
1.2.11	Increase applications for graduate admission and improve operational processes by continuing to centralize graduate admission operations in each school to the extent permitted by school accreditors.	↑	↓	↓	↑	
1.3	*Improve the effectiveness of the recruitment, admission, and enrollment processes of transfer students and remove unnecessary barriers to transferring academic credits.*	--	--	--	--	
1.3.1	Increase the annual number of new transfer students to 600 by 2025.	↑	↓	↑	↑	
1.3.2	Enhance recruitment, scholarship support, and retention initiatives for transfer students to increase the racial, ethnic, and socioeconomic diversity of the student body.	↑	↑	↑	↓	
1.3.3	Enhance support for Student Affairs, Residence Life, and faculty to integrate transfer students into the SMU community, strengthening retention of transfer students and timely completion to graduation.	↑	↑	↑	↑	
1.4	*Attract and retain a skilled, diverse, and professional staff to support, efficiently and effectively, the academic units as centers of research, teaching, and learning.*	--	--	--	--	
1.4.1	Continue market-based compensation programs for staff that facilitate competitive talent choices while remaining fiscally responsible.	✓	✓	✓	✓	
1.4.2	Support awards and processes to recognize high-achieving staff and promote professional development of staff through training and certification.	✓	✓	✓	✓	
1.4.3	Reflect the average percentages, as reported by cohort and aspirational institutions, of total diversity among the staff, including in the managerial ranks.	↑	↑	↑	↑	managerial, aspirational
		↑	↑	↑	↑	managerial, cohort
		↑	↑	↑	↑	staff, aspirational
		↑	↑	↑	↑	staff, cohort
1.5	*Invest strategically in instruction, research, and creative interdisciplinary initiatives where SMU can be a world leader, such as high-performance computing; data science; ethics, leadership, and human development; and innovation, creativity, and entrepreneurship.*	--	--	--	--	
1.5.1	Leverage the new Moody School of Graduate and Advanced Studies to strengthen collaborations with other universities, major corporations and others to produce high-impact, interdisciplinary research; increase research grant funding, and boost the University's reputation for research excellence.	⇔	↑	↑	↑	
1.5.2	Complete design and construction of Frances Anne Moody Hall to house the Moody School and engage in fundraising to further enhance the $100 million gift from the Moody Foundation.	⇔	↑	↑	✓	
1.5.3	Through the Moody School, provide increased services and support to graduate students and post-doctoral scholars and create a forum for the interaction of faculty, students and visiting scholars.	⇔	↑	↑	↑	
1.5.4	Initiate, monitor, evaluate, and fine-tune as necessary the Moody Fellowship Program to attract and support the best and brightest new PhD students.	⇔	↑	↑	↑	
1.5.5	Recruit faculty where appropriate through interdisciplinary search committees that reflect more than one discipline.	↑	⇔	↑	↑	
1.5.6	Develop SMU's Data Science Institute (DSI) to coordinate and facilitate interdisciplinary programs in data science, connect with other institutes and centers on campus, and encourage faculty expertise and interdisciplinary research that are based on data science and the use of big data.	↑	↑	↑	↑	
1.5.7	Strengthen programming linkages for students and faculty in partnership with the George W. Bush Presidential Center.	↑	↑	↑	↑	
1.6	*Strengthen the Meadows Museum and University library system by expanding collections, enhancing the digital research infrastructure, and engaging with the undergraduate curriculum.*	--	--	--	--	
1.6.1	Carry out the strategic vision for libraries to support SMU as a global research university with a liberal arts tradition.	↑	↑	↑	↑	
1.6.2	Expand the information environment by increasing library holdings to support scholarly research and teaching at the highest level.	↑	↑	↑	↑	
1.6.3	Position librarians as active participants in the creative research process, including, but not limited to, digitization for primary resources, information retrieval, and curation of big data.	↑	↑	↑	↑	
1.6.4	Measure progress on the criteria for ranking among the top 100 academic libraries in North America.	↑	↑	↑	⇔	
1.6.5	Present exhibitions to attract robust numbers of museum visitors, including students, and increase the number of courses taking advantage of museum holdings.	↑	↑	↑	↑	

| Strategic Plan - Goal, Objective, Metric | ✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage | | | | |
	2019–20 versus 2018–19*	2020–21 versus 2019–20*	2021–22 versus 2020–21*	2022–23 versus 2021–22*	Subcategory of metric
1.7 Continue to develop distinctive educational opportunities for the SMU-in-Taos campus.	--	--	--	--	
1.7.1 Implement recommendations of the 2020 master plan for SMU-in-Taos.	⇔	⇔	⇔	↑	
1.7.2 Develop or maintain near-capacity enrollments at SMU-in-Taos for January, May, June, and August terms and connect with other universities to expand year-round educational usage of the campus.	↑	↑	↓	↑	enrollments
	⇔	⇔	⇔	⇔	other universities
1.7.3 Increase collaboration and partnerships between SMU-in-Taos and the surrounding community.	⇔	⇔	⇔	⇔	
2.0 GOAL TWO: TO IMPROVE TEACHING AND LEARNING	--	--	--	--	
2.1 Enhance teaching and learning through innovative curricula and pedagogies that lead to critical and creative thinking and problem solving, informed by research and the use of advanced technologies.	--	--	--	--	
2.1.1 Gauge the effectiveness of the peer review of teaching offered by the Center for Teaching Excellence (CTE).	⇔	⇔	⇔	↑	
2.1.2 Increase the annual percentage of faculty using the CTE to 33%.	✓	✓	↓	↑	
2.1.3 Evaluate the quality of online teaching and make recommendations for the continued improvement of online teaching.	↑	↑	↑	↑	
2.1.4 Expand faculty training for alternative course delivery methods, including, where appropriate, online and hybrid approaches in order to foster curricular innovation.	↑	↑	↑	↑	
2.1.5 Manage degree pathways and course offerings, including intersession, for timely degree completion as measured by four- and six-year graduation rates.	✓	✓	✓	✓	
2.1.6 Expand online courses during intersession to reach non-SMU students.	↑	↑	↑	↓	
2.2 Design, implement, and evaluate interdisciplinary programs, combining fields generally considered distinct, to reflect the interdisciplinarity of the world today.	--	--	--	--	
2.2.1 Encourage students to take multiple majors and minors that span disciplines rather than "double-down" in an area, increasing the percentage of students completing interdisciplinary programs.	↑	↑	↑	↓	
2.2.2 Complete the integration of SMU Guildhall into Lyle School of Engineering and Meadows School of the Arts and promote connections of Guildhall with other academic units.	⇔	↑	↑	↑	
2.3 Review programs to ensure excellence and alignment with the University's strategic objectives, discontinuing programs where appropriate while accommodating new educational ventures.	--	--	--	--	
2.3.1 Report annually on internal and external departmental reviews.	✓	✓	✓	✓	
2.3.2 Report annually on new educational programs and discontinued programs in light of the University's strategic priorities.	✓	✓	✓	✓	
2.4 Engage the community for lifelong learning through professional training and continuing education.	--	--	--	--	
2.4.1 Review best practices in continuing education, examine market studies for continuing education in North Texas, and enhance SMU's academic mission through continuing education offerings that resemble the rewarding robustness found in our aspirational peer institutions.	↑	↑	↑	↑	
2.4.2 Develop new continuing education offerings, including innovative professional master's degrees and certificate programs, to serve alumni as well as new populations of learners.	↑	↑	↑	↑	
2.5 Increase involvement of students in internships and practical, field-based experiential learning on campus (including SMU-in-Taos), in the local community, and around the world.	--	--	--	--	
2.5.1 Foster programs that use Dallas, SMU-in-Taos, the nation, and the world as a laboratory and a classroom.	✓	✓	✓	✓	
2.5.2 Increase the number of students engaged in internship programs.	↓	↓	↓	↓	
2.6 Enhance the exposure of students to ethical thinking and behavior at the undergraduate and graduate levels.	--	--	--	--	
2.6.1 Increase the number of courses fulfilling the Common Curriculum ethics requirement.	✓	✓	✓	✓	
2.6.2 Leverage the Maguire Center to help faculty incorporate more ethics as content in courses.	↑	↑	↑	↑	
2.6.3 Implement required training in Responsible Conduct of Research for all PhD students.	⇔	↑	↑	↑	
3.0 GOAL THREE: TO STRENGTHEN SCHOLARLY RESEARCH, CREATIVE ACHIEVEMENT, AND OPPORTUNITIES FOR INNOVATION	--	--	--	--	
3.1 Encourage widespread development of campuswide interdisciplinary research projects.	--	--	--	--	
3.1.1 Review and act on recommendations of the task force on scholarly research and creative impact.	✓	✓	✓	✓	

Strategic Plan - Goal, Objective, Metric		2019–20 versus 2018–19*	2020–21 versus 2019–20*	2021–22 versus 2020–21*	2022–23 versus 2021–22*	Subcategory of metric
		✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage				
3.1.2	Develop a policy to enhance the effectiveness of centers and institutes in research, particularly interdisciplinary work.	↑	↑	↑	↑	
3.1.3	Increase internal and external support for interdisciplinary research that positions SMU as a world leader in addressing global challenges.	↓	↑	↑	↑	
3.1.4	Initiate and evaluate seed grant programs for enhancing research.	↑	↑	↑	↑	
3.2	*Improve infrastructure and administrative support for faculty applying for external funding to enable expanded collaborative research with corporations, foundations, governments, and educational institutions.*	--	--	--	--	
3.2.1	Increase annual research expenditures to $60 million by 2025.	↑	↑	↓	↑	
3.2.2	Increase restricted and unrestricted funding for instrumentation, maintenance, and upgraded labs.	✓	✓	✓	✓	
3.2.3	Revise the overhead recovery model of the University so that the support for research infrastructure increases with the growth of research grants.	✓	✓	✓	✓	
3.2.4	Strengthen partnerships and collaborative development and research programs with other universities and external businesses and organizations.	↑	↑	↓	↑	
3.3	*Ensure the capability of high-performance computing to support research computing and utilize it as a basis for faculty recruitment and research investment.*	--	--	--	--	
3.3.1	Construct metrics for software and hardware for use in helping to keep SMU competitive in high-performance computing.	↑	↑	↑	↑	
3.3.2	Strengthen faculty involvement in high-performance computing through collaboration among the Office of Information Technology, the Institute for Data Science, and the Center for Research Computing.	✓	✓	✓	✓	
3.4	*Increase financial support of doctoral programs and graduate student fellowships to encourage research and creative achievement.*	--	--	--	--	
3.4.1	Improve graduate fellowship support in selected core areas to comparable averages (in amount and duration) of aspirational institutions.	↑	↑	↑	↑	
3.4.2	Increase the annual number of PhDs awarded to 80 by 2025, while increasing completion rate and reducing the time to completion.	↑	↑	↓	↑	
3.4.3	Increase the six-year completion rate for PhD degrees.	↑	↓	↑	↓	
3.4.4	Increase the number of post-docs supporting research in STEM fields.	↑	↓	↑	↓	
3.5	*Implement an updated technology transfer program.*	--	--	--	--	
3.5.1	Benchmark the technology transfer office against comparable offices at cohort and aspirational institutions.	↑	↑	↑	✓	
3.5.2	Partner with existing technology and innovation incubators with a goal toward forming University-run incubators.	↑	↑	↑	↑	
3.5.3	Develop an updated tech transfer program that is fully integrated with academic programs in the schools.	⇔	⇔	⇔	⇔	
3.5.4	Develop metrics to target specific numbers of applications, licensures, start-ups, etc., each year.	↑	↑	↑	↑	
4.0	**GOAL FOUR: TO EXPAND OPPORTUNITIES FOR STUDENT DEVELOPMENT THROUGH AN ENGAGING AND SUPPORTIVE CAMPUS EXPERIENCE**	--	--	--	--	
4.1	Enhance critical student life programs related to student performance and retention.	--	--	--	--	
4.1.1	Identify and implement best practices for programs and services that promote the retention and graduation of underrepresented minority populations.	↑	↑	↑	↑	
4.1.2	Support military veterans who are students at SMU by providing Yellow Ribbon Program funds and other sources of support.	✓	✓	✓	✓	
4.1.3	Measure the implementation of bystander intervention and values programming to enhance response and knowledge of resources for emotional distress, substance abuse, and sexual assault.	↑	⇔	⇔	↑	
4.1.4	Utilize the Dr. Bob Smith Health Center to improve physical and mental health services in support of SMU students' well-being.	✓	✓	✓	✓	
4.1.5	Develop formal transition programs and maintain high levels of participation for graduate and transfer students to enhance their sense of belonging and connection to the University.	↑	↑	↑	✓	
4.2	*Assess critical student life programs to ensure they provide for intellectual and social engagement and leadership opportunities.*	--	--	--	--	
4.2.1	Strengthen and assess programming that promotes social and civic engagement and community.	↑	↑	↑	↑	
4.2.2	Increase faculty and student engagement in co-curricular activities in each Residential Commons.	↑	⇔	↑	↑	
4.3	*Assess critical student life programs to ensure they provide for understanding of personal responsibility, respect for others, and diversity.*	--	--	--	--	
4.3.1	Strengthen programs designed to develop student leadership and cultural competence through community service.	↑	↑	↑	↑	

Strategic Plan - Goal, Objective, Metric		✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage				
		2019–20 versus 2018–19*	*2020–21 versus 2019–20**	*2021–22 versus 2020–21**	*2022–23 versus 2021–22**	*Subcategory of metric*
4.3.2	Continue the development of CIQ@SMU and assess the reach of CIQ@SMU with student, staff, and faculty groups across campus.	↑	↑	↑	↑	
4.3.3	Develop values-based programming for students who are members of SMU fraternities and sororities and other student groups.	↑	↑	↑	↑	
4.3.4	Implement all-Greek programming to strengthen collaboration among the four governing councils.	↑	↑	↑	↑	
4.4	*Enhance career services for all students by expanding partnerships with businesses, cultural and charitable organizations, and alumni.*	--	--	--	--	
4.4.1	Enhance ongoing collaboration among the Hegi Family Career Development Center, other career centers, and the schools to provide students with more seamless career counseling as well as residential and cocurricular experiences that support their careers and life goals.	✓	✓	✓	✓	
4.4.2	Continue and improve tracking of the career placement of those awarded degrees, both undergraduate and graduate.	✓	✓	✓	✓	
4.4.3	Implement a career development program in collaboration with other SMU career centers to assist with post-graduation employment opportunities for SMU student-athletes.	✓	✓	✓	✓	
4.4.4	Increase the internship and career opportunities for undergraduates and, where appropriate, graduate students.	↑	↑	↑	↑	
4.5	*Increase academic success for student-athletes, and strengthen intercollegiate programs to increase our national competitiveness.*	--	--	--	--	
4.5.1	Maintain satisfactory NCAA Academic Progress Rate (APR) standards with all eligible programs posting a multiyear score of 975 or better.	⇔	↑	↑	⇔	
4.5.2	Maintain average team GPA for each sport above 3.0.	⇔	⇔	↓	⇔	
4.5.3	Win the most conference championships annually among member institutions.	⇔	⇔	↑	✓	
4.5.4	Enhance SMU's position in the National Association of Collegiate Directors of Athletics (NACDA) Directors' Cup rankings.	NA	↑	↑	✓	(canceled in 2019-20)
4.5.5	Establish the clear goal of postseason participation in all sports, including postseason bowls in football and NCAA tournaments in men's and women's basketball.	↑	↑	↑	↓	
4.5.6	Increase the annual Mustang Athletic Fund in Athletics by at least 3% each year.	✓	↓	✓	✓	
4.5.7	Increase ticket sales and average home attendance for football, women's basketball, and men's basketball.	↑	↓	✓	✓	football
		↓	↓	✓	✓	men's basketball
		⇔	⇔	✓	✓	women's basketball
4.5.8	Complete funding and construction of athletics facilities for swimming and diving, soccer, and football.	↑	↑	↑	↑	
4.6	*Continue to implement programs that increase awareness and understanding within the SMU community of the various forms of diversity such as cultural, ethnic, gender, racial, religious, sexual orientation, and socioeconomic status of North Texas.*	--	--	--	--	
4.6.1	Strengthen campus programs, services, and oversight of the student experience at SMU that foster respect for and inclusivity of all diverse identities, including ethnic, racial, religious, socioeconomic status, gender, and sexual orientation.	↑	↑	↑	↑	
4.6.2	Strengthen support services for international students.	↑	↑	↑	↑	
4.6.3	Expand the impact of CIQ@SMU across campus.	↑	↑	↑	↑	
4.7	*Goal Four, Objective Seven: Evaluate options for providing enhanced child development, child care, and family services for faculty, staff, and students.*	--	--	--	--	
4.7.1	Maintain the child care center and consider the feasibility of providing additional services for students, staff, and faculty with young children.	✓	✓	✓	✓	
4.7.2	Provide services to assist members of the SMU community for assistance with access to elder care.	↑	✓	✓	✓	
5.0	**GOAL FIVE: TO BROADEN GLOBAL PERSPECTIVES**	--	--	--	--	
5.1	*Continue the development of new international consortial agreements at the faculty, graduate, and undergraduate levels.*	--	--	--	--	
5.1.1	Increase the number of signed agreements for academic and research collaboration with foreign universities, in particular Central American, South American, and Asian universities.	↑	⇔	⇔	↑	
5.2	*Expand the emphasis on global content in curricula across the University, and strengthen international studies within the overall curriculum.*	--	--	--	--	
5.2.1	Implement the University-wide plan for undergraduate study abroad.	⇔	⇔	⇔	↑	
5.2.2	Increase the number of undergraduates from a variety of academic programs who study abroad and advise them on how to fit study abroad into their academic careers. Increase the number of graduating SMU seniors who have studied abroad to 50% by 2025.	↑	↓	↓	↑	
5.2.3	Develop sources of support for academically meritorious students with financial need to provide an international study opportunity.	✓	✓	✓	✓	

| Strategic Plan - Goal, Objective, Metric | | ✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage | | | |
		2019–20 versus 2018–19*	2020–21 versus 2019–20*	2021–22 versus 2020–21*	2022–23 versus 2021–22*	Subcategory of metric
5.2.4	Develop study abroad programs for intersessions.	⇔	⇔	↑	↑	
5.2.5	Increase the number of courses that include an international experience during spring break.	⇔	⇔	⇔	⇔	
5.2.6	Increase the percentage of undergraduates who graduate having completed the third semester of a second language.	↓	↓	↓	↑	
5.2.7	Maintain the number of courses with a robust global focus or perspective.	✓	✓	✓	✓	
5.2.8	Sustain and, as appropriate, expand the number of majors who encourage study abroad in their curricular requirements.	↑	↑	✓	✓	
5.3	*Increase the international representation of students and faculty.*	--	--	--	--	
5.3.1	Develop sources of support for scholarships for the most academically and creatively talented international students.	✓	✓	✓	✓	
5.3.2	Increase the number of faculty engagements with prospective students around the world through speaking opportunities, courses taught abroad, etc.	↑	⇔	⇔	⇔	
5.3.3	Increase the number of strategic relationships with high schools and international educational organizations (not recruitment agents) that would promote SMU to international first-year and transfer students.	⇔	⇔	⇔	⇔	
5.3.4	Increase the number of international graduate and undergraduate student applications, admits, deposits, and enrollments resulting in 15% international students by 2025, with international undergraduates at a minimum of 7%.	↓	↓	↓	↑	composition, all
		↓	↓	↓	↓	composition, undergraduate
		↓	↓	↓	↑	undergraduate applications
		⇔	↓	↓	↑	undergraduate admitted
		↓	↑	↑	↑	undergraduate enrollments
		↑	↓	↓	↑	graduate applications
		↑	↓	↓	↑	graduate admitted
		↓	↓	↓	↓	graduate enrollments
5.3.5	Enhance services for international undergraduate students that improve retention and graduation rates.	↓	↑	↑	↑	retention rate
		↑	↑	↑	↑	graduation rate, 4-year
		↑	↓	↓	↓	graduation rate, 6-year
5.4	*Goal Five, Objective Four: Share research and best practices throughout the country and worldwide through interdisciplinary programs to raise SMU's visibility and reputation to the nation and the world.*	--	--	--	--	
6.0	**GOAL SIX: TO INCREASE REVENUE GENERATION AND PROMOTE RESPONSIBLE STEWARDSHIP OF RESOURCES**	--	--	--	--	
6.1	Develop, as appropriate, initiatives to improve the efficiency and effectiveness of University functions.	--	--	--	--	
6.1.1	Evaluate the measures identified for each initiative to ensure that processes are effective and efficient, and that the goal of the initiative is achieved. Show amounts of funding redirected to the academic sector.	✓	✓	✓	✓	
6.2	*Develop an inclusive, transparent budgeting process that recognizes strategic priorities while lowering expenses.*	--	--	--	--	
6.2.1	Limit the growth in positions funded through unrestricted means to those directly supporting strategic priorities.	✓	✓	✓	✓	
6.2.2	Evaluate the percentage of the budget that supports academic functions to ensure that emphasis remains on the academic mission.	✓	✓	✓	✓	
6.3	*Increase levels of future private support, building on the success of past campaigns.*	--	--	--	--	
6.3.1	Continue momentum from the previous campaign by focusing on targeted key priorities and meeting the campaign goal.	✓	✓	✓	✓	
6.3.2	Complete funding for existing capital projects.	↑	↑	↑	↑	
6.3.3	Continue processes and staffing structures to provide greater support for ongoing University operations, sustaining current-use giving at $50 million annually.	✓	✓	✓	✓	
6.3.4	Develop new ways to cultivate and motivate major donors identified during the previous campaign, leading to new and larger future gifts; grow the number of $1 million donors to SMU to 200 by 2025.	↑	↑	↑	↑	
6.3.5	Continue the upward trend in planned giving support, increasing the number and value of deferred gift expectancies and matured deferred gifts through 2025.	↑	↑	↑	↑	
6.3.6	*Continue the focus on scholarship and endowed faculty funding priorities, adding another 750 endowed scholarships by 2025 and raising the total number of endowed faculty positions to 160 by 2025.*	↑	↑	↑	↑	
6.3.7	Increase annually the number of volunteers involved in fundraising initiatives.	↓	↓	↑	↓	

