



SOUTHWESTERN UNIVERSITY

Institutional Dashboard

Confidential

November 2025

Compiled by the Office of Institutional Research & Effectiveness with the assistance of the following offices: Academic Affairs, Enrollment (Financial Aid), Finance & Administration, President, Student Life, University Relations (Development), and Marketing & Communications.

The Office of Institutional Research & Effectiveness provides and coordinates information utilized for Southwestern University decision-making, reporting, assessment, and accreditation. The webpage for the office contains data on student enrollment, retention and graduation rates, student surveys, top majors, and more at: <https://www.southwestern.edu/institutional-research/>

OFFICE OF INSTITUTIONAL RESEARCH AND EFFECTIVENESS
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BOARD OF TRUSTEES (BOT)
COMPARISON GROUP

PEER :

Austin College, TX
Centre College, KY
Connecticut College, CT
Occidental College, CA
Rhodes College, TN
Sewanee: The University of the South, TN
The College of Wooster, OH
Trinity College, CT
Trinity University, TX

ASPIRATIONAL :

Dickinson College, PA
Franklin & Marshall College, PA
Gettysburg College, PA
Kenyon College, OH
Lawrence University, WI
Macalester College, MN

ASSOCIATED COLLEGES OF THE SOUTH (ACS)
COMPARISON GROUP

Centenary College of Louisiana, LA
Centre College, KY
Davidson Colleges, NC
Furman University, SC
Hendrix College, AR
Millsaps College, MS
Morehouse College, GA
Rhodes College, TN
Rollins College, VA
Sewanee The University of the South, TN
Spelman College, GA
Trinity University, TX
University of Richmond, VA
Washington and Lee University, VA

This presentation implements a red, yellow, and green "light" concept. These icons indicate Southwestern's performance among comparable institutions. These can be found at the top of relevant slides in the presentation.



RED
Watch closely.



YELLOW
Keep an eye on it.



GREEN
Not a worry.

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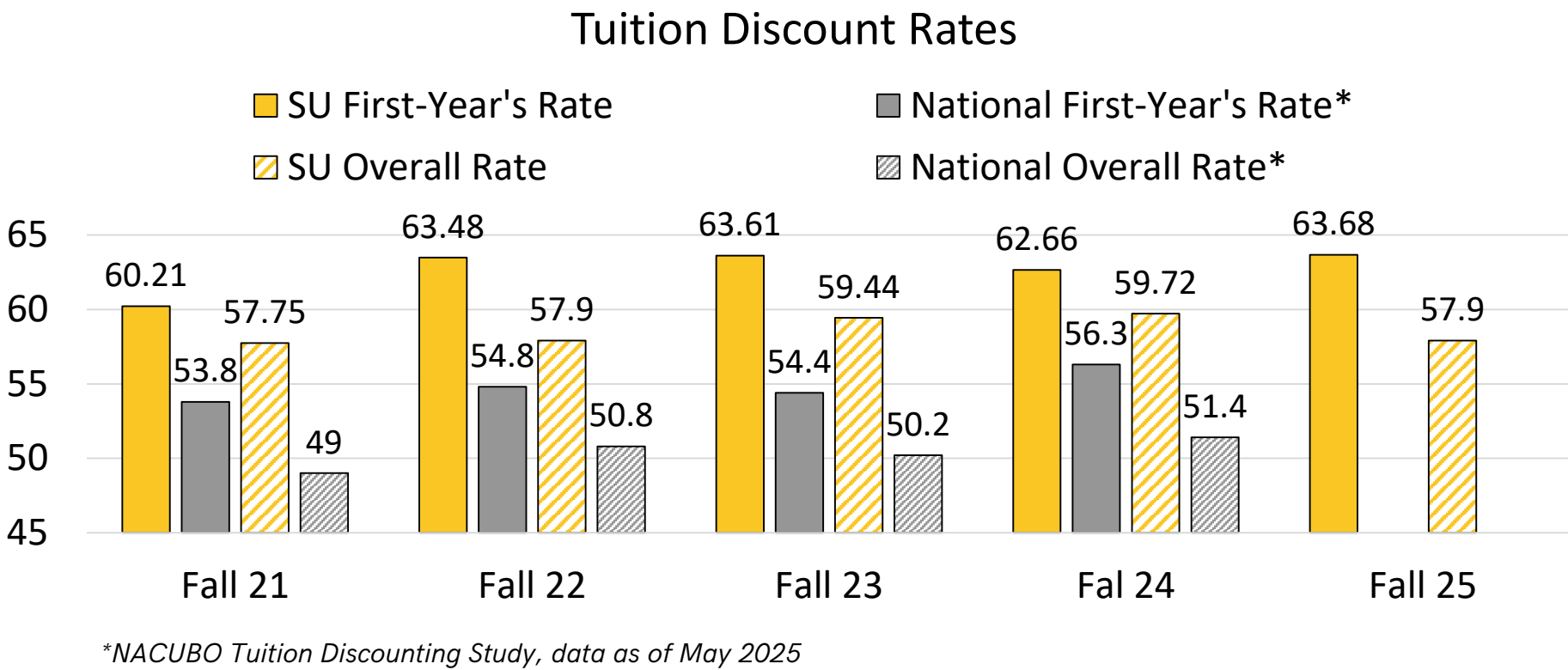
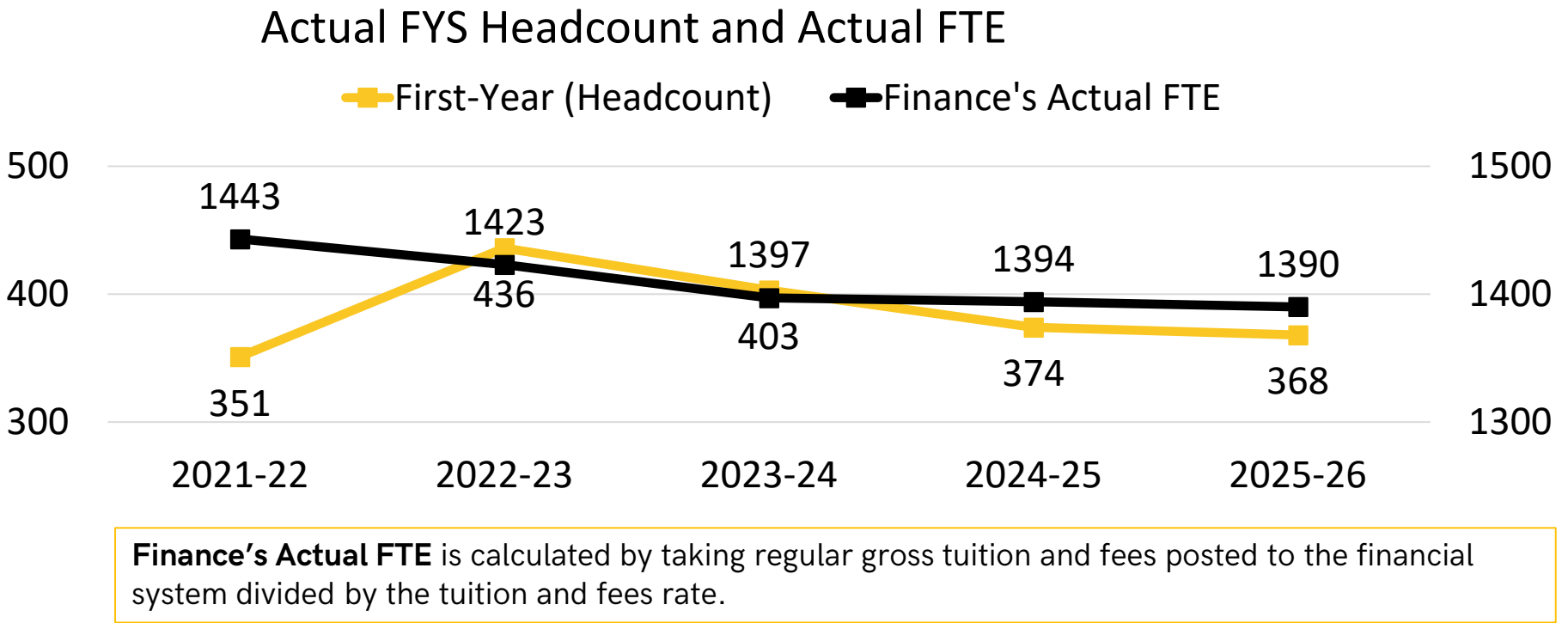
Admissions

Enrollment Goals vs. Actuals

GOAL: Meet the budgeted target without a mid-year adjustment.
Admissions has not met the budgeted FTE target four out of the last five years. The loss in revenue is compounded over the next four years. Actual FTE's have decreased 3.7% over 5 years while first-year cohort headcounts have decreased 15.6% over the last 4 years. This enrollment decline appears to be a general trend and not a temporary deviation.



| | FY22 | FY23 | FY24 | FY25 | FY26 |
|---|-------------|-------------|-------------|-------------|-------------|
| Discount Rate | 57.75% | 57.90% | 59.44% | 59.72% | 57.90% |
| Target FYS | 385 | 425 | 425 | 395 | 395 |
| Target FYS (Adjusted) | 351 | 434 | 395 | 373 | 395 |
| Actual FYS | 351 | 436 | 403 | 374 | 368 |
| Target Student FTE | 1446 | 1423 | 1401 | 1397 | 1401 |
| Finance's Actual Student FTE | 1443 | 1423 | 1397 | 1394 | 1390 |
| Actual Number Enrolled | 1504 | 1483 | 1459 | 1441 | 1434 |
| Tuition Rate | 46,300 | 48,450 | 50,588 | 53,288 | 56,219 |
| Student Services & IT Fee Rate | 300 325 525 | | | | |
| Total Tuition and Fees | 68,366,247 | 69,469,299 | 71,797,912 | 75,586,553 | 79,705,733 |
| Scholarships (per Enrollment Research) | -39,429,327 | -40,220,536 | -42,678,531 | -45,141,142 | -46,151,000 |
| Net Tuition Revenue | 28,936,920 | 29,248,763 | 29,119,381 | 30,445,411 | 33,554,733 |
| Revenue Lost Target to Actual Student FTE | 138,900 | 0 | 203,552 | 160,839 | 624,184 |



Attrition

Estimated Total Cost of Student Attrition Per Year

GOAL: Increase retention rate between the first and second semester, increase the retention rate between the first and second year, and increase the retention rate between the first and third year by 2% each. When students leave, the loss in revenue is compounded over future years. The lost revenue from students who left from the 2022, 2023, and 2024 first-year cohorts continues to impact Southwestern’s 2025-26 budget. This table is an estimate of that cumulative effect.



Estimated Total Annual Cost of Attrition

| Students Leave Southwestern After: | Average Number of Students Leaving ¹ | Cost of Future Tuition and Fees Lost by Attrition Per Student | Cost of Future Tuition and Fees Lost by Attrition Per Category |
|------------------------------------|---|---|--|
| Fall of Freshman Year | 23 | \$130,761 | \$3,007,503 |
| Spring of Freshman Year | 48 | \$113,012 | \$5,424,576 |
| Fall of Sophomore Year | 15 | \$91,971 | \$1,379,565 |
| Spring of Sophomore Year | 18 | \$74,222 | \$1,355,996 |
| Fall of Junior Year | 5 | \$54,311 | \$271,555 |
| Spring of Junior Year | 6 | \$36,562 | \$201,091 |
| Cost of Attrition Per Year * | | | \$11,620,286 |

**Weighted average of 2025 net price using a conservative 3% annual increase of tuition and fees. Using a weighted average cost assumes that attrition is proportional across income categories and the students do not return to Southwestern University. This calculation depicts the cumulative impact of attrition across multiple first-year cohorts in any specific year.*

¹ Average number of students leaving after the given term using actual attrition from Fall 2019 to Fall 2025.

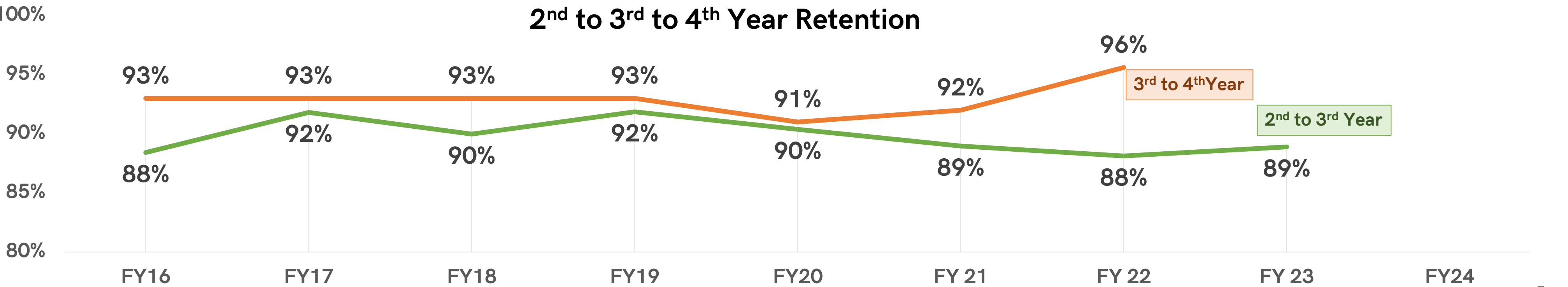
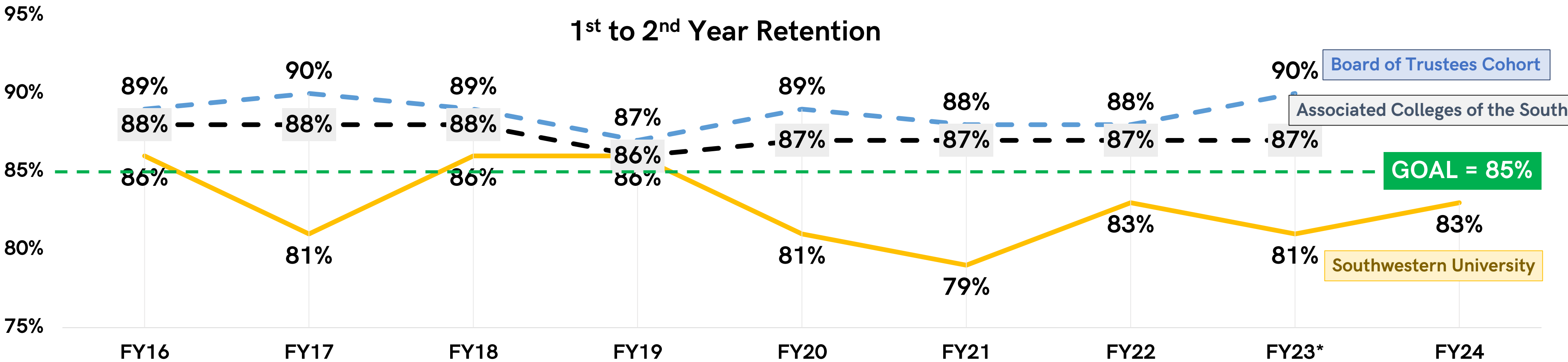
Retention Rates

Retention by First-Year Cohorts

- GOAL: Achieve a consistent 1st to 2nd Year retention rate of 85%
- GOAL: Achieve a consistent 2nd to 3rd Year retention rate of 90%
- GOAL: Achieve a consistent 3rd to 4th Year retention rate of 95%



With current trends, increasing retention rates are expected. Each of these three metrics improved between Fall 2024 and Fall 2025.



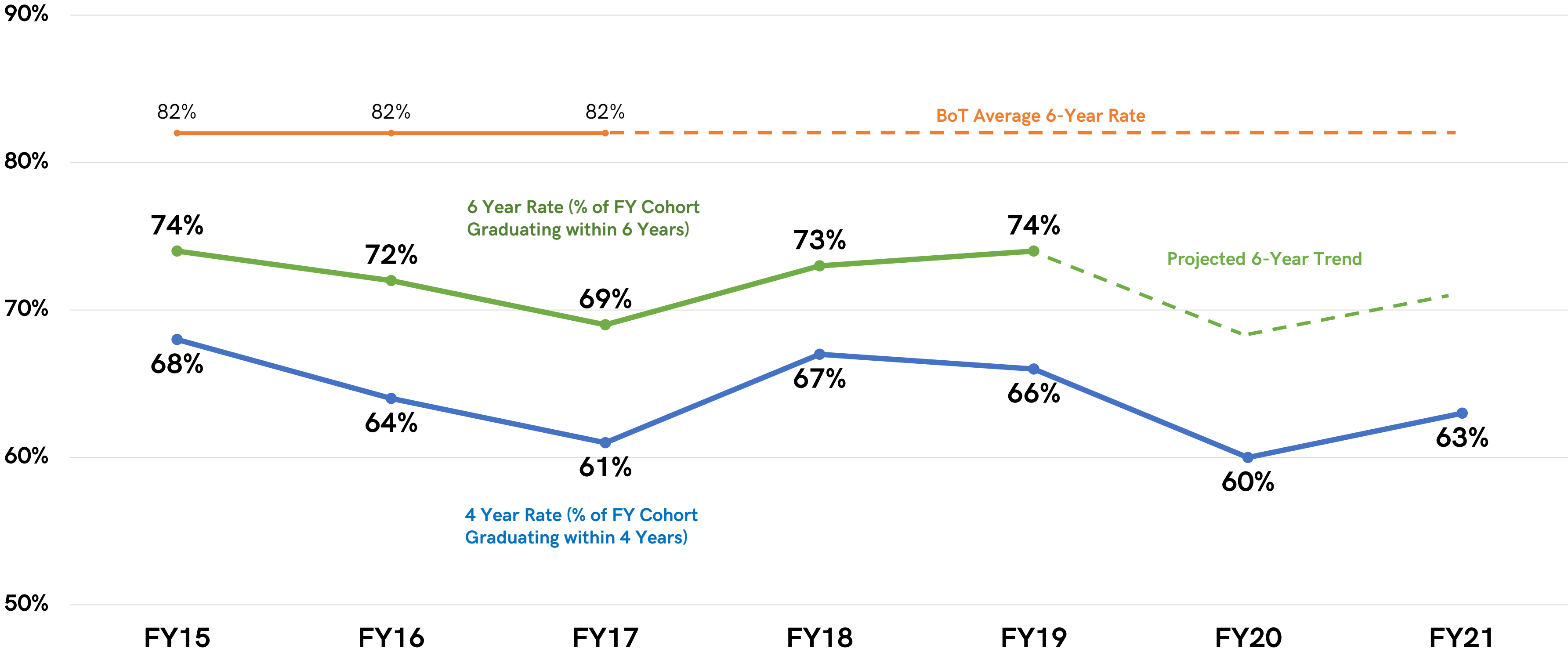
Graduation Rate

Graduation by First-Year Cohorts

The six-year graduation rate is an important measure of student success. This metric is the percentage of students that graduate within 6 years and it is reported to SACSCOC and the U.S. Department of Education as a key performance indicator for Southwestern.