Strategic Plan - Goal, Objective, Metric		✓ achieved, ↑ progress, ⇔ no progress, ↓ slippage				
		2019–20 versus 2018–19*	*2020–21 versus 2019–20**	*2021–22 versus 2020–21**	*2022–23 versus 2021–22**	*Subcategory of metric*
6.4	Elevate SMU's national profile to raise rankings and garner additional support for the University's strategic priorities, building on the accomplishments of SMU programs and its people.	--	--	--	--	
6.4.1	Continue to support SMU branding efforts, centrally and through schools and units.	↑	↑	↑	↑	
6.4.2	Build external support for the goals of the SMU strategic plan.	↑	↑	↑	↑	
6.4.3	Annually expand social media use to reach new audiences, increase visibility of academic progress, and gain more financial support.	↑	↑	↑	↑	
6.5	*Employ investment best practices to balance potential rewards and risks to grow a diversified endowment to increase support to the University's academic priorities.*	--	--	--	--	
6.5.1	Outperform policy benchmarks while managing risk.	✓	✓	↓	↓	
6.5.2	Ensure a total return ranked in the top 50% cohort and aspirational universities over a business cycle.	✓	✓	↓	✓	
6.6	*Promote a shared sense of community at SMU to conserve resources, establish sustainable practices, and contribute to the community's livability.*	--	--	--	--	
6.6.1	Work to engage students, faculty, and staff in sustainability efforts that will benefit the campus and the environment.	✓	✓	✓	✓	
6.6.2	Continue to seek appropriate Leadership in Energy and Environmental Design (LEED) designations on all new construction and renovations.	✓	✓	✓	✓	

Note : ✓ for achieved, ↑ for progress, ⇔ for neither progress nor slippage ("no progress"), and ↓ for slippage.
"*" Except when the latest available data are for earlier years.

MISSION STATEMENT

Southern Methodist University will create, expand, and impart knowledge through teaching, research, and service, shaping world changers who contribute to their communities and excel in their professions in a global society. Among its faculty, students, and staff, the University will cultivate principled thought, develop intellectual skills, and promote an environment emphasizing individual dignity and worth. SMU affirms its historical commitment to academic freedom and open inquiry, to moral and ethical values, and to its United Methodist heritage.

GOAL ONE: TO ENHANCE THE ACADEMIC QUALITY AND STATURE OF THE UNIVERSITY

A university is measured by the quality of its faculty, students, alumni, libraries, and facilities. These are—and always will be—the primary areas where qualitative growth and development are essential. For SMU to fulfill its goal of becoming one of the nation's finest educational institutions, distinguished faculty appointments must be made at the senior and junior ranks. Our concomitant rise in student profiles, both in quality and diversity, is equally important. Both elements will require additional endowments that enable the University to make permanent progress.

GOAL ONE OBJECTIVES

Objective 1.1 Strengthen the University's ability to recruit, promote, and retain a distinguished, gifted, and diverse faculty.

- 1.1.1 Increase the number of substantially funded endowed chairs and academic positions to 160 by 2025.

  Currently, 145 substantially endowed chairs and academic positions make up 32.4% of SMU's 447 tenured and tenure-track faculty – 15 more endowed positions would reach the goal of 160. During 2022–23, donor gifts created 15 new, endowed academic positions:

  - The G. Marlyne Sexton Endowed Director of Musical Theatre
  - The Mary and Richard Templeton Endowed Dean
  - The Elisabeth Martin Armstrong Endowed Dean
  - The Walden and Paula Rhines Endowed Quantum Informatics Professorship
  - The Kairo Endowed Directorship for the Center for Faith and Learning
  - The O'Donnell Foundation gift establishing two endowed professorships, an endowed associate director in the O'Donnell Data Science Institute, three endowed department chair positions in Lyle, and four additional endowed professorships in Lyle.

- 1.1.2 To increase externally funded research, encourage schools to recruit exceptional faculty researchers with start-up funding informed by strategic priorities and assessment of return on previous investments.

  Beginning 2022–23, the provost provided discretionary start-up funding dollars to the deans to reward academic units for school performance on metrics that align with strategic priorities. Overall, the provost awarded the schools a total of $5 million for the 2024 fiscal year and has earmarked the same amount for fiscal years 2025 and 2026. In that $5 million for 2022–23, the provost awarded the deans over $2.2 million in discretionary research dollars. The schools then provided $1.5 million in new start-up research funds to faculty within their unit for use over the next few years. Actual start-up expenditures at SMU for 2022–23 totaled almost $2.4 million, reflecting in part the honoring of previous faculty start-up agreements. Return on these start-up funds is tracked in monthly reports assessed by the deans and provost. The reports detail externally funded research expenditures and overhead recovery by department and principal investigator.

- 1.1.3 Reconfigure current faculty positions to further interdisciplinary research, creative works, external funding opportunities, innovative teaching, and nationally recognized programs.

  In 2022–23, the provost worked with faculty and deans to enact a multi-year plan for supporting three faculty cluster hires and for launching a fourth cluster, (added to the 2023–24 faculty search cycle). No new faculty lines were added; existing faculty lines were repurposed. In 2022–23, the Data Science cluster was authorized to hire up to 12 faculty; eight faculty were hired in four schools and the College. Four authorized searches in 2023–24 should bring this cluster to 12 faculty. The second cluster, Technology-Enhanced Instruction and Learning (TEIL), brought in one faculty member in spring 2023, with three TEIL faculty joining the cluster in fall 2023. The Earth Hazards and National Security cluster (four faculty) hired no faculty in 2022–23. Experiences with these three clusters have informed a new, fourth cluster in Urban Research. The provost appointed a faculty-led task force in spring 2023 to make recommendations for this cluster, with up to six new positions to be searched in 2023–24.

- 1.1.4 Make promotion and tenure procedures for University faculty more uniform across all schools and departments; develop college- and school-based applications of terms in the University policy promotion standards.

  This target has been met as progress has been made toward more uniform promotion and tenure procedures. The provost's office hosted discussions with deans, the Provost's Advisory Committee on Promotion and Tenure, and select

faculty to discuss which policies and practices should be revised and which needed more standardization across the University. Subsequent work accomplished these revisions and greater standardization.

During the 2022–23 year, the changes to the tenure and promotion guidelines were put in place in all departments. Faculty who began at SMU in fall 2022 or later must demonstrate "outstanding" achievement in research or creative activity (formerly, "high quality") and faculty can go up for tenure only once. Deans have submitted revised guidelines that align with the University policy. Also, during 2022–23, the provost required all schools and the College to establish clear, discipline-specific metrics of what constitutes promotion for non-tenure track faculty, in accordance with SMU policy. Each school and the College submitted guidelines, which are under review for approval in fall 2023.

- 1.1.5 Review determinations of cohort and aspirational peer institutions for continued use as guidelines for salaries, benefits, faculty support, and student support. Seek to keep SMU competitive in each area with the midpoint of cohort and aspirational averages as the minimal standard.

Review of SMU's cohort and aspirational peers is always ongoing, but the most recent revision was completed and presented to the Board of Trustees in September 2018. The current list of SMU's aspirational and cohort peers can be found at SMU.edu/Peers and informs salary, benefits, and support benchmarking.

- 1.1.6 Strengthen efforts to add women and minorities to the faculty at all ranks with the goal to exceed the average percentages for each at cohort and aspirational institutions. Continue progress toward gender parity at the full professor rank.

Integrated Postsecondary Education Data System (IPEDS) data, the most recent available for fall 2021, allows comparisons of minority faculty percentages at SMU and peer universities, with faculty defined as full-time instructional faculty. Data for fall 2022 should become available in December 2023. As the table below shows, while SMU's minority faculty composition hovered around 19% in 2016–2020 before rising to 21% in 2021, peer averages have edged up from 19.0% to 23.1%. The specific group percentages for Asian Americans, African Americans, and Hispanics within SMU, aspirational peers, and cohort peers in 2021 reveal that SMU matches peer averages within +/-0.5 percentage points except among aspirational peers for Hispanics (SMU leads by 0.9 percentage points) and Asians (SMU trails by 1.6 percentage points).

Minority faculty among the full-time instructional faculty at SMU, compared to peer averages, fall 2016–fall 2021 (%)

	2016	2017	2018	2019	2020	2021
SMU	19.4	18.5	19.0	19.2	19.4	21.0
Aspirational peers	18.9	19.8	20.0	20.9	21.9	22.6
Cohort peers	19.0	20.0	20.4	21.1	22.0	23.1

Note: Minorities include Asian, Black, Hispanic, and two or more races, as well as other Integrated Postsecondary Education Data System (IPEDS) reporting categories except white, nonresident alien, and unknown race or ethnicity. The latest data available from IPEDS are for fall 2021.

IPEDS data also allows comparisons of women faculty percentages at SMU and at SMU's peers, with faculty defined as full-time instructional faculty. As the table below shows, from 2016 to 2021, SMU's percentage of women faculty rose from 39.4 to 41.8, aspirational peers from 39.1 to 42.4, and cohort peers from 40.8 to 44.5.

Women faculty among the full-time instructional faculty at SMU, compared to peer averages, fall 2016–fall 2021 (%)

	2016	2017	2018	2019	2020	2021
SMU	39.4	40.0	41.2	40.2	41.5	41.8
Aspirational peers	39.1	40.1	40.9	41.1	41.9	42.4
Cohort peers	40.8	41.5	42.6	43.4	43.9	44.5

Note: The latest data available from IPEDS are for fall 2021.

In fall 2015, 18.3% of SMU full professors were women. This increased to 25.4% in fall 2022. In the pipeline from assistant to associate to full professor, the percentage of female faculty at the associate level dipped from 39.0% in 2015 to 36.8% in 2022. Among assistant professors, the percentage edged up from 46.3% in 2015 to 48.3% in 2022.

In 2022–23, 17 faculty were promoted: nine to associate professor with tenure and eight to full professor. Women made up five of the nine faculty promoted to

associate professor with tenure (55.6%) and two of the eight promoted to full professor (25%).

SMU must continue its commitment to diversifying its faculty. In 2022–23, the provost's office and IAE collaborated with the chief diversity officer to implement best practices to carry out this commitment. Both the provost's office and Institutional Access and Equity (IAE) require open faculty positions to be advertised broadly in various media to attract women and minority applicants. Authorization of a search requires providing evidence of such robust outreach.

- 1.1.7 Develop University policies to facilitate spousal and partner hires.

The provost's office will assess the challenges in this area that guidelines and policy might effectively address. Funding for spousal and partner hires, for example, has been discussed with the deans such that collaborative budgetary commitments to spousal/partner hires can be integrated with strategic long-term planning.

Objective 1.2 Enhance the University's ability to recruit, retain, and graduate academically and creatively gifted undergraduate and graduate students from diverse backgrounds.

- 1.2.1 Continue to support, as a top priority, the recruiting, admission, and enrollment of high-achieving undergraduate first-year and transfer students who contribute to the intellectual life of the University.

Limited administration of standardized testing during the pandemic led SMU and most other universities to adopt and then continue a test-optional policy starting in fall 2020. Consequently, many university applicants did not report test scores, making an institution's average test scores in recent years less comparable to prior years. Nevertheless, for the one-third of enrollees submitting test scores to SMU, preliminary data as of August 22, 2023, on SMU's fall 2023 first-year class give an average ACT score of 31.6, matching the strong showings of the past two years, up from the 2013–20 averages in the 29-30 range. An ACT of 31.6 indicates the 96th percentile of test-takers in the high school graduating classes of 2020–22. The following graph shows the average superscored ACT for SMU's entering cohorts since 2012.

Average ACT score of first-year students, entry cohorts, fall 2012–fall 2023
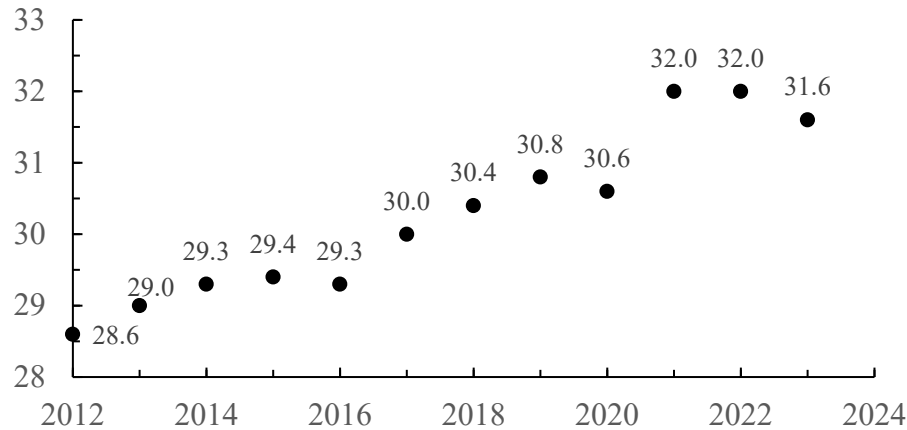
Note: Figure for the fall 2023 cohort is as of August 22, 2023.

- 1.2.2 Demonstrate ongoing improvements in the academic quality of students in undergraduate and graduate programs through measurable metrics such as national testing, external fellowships, publications, postdocs, and graduate placements with research doctorates in tenure-track academic positions.

SMU students won notable, prestigious national awards during 2022–23. Second-year undergraduate Joshua Ange received the Goldwater Scholarship, the most prestigious undergraduate STEM scholarship in the nation. SMU continued its strong showing with Fulbright awards: two undergraduates and one graduate student were selected for Kazakhstan, Poland, and Uzbekistan. Previous Fulbright award winners numbered six (2021–22), six (2020–21), nine (2019–20, an SMU record), two (2018–19), seven (2017–18), and three (2016–17). Three recent graduates won fellowships that attract and prepare outstanding students for Foreign Service careers in the U.S. Department of State: two were the first SMU students to win a Rangel Graduate Fellowship, the other was the first to win a Payne Fellowship. Two undergraduates were selected for the U.S. Department of Defense's Boren Scholarship. Two undergraduates were awarded a Department of State Critical Language Scholarship, the country's most prestigious language study award, for host-country based, intensive language training, in Arabic and Persian. Two SMU PhD students (chemistry, biostatistics) won highly competitive National Science Foundation Graduate Research Fellowships, which are five-year fellowships that provide three years of financial support inclusive of an annual stipend of $37,000.

The graduate management admission test (GMAT) average for the two-year MBA in preliminary data for fall 2023 is 698 (88%), up from 694 (88%) in 2022, 686 (85%) in 2021, 650 (72%) in 2020, and 652 (72%) in 2019.

The law school admission test (LSAT) median score for fall 2022 was a record-setting 164 (87.4%), up from the previous 163 (fall 2021), 162 (fall 2020), and 161 (fall 2019). Preliminary numbers for the fall 2023 entering cohort are on track to meet or exceed 2022's record high LSAT and post the highest median undergraduate GPA in the law school's history.

Data on job placements, another mark of student quality, indicate 17 SMU PhDs transitioned to tenure-track positions in 2022–23, well above the nine in 2021–22 and the previous high of 13 recorded in 2020–21 and 2018–19. Another 23 transitioned to postdoctoral positions during 2022–23, down slightly from 25 in 2021–22 (see also 4.4.2).

- 1.2.3 Increase the number of undergraduate applications to 20,000 by 2025, maintain an admit rate below 50% of total applications, and improve the yield rate.

Between fall 2015 and fall 2019 SMU made progress, achieving an admit rate below 50% and a higher yield rate. COVID-19's impact on fall 2020 and later cohorts paused this progress. Despite the pandemic, enrollment remains strong. As the table below shows, total applications surpassed 16,000 for the first time in fall 2022 and again in fall 2023, increasing for the fifth straight year.

Undergraduate applications, admit rates, and yield rates, fall 2015–fall 2023

	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total applications	12,992	13,250	13,128	12,603	13,959	14,010	15,685	16,150	16,003
Admitted	6,360	6,482	6,402	6,457	6,601	7,379	8,333	8,439	9,239
Admit rate (% of total)	49.0	48.9	48.8	51.2	47.3	52.7	53.1	52.3	57.7
Enrolled	1,374	1,522	1,423	1,530	1,544	1,531	1,572	1,639	1,597
Yield rate (% enrolled of admits)	21.6	23.5	22.2	23.7	23.4	20.7	18.9	19.4	17.3

Note: Data for 2023 as of August 22, 2023. The official numbers for 2023 will be available after the census date of September 6, 2023. Transfer applicants are not included in the above numbers.

- 1.2.4 Exceed the average percentages, as reported by cohort and aspirational peer institutions, of total enrollment of individual racial and ethnic undergraduate minorities by 2025.

IPEDS data, the most recent available for fall 2021, allows comparison of SMU and peer institutions: minority students as a percentage of SMU's undergraduates increased from 26.4 to 31.5 between 2016 and 2021. In 2021, SMU's minority undergraduate percentage ranked above five of the 12 aspirational peers and six of the 12 cohort peers. Although SMU's minority undergraduate percentage trailed the overall average percentages for aspirational and cohort peers, by contrast, SMU's minority graduate student percentage (33.7) topped the averages for both aspirational (24.2) and cohort peers (30.8).

Minority undergraduate student enrollment compared to peer averages, fall 2016–fall 2021 (%)

	2016	2017	2018	2019	2020	2021
SMU	26.4	26.8	27.7	27.8	29.7	31.5
Aspirational peers	30.5	31.1	32.2	33.2	35.2	36.4
Cohort peers	27.6	28.4	29.1	30.2	32.3	33.6

Note: Minorities include Asian, Black, Hispanic, and two or more races, as well as other Integrated Postsecondary Education Data System (IPEDS) reporting categories except white, nonresident alien, and unknown race or ethnicity. The latest data available from IPEDS are for fall 2021.

- 1.2.5 Engage in strategic relationships with community, educational, and religious organizations that foster access to college for racially, ethnically, and socioeconomically diverse high-achieving students.

Undergraduate Admission has expanded connections with community-based organizations at the local and national level as well as maintaining longstanding relationships with individual high schools and school districts. Targeting charter school networks such as KIPP Schools (national), IDEA Public Charter School Network (Texas), and Uplift Public Charter Schools (Dallas-Fort Worth) gives additional contact with students and families, allowing SMU to target diverse high-achieving students. With the recent Supreme Court ruling on affirmative action, these strategic relationships will become even more central to SMU's longstanding commitment to diversity, equity, and inclusion.

To foster access to college for underrepresented, high-achieving students, the Simmons School, like Undergraduate Admission, also maintains strategic relationships with these leading national and state charter school organizations. Also, the work by Simmons with the West Dallas STEM School (WDSS)

strongly advances these goals. In the 2022–23 academic year, WDSS entered its second year of implementation with the enrollment of both elementary (pre-K, kindergarten, and first grade) and middle school (7th and 8th grade) students. This project is the result of an innovative four-way partnership among SMU's Simmons School, Dallas Independent School District, the West Dallas Community, and Toyota USA Foundation.

In addition, the Simmons School's College Access program consists of eight federally funded TRIO program grants through the Department of Education. Through these programs College Access assisted over 1,300 students who were potential first-generation college students, underrepresented minorities, or members of families with limited incomes to prepare for college success through its Upward Bound, Upward Bound Math Science, Educational Talent Search, and the Ronald E. McNair Postbaccalaureate program opportunities in 2022–23.

- 1.2.6 Leverage the number, scope, and influence of alumni to promote SMU to prospective students in the United States and around the world.

Undergraduate Admission and the Alumni Relations office work to connect prospective students with alumni at both on and off-campus events as well as through phone and email. This year, local Dallas-Fort Worth alumni supported on campus programs by helping with registration, programming, and interacting with students and families. Alumni volunteers are also engaged and encouraged to connect individually with admitted students during yield season. Alumni calling admitted students was more focused as Admission requested alumni call students who had indicated an interest in such contact (see 6.3.7).

- 1.2.7 Increase marketing and relationship-building with high school counselors, higher education colleagues, and other publics to strengthen the local and national reputation of SMU.

During 2022–23, work continued to engage the high school counselor community, spearheaded by SMU's Counselor Advisory Board. Objectives include deepening the understanding and reputation of SMU, enhancing and diversifying SMU's marketing outreach, communicating how financial aid makes SMU affordable, and raising awareness among prospective students of the recently launched Access SMU financial award. Access SMU features merit scholarships to meet full need for high-achieving scholars who receive federal Pell Grants, beginning with Texas students.

SMU continues to make gains in using social media to increase the numbers of higher education leaders who recognize SMU as a premier university, of alumni

and North Texans who perceive SMU as a smart investment, and of prospective students who make SMU their top choice (see 6.4.3).

- 1.2.8 Increase the retention rate from first to second year for undergraduate students to 94% by 2025.

The rising trend in the retention of first-year cohorts between 2009 and 2018 was at levels above or almost matching those needed to achieve the ambitious goal of 94% by 2025. Under 88% with the 2008 cohort, retention rose to 91.5% for the 2018 cohort. But the pandemic interrupted that trend and retention receded to 90.3% for the fall 2019 cohort. Retention edged up to 90.6% for 2020, then retreated to 90.2% for 2021. Under the leadership of Associate Provost Sheri Kunovich, SMU increased the focus on retention rates through "SMU in Four," SMU's Quality Enhancement Plan (QEP), developing new ways to identify students who struggle academically, personally, or financially, and to assist in their retention and graduation. After in-depth analysis of retention data for the past five years, seven initiatives were funded and started in 2022–23 to increase retention a full percentage point each year over the next few years. Even if retention proves to be only 0.5% each year, the projected increase in net revenues will cover the costs of the initiatives. The success of this work is essential if SMU is to reach by 2025 the goals for retention and graduation.

First- to second-year retention rates, undergraduate entry cohorts, fall 2008–fall 2021 (%)
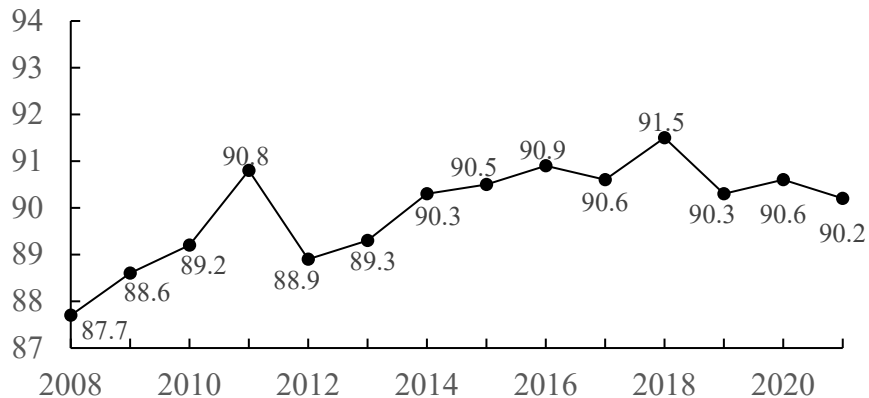
Note: Retention for the 2022 entry cohort will be available after the census date of September 6, 2023.

- 1.2.9 Increase the four-year and six-year graduation rates for undergraduate students to 80% and 84%, respectively, by 2025.

Despite the challenges of the pandemic, the previous six-year graduation rate goal of 74% was accomplished for the fourth straight year. This has led to

raising the goal to 84% to align more closely with our aspirational peers. Efforts underway through SMU's QEP, "SMU in Four" will focus and further prospects for attaining this goal. Excepting the 2012 and 2018 cohort, the four-year graduation rate has also climbed, reaching 76.1% for the 2018 cohort. The past four years have shown the progress needed to reach 80% by 2025 with the 2021 cohort.

Four- and six-year graduation rates, undergraduate entry cohorts, fall 2008–fall 2018 (%)
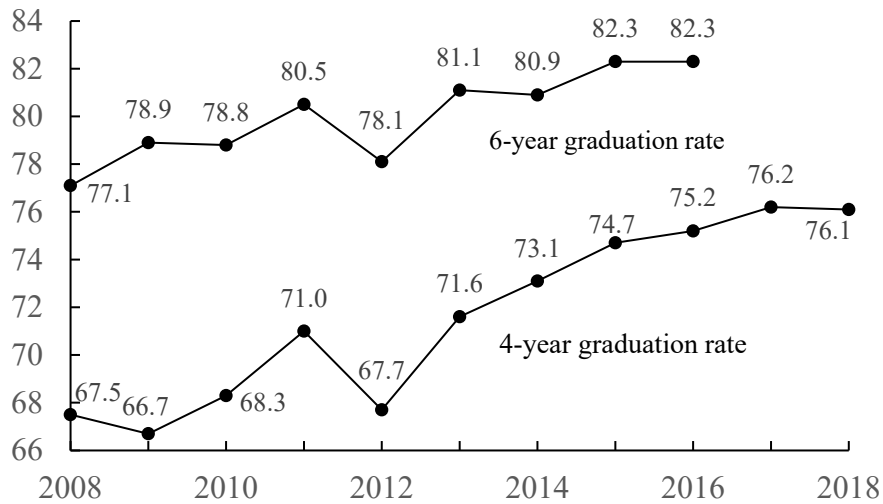
- 1.2.10 Enhance recruitment, scholarship support, and retention initiatives designed to increase the racial, ethnic, and socioeconomic diversity of the student body as well as the retention and four- and six-year graduation rates of diverse students.

In fall 2023, Access SMU began meeting full demonstrated financial need for our highest-achieving students from Texas who receive Federal Pell Grants. A commitment from unrestricted funds provides support for this effort to enroll new and continuing meritorious students regardless of their financial background.

Significant progress was achieved in fall 2022 in racial and ethnic diversity in recruitment: 33.3% minority students among the first years out of high school entering SMU and 48.3% minority students among the entering transfers. For students in the fall 2023 cohort, preliminary data as of August 22, 2023, indicate racial and ethnic diversity will continue with 34.7% minority students among first-years and 48.6% among transfers.

Among the first years, the same preliminary data for students entering in fall 2023 indicate Pell-eligible students make up 13.2%, compared to 12.0% in fall

2022, 11.2% in fall 2021, and 9.4% in fall 2020. So far, first-generation students make up 10.5% for fall 2023, compared to 9.6% in fall 2022, 8.1% in fall 2021, and 5.7% in fall 2020.

The Mustang Scholars Program offers selected Dallas County students from low-income households a four-year experience with a full tuition and fees scholarship. Students from racially and ethnically underrepresented groups make up 91.7% of the Mustang Scholars.

SMU continues to align its financial aid and scholarship programs with best practices for ensuring that high achieving students can earn an SMU degree regardless of their financial resources. Through merit and need-based aid, these practices support a population of underrepresented students that has been increasing both in number and quality. In 2022–23, SMU awarded $63.3 million in scholarships and grants to these students – a 10.3% increase over 2021–22 and a 93.6% increase over 2015–16.

See 1.2.4, 1.2.5, and 1.3.2 for further discussion of diversity in enrollment.

The figure below shows retention for minority students. With the 2020 and 2021 cohorts, the minority student retention rate trailed the rate for all students (1.2.8), but for each of the five previous cohorts, the minority student retention rate surpassed or matched the overall retention rate.

First- to second-year retention rates, minority students, undergraduate entry cohorts, fall 2008–fall 2021 (%)
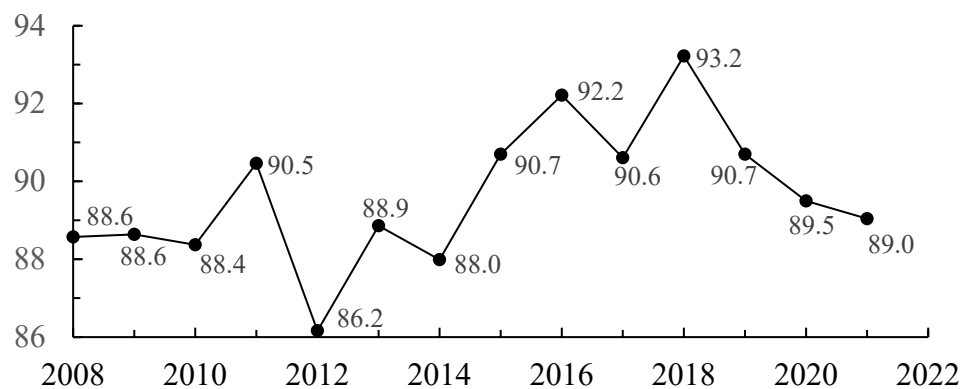
Note: Retention for the 2022 minority entry cohort will be available after the census date of September 6, 2023.

For four- and six-year graduation rates, the most recent minority percentages increased over the rates for the previous cohort but mostly lag the overall percentages (1.2.9) by averages of about three percentage points for four-year and two percentage points for six-year graduation. In the years ahead, provost

office initiatives around student success such as "SMU in Four" will work to close the gap in the minority graduation rate and the overall rate.

Four- and six-year graduation rates, minority students, undergraduate entry cohorts, fall 2008–fall 2018 (%)
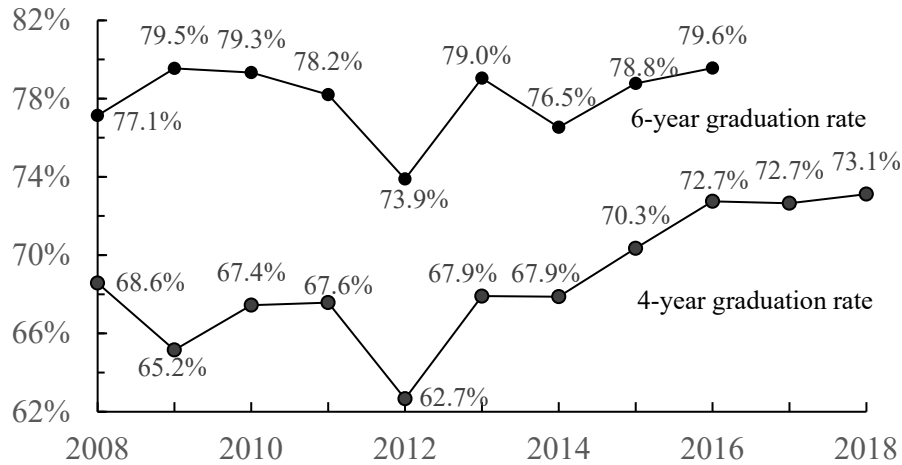
- 1.2.11 Increase applications for graduate admission and improve operational processes by continuing to centralize graduate admission operations in each school to the extent permitted by school accreditors.

In 2023–24, the Moody School will assume oversight of the University's graduate admission process, managing master's and doctoral applications for most schools. A lead generation marketing campaign will seek to increase the number of domestic graduate applications across SMU graduate programs.

The pandemic was not an auspicious time for graduate and professional applications with declines in applications during the pandemic. In 2022–23, overall application numbers have increased over the previous year with Lyle and Cox registering notable increases. International application numbers for graduate school are presented at 5.3.4.

Graduate and professional applications by school, 2022–23

School	2022	2023	School	2022	2023
Cox	1,922	2,294	Meadows	277	282
Dedman College	704	674	Perkins	147	153
Dedman Law	2,445	2,380	Provost / SMU GO	155	138
Guildhall	156	215	Simmons	924	831
Lyle	1,037	1,378	University total	7,767	8,345

Note: Annual figures are for the calendar year. Figures for fall 2023 are as of early August 2023.

Objective 1.3 Improve the effectiveness of the recruitment, admission, and enrollment processes of transfer students and remove unnecessary barriers to transferring academic credits.

- 1.3.1 Increase the annual number of new transfer students to 600 by 2025.

   In 2022–23, 490 transfer students entered SMU, the highest number in the past 13 years as shown by the figure below. Even so, to reach the goal of 600 will require significant gains as indicated by the dotted line. This goal for transfers remains a priority, challenging though its attainment may be.

   New transfer students by academic year, 2011–23
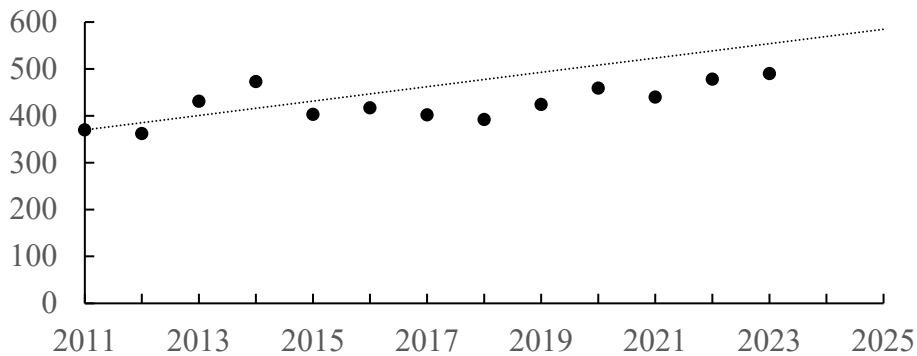
   Note: Year indicates the year ending the academic year. The dotted line indicates the growth needed to achieve the goal of 600 transfers by 2024–25.

- 1.3.2 Enhance recruitment, scholarship support, and retention initiatives for transfer students to increase the racial, ethnic, and socioeconomic diversity of the student body.

  Transfer student initiatives for recruitment and support have helped boost diversity. For fall 2023, preliminary figures as of August 22, 2023, show minority students make up 48.6% of the new transfer students compared to 34.7% for first-year students entering from high school (see 1.2.10). In prior academic years, counting entering transfer students in both fall and spring terms, minority students made up the following percentages of transfer students: 48.2 (2021–22), 43.3 (2020–21), 44.8 (2019–20), 39.3 (2018–19), 38.2 (2017–18), and 37.0 (2016–17).

- 1.3.3 Enhance support for Student Affairs, Residence Life, and faculty to integrate transfer students into the SMU community, strengthening retention of transfer students and timely completion to graduation.

  Multiple efforts were made during 2022–23 to enhance the transfer student experience and integrate transfer students into the SMU community. In 2023, the inaugural January Stampede, incorporating programming tailored for spring transfer students, was held. A transfer and veteran services center has been established to provide support, resources, and guidance for transfer and veteran students. Dedicated transfer student academic advising, workshops, and resources are provided. Monthly Transfer Table lunches are organized to introduce current transfer students to campus support resources and connect them with other transfer students. The Mustang Transfers group has been rechartered to promote a sense of belonging and community among transfer students from diverse backgrounds.

Objective 1.4 Attract and retain a skilled, diverse, and professional staff to support, efficiently and effectively, the academic units as centers of research, teaching, and learning.

- 1.4.1 Continue market-based compensation programs for staff that facilitate competitive talent choices while remaining fiscally responsible.

  SMU continues to be considered a competitive employer in the Dallas-Fort Worth area for staff positions. In 2022–23, over 15,897 applications/resumes were received for posted positions, which resulted in 363 new staff and postdoctoral hires, contrasted with 10,053 applications for 349 new hires the previous year.

As part of the compensation strategy, SMU performs a market review every two years to confirm that salary ranges assigned to job classifications and pay grades are aligned with peer universities and top employers in the Dallas-Fort Worth region. SMU HR will be partnering with Segal, a compensation and benefits consultant, to complete the study. The benchmarking analysis began March 1, 2023, with a goal to complete the study by October 2023. The study could result in salary adjustments for existing staff as well as identify position salaries that might need adjustment to attract and retain top talent.

SMU's comprehensive benefits offering continues to attract and retain staff. Benefit plans continue to be affordable and heavily subsidized by the University. Human Resources completed a benefits benchmark study in 2021 with recommendations in 2022, comparing SMU's benefit offerings with aspirational and cohort peer universities and five major Dallas-Fort Worth employers. The survey found that SMU offers a broad and competitive benefits package. Key areas where SMU's benefits stood out favorably were retirement matching, Emeriti retiree health plan, life insurance policies and tuition benefits. Other areas identified and addressed for enhancement were the Employee Assistance Programs (EAP) and the long-term disability monthly benefit. As a result of the study, several enhancements were made. The 2023–24 Benefits Benchmark study has started with recommendations to be made in 2024.

- 1.4.2 Support awards and processes to recognize high-achieving staff and promote professional development of staff through training and certification.

  SMU continuously promotes a culture of recognition and appreciation for staff through recognition programs and award initiatives. This past year, professional and manager development workshops were offered in-person, hybrid, and in on-demand formats to meet the comfort level of participants. All told, staff completed 834.5 hours of professional development training and 445 hours of manager development training. In addition, 4,885 new and existing employees engaged in 5,595 hours of required on-line trainings in response to University policy and federal and state laws.

- 1.4.3 Reflect the average percentages, as reported by cohort and aspirational institutions, of total diversity among the staff, including in the managerial ranks.

  For 2016–2021, the SMU percentage of total minorities in managerial positions is higher than the averages of SMU's aspirational and cohort peers. The SMU share of total minorities in staff positions also exceeds the aspirational peer average consistently and the cohort peer average except for 2016, 2020, and 2021. Several initiatives now underway at SMU have specific objectives to

enhance minority recruiting as well as retention strategies that create pathways for career advancement for ethnic minorities.

Staff and managerial diversity, SMU compared to aspirational and cohort peer averages, fall 2016–fall 2021 (%)

Minority Staff	2016	2017	2018	2019	2020	2021
SMU	29.2	31.2	31.7	32.2	31.8	33.3
Aspirational peers	26.3	26.5	27.0	27.7	28.7	29.3
Cohort peers	29.6	30.2	31.1	31.9	32.5	33.8
Minority Managers	2016	2017	2018	2019	2020	2021
SMU	27.2	29.4	28.1	28.9	29.0	29.2
Aspirational peers	15.0	16.0	17.0	18.4	19.6	21.0
Cohort peers	20.3	21.0	22.9	22.7	23.7	24.9

Note: Minorities include Asian, Black, Hispanic, two or more races, and others, but not white, nonresident alien, and unknown race or ethnicity. The figures exclude faculty. The latest data available from IPEDS are for fall 2021.

Objective 1.5 Invest strategically in instruction, research, and creative interdisciplinary initiatives where SMU can be a world leader, such as high-performance computing; data science; ethics, leadership, and human development; and innovation, creativity, and entrepreneurship.