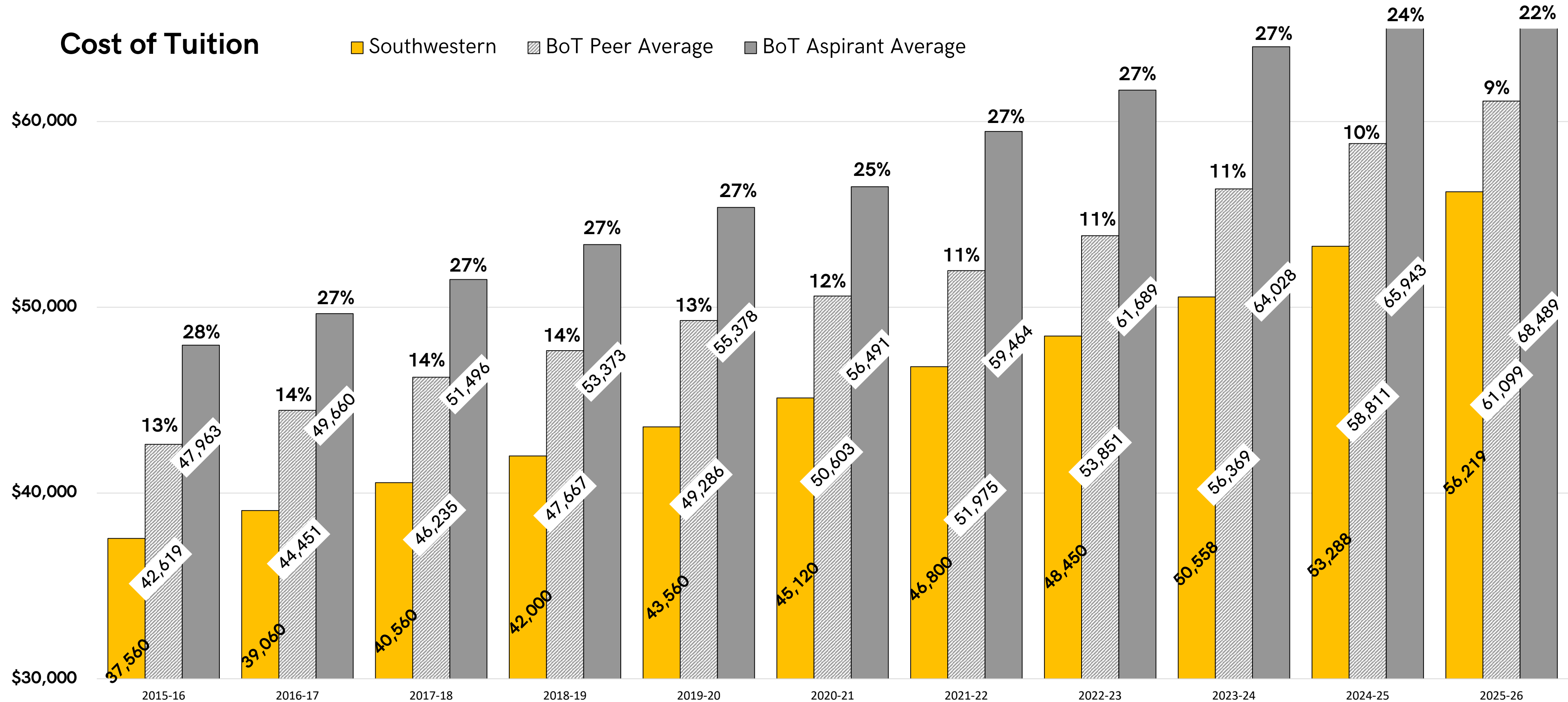
Graduation by First-Year Cohort



Admissions

Tuition Since 2015

GOAL: Reduce difference between SU and Peers to 8% and the difference between SU and Aspirants to 22%. Consideration should be given to the landscape of higher education and college pricing strategy. We are one point from meeting the Aspirant average goal.



Admissions

Proposed Costs for 2026-27

2026-27 rates for other institutions were estimated by repeating the published increase between 2024 and 2025.



Estimated 2026-27 Rate Based on 2025-26 Published Rates and Increases

| | | 2025-26 | | 2026-27 | | 2025-26 | | 2026-27 | | 2026-27 | |
|---------------|-------------------------|----------------|-------|----------------|--|-------------------------|-----------|--------------|-----------|-------------------------|-----------|
| | | Tuition & Fees | % Inc | Tuition & Fees | | Room & Board | % Inc | Room & Board | | Total | |
| BoT Aspirant | Franklin and Marshall | \$ 73,070 | 3.38% | \$ 75,536 | | Connecticut College | \$ 19,934 | 7.41% | \$ 21,411 | Connecticut College | \$ 94,820 |
| ACS | Davidson College | \$ 69,315 | 7.62% | \$ 74,594 | | Trinity College | \$ 19,650 | 4.02% | \$ 20,440 | Trinity College | \$ 94,051 |
| BoT Aspirant | Macalester College | \$ 70,862 | 4.06% | \$ 73,730 | | Spelman College | \$ 18,924 | 4.60% | \$ 19,795 | Franklin and Marshall | \$ 93,407 |
| BoT Peer | Trinity College | \$ 70,790 | 4.01% | \$ 73,611 | | Occidental College | \$ 20,321 | -4.14% | \$ 19,480 | Davidson College | \$ 93,122 |
| BoT Peer | Connecticut College | \$ 70,266 | 4.50% | \$ 73,409 | | Kenyon College | \$ 17,380 | 11.13% | \$ 19,314 | Kenyon College | \$ 92,217 |
| BoT Aspirant | Kenyon College | \$ 72,220 | 0.95% | \$ 72,903 | | University of Richmond | \$ 18,010 | 5.08% | \$ 18,924 | Macalester College | \$ 90,954 |
| BoT Aspirant | Dickinson College | \$ 68,580 | 4.50% | \$ 71,641 | | Rollins College | \$ 17,730 | 5.41% | \$ 18,689 | Occidental College | \$ 90,704 |
| BoT Aspirant | Gettysburg College | \$ 68,970 | 3.50% | \$ 71,384 | | Washington and Lee U | \$ 18,685 | 0.00% | \$ 18,685 | Dickinson College | \$ 90,275 |
| BoT Peer | Occidental College | \$ 68,704 | 3.70% | \$ 71,224 | | Dickinson College | \$ 17,850 | 4.39% | \$ 18,634 | University of Richmond | \$ 89,479 |
| ACS | University of Richmond | \$ 67,840 | 4.00% | \$ 70,554 | | Davidson College | \$ 17,800 | 4.09% | \$ 18,529 | Gettysburg College | \$ 88,634 |
| ACS | Washington and Lee U | \$ 68,045 | 0.00% | \$ 68,045 | | Franklin and Marshall | \$ 16,936 | 5.52% | \$ 17,871 | Washington and Lee U | \$ 86,730 |
| BoT Peer | College of Wooster | \$ 64,210 | 3.00% | \$ 66,115 | | Furman University | \$ 17,164 | 4.00% | \$ 17,850 | Rollins College | \$ 84,102 |
| ACS | Rollins College | \$ 62,950 | 3.91% | \$ 65,413 | | The University of the S | \$ 16,628 | 3.74% | \$ 17,250 | College of Wooster | \$ 82,376 |
| ACS | Furman University | \$ 61,444 | 2.80% | \$ 63,165 | | Gettysburg College | \$ 16,670 | 3.48% | \$ 17,250 | Furman University | \$ 81,015 |
| ACS | The University of the S | \$ 58,647 | 4.50% | \$ 61,288 | | College of the South | \$ 16,628 | 3.74% | \$ 17,250 | The University of the S | \$ 78,538 |
| BoT Peer, ACS | Rhodes College | \$ 59,082 | 3.50% | \$ 61,122 | | Macalester College | \$ 16,476 | 4.54% | \$ 17,224 | College of the South | \$ 77,648 |
| BoT Aspirant | Lawrence College | \$ 58,794 | 3.20% | \$ 60,665 | | Austin College | \$ 14,476 | 12.84% | \$ 16,335 | Southwestern | \$ 76,488 |
| BoT Peer | College of the South | \$ 58,226 | 3.75% | \$ 60,398 | | Southwestern | \$ 15,224 | 7.00% | \$ 16,290 | Rhodes College | \$ 76,212 |
| | Southwestern | \$ 56,769 | 6.10% | \$ 60,198 | | College of Wooster | \$ 15,350 | 5.94% | \$ 16,262 | Trinity University | \$ 75,545 |
| BoT Peer, ACS | Trinity University | \$ 56,496 | 5.25% | \$ 59,462 | | Trinity University | \$ 15,402 | 4.42% | \$ 16,083 | Lawrence College | \$ 74,299 |
| BoT Peer, ACS | Centre College | \$ 55,490 | 5.05% | \$ 58,295 | | Centre College | \$ 14,850 | 6.53% | \$ 15,820 | Centre College | \$ 74,115 |
| BoT Peer | Austin College | \$ 50,004 | 2.75% | \$ 51,374 | | Hendrix College | \$ 15,278 | 2.87% | \$ 15,716 | Austin College | \$ 67,708 |
| ACS | Millsaps College | \$ 45,570 | 1.99% | \$ 46,478 | | Centenary College of L | \$ 15,200 | 2.70% | \$ 15,611 | Centenary College of L | \$ 61,434 |
| ACS | Centenary College of L | \$ 43,450 | 5.46% | \$ 45,823 | | Morehouse College | \$ 14,984 | 1.39% | \$ 15,193 | Millsaps College | \$ 61,010 |
| ACS | Hendrix College | \$ 40,572 | 6.21% | \$ 43,091 | | Rhodes College | \$ 14,336 | 5.26% | \$ 15,090 | Hendrix College | \$ 58,808 |
| ACS | Spelman College | \$ 32,470 | 2.90% | \$ 33,410 | | Millsaps College | \$ 14,370 | 1.13% | \$ 14,532 | Spelman College | \$ 53,206 |
| ACS | Morehouse College | \$ 32,934 | 0.12% | \$ 32,975 | | Lawrence College | \$ 12,972 | 5.10% | \$ 13,634 | Morehouse College | \$ 48,168 |