- 1.5.1 Leverage the Moody School of Graduate and Advanced Studies to increase the University's research activity and stature through the strategic award of fellowships to support promising faculty research directions and strengthen the University's ranking in the Carnegie Classification of Institutions of Higher Education.

  Under the direction of the new dean, Robin Poston, the Moody School has provided strong support for initiatives to enhance the University's bid for Carnegie R1 status. The Carnegie year of record for its next classification was 2022–23. During this year of record, Moody, Simmons, and Dedman College hired 14 postdoctoral scholars to boost the number of science and engineering postdocs at SMU. Doctoral Completion Grants were awarded to 11 PhD students (ten have already completed their doctorate) to boost the number of PhDs conferred at SMU. For next year, budget commitments include funding to hire postdocs (15 new postdocs will be hired in 2023–24) and to support PhD students for degree completion (15 doctoral students will receive full academic

year support and seven doctoral students will receive summer support in 2023–24).

- 1.5.2 Complete design and construction of Frances Anne Moody Hall to house the Moody School and engage in fundraising to further enhance the $100 million gift from the Moody Foundation.

    With construction of the three-story, 44,222 square-foot Frances Anne Moody Hall complete in May 2023, the Moody School and the Office of Research and Innovation moved into the building in June. The dedication and ribbon cutting ceremony are scheduled for September 15, 2023. Through the *SMU Ignited* campaign in 2022–23, donors made 16 six-figure and 19 seven-figure gifts in support of doctoral programs and graduate student fellowships, contributing to the transformation of graduate education at SMU, spearheaded by the new Moody School.

- 1.5.3 Through the Moody School, provide increased services and support to graduate students and postdoctoral scholars and create a forum for the interaction of faculty, students, and visiting scholars.

    During 2022–23 the Moody School assumed oversight of the postdoctoral hiring process, accelerating the onboarding of postdoctoral scholars and providing additional support and services throughout their employment at SMU. During the year, the Moody School convened PhD mentors to share best practices for supporting students' PhD completion. The Moody School also organized the first SMU Graduate Student Success Day – intended to become an annual event – sharing best practices for faculty who mentor graduate students and postdocs and informing faculty of mentoring resources available to them.

- 1.5.4 Initiate, monitor, evaluate, and fine-tune as necessary the Moody Fellowship Program to attract and support the best and brightest new PhD students.

    Moody Graduate Fellowships attract outstanding applicants to SMU PhD programs, providing up to five years of support at competitive stipends. To keep funding offers competitive amid cost-of-living increases, the Moody School implemented an annual 1.5% increase in stipends for Moody Graduate Fellowships and Moody Dissertation Fellowships to $30,450 per year in 2023. Seven fall 2023 PhD applicants were offered Moody Graduate Fellowships; four accepted. The high yield rate of 57%, like last year's yield rate of 58%, suggests that most of the time, the program is meeting its goal of recruiting outstanding applicants who have competing offers from other established programs. Also, to

increase PhD completion and shorten time-to-degree, the Moody School offers Moody Dissertation Fellowships to support students in the final stages of completing the PhD. Five Moody Dissertation Fellowships were offered in spring 2022. Four completed the PhD in spring 2023; one is expected to complete by fall 2023. Five Moody Dissertation fellows were offered to outstanding PhD students for 2023–24.

- 1.5.5 Recruit faculty where appropriate through interdisciplinary search committees that reflect more than one discipline.

    During 2022–23, the searches for 12 new faculty in the clusters of Data Science and of TEIL (see 1.1.3) were strong examples of interdisciplinary search committees. These search committees were comprised of faculty from as many as three schools and nine different departments.

- 1.5.6 Develop SMU's Data Science Institute (DSI) to coordinate and facilitate interdisciplinary programs in data science, connect with other institutes and centers on campus, and encourage faculty expertise and interdisciplinary research that are based on data science and the use of big data.

    Interim directors have led SMU's Data Science Institute (DSI) since its approval by the provost in 2020. A national search for a director is underway with expectations to appoint the director during the 2023–24 academic year.

    Academic reorganization has served to advance data science at SMU. The new Department of Statistics and Data Science (SDS) draws on faculty in Cox, Dedman College, and Lyle. SDS constitutes the culmination of a multi-year effort to provide cohesiveness and coherency to SMU's different data science curricula and to facilitate faculty researchers from across the University to participate more fully in data science. The department will take responsibility for the majors and minors in statistical science and in data science, the MS in applied statistics and data analytics, the MS in data science, and three PhD programs: biostatistics, data science, and statistical science. The first cohort of data science graduate students is expected in fall 2024.

    In 2022–23 the provost, together with the deans of Cox, Dedman College, Lyle, and Simmons, launched a data science cluster hire. This followed two previous cluster hires which involved data science as well (see 1.1.3).

    SMU DataArts, an arts research center within the Meadows School, brings advanced analytical techniques and data science into arts management. SMU DataArts has created one of the nation's largest and unique arts and cultural data sets by integration of data collected through a proprietary survey instrument (the

Cultural Data Profile) with commercial and governmental data. In 2022–23, SMU DataArts published 11 research reports and blogs and gave more than 50 conference presentations and educational trainings, reaching over 1,100 attendees. Over the past year, SMU DataArts completed an evaluation for the Ford Foundation and is continuing another multi-year analysis regarding Ford's arts funding programs. SMU DataArts also worked with Bloomberg Associates to analyze the impact of COVID-19 stimulus funding for the arts, and has been awarded a grant from the National Endowment for the Arts to examine workforce diversity, equity, and inclusion (DEI) and explicate how each component of DEI impacts employee, board member, and organizational outcomes. SMU DataArts' strategic effort reflects SMU's historical commitment to the arts and an emphasis on data science and R1 research activity (see 3.2.1).

- 1.5.7 Strengthen programming linkages for students and faculty in partnership with the George W. Bush Presidential Center.

Continuing a program established in spring 2022, the Office of the Provost and the George W. Bush Institute partnered to award three more postdoctoral fellowships for 2023–24. These postdoctoral fellowships encourage collaborative research between SMU and the Institute and increase the number of postdocs at SMU. All SMU tenured and tenure-track faculty are eligible to submit proposals with preference given to proposals from assistant professors. Proposals must both advance SMU strategic research objectives and address topics that are central to the research focus of the Institute.

The Albert W. Niemi Center for Economic Growth and Leadership Development in the Cox School provides research fellowships to SMU students with placements at the Bush Institute. Up to 10 students a semester work in various initiatives at the Institute, with students from different disciplines across campus.

The Bush Institute-SMU Economic Growth Initiative increased last year to support four Bush PhD Fellows in SMU's Economics Department. The Department of Economics credits this initiative with contributing to more PhD applications and higher quality applicants.

The Presidential Leadership Scholars program (PLS) is a joint undertaking of the presidential centers of George W. Bush, Bill Clinton, and George H.W. Bush. The PLS selects a diverse group of mid-career professionals to hone their leadership abilities through interactions with former presidents, key administration officials, leading academics, and business and civic leaders.

CORE in the Simmons School is continuing a multi-year partnership with the PLS that provides formative and summative evaluation and thought partnership to program leaders. The PLS is now admitting its 9th cohort, and CORE plans to serve as the external evaluator for cohorts 9 and 10.

Objective 1.6 Strengthen the Meadows Museum and University library system by expanding collections, enhancing the digital research infrastructure, and engaging with the undergraduate curriculum.

- 1.6.1 Carry out the strategic vision for libraries to support SMU as a global research university with a liberal arts tradition.

  The SMU Libraries continue to focus on key objectives of strengthening student learning, accelerating research activities, and preserving cultural heritage resources as set forth in the SMU Libraries Strategic Plan, 2019–2024. Among the notable successes during 2022–23 was activating cultural heritage and engaging audiences by curating or hosting ten exhibits, including Bridwell Library & Sotheby's "The Codex Sassoon," the world's oldest, most complete Hebrew Bible which attracted over four thousand visitors.

- 1.6.2 Expand the information environment by increasing library holdings to support scholarly research and teaching at the highest level.

  A major gift from Jan and Trevor D. Rees-Jones '78 will strengthen the University's standing as a vital place for education and research on the American West. At the center of the couple's gift is a significant portion of the expansive Rees-Jones Collection of thousands of items – including rare books, manuscripts, maps, photographs, and ephemera. The donors have also committed $25 million to establish and build the Rees-Jones Library of the American West and a $5 million endowment to support the library and its staffing.

  SMU Libraries has also made notable progress augmenting its collections. An increase in the general collections budget and allocation of one-time funds allowed SMU Libraries to acquire resources requested by faculty. Since 2019, increases from OE2C savings totaling over $1 million to the SMU Libraries Collections budget have boosted the library's acquisitions.

- 1.6.3 Position librarians as active participants in the creative research process, including, but not limited to, digitization for primary resources, information retrieval, and curation of big data.

  Adding SMU Digital Collections to the Digital Public Library of America (DPLA) extends the reach of these collections and offers researchers access to

the unique materials they contain. The move to DPLA is part of an ongoing commitment that all patrons, including researchers, can access library resources.

SMU Libraries has enhanced its commitment to robust data sharing and storage by becoming a member of the Texas Data Repository. This step significantly amplifies the visibility and accessibility of research data generated at SMU. It not only ensures data preservation but also fosters collaboration and data reusability, enhancing the overall quality and impact of research.

The SMU Libraries Norwick Center for Digital Solutions continues to digitize and make primary resources accessible to the global community of researchers. As a result, the SMU Digital Collections grew 6% during 2022–23. Over the same period, page views of SMU Libraries Digital Collections increased by 8%.

- 1.6.4 Measure progress on the criteria for ranking among the top 100 academic libraries in North America.

Comparing SMU Libraries to members of the Association of Research Libraries (ARL) provides a sense of the ranking of SMU with the top 100 academic libraries. The ARL is a nonprofit coalition of 124 leading research libraries in the U.S. and Canada, mostly in major universities. The most recent data (February 2023) from ARL is based on fiscal year 2021, so SMU Libraries data from 2021 is used for comparison.

SMU Libraries ranks just above 100 based on staff FTE; 94 in total staff expenditures; 82 in total collection materials expenditures; and 101 in total expenditures. Since 2021 SMU's staff FTE has declined, and materials spending has increased, thanks to annually recurring central administrative support.

- 1.6.5 Present exhibitions to attract robust numbers of museum visitors, including students, and increase the number of courses taking advantage of museum holdings.

Post-pandemic, audiences continued to return to the Meadows Museum, resulting in the largest attendance in three years. Special exhibitions organized by the Meadows Museum complement and expand upon the strengths of the Museum's permanent collection of Spanish art. Each exhibition was accompanied by public lectures and a catalogue. *Dali/Vermeer: A Dialogue* (October 16, 2022–January 15, 2023) united Johannes Vermeer's *Woman in Blue Reading a Letter* (c. 1663) and Salvador Dalí's interpretation thereof, *The Image Disappears* (1938), for the first time. Through an examination of prints and drawings of female biblical figures, saints, and monastics, *Picturing Holy Women in the Spanish Empire* (September 18, 2022–January 15, 2023)

examined the question of how women both upheld and challenged the exemplary model of female sanctity predominant in Spain and the Americas during the early modern period. *Masterpiece in Residence: Velázquez's King Phillip IV of Spain from The Frick Collection* (September 18, 2022–January 15, 2023) continued the Masterpiece-in-Residence loan program, which features an exemplary work of Spanish art from an American collection. The project continued with *King Philip IV of Spain* (1644) by Diego Rodríguez de Silva y Velázquez (1599–1660), on loan from The Frick Collection in New York, the painting's first visit to the Meadows and to the state of Texas. *In the Shadow of Dictatorship: Creating the Museum of Spanish Abstract Art* (February 26–July 30, 2023) featured more than forty works from the remarkable collection of the Museo de Arte Abstracto Español in Cuenca (Castilla-La Mancha).

Construction is underway for the Custard Institute for Spanish Art and Culture (CISAC) at the Meadows Museum. The CISAC will expand the museum's current research and educational programs and increase the museum's interdisciplinary collaborations with peer institutions as well as by facilitating, alongside SMU's archives and libraries, new ways of teaching and learning. Funding for CISAC was made possible in 2021 when Linda P. and William A. Custard committed $3 million, matched by $3 million from The Meadows Foundation, to establish the new cultural institute in the Meadows Museum.

Objective 1.7 Continue to develop distinctive educational opportunities for the SMU-in-Taos campus.

- 1.7.1 Implement recommendations of the 2020 master plan for SMU-in-Taos.

    The 2020 master plan for SMU-in-Taos updates the master plan created in 2008. Planning for implementation of the 2020 master plan was underway when the pandemic occurred. The COVID-19 pandemic led to the closure and shuttering of the Taos campus for two years and the furlough of all New Mexico staff. Reopening required a restructuring of personnel and business operations, with the "soft reopening" of the campus in the January 2022 term. Revisiting and re-costing the 2020 master plan has been undertaken in collaboration with SMU Facilities Planning and Management. The success of the Taos campus remains an important strategic priority for the University. Components of the master plan remain priorities for implementation and fundraising, and this process is moving forward. Yet lasting changes and the timeline for recovery from the pandemic require reevaluation of strategies for the campus. A task force was initiated and charged in 2023 to carry out this reevaluation and make recommendations.

- 1.7.2 Develop or maintain near-capacity enrollments at SMU-in-Taos for January, May, June, and August terms and connect with other universities to expand year-round educational usage of the campus.

In-person courses at the SMU-in-Taos campus resumed in January of 2022. Enrollment continues to lag pre-pandemic levels. Suspending the Taos campus for two years lost the most effective marketing: "word of mouth" from student peers recommending the Taos experience. Yet despite cancelling the August 2022 term due to too few students, January, June, and May enrollments totaled 77, slightly higher than the previous year.

Expanding educational usage of campus by making the campus available to other universities remains an objective. However, these institutions have also seen participation returning slowly and struggle with rising costs and limited resources. As with SMU students and Taos, it will take time to rebuild this aspect of campus activity.

- 1.7.3 Increase collaboration and partnerships between SMU-in-Taos and the surrounding community.

As New Mexico communities have emerged slowly from pandemic mitigation measures, potential partners have been fewer. Some specific Taos course-based activities continue to engage students with the local community, and efforts have focused first on SMU student program recovery. As campus operations continue to normalize, previous activities, such as the colloquium series, will come back under consideration in the coming academic year (2023–24).

GOAL TWO: TO IMPROVE TEACHING AND LEARNING

For a university to be well-regarded by its wide range of stakeholders, an embedded value of the institution must be a deep commitment to its mission of teaching and learning. This commitment occurs through formal processes such as program review, teaching evaluation, and assistance in the learning and practice of technology-supported pedagogical advances. It also occurs through faculty being actively involved with students in and out of the classroom, laboratory, and studio, as well as through service activities within the community.

GOAL TWO OBJECTIVES

Objective 2.1 Enhance teaching and learning through innovative curricula and pedagogies that lead to critical and creative thinking and problem solving, informed by research and the use of advanced technologies.

- 2.1.1 Gauge the effectiveness of the peer review of teaching offered by the Center for Teaching Excellence (CTE).

  CTE has pivoted from providing a leadership role of supporting remote teaching by SMU's faculty during the pandemic to its current mission of serving as a catalyst for the growth of a university culture that values, supports, and rewards effective student-centered teaching. The recently created five-year strategic plan targets data gathering and assessment essential for gauging the effectiveness of CTE programs.

- 2.1.2 Increase the annual percentage of faculty using the CTE to 33%.

  Faculty engaging with CTE in 2022–23 were 23% of the instructional faculty, an eight-percentage point rise over the prior year. More programs, workshops and services caused the increase. More programs and thus greater faculty usage are planned for 2023–24. During the pandemic, CTE met the goal of 33% faculty usage, with almost 48% in 2020–21 and 40% in 2019–20, record levels reached thanks to faculty in training courses for online teaching.

- 2.1.3 Evaluate the quality of online teaching and make recommendations for the continued improvement of online teaching.

  The provost formalized training requirements for online and hybrid faculty in February 2022 such that only faculty certified to teach online may develop or teach a course in the online or hybrid modality. To gain certification, faculty complete training delivered in conjunction with Quality Matters (QM)

Consortium. As of summer 2022, over 640 SMU faculty have been certified to teach online and hybrid courses.

- 2.1.4 Expand faculty training for alternative course delivery methods, including, where appropriate, online and hybrid approaches in order to foster curricular innovation.

CTE's annual Teaching Effectiveness Symposium each August showcases creative and engaging teaching practices of SMU's faculty. Preliminary indications are that the 2023 attendance will match 2022's turnout of 137 faculty. In 2021, during the pandemic, attendance fell to 107. To encourage innovative teaching, CTE awarded Just-in-Time Teaching and Technology grants to faculty in 2022–23 to promote teaching improvements such as the use of virtual reality, digital design, and active learning techniques.

- 2.1.5 Manage degree pathways and course offerings, including intersession, for timely degree completion as measured by four- and six-year graduation rates.

The Common Curriculum, SMU's general education program, was designed in part to remove obstacles to timely graduation. Also, Student Academic Engagement and Success in the Office of the Provost and Student Academic Success Programs in Student Affairs, monitor wide-ranging issues affecting timely graduation and recommend actions to address concerns, such as steps to increase intersession access for graduating students. Four- and six-year graduation rates are discussed at 1.2.9, 1.2.10, and 5.3.5.

- 2.1.6 Expand online courses during intersession to reach non-SMU students.

During 2020–21 intersessions, 14% of the students enrolled in 31 online class sections were non-SMU students, a marked increase over the 3% from the year before. Yet this slipped to less than 1% for the 38 online class sections in 2022–23. This count excludes class sections that were not customarily online but had moved online because of the pandemic.

Objective 2.2 Design, implement, and evaluate interdisciplinary programs, combining fields generally considered distinct, to reflect the interdisciplinarity of the world today.

The PhD in data science, a collaboration among Cox, Dedman, and Lyle faculty, has been approved and will begin enrolling students in fall 2023.

The Cox School has launched the BBA major in business analytics and supply-chain management, which combines with the second major in data science.

Lyle is in early-stage discussions to launch a new graduate program in quantum information engineering, striving for a fall 2024 launch. Lyle is also creating or revising several MS programs including graduate certificates in areas such as manufacturing, robotics, energy, and sustainability with a new artificial intelligence, engineering-based approach.

Approved in 2022–23, Dedman Law and the Cox School created a business law concentration in the JD program.

The Earth Hazards and National Security Cluster began last year with four recent faculty hires. More than a dozen other faculty took part. Cluster members, taking advantage of inter-departmental research and teaching interactions, focused on collaborative grant proposals, improvements in teaching, and curricular innovation.

- 2.2.1 Encourage students to take multiple majors and minors that span disciplines rather than "double-down" in an area, increasing the percentage of students completing interdisciplinary programs.

Research has shown the benefit of programs that stretch students across different disciplinary perspectives. A second major or minor that offers undergraduates a different viewpoint helps accomplish this. Of SMU undergraduates graduating in 2014–15 and later, 23%–27% had two or more majors, peaking in 2021–22. Of those with only one major, many earned one or more minors, and such students made up 35%–42% of all undergraduates earning degrees each year. If we combine both groups, in the last nine academic years, 58%–68% of undergraduates with degrees had two or more credentials, again peaking in 2022.

If we ask how many SMU graduates took majors and minors that spanned disciplines, we find a noticeable increase over the past nine years. Grouping the disciplines into humanities, social sciences, and natural sciences by adding performing arts (Meadows) to the humanities; Lyle majors and minors to natural sciences; and Cox, Simmons, and other Meadows disciplines (communications, advertising, journalism) to the social sciences reveals how many students spanned these disciplines in their choice of majors and minors. How many students majored or minored in one grouping (humanities, social sciences, or natural sciences) but also majored or minored in at least one other grouping? In 2014–15, the percentage was 26, rising steadily each year to 27, 29, 30, 31, 33, 37, and 37 in 2021–22 before dipping to 32. Still, in the last ten years, the share of undergraduates taking an interdisciplinary approach has grown from a quarter to one-third.

- 2.2.2 Complete the integration of SMU Guildhall into Lyle School of Engineering and Meadows School of the Arts and promote connections of Guildhall with other academic units.

  With Guildhall's relocation to the main campus, collaboration with Guildhall has become more extensive. For example, three research projects on which Simmons faculty have teamed up with Guildhall faculty involve seeing the world through a mathematical lens, adult literacy game-based learning, and integrating human computer interaction, machine learning, game design, and educational assessment. Planning to promote Guildhall's connections with academic units has been broadened with a goal of expanding research grant activity and expenditures. See also 3.2.4.

Objective 2.3 Review programs to ensure excellence and alignment with the University's strategic objectives, discontinuing programs where appropriate while accommodating new educational ventures.

- 2.3.1 Report annually on internal and external departmental reviews.

  The University Senate of the United Methodist Church conducted its decennial review of SMU and the Perkins School of Theology in 2022–23. Following a review of a report from the Perkins School, university records, and an on-campus site visit conducted by external reviewers, SMU received a positive review, with commendation for the excellence of its academic programming, and continued listing as a UMC-related university and school of theology. As a result, SMU and the UMC Senate mutually reaffirmed the historical relationship between the institution and the United Methodist Church.

  The Provost's Office carried out external reviews on three academic programs in 2022–23: International Studies, the Freshman Academic Writing and Critical Reasoning program, and Religious Studies.

- 2.3.2 Report annually on new educational programs and discontinued programs in light of the University's strategic priorities.

  In 2021–22, the Academic Affairs Committee of the Board of Trustees approved 14 changes to academic programs, including one department name change and the creation of a new department, Statistics and Data Science. For academic programs, four undergraduate and six graduate were changed significantly, requiring committee approval. One undergraduate and another graduate program were discontinued, requiring committee approval. The committee was informed of 14 additional changes.

Objective 2.4 Engage the community for lifelong learning through professional training and continuing education.

- 2.4.1 Review best practices in continuing education, examine market studies for continuing education in North Texas, and enhance SMU's academic mission through continuing education offerings that resemble the rewarding robustness found in our aspirational peer institutions.

  SMU's online offerings have matured in recent years. Examples include the online MBA and MBA Direct programs in Cox which combined to finish the 2022 academic year with 557 enrollments, rising to 590 in 2022–23. Three computer science MS degree programs in Lyle enrolled 111 in the 2021–22 academic year, increasing to 167 enrollments in 2022–23. The online Master of Science in data science finished 2021–22 with 255 enrollments decreasing to 198 in 2022–23. The new Data Science Department will seek to reverse that decline. Despite an increasingly competitive online degrees market, stakeholders across the University will be working to improve these online enrollments and develop additional programs market research recommends in 2023–24.

- 2.4.2 Develop new continuing education offerings, including innovative professional master's degrees and certificate programs, to serve alumni as well as new populations of learners.

  SMU's schools are working to develop new degree programs and alternative credentials. The Cox School launched 18 graduate certificates and received approval to launch the MS in real estate in fall 2024. Also, Cox launched Cox Edge, a program that offers graduate students flexibility to enroll in both in-person and online classes: Online MBA students take most courses online but may take up to seven elective courses in person; full-time two-year MBA students take most courses in person but may take up to 12 electives online.

  Dedman Law has committed to create an online Master of Legal Studies with the goal of launching the program in fall 2024 or spring 2025.

  Five new Lyle graduate certificate programs, starting in fall 2023, are "stackable" and can be combined for a master's degree. Also, the Lyle Operations Research and Engineering Management Department is working with leading professional societies to create industry-desired certificate training programs.

  In 2022–23, Meadows has been approved for a fully online MA in creative technology that will begin offering courses in fall 2023. Corporate Communication and Public Affairs in Meadows began to develop online courses

and stackable certificates for graduate degree programs in arts, nonprofit leadership, and museum management. Also, online courseware development has begun to allow students to complete the established joint Master of Arts/Master of Business Administration (MA/MBA) in a completely online or hybrid format.

Simmons' MS in counseling began work to deliver curriculum online with implementation planned for 2024–25. Additionally, Simmons developed online courses to offer in 2023–24 for both a Science of Teaching Reading program and a diagnostician program.

Objective 2.5 Increase involvement of students in internships and practical, field-based experiential learning on campus (including SMU-in-Taos), in the local community, and around the world.

- 2.5.1 Foster programs that use Dallas, SMU-in-Taos, the nation, and the world as a laboratory and a classroom.

In 2022–23 the Office of Engaged Learning (OEL) promoted undergraduate entrepreneurship through pitch competitions, funding, mentoring, and start-up incubation. Through the E-Launch program, the Office of Engaged Learning provided education, mentorship, and funding to new start-ups founded by SMU undergraduate and graduate students, faculty, and staff. The Big iDeas program awarded $35,000 to a total of 18 undergraduate entrepreneurs.

In 2022–23, Engaged Learning Fellowships supported a total of eighteen creative initiatives and 21 research projects. Fifty-four percent of these students were non-white, 74% were female, 5% were first-generation college students, and 13% qualified for Pell grants.

Now in its eleventh year, Dedman Law's corporate counsel externship program, combining a corporate counsel course with externships in corporate legal departments, serves as a national model. Launched in fall 2013 with 30 students, enrollment was 53 students in 2016, 70 in 2017, 90 in 2018, and 86 in 2019. Due to the pandemic, the 2020 program was moved to spring 2021, with 92 JD and international LLM students participating. In the 2021–22 and 2022–23 academic years, 82 and 122 students, respectively, participated in remote, hybrid, and in-person placements.

Dedman Law's externship programs enable students to engage in experiential learning while working in government and public interest agencies, federal judicial clerkships, corporate counsel offices, and small firms. In all, 219 students participated in externships in 2022–23, a significant increase from the 99 students in 2021–22, which was down largely due to the pandemic, but also

substantially greater than the 122 students in 2020–21. Summer internships have increased, with placements at 93% for first-year students and 96% for second-year students, respectively.

- 2.5.2 Increase the number of students engaged in internship programs.

    Some virtual internships were possible during the pandemic, but internship opportunities were fewer. Consequently, among the undergraduates graduating in 2022–23, only 22.3% had internships during their undergraduate years, slightly below the 25.8% from 2021–22. Recovery from the pandemic should mean a return to more typical levels when about one-third of SMU undergraduates graduating had internships: 27.2% (2020–21), 30.2% (2019–20), 34.3% (2018–19), 32.6% (2017–18), 34.7% (2016–17), and 36.5% (2015–16).

    Engage Dallas, a residential commons programming initiative, addresses community needs of South and West Dallas. For the third year, the Hegi Center, in partnership with Engage Dallas and partly in response to the Black Unity Forum, offered Diversity, Equity, and Inclusion internships as well as unpaid internships with local business and non-profit organizations. Through this program, the Hegi Center offered and supported 37 summer internship opportunities, 19 more than in the previous summer. Also, 14 students applied for SMU Board Fellows positions, and seven were placed on non-profit boards. Nine interns were funded to serve with eight different Engage Dallas community partners.

    The number of Perkins students engaged in internship programs has fluctuated with enrollment: 48 in 2022–23, 57 in 2021–22, and 51 in 2020–21.

Objective 2.6 Enhance the exposure of students to ethical thinking and behavior at the undergraduate and graduate levels.

- 2.6.1 Increase the number of courses fulfilling the Common Curriculum ethics requirement.

    The new Common Curriculum (CC) started in fall 2020 with 17 courses that satisfied the Civics and Individual Ethics requirement. By 2022–23, the net number of courses approved had more than doubled to 36.

- 2.6.2 Leverage the Maguire Center to help faculty incorporate more ethics as content in courses.

    The Cary M. Maguire Center for Ethics and Public Responsibility continued to support faculty in ethics education and the inclusion of ethical content in courses by organizing lectures, symposia, and events in which leading scholars analyzed

pressing ethical challenges. This year's opportunities included the 37th Maguire Public Scholar Lecture on museum neutrality, an author lecture pertinent to a Dedman College Interdisciplinary Institute research cluster on Healthcare and Human Flourishing, and a symposium on the Pursuit of Life: How Literature Enhances Healthcare.

- 2.6.3 Implement required training in Responsible Conduct of Research for all PhD students.

Responsible Conduct of Research (RCR) training is required for all PhD students who are listed on federally funded grants or projects. SMU offers ongoing comprehensive online RCR training through the nationally recognized Collaborative Institutional Training Initiative (CITI) Program that is used throughout higher education. The Office of Research Compliance works closely with the Office of Sponsored Projects and Contracts to ensure this federal requirement is completed. To supplement the online RCR training, an in-person training program is being developed for doctoral students and postdocs, with a projected implementation date of spring 2024.

GOAL THREE: TO STRENGTHEN SCHOLARLY RESEARCH, CREATIVE ACHIEVEMENT, AND OPPORTUNITIES FOR INNOVATION

The mission of distinguished universities includes both sharing and creating knowledge. To enhance its standing among peer institutions, SMU must increase its support of basic and applied research, scholarship, and creative achievement through more interdisciplinary projects and the support of high-performance computing.

GOAL THREE OBJECTIVES

Objective 3.1 Encourage widespread development of campuswide interdisciplinary research projects.

Dedman College Interdisciplinary Institute (DCII) brings faculty from different disciplines and schools together for discussion and debate, resulting in new interdisciplinary material for teaching and research. Research clusters cover topics spanning the humanities, social sciences, sciences, and professions. DCII sponsored 29 research clusters in 2022–23, surpassing the 22 clusters from 2021–22, the previous largest cohort. Cluster topics have included wide-ranging topics such as Asian studies and Asian American experience; cognitive science; culture, mind, and brain; and earth hazards and national security.

- 3.1.1 Review and act on recommendations of the task force on scholarly research and creative impact.

  Recommendations of the task force on scholarly research and creative impact have led to establishment of the Moody School of Graduate and Advanced Studies (see 1.5.3) and created a separate Office of Research and Innovation. That has been accomplished. Other recommendations are underway and ongoing: cluster hires in critical research areas, seed grants supporting interdisciplinary research, and increased funding for equipment and research infrastructure.

- 3.1.2 Develop a policy to enhance the effectiveness of centers and institutes in research, particularly interdisciplinary work.

  The Provost's office and a faculty working group are benchmarking SMU's policies on centers and institutes against policies of leading research universities to develop qualitative and quantitative metrics to assess research at the centers and institutes. Two important foci are research expenditures accounted for by the institutes and centers which is key to the NSF HERD reporting for Carnegie

R1 (see 3.2.1) and research area utilization which is essential to the F&A rate calculations (see 3.2.3).

- 3.1.3 Increase internal and external support for interdisciplinary research that positions SMU as a world leader in addressing global challenges.

The Office of Research and Innovation has been working with faculty to pursue opportunities to increase support for interdisciplinary research. These initiatives include: 1) targeting large inter-disciplinary funding from federal agencies such as the National Science Foundation and the Economic Development Agency; 2) securing earmark funding through congressional appropriation; 3) building infrastructure to facilitate bids for classified research; and 4) partnerships such as Pegasus Park to broaden faculty collaboration with UT-Southwestern, University of North Texas Health Sciences and the biotech industry.

Faculty submitted 297 proposals for a record $207.1 million. Expendable research funding from external grants for the 2022–23 fiscal year stands at $30.6 million, with 79% in federal funding, 3% in state and local government funding, and 18% in corporate and foundation funding. The $30.6 million figure is 30% higher than the research expenditures from external sources reported for the 2021–22 year.

SMU received the facility security clearance (FCL) designation for the Sensitive Compartmented Information Facility (SCIF) at the Bush Presidential Center. Several SMU research groups are in the process of bidding for classified research projects.

- 3.1.4 Initiate and evaluate seed grant programs for enhancing research.

For fiscal years 2024 and 2025, $5 million has been earmarked by the Provost's office for seed grants supporting interdisciplinary research.

The Dedman College Dean's Research Council was created in 2010–11 to award competitive seed funding for faculty research capable of attracting external funding. This program has traditionally returned $11 in grant and foundation funding for every dollar spent. That strong result continued in 2022–23 with a ratio of $11.96 to $1, compared to the return in 2021–22 of $11.60, $11.37 in 2020–21, and $10.92 in 2019–20. During 2022–23, the Council awarded an unprecedented $150,000 for research in areas such as identifying Central Africa's first farmers, topology-based tumor analysis for medical images, and feeding the world in the 21st century.

Objective 3.2 Improve infrastructure and administrative support for faculty applying for external funding to enable expanded collaborative research with corporations, foundations, governments, and educational institutions.

- 3.2.1 Increase annual research expenditures to $60 million by 2025.

  For the 2021–22 fiscal year, SMU reported a record $57.5 million in research expenditures, nearing the $60 million goal set for 2025. Such increases in research expenditures at SMU are essential to advancing toward R1 status in the Carnegie classification of research universities. The graph depicts SMU's research expenditures reported each year to the National Science Foundation for the Higher Education Research and Development (HERD) report. The 2022 record figure returns SMU to the growth line needed to attain the $60 million goal in research expenditures by 2025.

  Research expenditures, 1999–2022 (millions of dollars)
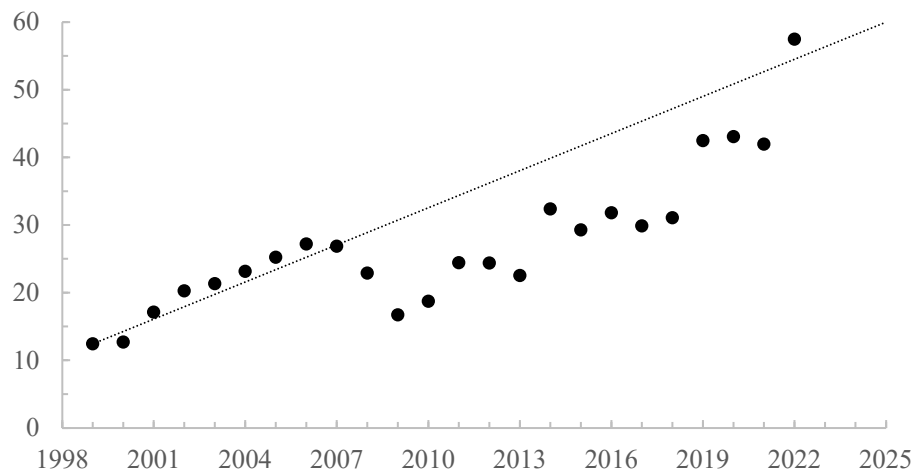
  Note: Research expenditures in millions of dollars by fiscal year. The dotted "goal line" indicates the growth needed to attain $60 million in 2025.

- 3.2.2 Increase restricted and unrestricted funding for instrumentation, maintenance, and upgraded labs.

  In 2022–23, $305,755 was spent on lab maintenance, renovations, and construction throughout the campus. Over the next three fiscal years, $4 million has been earmarked for spending on equipment and infrastructure.

- 3.2.3 Revise the overhead recovery model of the University so that the support for research infrastructure increases with the growth of research grants.

  The most recent facilities and administrative (F&A) proposal for indirect costs (overhead) was completed and submitted in 2018–19. This raised the rate to

36

48.5% from the prior 45.5%. SMU is in the process of submitting a new F&A proposal to raise again the rate because of the increase in SMU's institutional investments for research such as research fellowships, establishment of the Moody School for Graduate and Advanced Studies, and major investments in high performance computing. In 2022–23, F&A overhead costs recovery provided $5.93 million to the University's operating budget.

- 3.2.4 Strengthen partnerships and collaborative development and research programs with other universities and external businesses and organizations.

In 2022–23, SMU's Corporate and Foundation Relations office completed 71 proposals to corporate and foundation entities in support of faculty and staff initiatives. Eight proposals were for $1 million or more, 19 proposals ranged between $100,000 and $1,000,000. The University received philanthropic support of $39,721,366 in foundation funding and $3,221,241 in corporate funding for current operations and capital projects. In prior years, comparable figures were, respectively, $25,857,760 and $4,117,330 for 2021–22; $33,409,577 and $2,462,525 for 2020–21; and $37,791,000 and $3,414,000 for 2019–20.

SMU Guildhall continues to lead and participate in research across academic units that engages other universities and external organizations. This research is in diverse fields that reach beyond mere entertainment to tackle some of the most difficult challenges today: human trafficking, science and math primary education, adult literacy, understanding how governance can affect pandemics, and how best to provide virtual reality training to police to de-escalate violence.

Objective 3.3 Ensure the capability of high-performance computing to support research computing and utilize it as a basis for faculty recruitment and research investment.

- 3.3.1 Construct metrics for software and hardware for use in helping to keep SMU competitive in high-performance computing.

Data science and advanced computing are important components of SMU's push for R1 status. During summer 2022, the NVIDIA DGX "SuperPOD" was fully launched and made available for research use in artificial intelligence and machine learning. During spring 2023, M3 (ManeFrame 3), SMU's next generation supercomputer, was acquired, brought online, and made available for research work. The SuperPOD and M3 are strong steps to keep SMU competitive in high-performance computing.

SMU was the second of only three universities in the nation with a DGX SuperPOD. In large part due to the SuperPOD, SMU's advanced computing has been boosted dramatically to perform 100 quadrillion operations per second, speeds 25 times faster than previous levels, and increasing SMU's current supercomputer memory tenfold. The following table sets forth specifications for SMU's growth in super computing.

SMU's high-performance computing growth, 2014–2023

	ManeFrame (M)				*NVIDIA SuperPOD, 2022*	*SuperPOD and M3*
	M1, 2014	M2, 2017	M2, 2019	M3, 2022		
Computational ability (teraflops)	104	630	870	1,004	1,644	2,648
Number of nodes	1,104	349	354	200	20	220
CPU cores	8,832	11,088	11,276	25,600	2,560	28,160
Total accelerator cores	0	132,608	275,968	0	1,392,640	1,392,640
Total memory (terabytes)	29	117	120	112	53	165
Node interconnect bandwidth (gigabits / second)	20	100	100	200	200	200
Work storage (petabytes)	None	None	0.768 (Shared)	3.0	0.768 (Shared)	3.768
Scratch space (petabytes)	1.4	1.4	2.8	5.0	0.8	5.8
Operating System	Scientific Linux 6	CentOS 7	CentOS 7	Ubuntu / Rocky	Ubuntu	Ubuntu / Rocky

Note: Definitions are as follows: teraflop: a unit of computing speed equal to one trillion floating point operations. Definitions of units of digital data: petabyte: 1,024 terabytes; terabyte: 1,024 gigabytes; gigabyte: about one billion bytes.

- 3.3.2 Strengthen faculty involvement in high-performance computing through collaboration among the Office of Information Technology, the Data Science Institute, and the Center for Research Computing.

Efforts to strengthen faculty engagement with high-performance computing have paid off: users of ManeFrame II (M2), defined as those who submitted at least one job, more than tripled from 2018–19 to 2022–23, rising strongly each

year from 146 users in 2018–19 to 305, 372, 464, then 484 in 2022–23. Users submitted 4.7 million jobs in 2019–20, more than 11 million in 2021–22, and 14.5 million in 2022–23. The supercomputer has also been an invaluable teaching tool for courses in machine learning and data science as well as a standard compute environment for accelerating workflows in digital history, engineering design, and research workshops.

Objective 3.4 Increase financial support of doctoral programs and graduate student fellowships to encourage research and creative achievement.

- 3.4.1 Improve graduate fellowship support in selected core areas to comparable averages (in amount and duration) of aspirational institutions.

  As previously noted (see 1.5.4), an annual increase in stipends for the Moody Graduate Fellowships and Moody Dissertation Fellowships was implemented in 2022–23. In 2023–24, a Provost's Faculty Fellow will research best practices of our graduate competitors, analyzing graduate stipends, teaching assistantships, and such to continue benchmarking graduate support at SMU.

- 3.4.2 Increase the annual number of PhDs awarded to 80 by 2025, while increasing completion rate and reducing the time to completion.

  This goal was met with 90 PhDs awarded during fiscal year 2023, well above the goal of 80. By contrast, during fiscal year 2022, 79 PhDs were awarded, down from 82 in fiscal year 2021. Sustaining the increased number of PhDs graduates at SMU is essential to advancing toward R1 status in the Carnegie classification of research universities.