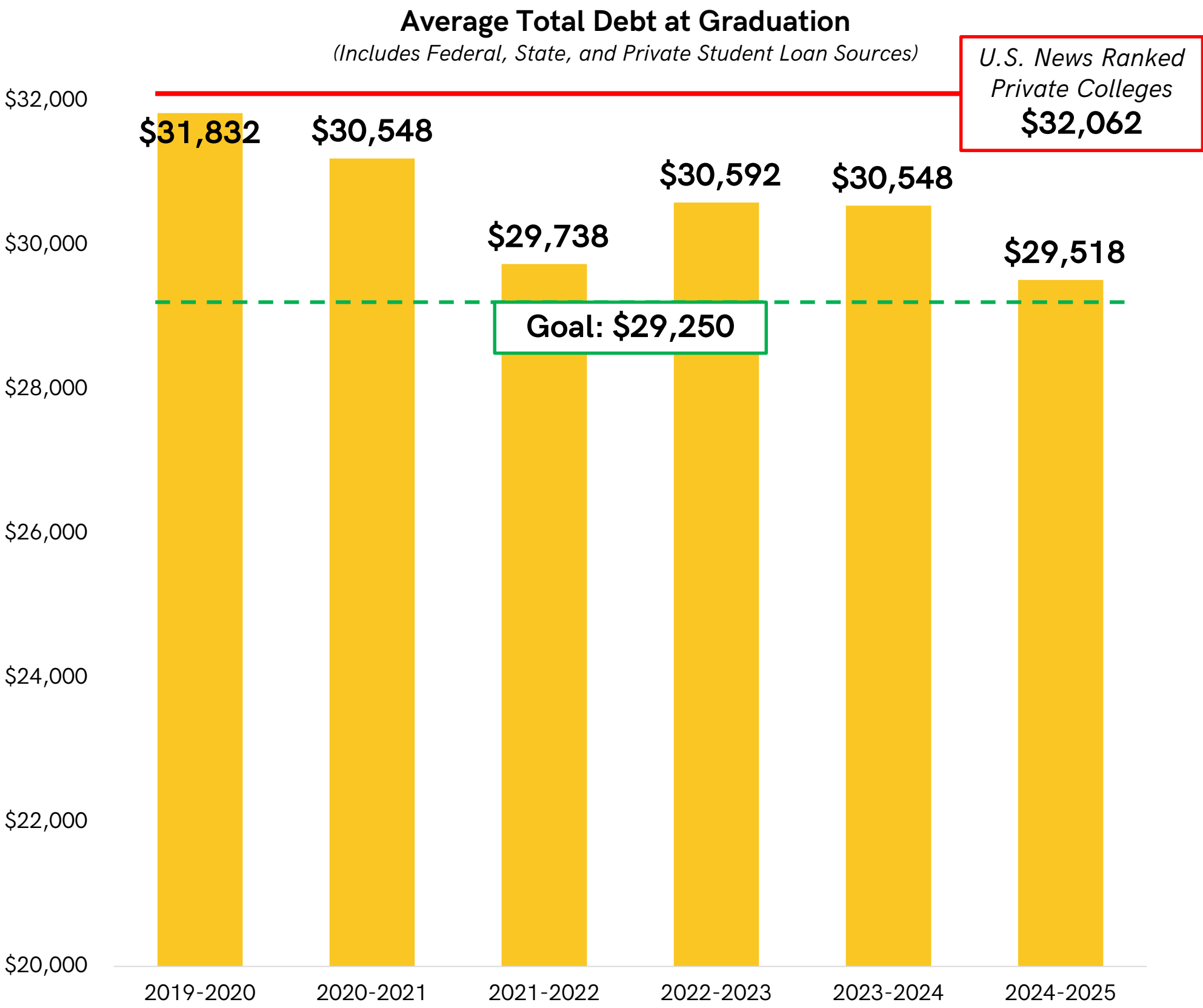
Admissions

Indebtedness of Graduating Students

GOAL: Average total debt for Southwestern students at graduation is \$29,250 which is \$2,812 less than the national average for US News ranked private colleges. According to U.S. News (2023), 59% of all graduates leave university with student loan debt, while only 54% of Southwestern 2024-25 graduates had student loan debt. The amount of average debt for them was within \$268 of the goal.



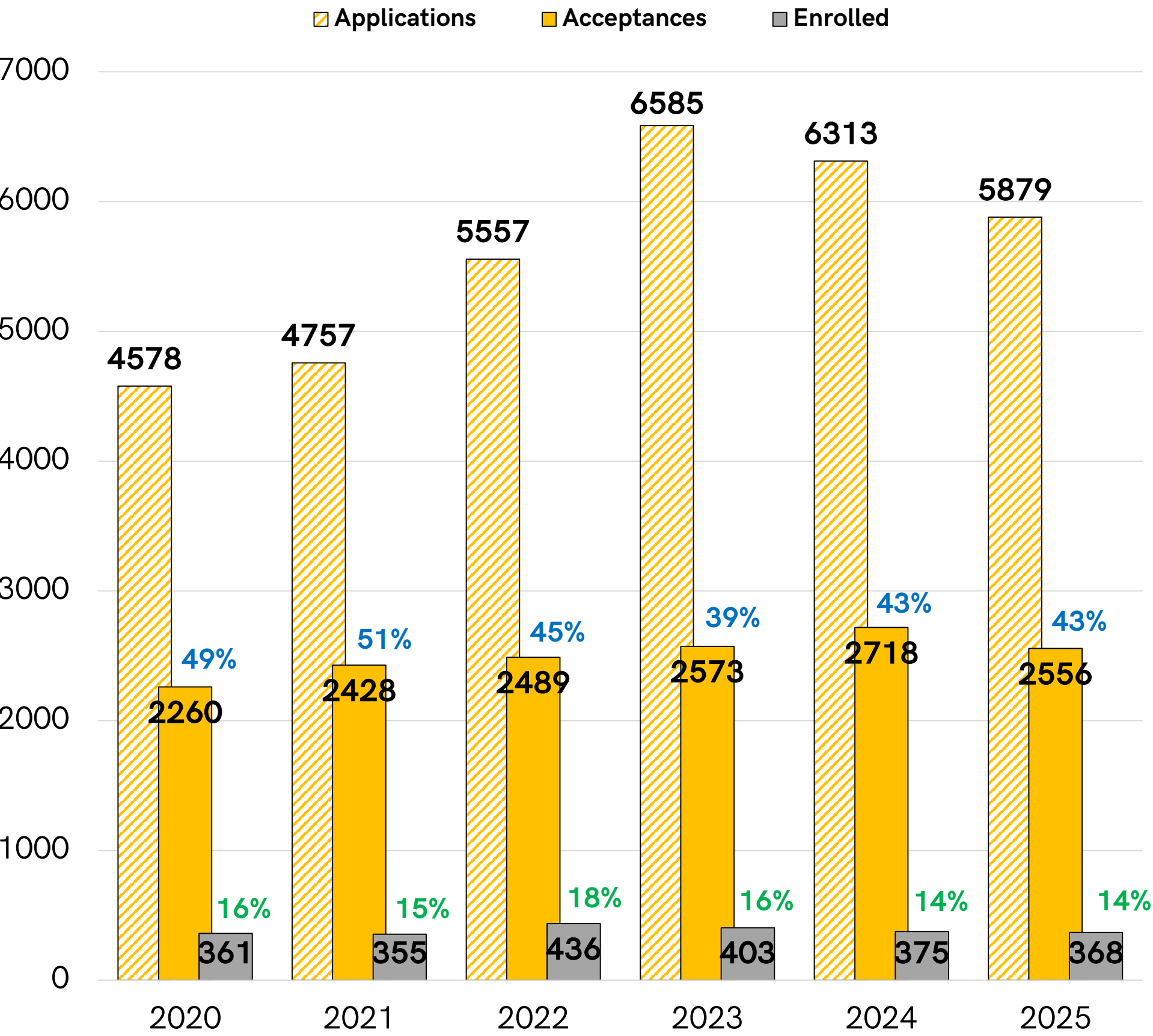
| DEMOGRAPHIC GROUP | AVERAGE AMOUNT BORROWED | <i>National Center for Education Statistics</i> Average Cumulative Amount Borrowed for Bachelor's Degree: |
|-------------------------------|-------------------------|--|
| Female | \$30,174 | |
| Male | \$28,558 | |
| Black/African American | \$48,692 | \$33,960 |
| Asian | \$11,500 | \$30,470 |
| Hispanic | \$26,550 | \$27,020 |
| Multiple Races | \$22,580 | \$30,420 |
| White | \$30,369 | \$30,720 |
| First-Generation Students | \$27,545 | |
| Non-First-Generation Students | \$30,125 | |



Admissions

Selectivity and Yield

A completed application is initiated by the student, requires a high school transcript, application essay, and SAT/ACT test scores or an interview.



GOAL for Fall 2026:
6500 applications and a first-year class size of 378.

GOAL:
Selectivity: **45%**
Yield (Conversion Rate): **17%**



Each year, approximately half of first-year applications come from the four major metropolitan areas in Texas (Austin, San Antonio, Houston, and DFW). A sample of other recruitment regions along with these areas is included below.

| Selectivity | 2023 | 2024 | 2025 |
|-------------|-------|-------|-------|
| Overall | 39.1% | 43.1% | 43.4% |
| Austin | 53.9% | 54.1% | 59.3% |
| San Antonio | 51.3% | 49.3% | 48.7% |
| Houston | 55.3% | 62.0% | 55.9% |
| DFW | 55.2% | 56.3% | 53.9% |
| Panhandle | 61.5% | 46.2% | 44.4% |
| El Paso | 28.4% | 28.0% | 23.7% |
| Valley | 27.4% | 26.1% | 28.1% |

Selectivity: The proportion of those students who submitted applications and were accepted to the University.

| Yield (Conversion) | 2023 | 2024 | 2025 |
|--------------------|-------|-------|-------|
| Overall | 15.7% | 13.8% | 14.5% |
| Austin | 21.7% | 16.2% | 14.3% |
| San Antonio | 18.4% | 14.6% | 12.2% |
| Houston | 15.8% | 15.1% | 17.7% |
| DFW | 11.9% | 12.2% | 11.5% |
| Panhandle | 16.7% | 8.3% | 12.5% |
| El Paso | 15.8% | 23.8% | 9.1% |
| Valley | 8.7% | 9.7% | 13.1% |

Yield (Conversion Rate): The proportion of students who enroll after being accepted to the University.