PhDs awarded, by fiscal year, 2006–23
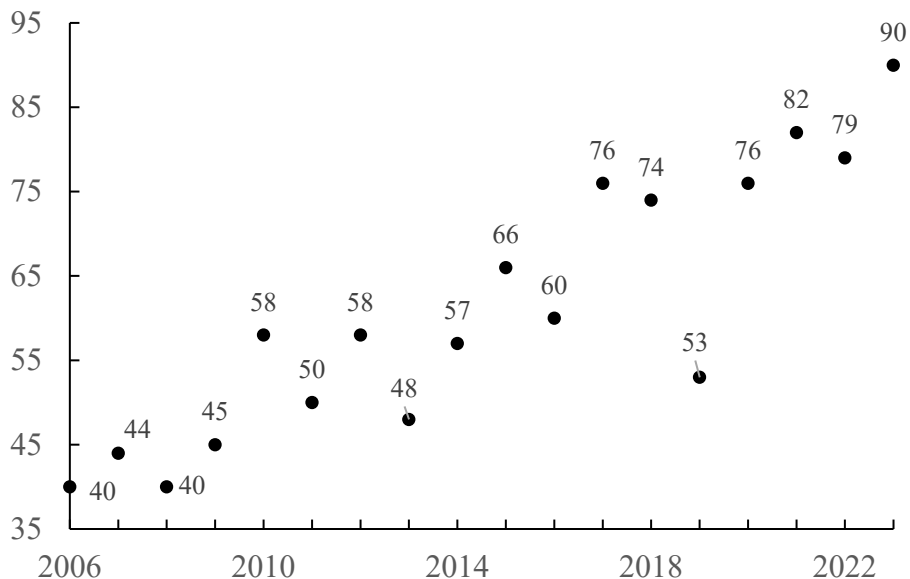
- 3.4.3 Increase the six-year completion rate for PhD degrees.

The six-year completion rate for PhD degrees was 55.1% with the 2017 entry cohort, remaining above 50% for five of the past six years.

Six-year PhD completion rate, 2007–17 entering cohorts (%)
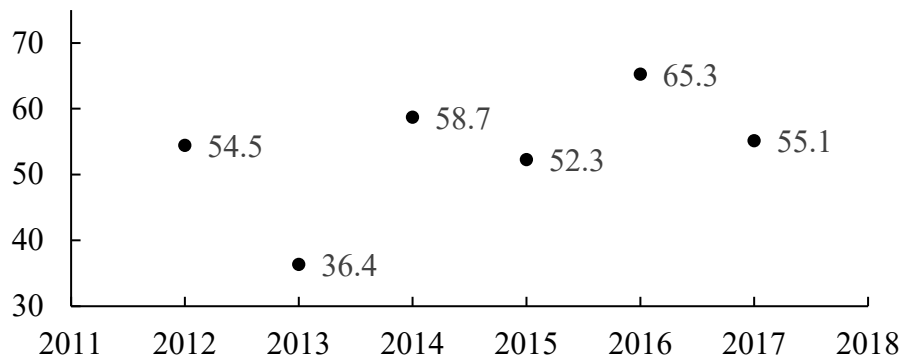
- 3.4.4 Increase the number of postdocs supporting research in STEM fields.

SMU had 77 postdocs overall but in STEM fields there were 61 postdoctoral and non-faculty researchers for 2022–23, down slightly from the record of 64 in 2021–22. Figures for prior years were 52 in 2018–19, 58 in 2019–20, and 52 in 2020–21. Increasing the number of postdocs in STEM fields is important to advancing SMU toward R1 status in the Carnegie classification. Significant commitments to support the hiring of additional postdoctoral scholars will help further increase the number of postdocs.

Objective 3.5 Implement an updated technology transfer program.

- 3.5.1 Benchmark the technology transfer office against comparable offices at cohort and aspirational institutions.

Progress has been made towards a more rational, efficacious management of SMU research generated intellectual property (IP). The Office of Technology Transfer (OTT) conducted a comparative evaluation of SMU's Royalty Distribution policies and confirmed that we are in alignment with cohort and aspirational peers. The OTT balanced pruning the SMU patent pool with keeping a reasonable patent portfolio with promising commercial merits.

- 3.5.2 Partner with existing technology and innovation incubators with a goal toward forming University-run incubators.

The 25 active companies in the SMU Incubator reported $1.7 million in capital raised between June 2022 and May 2023. The total funds raised by incubator companies from fall 2019 through spring 2022 amounts to $10.2 million.

SMU's patent portfolio has 21 active agreements. These agreements address the needs of various commercial areas, such as clean energy, multi-material 3D printing, chip-scale quantum photonics, and custom data solutions. Also, SMU has collaborative and licensing agreements with other universities, such as the University of Central Florida, University of Texas-San Antonio, University of Texas-Southwestern, Northwestern, University of Rhode Island, and Washington State University.

- 3.5.3 Develop an updated tech transfer program that is fully integrated with academic programs in the schools.

SMU's policy on intellectual property is currently in revision to update and clarify the role of tech transfer at the University. In 2019–20, the University achieved for the first time full, up-to-date compliance with federal reporting requirements for invention disclosures resulting from federally funded research. The University has maintained compliance since 2019–20.

- 3.5.4 Develop metrics to target specific numbers of applications, licensures, start-ups, etc., each year.

To date, SMU has 86 patents in good standing with the United States Patent and Trademark Office. In 2023–24, to assist in the stewardship of funds and curation of SMU's patent portfolio, the Office of Research will launch an Innovation committee composed of experts from faculty, industry leaders, entrepreneurs, investors, and IP/Corporate Law firms. The committee will evaluate faculty disclosures for potential patent prosecution and patents for potential commercialization. As part of the incubator activity, SMU will track the number of disclosures, patents, licensing agreements and revenues, and various metrics related to start-up activities such as external investment, revenues, and research and development investment.

GOAL FOUR: TO EXPAND OPPORTUNITIES FOR STUDENT DEVELOPMENT THROUGH AN ENGAGING AND SUPPORTIVE CAMPUS EXPERIENCE

The Division of Student Affairs is committed to developing opportunities for students to become productive citizens and leaders through the creation of environments that are both supportive and challenging. These opportunities will contribute to the students' intellectual, spiritual, physical, social, cultural, moral, and emotional growth by engaging them with the broadest range of individuals at the University and beyond. Within this overall framework, intercollegiate athletics programs will operate with integrity while achieving high graduation rates for student-athletes and providing competitive opportunities at the highest NCAA level.

GOAL FOUR OBJECTIVES

Objective 4.1 Enhance critical student life programs related to student performance and retention.

- 4.1.1 Identify and implement best practices for programs and services that promote the retention and graduation of underrepresented minority populations.

  One of the key strategies for promoting retention and graduation of underrepresented minority populations involves mentorship. In 2022–23, one of SMU's several mentorship programs, the Connect Mentorship Program, increased its mentees, all students of color, from 90 to 150 and its mentors from 52 to 55.

  Moreover, the Caring Community Connections (CCC) program continued its mission to support all students experiencing challenges. Faculty, staff, students, and others continued relying on the CCC program to identify such students. In 2022–23 there were 1,633 students of concern, compared to 1,869 the previous year. The decrease can be attributed to the easing of the pandemic. There were 93 fewer COVID-19 cases in 2022–23 than in 2021–22 and a decrease in cases related to the Student Emergency Fund, presumably reduced by less financial hardship with the easing of the pandemic. Comparable cases in prior years from 2020–21 back to 2015–16 numbered 1,394; 1,222; 996; 908; 782; and 708.

  Retention and graduation rates for students from underrepresented groups can be found at 1.2.10.

- 4.1.2 Support military veterans who are students at SMU by providing Yellow Ribbon Program funds and other sources of support.

  Recent figures from fall 2022 show veteran students at SMU number 158, mostly graduate students (75%), slightly above the average of 154 since fall 2013. Most veterans are supported in part by Yellow Ribbon Program funds, which SMU doubled in 2020–21 from 50 to 100 available spots, then in 2022–23 expanded further to an unlimited status. The Veterans' Center in the Hughes-Trigg Student Center remains a well-utilized space for student veterans to gather and work. The Student Senate Veteran Senator continued to represent student veterans' needs and connect student veterans with other students.

- 4.1.3 Measure the implementation of bystander intervention and values programming to enhance response and knowledge of resources for emotional distress, substance abuse, and sexual assault.

  After reviewing SMU policies and practices and evaluating third-party offerings, in spring 2023, SMU selected Bringing in the Bystander, an intervention initiative of National Association of Student Personnel Administrators. Bringing in the Bystander will be implemented over two years.

  The Call for Help program, a medical amnesty and Good Samaritan policy, experienced an 18% increase in calls between 2021–22 and 2022–23.

- 4.1.4 Utilize the Dr. Bob Smith Health Center to improve physical and mental health services in support of SMU students' well-being.

  During 2022-23, the health center provided services to SMU students through traditional in-person encounters, virtual visits, and 24/7 online access to clinical and self-help resources. Medical services returned to pre-pandemic levels after several years of unprecedented patient care volume driven by COVID-19. As COVID-19-related care dropped off, medical services declined from the previous year by 23% to 13,144 appointments and 5% to 4,721 unique patients. Comparable numbers pre-pandemic were 13,286 and 5,130 in 2018–19.

  Counseling appointments also declined in 2022–23, in part due to attrition-induced staff shortages in Counseling Services. Total appointments were 4,684, down 27% from the previous year and 892 unique clients, down 17%. Comparable appointment numbers pre-pandemic were 5,118 in 2018–19. Alternative resources were added to offset some of the staffing challenges, including an online teletherapy service for immediate access to a large network of providers. A robust student peer-to-peer mental health support community was made available 24/7 and counselor-on-call service was expanded.

Pharmacy utilization increased modestly this past year both in total prescriptions (by 19%) and unique patients (by 15%), continuing its gradual return to 87% of pre-COVID-19 levels. Lab work decreased by 10% due to a drastic decline in COVID-19 testing, but still ended with a far higher volume of lab work performed than prior to the pandemic (153%).

The health center continued to provide COVID-19 testing and booster vaccinations as well as flu shots. In 2022–23, the health center administered 1,127 COVID-19 tests and 298 COVID-19 vaccinations, along with 2,381 flu shots. Comparable 2021–22 figures were 2,926, 3,525, and 2,657, respectively.

In 2022–23 SMU began making forensic exams available on campus 24/7 for victims of sexual assault. Through a partnership with The Turning Point Rape Crisis Center, a SANE nurse and advocate can be dispatched immediately to the health center as needed. Three students made use of this service in 2022-23.

- 4.1.5 Develop formal transition programs and maintain high levels of participation for graduate and transfer students to enhance their sense of belonging and connection to the University.

  Efforts to streamline the transition experience for undergraduates continued in 2022–23, with new students connecting to campus through Mustang StartUp, Stampede, and First 5. Participation in orientation remained a requirement for all incoming undergraduates, and the inaugural January Stampede ensured mid-year student entrants, both undergraduate and graduate, a traditional orientation experience. Graduate student transition and orientation programs are largely school based, with support from SMU Libraries as well as Student Affairs and International Student and Scholar Services for international graduate students.

Objective 4.2 Assess critical student life programs to ensure they provide for intellectual and social engagement and leadership opportunities.

- 4.2.1 Strengthen and assess programming that promotes social and civic engagement and community.

  In 2022–23, programming promoting social and civic engagement with the community included The Big Event, Mustang Heroes, Alternative Breaks, Engage Dallas, One Night for Dallas, and SMU Serves. An event of note was the Dr. Dennis Simon Civil Rights Pilgrimage, through which 16 SMU community members (14 students and two Student Affairs staff) journeyed together and connected racial justice movements of the past to the present and future.

The second annual community partner reception, One Night for Dallas, honored the collective work of SMU service organizations, faculty and staff members, and community partners who worked together throughout 2022–23 to make a positive impact and create sustainable change in the Dallas community.

Engage Dallas, a Residential Commons programming initiative, addresses community needs of South and West Dallas. During 2022–23 Engage Dallas hosted 34 events with 1,199 students participating in general engagement service and 687 in direct service, up from 900 students and 556 students, respectively, the prior year. This resulted in 3,771 total hours served, with 259 students indicating their intent to complete the Community Engagement Proficiency and Experience for general education through Engage Dallas.

- 4.2.2 Increase faculty and student engagement in co-curricular activities in each Residential Commons.

Faculty and student engagement in Residential Commons co-curricular activities continued strong. Faculty-in-Residence hosted over 259 events for students, mainly regularly scheduled weekly gatherings for students to connect with each other as well as faculty, administrators, and staff.

Objective 4.3 Assess critical student life programs to ensure they provide for understanding of personal responsibility, respect for others, and diversity.

- 4.3.1 Strengthen programs designed to develop student leadership and cultural competence through community service.

Residence Life and Student Housing continued leadership training during an early return to campus for resident assistants, Commons Council executive members, honors mentors, student wellness champions, peer academic leaders, peer chaplains, Housing Unification Board members, and Engage Dallas directors.

The second annual #1Day4Dallas event, held in fall 2022, attracted students from each of the 11 Residential Commons. The 123 student participants served at nine different sites throughout South and West Dallas. Collectively, participants contributed nearly 500 hours of direct service.

- 4.3.2 Continue the development of CIQ@SMU and assess the reach of CIQ@SMU with student, staff, and faculty groups across campus.

Entering its sixth year, the Cultural Intelligence Initiative (CIQ@SMU) continues its mission to equip faculty, staff, and students with the knowledge and skills to manage and communicate in a 21st century defined by its cultural

complexity. CIQ@SMU maintains its efforts to increase both its reach and impact on its stakeholders. See 4.6.3 for further discussion of CIQ@SMU and assessing its impact.

- 4.3.3 Develop values-based programming for students who are members of SMU fraternities and sororities and other student groups.

The Office of Fraternity and Sorority Life (FSL) facilitated FSLead, a five-week emerging leader series focused on fraternal values and leadership, was hosted for its sixth year with a record 38 participants (28 in 2022, 19 in 2021, 30 in 2020, 20 in 2019, 11 in 2018). Emerging leaders participated in weekly discussion sessions on espoused personal and fraternal values, ethical leadership, navigating difficult conversations and decision making, service, and inclusive leadership.

Another example of value-based programming: FSL hosted the first R.I.T.U.A.L. (Responsibility, Inclusion, Trust, Unity, Advocacy, and Leadership) Retreat for established leaders. The retreat was a one-day leadership experience focused on inclusion and identity in Greek Life.

- 4.3.4 Implement all-Greek programming to strengthen collaboration among the four governing councils.

In 2022–23, FSL continued monthly all-President Roundtables to create regular engagement and dialog between the four councils, adding a "welcome back" event in August to kick off the new year and build relationships among the community.

Objective 4.4 Enhance career services for all students by expanding partnerships with businesses, cultural and charitable organizations, and alumni.

- 4.4.1 Enhance ongoing collaboration among the Hegi Family Career Development Center, other career centers, and the schools to provide students with more seamless career counseling as well as residential and co-curricular experiences that support their careers and life goals.

As part of collaborative efforts to increase communication, programming, and planning between SMU career centers, the Hegi Family Career Development Center hosted monthly career services meetings with career development and employer relations professionals from Cox, Lyle, Guildhall, Dedman Law, the Moody Graduate School, and Hegi. Discussions focused on shared needs of students and career center professionals, to understand better collective and individualized career needs among SMU's decentralized career centers.

The Fall and Spring Career Fairs in 2022–23 saw the return of large-scale in-person employer recruiting events to campus: 167 employers attended across both fairs and interacted with 1,096 student attendees.

Students were served through 2,070 advising appointments in the Hegi Center, up strongly from 1,438 in 2021–22; 1,161 in 2020–21; and even topping the pre-pandemic peak of 1,586 in 2019–20.

The Hegi Center continued to serve as the contract holder for the job-search platform Handshake, sharing its services with campus career center partners. The Handshake platform manages student registration and attendance for campus career events, career fairs, and counseling appointments as well as a job search site for internships, full-time jobs, and on-campus work. Handshake means all SMU undergraduates share in the same resources for campus job search and to career center access.

Guildhall and Hegi are collaborating to develop a more united point of contact for gaming studios and companies seeking to hire SMU's graduating students, both graduate and undergraduate.

- 4.4.2 Continue and improve tracking of the career placement of those awarded degrees, both undergraduate and graduate.

The Hegi Family Career Development Center and the Office of Institutional Effectiveness partner to track comprehensive career outcomes and placement of SMU students, both graduate and undergraduate. The Hegi Center also reports this information to the National Association of Colleges and Employers.

Students are surveyed three or six months after graduation (up to ten months for law school students), so 2022 graduates are the most recent data. For undergraduate students earning degrees in 2021–22, 88% were employed or continuing education, up from 87% in 2020–21 and 85% in 2019–20. For graduate students earning degrees in 2021–22, 90% were employed or continuing education, down from 91% in 2020–21, up from 88% in 2019–20.

The law school achieved its highest employment outcome ever at 98.9% full-time employment for the Class of 2022, compared to 98.6% for 2021 graduates, 93.2% for 2020, and 94.1% for 2019.

In the latest data for full-time MBAs, surveyed up to three months after graduation, 97% of the 2021–22 graduates had accepted a job, markedly up compared to 83% in 2020–21, and 77% in 2019–20.

Perkins students had an overall job placement rate of 90% in 2022, 92% in 2021, 84% in 2020, and 76% in 2019.

- 4.4.3 Implement a career development program in collaboration with other SMU career centers to assist with post-graduation employment opportunities for SMU student-athletes.

  Athletics and SMU's career centers work together to prepare student-athletes for post-graduation employment. Prominent in this work is Life After Ball (LAB). LAB utilizes SMU alumni to create networking experiences as well as mentorship and internship opportunities. LAB exposes student-athletes to a wide array of sectors and industries to discover fields where interests and skill sets align. All student-athletes must complete LAB's Professional Development Series, which provides professional photographs and a custom suit. All athletes are offered one-on-one help with resumes, LinkedIn profiles, interview prep, and other career-related needs.

- 4.4.4 Increase the internship and career opportunities for undergraduates and, where appropriate, graduate students.

  In 2022–23, there were 23,947 approved and expired jobs listed on Handshake, as well as hundreds of events featuring engaged employers searching to hire qualified SMU students. To cultivate positions of direct interest and professional training available on Handshake, this year Hegi streamlined and highlighted professional, full-time work and internship experiences, limiting the listing of positions that are not work-based learning opportunities, internships, or full-time jobs. This action decreased the number of positions posted on Handshake (the prior year had 92,156) but enriched the position quality and helped students find roles related to their majors while enhancing access to experiential learning opportunities. Employers continued to be extremely interested in hiring SMU students.

  See also the discussion of internships at 2.5.1 and 2.5.2.

Objective 4.5 Increase academic success for student-athletes, and strengthen intercollegiate programs to increase our national competitiveness.

- 4.5.1 Maintain satisfactory NCAA Academic Progress Rate (APR) standards with all eligible programs posting a multiyear score of 975 or better.

  This goal was achieved for all but one program: 14 of 15 programs scored above SMU's 975 goal for the four-year span. In prior years, the comparable marks for the 15 programs were 14 (2021–22), 13 (2019–20), and 12 (2018–19).

- 4.5.2 Maintain average team GPA for each sport above 3.0.

  For 2022–23, 14 of SMU's 17 sports had an average team GPA above 3.0, with only football (2.919), men's basketball (2.938) and women's basketball (2.953) falling shy of the mark. For the 17 SMU sports, in prior years 14 (2021–22) and 15 teams (2020–21) averaged 3.0 or above.

- 4.5.3 Win the most conference championships annually among member institutions.

  SMU met this goal in 2022–23, winning five American Athletic Conference championships– rowing, men's swimming and diving, women's golf, and men and women's tennis. This was the most among AAC members. SMU also won the National Collegiate Equestrian Association's National Championship.

- 4.5.4 Enhance SMU's position in the National Association of Collegiate Directors of Athletics (NACDA) Directors' Cup rankings.