Attrition

Attrition of Athletes

| Men's Teams | Players FA25 | Annual Recruit Goals | Fall to Fall Attrition (5yr Avg) | Women's Teams | Players FA25 | Annual Recruit Goals | Fall to Fall Attrition (5yr Avg) |
|-------------|--------------|----------------------|----------------------------------|---------------|--------------|----------------------|----------------------------------|
| Baseball | 43 | 10 – 12 | 17% | Softball | 23 | 6 - 8 | 9% |
| Basketball | 22 | 5 – 7 | 14% | Basketball | 13 | 5 – 7 | 15% |
| Football | 104 | 35 – 45 | 18% | Volleyball | 17 | 5 – 6 | 10% |
| Lacrosse | 45 | 12 – 15 | 11% | Lacrosse | 16 | 8 – 10 | 9% |
| Soccer | 30 | 6 – 8 | 7% | Soccer | 35 | 6 – 8 | 10% |
| Swim/Diving | 12 | 6 - 8 | 7% | Swim/Diving | 16 | 6 - 8 | 6% |

GOAL: Retain athletes at the same rate as the overall student population.



Athletes Departing without Graduating Between Fall 2024 and Fall 2025

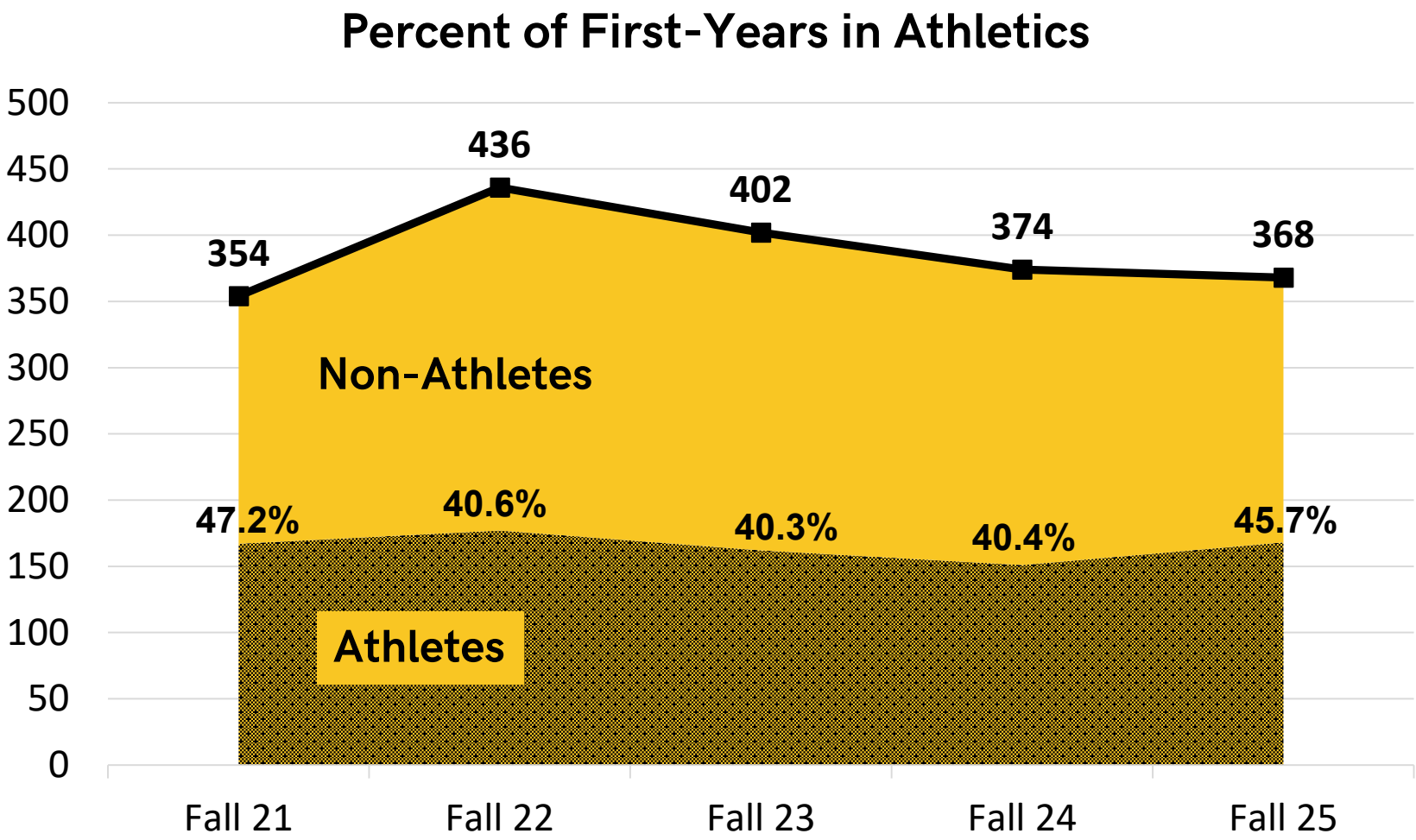
| Athletes Leaving (without Graduating) | Male Athletes | Female Athletes |
|---------------------------------------|---------------|-----------------|
| Between Fall 2024 and Fall 2025 | 55 (17%) | 18 (11%) |
| Between Fall 2023 and Fall 2024 | 49 (15%) | 24 (13%) |
| Between Fall 2022 and Fall 2023 | 47 (13%) | 13 (7%) |

Athletic teams vary in size and attrition rates. Male athletes leave SU at higher rates than their female counterparts and the three year trend is increasing. In comparing the demographics of athletes, Black and Hispanic students leave at rates higher than White or multi-race athletes. The teams with higher attrition rates between F24 to F25:

- Men's Basketball (29%)
Men's Baseball (21%)
Women's Basketball (32%)
- Men's Football (24%)
Men's Lacrosse (16%)

Race/Ethnicity of Athletes Departing between Fall 2024 and Fall 2025

| | | |
|---------------------------|----|---------------------------------|
| White | 35 | 14% of White athletes |
| Black | 7 | 19% of Black athletes |
| Hispanic | 21 | 15% of Hispanic athletes |
| Asian | 0 | 0% of Asian athletes |
| Hawaiian/Pacific Islander | 0 | 0% of Pacific Islander athletes |
| Multiple Races | 2 | 10% of Multi-race athletes |





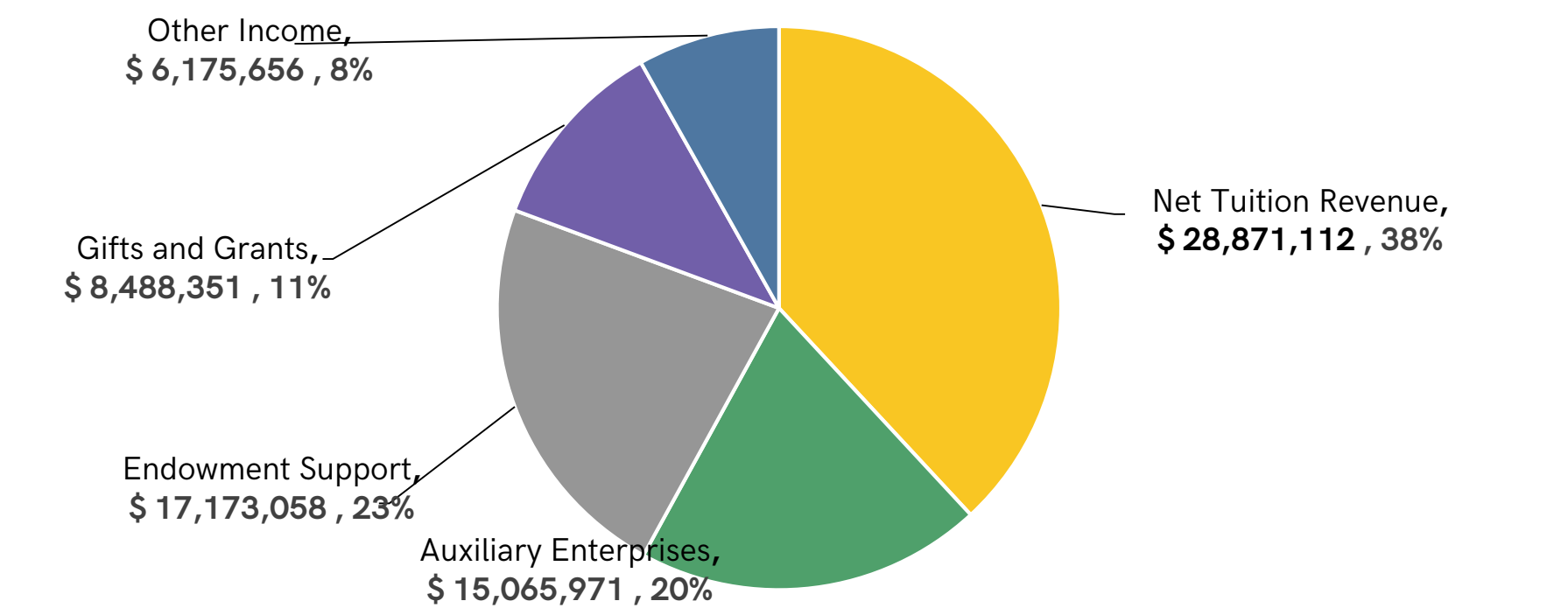
Financials

Revenues and Expenses (FY 2024-2025 Actual)

OPERATING REVENUES, FY 2024-25

| | |
|--------------------------|--------------|
| Net Tuition Revenue | 28,871,112 |
| Auxiliary Enterprises | 15,065,971 |
| Endowment Support | 17,173,058 |
| Gifts and Grants | 8,488,351 |
| Other Income | 6,175,656 |
| Total Operating Revenues | \$75,774,148 |

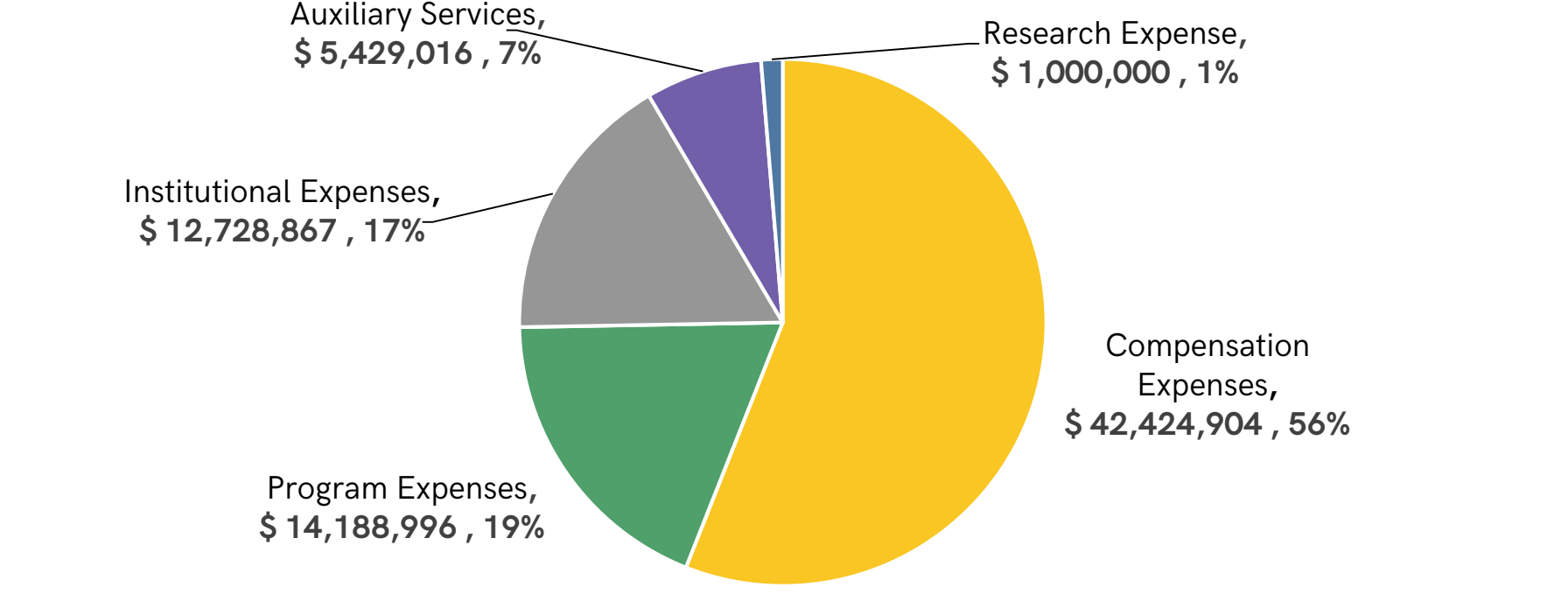
| OPERATING REVENUES | |
|---|--|
| Net Tuition Revenue: Gross tuition revenues (including Fall/Spring terms and Summer programs), net of all institutional scholarships. | |
| Auxiliary Enterprises: Revenues derived from campus room & board fees, bookstore, vending services, conference & event sales, café receipts, catering and Greek housing. | |
| Endowment Support: Endowment investment return, based on the Board-approved spend rate for the year (5.0%). | |
| Gifts and Grants: Recognized unrestricted contribution revenues from all sources, including government grants and all donors. | |
| Other Income: All other income sources, including investment income from non-endowment, summer camps, parking fees, violation revenues, late fees, etc. | |



OPERATING EXPENSES, FY 2024-25

| | |
|--------------------------|--------------|
| Compensation Expenses | 42,424,904 |
| Program Expenses | 14,188,996 |
| Institutional Expenses | 12,728,867 |
| Auxiliary Services | 5,429,016 |
| Research Expenses | 1,000,000 |
| Total Operating Expenses | \$75,771,783 |

| OPERATING EXPENSES | |
|---|--|
| Compensation Expenses: All personnel-related costs, including salaries, benefits, faculty/staff scholarships, and student wages. | |
| Program Expenses: Departmental operating budgets. | |
| Institutional Expenses: University-wide expenses, including insurance, depreciation, utilities, post-retirement benefits, and interest expense. | |
| Auxiliary Services: Expenses directly associated with campus housing and food services, bookstore, vending services and conference & event sales.. | |
| Research Expense: Expenses incurred through on-campus research. | |



Financials

Revenues and Expenses (FY 2025-2026 Budget)



OPERATING REVENUES, FY 2025-26

| | |
|--------------------------|--------------|
| Net Tuition Revenue | 33,310,294 |
| Auxiliary Enterprises | 15,515,918 |
| Endowment Support | 21,301,935 |
| Gifts and Grants | 4,650,000 |
| Other Income | 6,379,600 |
| Total Operating Revenues | \$81,157,747 |

OPERATING REVENUES

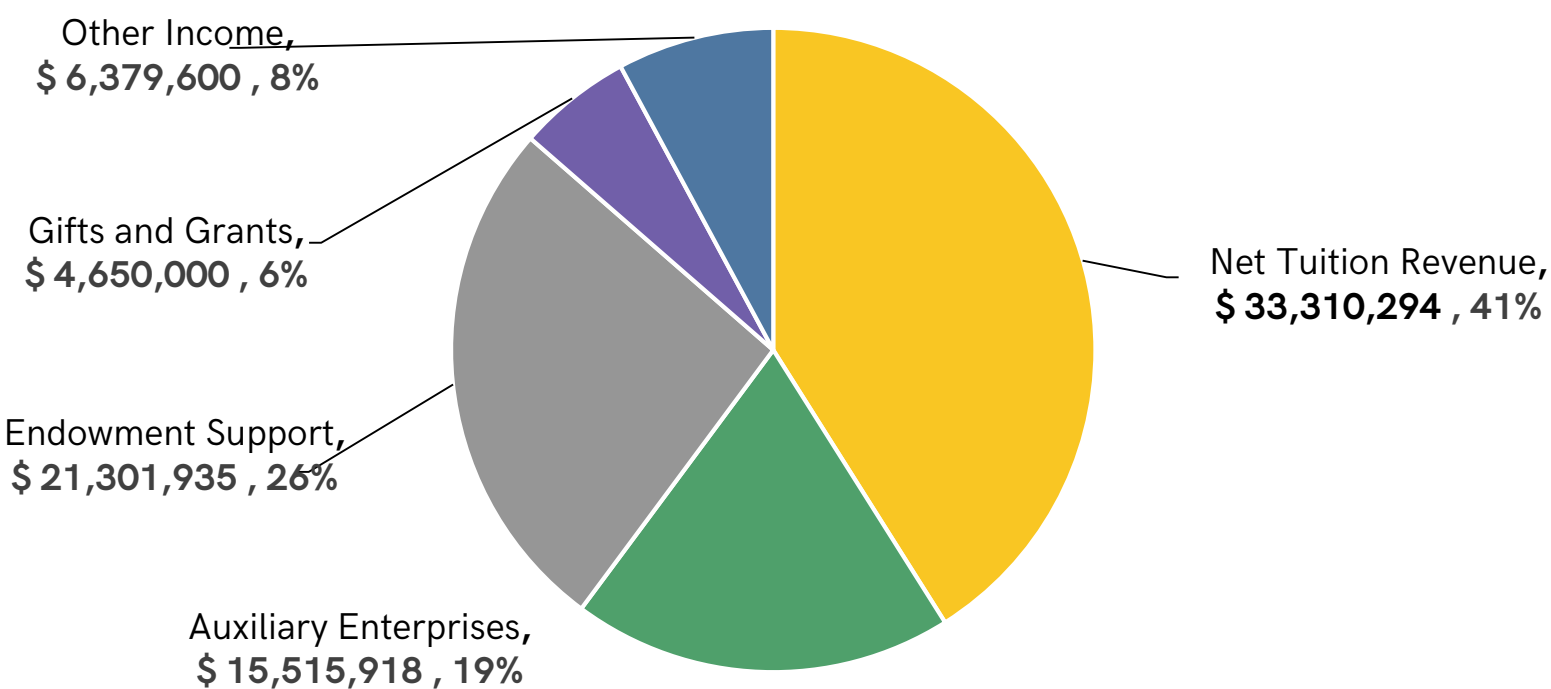
Net Tuition Revenue: Gross tuition revenues (including Fall/Spring terms and Summer programs), net of all institutional scholarships.

Auxiliary Enterprises: Revenues derived from campus room & board fees, bookstore, vending services, conference & event sales, café receipts, catering and Greek housing.

Endowment Support: Endowment investment return, based on the Board-approved spend rate for the year (5.0%).

Gifts and Grants: Recognized unrestricted contribution revenues from all sources, including government grants and all donors.

Other Income: All other income sources, including investment income from non-endowment, summer camps, parking fees, violation revenues, late fees, etc.



OPERATING EXPENSES, FY 2025-26

| | |
|--------------------------|--------------|
| Compensation Expenses | 42,983,719 |
| Program Expenses | 13,293,573 |
| Institutional Expenses | 19,212,641 |
| Auxiliary Services | 4,569,637 |
| Research Expenses | 1,000,000 |
| Total Operating Expenses | \$81,059,570 |