  Over the last four years, SMU has ascended 87 spots in the National Association of Collegiate Directors of Athletics (NACDA) Board of Directors Cup Division I Final Standings. SMU finished 73rd in 2022-23, 15 spots above last year (88th), 52 spots above 2020-21, and 87 spots higher than the 2018-19 rankings. (The 2019–20 Cup was canceled due to the pandemic's curtailing of competition.)

- 4.5.5 Establish the clear goal of postseason participation in all sports, including postseason bowls in football and NCAA tournaments in men's and women's basketball.

  Twelve of 15 SMU programs qualified for the postseason in 2022–23: cross country, equestrian, football, women's golf, rowing, men's soccer, women's basketball (WNIT), women's swimming and diving, men's swimming and diving, outdoor track and field, women's tennis and men's tennis. Equestrian won the National Collegiate Equestrian Association Championship. At the NCAA Championships, rowing was ninth and women's golf was 11th. SMU had 13 programs qualify for postseason appearances in 2021–22.

- 4.5.6 Increase the annual Mustang Athletic Fund in Athletics by at least 3% each year.

  Donations to the annual Mustang Athletic Fund increased 21.9% from $3.6 million in 2021–22 to $4.4 million in 2022–23. While total cash gifts to SMU Athletics declined 24.5% from $36.2 million in 2021–22 to $27.3 million in 2022–23, this was still the second highest total of cash donations in one year in

the history of SMU Athletics. In total, 2,900 donors gave to the Mustang Club's mission of shaping champions for fiscal year 2023, down slightly from 3,141 in 2021–22 and 3,434 in 2020–21 but up from 2,152 in 2019–20.

- 4.5.7 Increase ticket sales and average home attendance for football, women's basketball, and men's basketball.

  SMU averaged 24,971 fans for the 2022 season at Ford Stadium, an SMU-best since Ford Stadium opened in 2000, and a 7.8% increase from 2021. Season ticket sales also increased 27%. Basketball attendance also increased, with the men's team moving from an average attendance of 3,599 in 2021–22 to 3,916 in 2022–23 (8.8% increase) and the women's team going from 590 to 683 (15.8% increase).

- 4.5.8 Complete funding and construction of athletics facilities for swimming and diving, soccer, and football.

  Construction for the fully funded Holt Hickman Outdoor Pool behind the Barr-McMillion Natatorium at the Robson & Lindley Aquatics Center is on pace to complete in November 2023 and the dedication will take place in fall 2023.

  Construction for the Gerald J. Ford Stadium–Weber End Zone Complex is scheduled to be complete for the 2024 football season. Ford Stadium will be usable for the 2023 football season as construction continues on the project site. As of May 31, 2023, gifts and pledges for the project total $78 million of the $100 million fundraising goal.

  Construction is complete and the dedication of the new Washburne Soccer and Track Stadium occurred on April 8, 2022.

Objective 4.6 Continue to implement programs that increase awareness and understanding within the SMU community of the various forms of diversity such as cultural, ethnic, gender, racial, religious, sexual orientation, and socioeconomic status of North Texas.

- 4.6.1 Strengthen campus programs, services, and oversight of the student experience at SMU that foster respect for and inclusivity of all diverse identities, including ethnic, racial, religious, socioeconomic status, gender, and sexual orientation.

  Programs designed to advance awareness of diversity occurred across the University. Within the residential commons, 32 diversity-related programs occurred in the fall and 31 in the spring. In 2022–23 The Women and LBGT Center facilitated over 10 Ally training/LGBT 101 workshops and the LGBTQ

Symposium. The 58th annual Women's Symposium featuring Jade Mathis, a mental health advocate, drew 150 attendees.

In 2022–23, the Office of Diversity and Inclusion facilitated diversity events on campus such as the inaugural Asian American and Pacific Islander (AAPI) Academic Conference. This brought scholars and graduate students from across the nation for two days of symposia and workshops on the role and impact of AAPI scholarship.

- 4.6.2 Strengthen support services for international students.

In 2022–2023, SMU solidified support for international students, particularly through the orientation and transition process. Student Affairs and International Student and Scholar Services (ISSS) served international students by mentoring leaders, developing community ties, and helping new students transition to SMU and the Dallas community. ISSS developed a required immigration compliance course in Canvas to remind international students about enrollment and employment requirements. ISSS implemented outreach and orientation activities for global Mustangs – those who may identify as international but hold a visa other than F1 or J1. ISSS provided over 10,000 hours of advising contact last year and continues to offer services through in-person, Zoom, and online.

- 4.6.3 Expand the impact of CIQ@SMU across campus.

In addition to the continued use of CIQ@SMU's curriculum in the onboarding of new faculty, staff, and students within 90 days of their admission or hiring at SMU, the Office of Diversity and Inclusion (ODI) continues to identify ways in which it can leverage emerging technologies to measure impact. Partnering with the Office of Information and Technology in 2022, ODI acquired the first higher education campus survey software powered by artificial intelligence, UKG Climate. The intention is to measure biannually the sense of belonging and cultural intelligence on campus.

CIQ@SMU's training partnership with the Office of Academic Affairs entitled "Searching Intelligently" continued in 2022–23. Each faculty member, including administrative faculty, serving on an academic search, completed training on increasing applicant pools by creating new inter-institutional partnerships, engaging best practices for identifying top candidates, and how to reduce personal and disciplinary biases during the search process.

Objective 4.7 Evaluate options for providing enhanced child development, child care, and family services for faculty, staff, and students.

- 4.7.1 Maintain the child care center and consider the feasibility of providing additional services for students, staff, and faculty with young children.

  The SMU Child Care Center is seeking full Discovery Driven Learning implementation, achieving National Association for the Education of Young Children (NAEYC) accreditation and collaborating with SMU departments to enrich the education of children attending the center.

  Continuous quality improvement at the SMU Child Care Center led to enhancements to family communication with updates to the My Bright Day app (streamlined user interface, a calendar feature for Center events, and secure access to child assessment data). My Bright Day app is a tool used to communicate daily with families. Each family now receives a comprehensive digital child assessment portfolio quarterly.

- 4.7.2 Assess the feasibility of assisting members of the SMU community with access to elder care.

  SMU continues to offer Cariloop as a University paid benefit for employees to utilize for caregiver support. This benefit is offered at no cost to eligible faculty, staff, and dependents. Through this service, employees and their extended family are provided caregiving support including eldercare help. The need for elder care services has grown every year and the cases have increased exponentially. In the most recent fiscal year, 1,000 cases were opened through Cariloop for SMU employees and their dependents, contrasted with 546 cases the previous year and 105 cases the year before that.

GOAL FIVE: TO BROADEN GLOBAL PERSPECTIVES

Today's students must be prepared to live and work in a global environment. The intermingling of cultures, the complexities of financial strategies, the economies of strikingly different nations, and the plight of the world's poor are but a few of the conditions awaiting the intellect, skill, and zeal of our graduates. The diversity that will occur as our nation becomes more global will require significant changes in the way we think, lead, and analyze problems. The University is obligated by its trust and mission to prepare students for living in the dynamic, complex, and challenging times they will encounter in their lifetimes.

GOAL FIVE OBJECTIVES

Objective 5.1 Maintain and expand agreements for academic and research collaboration with foreign universities, in particular European, Central American, South American, and Asian universities, that advance SMU's strategic objectives in teaching and research.

- 5.1.1 Increase the number of signed agreements for academic and research collaboration with foreign universities, in particular Central American, South American, and Asian universities.

  SMU's schools have engaged globally through international consortial agreements, such as Lyle School's continued agreements with Feng Chia University (Taiwan), National Central University (Taiwan), Bahçeşehir University (Turkey), Istanbul Bilgi University (Turkey), Eastern Mediterranean University (Northern Cyprus), and Instituto Tecnologico Y De Estudios Superiores De Monterrey (Mexico). Meadows School of the Arts has a one-year master's program in arts administration with HEC Montréal (Canada) and Bocconi University Milan (Italy). Perkins School of Theology maintains agreements with Methodist University of Sao Paulo (Brazil), Cliff College (United Kingdom), and Bishop Han Theological School (Philippines).

  Dedman College signed a Memo of Understanding (MOU) with East China Normal University (China) to send their undergraduate economics students to SMU who may remain at SMU to pursue master's degrees.

  Dedman Law has a 3/1 Agreement with Facultad Libre de Derecho de Monterrey (Mexico) in which students from that law school can complete the one-year Dedman LLM (Master of Laws) for Foreign Lawyers and receive one year of academic credit towards their Mexican law degree.

In 2022–23, Lyle has signed multiple agreements and MOUs with international collaborators such as Veermata Jijabai Technological Institute (India), Sardar Vallabhbhai National Institute of Technology (India), Universidad Nacional de Colombia (Columbia), and Ardhi University (Tanzania).

Simmons maintains international consortial research agreements as a sub-awardee with King's College London (United Kingdom) on transforming global surgery training through virtual reality and as a sub-awarder with GeoGebra (Austria) on learning through gaming as well as on learning geometry.

Objective 5.2 Expand the emphasis on global content in curricula across the University and strengthen international studies within the overall curriculum.

- 5.2.1 Implement the University-wide plan for undergraduate study abroad.

  SMU Abroad has relied on the task force recommendations as guidance for recovery from the pandemic. More broadly, since fall 2022, SMU has participated in the 20th cohort of the American Council on Education's (ACE) Internationalization Laboratory, to create a comprehensive internationalization plan that touches every aspect of the University. To spearhead this work, the provost charged an Internationalization Steering Committee of faculty, staff, and students to conduct a self-study. The committee will develop an internationalization plan for the University for submission to SMU leadership in spring 2024. This work will also contribute to the ongoing development of the undergraduate study abroad program.

- 5.2.2 Increase the number of undergraduates from a variety of academic programs who study abroad and advise them on how to fit study abroad into their academic careers. Increase the number of graduating SMU seniors who have studied abroad to 50% by 2025.

  The pandemic set back progress on this goal. The participation rate in study abroad for academic credit for those who graduated in 2022–23 was 16.8%, up from 10.7% in 2021–22, a result of the suspension of study abroad during 2020–22 due to the pandemic. The exceptional nature of these low levels for both recent years can be seen by comparing percentages for graduating SMU seniors studying abroad in the eight previous academic years: 27.0 (2013–14), 25.3, 28.0, 27.1, 30.4, 29.0, 29.6, and 25.7 (2020–21 – percentages do not reflect students who studied abroad but not for academic credit).

  Return of study abroad participation rates to surpass pre-pandemic levels will make the goal of 50% of SMU graduating seniors studying abroad by 2025 more challenging. Nevertheless, the aspiration continues to focus energy on globally

engaging students. SMU undergraduates have shown strong interest in foreign study: in summer 2023, 434 undergraduate students studied abroad, topping the pre-pandemic summer 2019 figure of 426.

- 5.2.3 Develop sources of support for academically meritorious students with financial need to provide an international study opportunity.

In-person study abroad programs resumed in 2021–22 after a COVID-19 hiatus. SMU Abroad supplemented aid for qualified students who study abroad with need-based awards ranging from $250-$6,500. In summer 2022, January 2023, and spring 2023, SMU Abroad awarded $247,000 in additional need-based aid to 49 students. For comparison, in 2021, as studies abroad resumed from the pandemic, SMU Abroad awarded $112,000 in aid to 40 students. Pre-pandemic, in summer 2019, SMU Abroad awarded approximately $110,000 in need-based scholarships to 53 students; in summer 2018, SMU Abroad awarded approximately $126,000 to 37 students, and in summer 2017, almost $125,000 to 42 students.

In addition, SMU Abroad matched a pro-rated amount of centrally administered financial aid awards. This provides students with aid support comparable to that regularly received during fall and spring semesters. In summer 2022 and January 2023, this amounted to $1,057,475 in additional aid distributed to 276 students.

As before, academic departments and programs also support students who study abroad – the University Honors Program, Maguire Center, departments of French, Italian, Corporate Communications and Public Affairs, and others. Typically, these funds total $300,000-$350,000.

Also, as Access SMU begins meeting full, demonstrated financial need of high-achieving undergraduates from Texas who receive federal Pell Grants, this program will support those who wish to study abroad during fall or spring terms.

- 5.2.4 Develop study abroad programs for intersessions.

SMU Abroad in January 2023 saw increased popularity post-COVID-19, with 68 students studying abroad, a record number.

The Cox School offers global opportunities for MBA students: a required Global Leadership Program for one-year and two-year FTMBA as well as EMBA working on in-country consulting projects, OMBA Global Immersion, and elective experiential learning opportunities for PMBA and MS students. Also, the newly launched MBA Direct Program had its first Global Consulting Project in December 2022. During 2022–23, these programs took students to Tokyo, Lisbon, Cape Town, Johannesburg, Santiago, Dublin, Dubai, Abu Dhabi,

Singapore, and Ho Chi Minh City. Participation was strong with 356 graduate students, 17 faculty, and 13 staff in ten programs abroad in 2022–23. While down from 466 graduate students, 21 faculty, and 17 staff in ten programs in 2021–22, both years topped the prior peak of 302 graduate students in 2015–16.

- 5.2.5 Increase the number of courses that include an international experience during spring break.

Students in art history undertook a one-week travel, research seminar to Naples and Rome, Italy in March 2023. SMU University Honors students had a travel learning seminar to Cuzco and Machu Picchu, Peru in April 2023. University Honors Program and Human Rights students traveled to Ireland to study the Irish Civil War and the Northern Ireland conflict in May 2023.

Perkins School of Theology sponsored two international experiences during spring break, one to Cuba, the other to Paris.

- 5.2.6 Increase the percentage of undergraduates who graduate having completed the third semester of a second language.

For the past eight years, over 40% of SMU's undergraduates graduate have taken a third semester or more of a second language. That percentage rose from 27.1% in academic year 2014–15 rose to 51.9% in 2017–18 before receding to 42.9% in 2022–23, a slight increase over 42.2% in 2021–22.

- 5.2.7 Maintain the number of courses with a robust global focus or perspective.

This goal has been met: in 2022–2023, seven additional courses have been approved to satisfy the Global Perspectives requirement of the Common Curriculum. The total number of courses approved stands at 81 for fall 2023.

- 5.2.8 Expand the number of majors who encourage study abroad in their curricular requirements.

SMU major requirements facilitate study abroad. But the pandemic, suspending study abroad from spring 2020 through fall 2021, cut into the ability to take study abroad credits that count toward the major by the two most recent graduating classes. Between 2015 and 2021, graduating undergraduates counted study abroad credits toward major requirements in about 50 different majors, with the annual count fluctuating between 41 and 57, representing half to two-thirds of the majors of the graduates. The percentage of graduating seniors fulfilling one or more requirements for a major through study abroad has ranged from 14% to 17%. With study abroad essentially suspended for two years, the pandemic severely reduced that percentage to 4% in 2021–22 and 7% in 2022–

23. With the rejuvenation of study abroad, students meeting major requirements through study abroad should return to previous levels.

Objective 5.3 Increase the international representation of students and faculty.

- 5.3.1 Develop sources of support for scholarships for the most academically and creatively talented international students.

  SMU continues to offer merit or artistic scholarships, but not need-based financial aid, to international undergraduate students. Most of the admitted international first-year students since fall 2017 were offered academic- or talent-based scholarships. While percentages vary by year, international students offered these scholarships track overall yield rates for entering undergraduates, the pandemic years excepted. In addition, athletic scholarships are awarded to international students.

- 5.3.2 Increase the number of faculty engagements with prospective students around the world through speaking opportunities, courses taught abroad, etc.

  In 2022–23, 39 SMU faculty accompanied 401 students on 21 study abroad programs in various locations such as Bali, France, Italy, Morocco, Spain, and the United Kingdom. Several examples highlight the variety of ways in which faculty network internationally through speaking opportunities, performances, and conferences. Ben Voth, director of debate and speech and professor in Dedman College, escorted students to compete in Tokyo in which they won more than 60% of their debate rounds. SMU was invited to serve as a partner university and offered summer scholarships to two undergraduate students in the Sister2Sister Exchange Program, a public-private partnership that aims to empower Pakistani female college students. The Fundación Consejo España announced that the Meadows Museum was unanimously elected to receive the 2023 Bernardo de Gálvez award, which seeks to honor and publicize the work of those individuals or institutions that have promoted cooperation between Spain and the United States, have contributed to improving reciprocal knowledge or have strengthened the relationship between the two countries.

- 5.3.3 Increase the number of strategic relationships with high schools and international educational organizations (not recruitment agents) that would promote SMU to international first-year and transfer students.

  As the international recruitment landscape has changed, SMU has connected with recruitment agents in India to support graduate student enrollment. Also, Undergraduate Admission has agreed, as a courtesy and on a limited basis, to

consider undergraduate applicants referred by these agents and to explore these relationships further.

- 5.3.4 Increase the number of international graduate and undergraduate student applications, admits, deposits, and enrollments resulting in 15% international students by 2025, with international undergraduates at a minimum of 7%.

The graph below reveals that SMU achieved these goals in fall term for all students (15%) in 2017 and for undergraduates (7%) from 2015 through 2019. In more recent years, immigration and emigration policies and the COVID-19 pandemic restrained the ability of universities to recruit and enroll international students, challenging such recruitment in historically strong regions for SMU such as China, India, Latin America, and the Middle East. Since the fall 2017 peaks, international students have declined to 4.1% among undergraduates and 8.4% among all students. Such declines are typical of patterns across the nation.

International undergraduates and all students, fall 2015–fall 2022 (%)
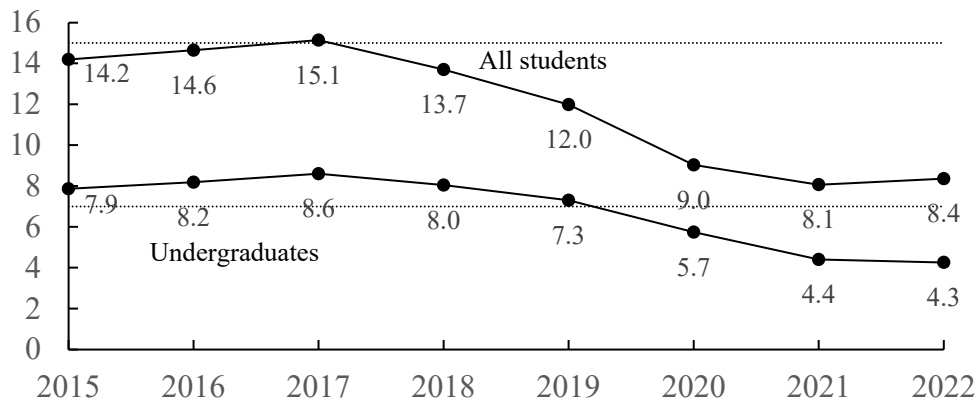
Note: The dotted lines indicate the goals for percentage international for all students and for undergraduates.

International applications, admissions, and enrollment at SMU among undergraduates and graduates give further details on international students at SMU. Consistent data is available for many years on undergraduate admissions but only for 2022 and 2023 for graduate admissions. The new Moody School and initiatives to improve graduate work will lead to more enrollment management best practices in graduate admissions. In 2022–23, the Moody School worked with Lyle and Dedman College to expand partnerships with recruiters in India and China to increase the number of international graduate applications.

About 2,000 undergraduate applications in 2016 and 2017 declined to 1,108 in 2021 before rising slightly to 1,222 so far for 2023. Nearly 600 international

admits in 2016 fell to 366 in 2021 before rising to 460 for 2023. Enrollments of 80 so far for 2023 match the enrollments for the three prior years and remains below the 175 in 2016 and 173 in 2017.

International applications, admit rates, and yield rates, undergraduate students, 2016–23 calendar years

	2016	*2017*	*2018*	*2019*	*2020*	*2021*	*2022*	*2023*
Applications	1,927	2,014	1,681	1,452	1,263	1,108	1,198	1,222
Admitted	598	573	515	494	490	366	397	460
Admit rate (%)	31.0	28.5	30.6	34.0	38.8	33.0	33.1	37.6
Enrollments	175	173	128	124	76	81	75	80
Yield rate (%, enrolled of admitted)	29.3	30.2	24.9	25.1	15.5	22.1	18.9	17.4

Note: Data for 2023 as of early August 2023. The official numbers for 2023 will be available after the census date of September 6, 2023.