OPERATING EXPENSES

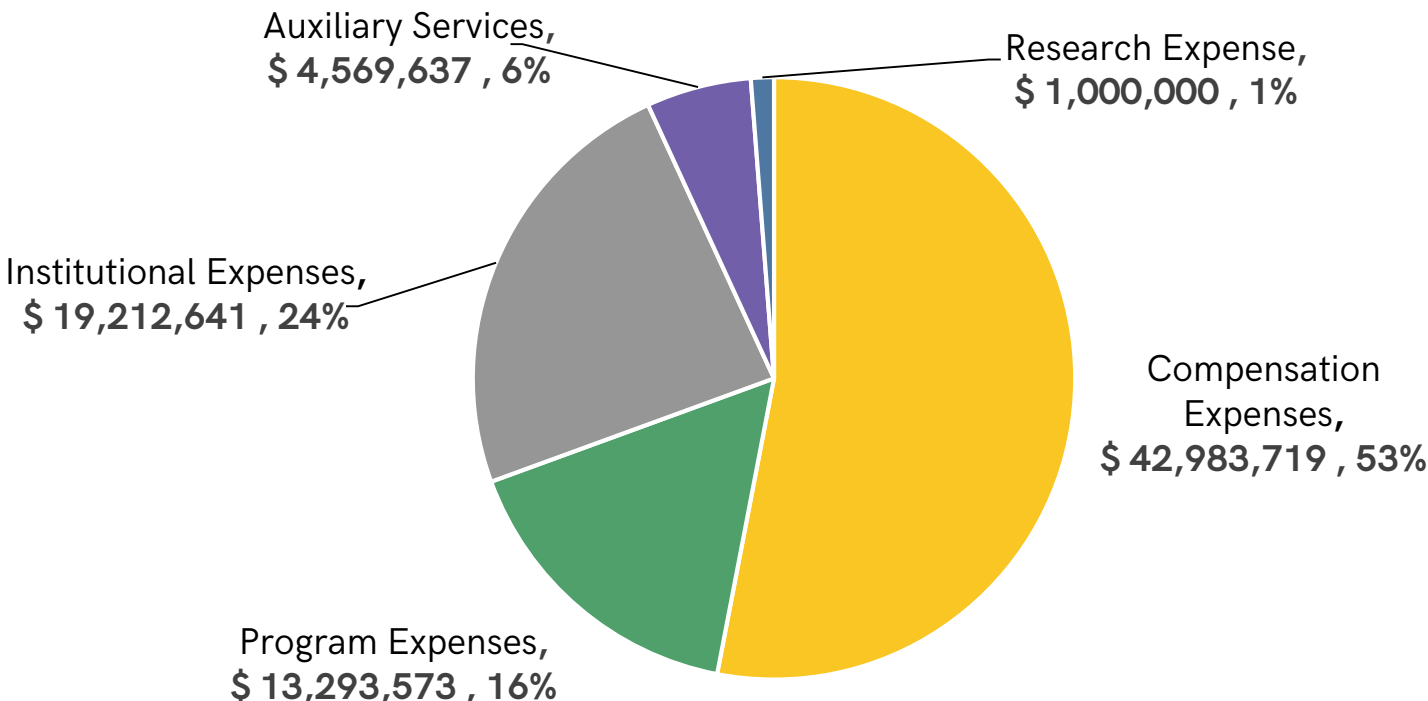
Compensation Expenses: All personnel-related costs, including salaries, benefits, faculty/staff scholarships, and student wages.

Program Expenses: Departmental operating budgets.

Institutional Expenses: University-wide expenses, including insurance, depreciation, utilities, post-retirement benefits, and interest expense.

Auxiliary Services: Expenses directly associated with campus housing and food services, bookstore, vending services and conference & event sales.

Research Expense: Expenses incurred through on-campus research.



*FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.

Financials

Net Asset Growth

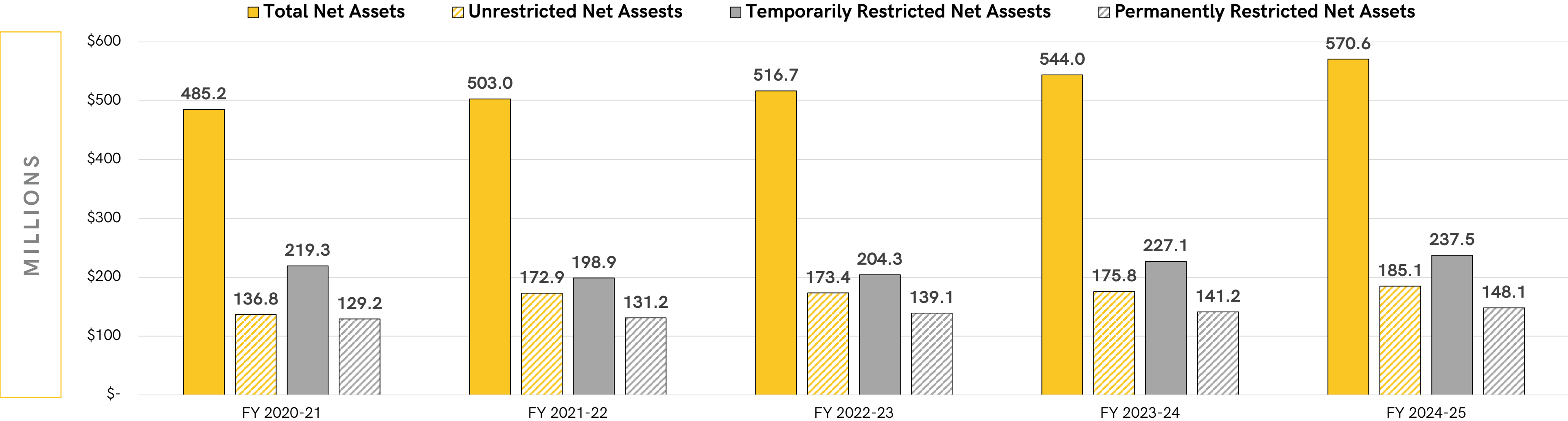
¹ CAGR: Compounded Annual Growth Rate, which measures the amount of growth over a period of time.

² HEPI: Higher Education Price Index, which measures the price changes of a "basket" of goods and services specific to institutions of higher education. The HEPI is a more precise measure for Universities than the Consumer Price Index (CPI).

Total Net Asset growth of SU is exceeding the rate of inflation. Net asset growth of 19.81% in FY 2020-21 primarily driven by endowment investment return beyond 6.0% spending rate.



| NET ASSETS | FY 2020-21 | FY 2021-22 | FY 2022-23 | FY 2023-24 | FY 2024-25* | 5 YEAR CAGR ¹ |
|-----------------------------------|-------------|-------------|-------------|-------------|-------------|--------------------------|
| Unrestricted Net Assets | 136,802,052 | 172,946,387 | 173,416,042 | 175,752,347 | 185,058,941 | 7.85% |
| Temporarily Restricted Net Assets | 219,272,125 | 198,918,076 | 204,268,689 | 227,072,001 | 237,530,635 | 2.02% |
| Permanently Restricted Net Assets | 129,174,444 | 131,183,915 | 139,055,256 | 141,174,806 | 148,052,113 | 3.47% |
| TOTAL NET ASSETS | 485,248,623 | 503,048,378 | 516,739,987 | 543,999,154 | 570,641,689 | |
| Annual Growth | 19.81% | 3.67% | 2.72% | 5.28% | 4.9% | |
| HEPI ² | 2.70% | 5.20% | 4.00% | 3.40% | 3.70% | |
| HEPI (Indexed) | 362 | 381 | 396 | 410 | 425 | 3.82% |



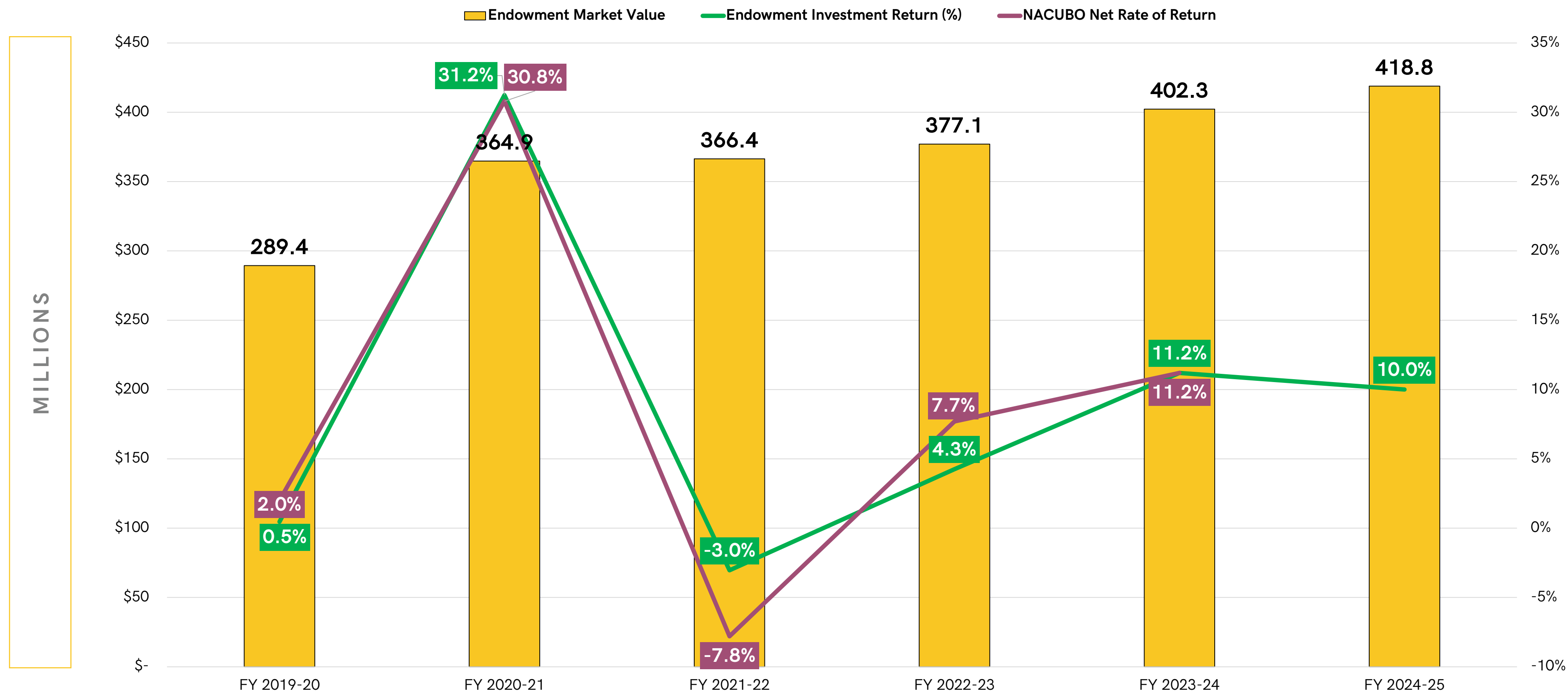
*FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.

Financials

Endowment Value and Return

Note: Investment return is defined as the net change in endowment market value, net of endowment spend distributions and contributions, divided by the starting market value.

The SU endowment has grown approximately 45% since FY2019-20.



Financials

Endowment Return and Spending Rate Comparison

1 Net Rate of Return represents the annualized returns of invested endowment assets, net of external management fees and expenses.

2 Effective Spending Rate represents the distribution for spending divided by the beginning market value of the endowment for that fiscal year.