International applications, admit rates, and yield rates, graduate students, 2022–23 calendar years

	2022	*2023*
Applications	2,210	2,830
Admitted	1,120	1,325
Admit rate	50.7%	46.8%
Enrollments	374	189
Yield rate (enrolled of admitted)	33.4%	14.3%

Note: Data for 2023 as of early August 2023. The official numbers for 2023 will be available after the census date of September 6, 2023.

Graduate international applications have increased over 2022, more international applicants have been admitted even with a lower admit rate. The dramatically lower yield rate is an artifact of timing, with graduate enrollments settling and being reported close to the start of the term.

The University and the schools will be closely monitoring and responding to the challenges for attracting and retaining international students. The new Moody School will help focus and coordinate this at the graduate level.

- 5.3.5 Enhance services for international undergraduate students that improve retention and graduation rates.

**First- to second-year retention rates, international undergraduate entry cohorts, fall 2008–fall 2021 (%)**
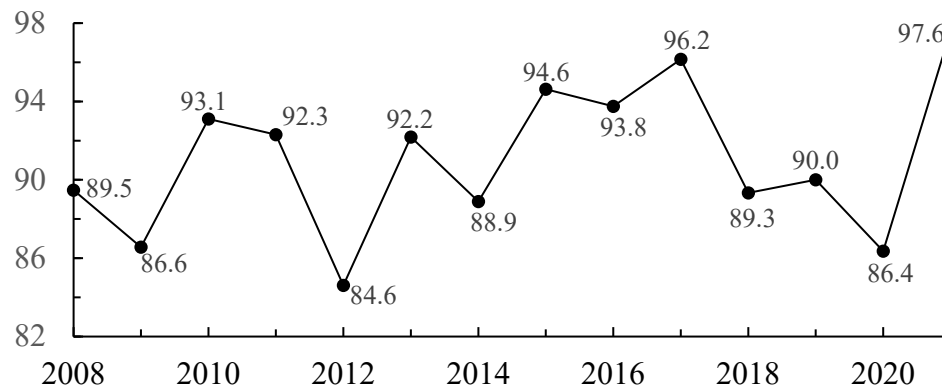
Note: The official retention figure for the 2022 international entry cohort will be available after the census date of September 6, 2023.

Support for international students by Student Affairs and International Student and Scholar Services has been discussed in Goal Four, Objective Six (4.6.2). The Hegi Career Center enhanced support for international students during 2022–23 by offering career events specifically for international students, identifying employers at career fairs willing to sponsor international workers, and advertising the summer DEI internship program to international students.

Support services for international undergraduates can help SMU retain and graduate these students at rates resembling those for all undergraduates (see 1.2.8 and 1.2.9). Indeed, retention of international undergraduates for the 2015–17 and 2021 cohorts surpassed or matched the overall University goal for 2025 of 94%, although the rate fell below 90% for the 2018–20 cohorts, in part due to the greater impact of the pandemic on international students. International graduation rates fluctuate but generally international students trail all undergraduates for the six-year and particularly the four-year rates.

Four- and six-year graduation rates, international undergraduate entry cohorts, fall 2008–fall 2018 (%)
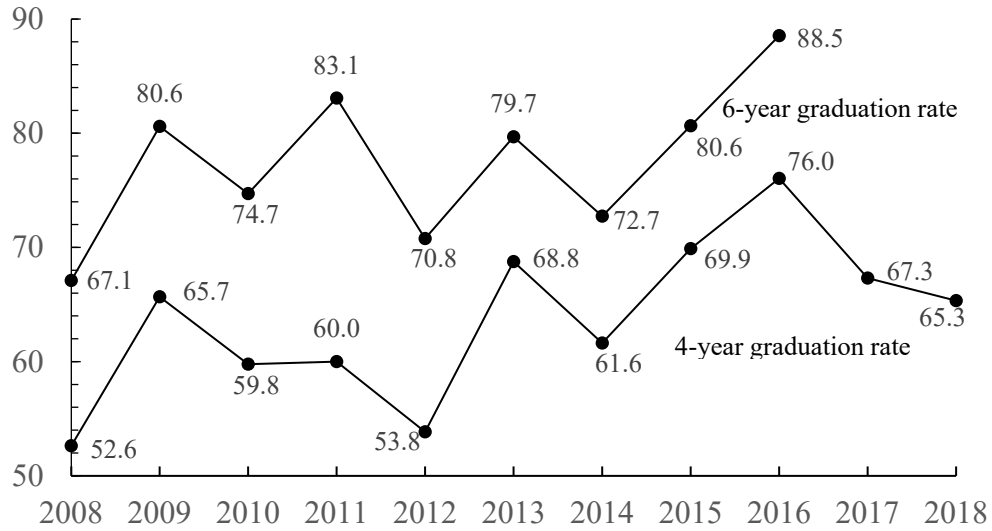
Objective 5.4 Share research and best practices throughout the country and worldwide through interdisciplinary programs to raise SMU's visibility and reputation to the nation and the world.

Social media outreach by SMU (see 6.4.3), seeks to leverage SMU's advances and progress. The $100 million Moody Foundation gift establishing the Moody School of Graduate and Advanced Studies was a major breakthrough in terms of visibility and raising the reputation of SMU. In the years ahead, the work of the Moody School itself will further support SMU's higher profile and progress.

GOAL SIX: TO INCREASE REVENUE GENERATION AND PROMOTE RESPONSIBLE STEWARDSHIP OF RESOURCES

To compete in higher education today, institutions must work proactively to maximize revenue generation and manage existing and new resources in ways that expand philanthropic opportunities, promote operational excellence, and ensure sound financial stewardship. It is important to create a transparent culture for budgets that begins with an understanding of current expenditures and metrics, along with distributed strategic budget requests that are discussed openly among all deans and vice presidents. This will provide knowledge of broad University budgets that lead to final priorities and decisions being communicated to all University leaders.

GOAL SIX OBJECTIVES

Objective 6.1 Develop, as appropriate, initiatives to improve the efficiency and effectiveness of University functions.

- 6.1.1 Evaluate the measures identified for each initiative to ensure that processes are effective and efficient, and that the goal of the initiative is achieved. Show amounts of funding redirected to the academic sector.

   Through the OE2C initiative, several administrative processes were evaluated and modified for efficiency. Metrics, posted on the Operational Excellence (OE2C) website (archived as historical data at http://blog.smu.edu/opex/ were developed for each initiative to measure service delivery, cost savings, and efficiency improvements, as appropriate. Also, a financial tracker posted on the Operational Excellence site outlined the administrative cost savings, along with the related academic uses of such funds. A total of $20 million was saved annually from administrative functions that has been redirected to the academic sector. In fiscal year 2022–23, $5.7 million in funds were allocated from Operational Excellence recurring and one-time savings.

Objective 6.2 Develop an inclusive, transparent budgeting process that recognizes strategic priorities while lowering expenses.

   During the annual budget-planning process, the president, provost, deans, and vice presidents meet several times to review historical budgets and spending proposals. The discussions and items funded reflect the priorities of the University set forth in the strategic plan. Also, the provost has created a transparent and inclusive resource allocation process that involves each dean and associate provost.

- 6.2.1 Limit the growth in positions funded through unrestricted means to those directly supporting strategic priorities.

  Since the organizational design and shared services efforts were completed in 2015 as part of OE2C, SMU has made progress in limiting the growth in unrestricted staff positions to those strategically focused or supporting additional revenue sources. In fiscal year 2022–23, there were 1,586 unrestricted staff positions (excluding postdocs) similar to the number for the prior two years (1,576 in 2021–22 and 1,571 in 2020–2021). Review and approval of new staff positions focus on confirming that new positions support strategic priorities and new revenue sources.

- 6.2.2 Evaluate the percentage of the budget that supports academic functions to ensure that emphasis remains on the academic mission.

  Total resources spent on the academic mission (financial aid, instruction, research, and academic support) increased since Operational Excellence (OE2C) ended in 2014–15. The percentage of total expenditures for these academic expenses increased from 62.8% in 2014–15 to 64.5% in 2022–23, an increase of $163 million.

Objective 6.3 Increase levels of future private support, building on the success of past campaigns.

- 6.3.1 Continue momentum during the current campaign by focusing on targeted key priorities and meeting the campaign goal.

  SMU Ignited officially launched September 2021. As of May 2023, the campaign total exceeded $1.054 billion in support of strategic priorities, including $198.6 million in student support; $438.8 million in faculty and academic support; $283.9 million in campus, community, and athletics support, and $132.9 million not yet designated by strategic priority.

  Gift revenue in 2022–23 was over $146 million.

- 6.3.2 Complete funding for existing capital projects.

  Efforts to complete funding for the Owens Arts Center renovation, Cox School expansion and renovation, and the Garry Weber End Zone Complex are ongoing. Funding for Athletics capital projects has been discussed at 4.5.8.

- 6.3.3 Continue processes and staffing structures to provide greater support for ongoing University operations, sustaining current-use giving at $50 million annually.

In 2022–23, SMU received over $60 million for current use priorities. As part of that, SMU Giving Day continues to thrive and grow. On March 7, 2023, 4,035 donors contributed over $5.2 million, compared to 3,347 donors and over $3.1 million in 2022. Previous figures were 5,244 donors, $2.5 million in 2021 and 3,250 donors, $1.4 million in 2019. (SMU Giving Day was suspended in 2020 due to COVID-19).

- 6.3.4 Develop new ways to cultivate and motivate major donors identified during the previous campaign, leading to new and larger future gifts; grow the number of $1 million donors to SMU to 200 by 2025.

  In 2022–23, the campaign received 28 new commitments of $1 million or more. Over the course of *SMU Unbridled*, the previous campaign, SMU had support from 184 donors at the $1 million or more level. Less than two years into the current campaign, at the end of May 2023, *SMU Ignited* already has 147 donors of $1 million or more.

- 6.3.5 Continue the upward trend in planned giving support, increasing the number and value of deferred gift expectancies and matured deferred gifts through 2025.

  In 2022–23, 12 new donors joined the Dallas Hall Society, which recognizes those who have included SMU in their deferred giving plans; 20 new expectancies were recorded for a total over $19 million.

- 6.3.6 Continue the focus on scholarship and endowed faculty funding priorities, adding another 750 endowed scholarships by 2025 and raising the total number of endowed faculty positions to 160 by 2025.

  SMU Unbridled raised the number of substantially endowed scholarships at SMU to 3,242. At the end of May 2023, that number had grown by 484 to 3,726, including 83 newly endowed scholarships and fellowships added in 2022–23.

  Support for scholarships (outright gifts and pledge payments) during 2022–23 totaled over $22 million – $11.8 million to endowed scholarships and $10.2 million to operational scholarships.

  See 1.1.1 for a discussion of endowed academic positions.

- 6.3.7 Increase annually the number of volunteers involved in fundraising initiatives.

  During 2022–23, 588 alumni and parents volunteered to participate through Annual Giving and Alumni Relations channels as fundraisers, admissions volunteers, board and committee members, chapter leaders and social media

ambassadors. This number is lower than in previous years. As a result of the pandemic, presumably due to more limited social exposure, students had become less responsive to cold calls from alumni. Admission found greater response from students through texting but did ask prospective students if they would like to be contacted by an SMU alum. Each admitted student who opted in received a call from an alum. Alumni engagement in the admission process shifted from being asked to make cold calls to admitted students to invitations to take part in on-campus Admission events, a shift well received by the students and the alumni. Alumni Board and Parent Boards considered engagement efforts for greater participation this year and are revising structures to allow for more participants each year.

Objective 6.4 Elevate SMU's national profile to raise rankings and garner additional support for the University's strategic priorities, building on the accomplishments of SMU programs and its people.

In the *U.S. News & World Report*'s 2023 Best Colleges, SMU again ranks among the top 20% of national universities (72 out of 443 institutions in 2022–23, 68 out of 392 institutions in 2021-22). In Texas, only Rice and the University of Texas at Austin ranked higher.

In its 2023 rankings, the Center for World University Rankings ranked SMU among the top 1.7% of world universities (343 of 20,531 institutions evaluated).

In its 2022 and 2023 rankings, *The Princeton Review* ranked SMU Guildhall No. 3 in the world for its graduate game design program.

For the first time, SMU had three graduate schools ranked in the top 50 by *U.S. News & World Report* in April 2023.

Cox School of Business

- o No. 33 Full-Time MBA (FTMBA) *U.S. News & World Report's Best Business Schools,* April 2023
- o No. 40 FTMBA *Bloomberg Businessweek,* October 2022, No. 33 for student learning, and No. 25 for entrepreneurship
- o No. 39 in the U.S and No. 53 globally FTMBA *The Economist,* June 2022, No. 11 globally for potential to network, and No. 15 globally for faculty quality
- o No. 35 FTMBA *Fortune Magazine* 2022–23
- o No. 35 *Poets & Quants'* "The World's Best MBA Programs for Entrepreneurship," November 2022

- No. 19 Professional MBA (PMBA), *Fortune Magazine,* 2022–23

- No. 35 PMBA, *U.S. News & World Report,* April 2023

- No. 17 Online MBA *Poets & Quants'* "The Best Online MBA Programs of 2023," November 2022

- No. 39 Cox BBA according to *U.S. News & World Report's Best Undergraduate Business Schools*, September 2022

- No. 23 Cox BBA, *Poets & Quants for Undergrads,* March 2023; No. 20 in the nation for academic experience and No. 24 for career outcomes

Dedman School of Law

- No. 45 *U.S. News & World Report's Best Law Schools, 2023-24*

- No. 38 *Above the Law Top 50 Law Schools*, 2023

- No. 15 highest percentage of 2022 graduates placed in long-term, full-time, bar-passage required jobs, *Reuters* May 2023

- No. 29 among law schools whose 2022 graduates landed associate jobs at the nation's 100 largest law firms, *National Law Journal*'s *The 2023 Top 50 Go-To Law Schools*

- No. 29 Heath Care Law, No. 36 Criminal Law, No. 42 International Law, No. 47 Corporate/Business Law, No. 47 Trial Advocacy Law, No. 50 Tax Law, *US News & World Report's Best Law Schools, 2023-24*

Lyle School of Engineering

- 2021 Bronze Award for diversity and inclusion from the American Society for Engineering Education – the highest such award a school can receive

Simmons School of Education and Human Development

- No. 49 *U.S. News & World Report's Best Graduate Education Schools*, April 2023

- 6.4.1 Continue to support SMU branding efforts, centrally and through schools and units.

Throughout fiscal year 2023, SMU continued to roll out the unified logo system introduced the prior year and to instill the "World Changers Shaped Here" brand message in communications across all schools and units.

See 6.4.3 for the impact of SMU's marketing as reflected in social media.

- 6.4.2 Build external support for the goals of the SMU strategic plan.

  SMU continued highly successful, aggressive promotion of SMU students, faculty, staff, and programs. The team balanced media inquiries for well-established experts in law and political science with building interest in additional experts across a broad range of topics. Placements in priority local media grew by 47% and total global media mentions increased slightly.

  The cultivation, editing and pitching of op-eds written by SMU faculty members continued to position SMU faculty as thought leaders on timely topics. The team's commentary editor successfully placed 40 op-eds in media across the country ranging from *The Dallas Morning News* and *USA Today* to the *South China Morning Post* – a Hong Kong-based English-language newspaper. First-time op-ed placements included *Slate*, the *New York Daily News*, Fox News Business, the *Boston Globe* and *Texas Monthly*.

  In fall 2022, the 2021–22 Annual Progress Report on the SMU Strategic Plan was shared with executive boards of each school and major center at SMU.

- 6.4.3 Annually expand social media use to reach new audiences, increase visibility of academic progress, and gain more financial support.

  With its five-year marketing plan, SMU seeks to increase the number of higher education leaders who recognize SMU as a premier university, the number of alumni and North Texans who perceive SMU as a smart investment, and the number of prospective students who make SMU their top choice.

  The numbers from fiscal year 2023 demonstrate continued strong performance. With higher education leaders, a shift in focus away from impressions and in favor of conversions led to more people clicking to visit the SMU website. Among alumni and North Texans, despite significant cost increases in airport advertising (a major driver of impressions), impressions were nearly equal to the previous year and SMU achieved a significant increase in clicks to the website. With prospective students, expanding our geographic focus from Dallas-Fort Worth to include Houston and Nashville meant a greater focus on impressions – generating a significant increase – and less on conversions.

  Higher education leaders:

  - 25% decrease in impressions (browsers on social media have been shown your content; 13.5 million in 2022–23 compared to 18.1 million compared in 2021–22)

- 11% increase in conversions (clicks through to SMU website; 162,874 compared to 146,367)

Alumni and North Texans:

- 3% decrease in impressions (browsers on social media have been shown your content; 63.7 million compared to 65.4 million)

- 31% increase in conversions (clicks through to SMU website; 123,212 compared to 93,721)

Prospective students:

- 49% increase in impressions (browsers on social media have been shown your content; 49.9 million compared to 33.6 million)

- 13% decrease in conversions (clicks, video views, and requests for more information; 138,147 compared to 158,387)

Across all audiences:

- 1% increase in mentions over traditional media (188,498 compared to 186,420)

- 4% decrease in mentions over social media (427,635 compared to 447,748)

SMU grew its total social media followers on its Facebook, LinkedIn, Twitter, and Instagram from 281,000 in 2021–22 to 298,000 in 2022–23, a 6% increase.

Objective 6.5 Employ investment best practices to balance potential rewards and risks to grow a diversified endowment to increase support to the University's academic priorities.

- 6.5.1 Outperform policy benchmarks while managing risk.

At the end of May 2023, SMU's endowment had a market value of $2.03 billion after providing $101 million in support of University operations.

The environment for financial markets remains dynamic as global equity markets have rebounded strongly from the September 2022 lows while global bond markets continue to be pressured by rising interest rates. While inflation in the United States peaked in 2022, it remains higher than the Federal Reserve's target of 2%. Despite these challenges, the national economy has shown resilience and the job market remains strong. In the National Association of College and University Business Officers (NACUBO) reporting, years, designated by the endpoint, start July 1 and end June 30. Years referenced in the following responses to 6.5.1 and 6.5.2 refer to such periods.

For 2023 global equities returned 16.5% while global bonds declined -1.3%. Over the same period, SMU's diversified pool of endowment assets returned 8.0%, underperforming the 70/30 Global Stocks/Bonds benchmark which returned 11%. Over the past three years, SMU's endowment portfolio has delivered a 9.4% annualized rate of return versus 6.1% for the 70/30 benchmark.

- 6.5.2 Ensure a total return ranked in the top 50% cohort and aspirational universities over a business cycle.

As of June 30, 2023, SMU's annual return of 8.0% ranked in the top quartile among large endowments (endowments with assets greater than $1 billion). The median return for this cohort was 5.6%.

Objective 6.6 Promote a shared sense of community at SMU to conserve resources, establish sustainable practices, and contribute to the community's livability.

STABLE (Supporting Technology, Assets, Buildings, Logistics, and Events), SMU's work management system begun in 2021, is now fully integrated across campus for use by students, faculty and staff for event management, space management, and facility maintenance request management.

- 6.6.1 Work to engage students, faculty, and staff in sustainability efforts that will benefit the campus and the environment.

Creative communications with students, faculty, and staff inform the campus of the ongoing sustainability efforts in new construction LEED certifications, energy management, and landscaping methods. Enhancements to the interactive map include city-provided recycling bin locations, electric vehicle charging stations, LEED building locations, and water bottle filling stations.

- 6.6.2 Continue to seek appropriate Leadership in Energy and Environmental Design (LEED) designations on all new construction and renovations.

The Office of Facilities Planning and Management continues to pursue LEED certification on new construction, and when feasible, renovations. The recently completed Frances Anne Moody Hall was awarded LEED certification. The SMU Owen Arts project in Meadows was awarded LEED Silver certification. LEED certification is being pursued for the Cox School of Business Renovation and Expansion, the Weber End Zone Complex, and the Smith Perkins Halls Renovation.

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