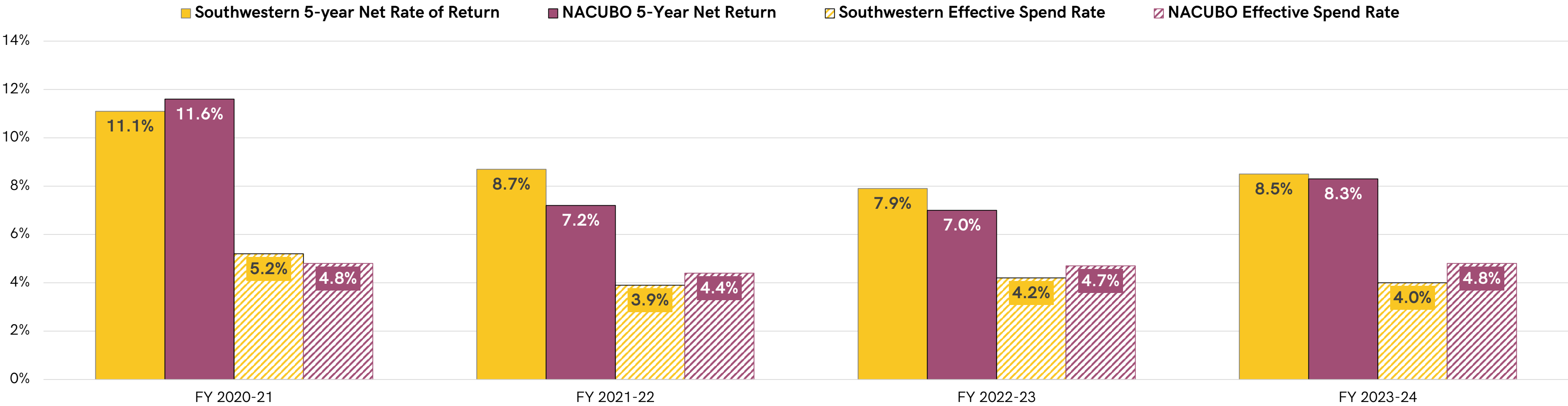
A 5-year average net rate of return is used for this comparison to offset the effects caused by shorter-term market cyclicity. Southwestern's return performance has steadily improved where the invested endowment is currently outperforming the average returns for the comparison group.

The spending formula determines spendable endowment return as a percentage of the 20-quarter average endowment market value, excluding investments in real estate as of June 30 of the second preceding fiscal year.

NACUBO comparison data is from annual endowment survey and represents Private Colleges and Universities. FY2024-25 has not been released as of yet.



| | FY 2020-21 | FY 2021-22 | FY 2022-23 | FY 2023-24 |
|---|------------|------------|------------|------------|
| Southwestern 5-Year Net Rate of Return ¹ | 11.1% | 8.7% | 7.9% | 8.5% |
| NACUBO 5-Year Net Rate of Return | 11.6% | 7.2% | 7.0% | 8.3% |
| Southwestern Effective Spend Rate ² | 5.2% | 3.9% | 4.2% | 4.0% |
| NACUBO Effective Spend Rate | 4.8% | 4.4% | 4.7% | 4.8% |



*FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.

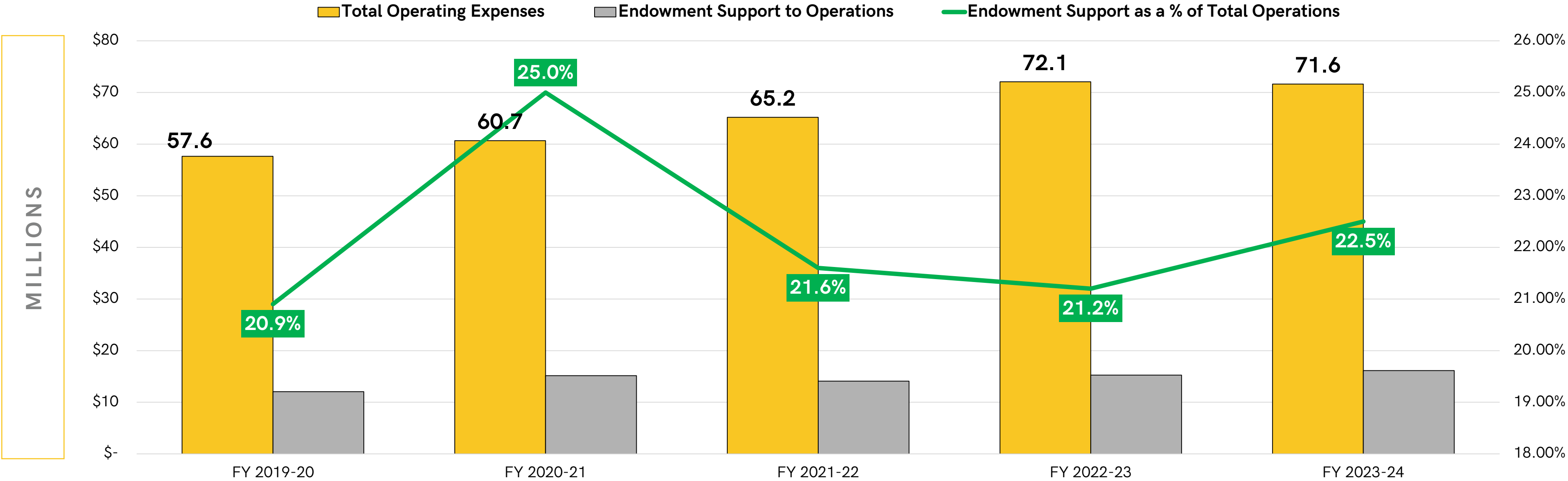
Financials

Endowment Support as a Percentage of Total Operations

Endowment support as a percentage of operations has remained relatively consistent, funding approximately 21% to 23% of the operating budget each fiscal year. FY 2020-21 is an outlier due to the endowment spend rate of 6.00% approved that year.



| SOUTHWESTERN FISCAL YEAR | FY 2020-21 | FY 2021-22 | FY 2022-23 | FY 2023-24 | FY 2024-25 |
|--|------------|------------|------------|------------|------------|
| Total Operating Expenses | 60,678,659 | 65,188,261 | 72,069,091 | 71,627,359 | 75,771,783 |
| Endowment Support to Operations | 15,164,646 | 14,089,774 | 15,270,090 | 16,148,506 | 17,173,058 |
| Board-Approved Endowment Spend Rate | 6.00% | 5.50% | 5.25% | 5.00% | 5.50% |
| Endowment Support as a % of Total Operations | 25.0% | 21.6% | 21.2% | 22.5% | 22.7% |



Financials

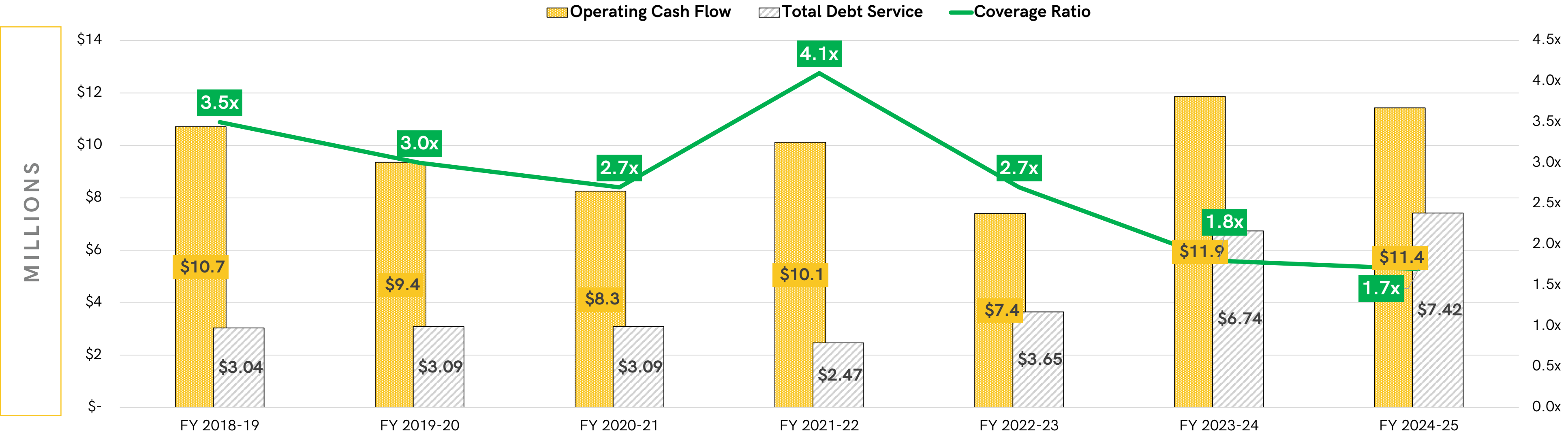
Debt Service Coverage

**FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.*

The debt coverage ratio measures the University’s available cash flow to pay current debt obligations. While the University has no current covenants requiring a specific debt coverage level, industry standard states that a ratio of 2.0 or greater is considered to be strong.



| | FY 2020-21 | FY 2021-22 | FY 2022-23 | FY 2023-24 | FY 2024-25 |
|-----------------------------|------------|------------|-------------|-------------|-------------|
| Total Operating Revenue | 60,702,677 | 65,718,092 | 69,899,716 | 73,740,000 | 75,773,000 |
| Total Operating Expenses | 60,071,934 | 63,570,701 | 72,109,929 | 73,740,000 | 73,740,000 |
| Operating Cash Flow (EBIDA) | 8,253,544 | 10,115,656 | 7,398,650 | 11,871,000 | 11,431,000 |
| Total University Debt | 37,310,360 | 26,438,804 | 105,924,243 | 105,563,659 | 106,349,716 |
| Total Debt Service | 3,090,929 | 2,470,700 | 3,649,666 | 6,739,000 | 6,725,833 |
| DEBT SERVICE COVERAGE RATIO | 2.7 | 4.1 | 2.7 | 1.8 | 1.7 |



Financials

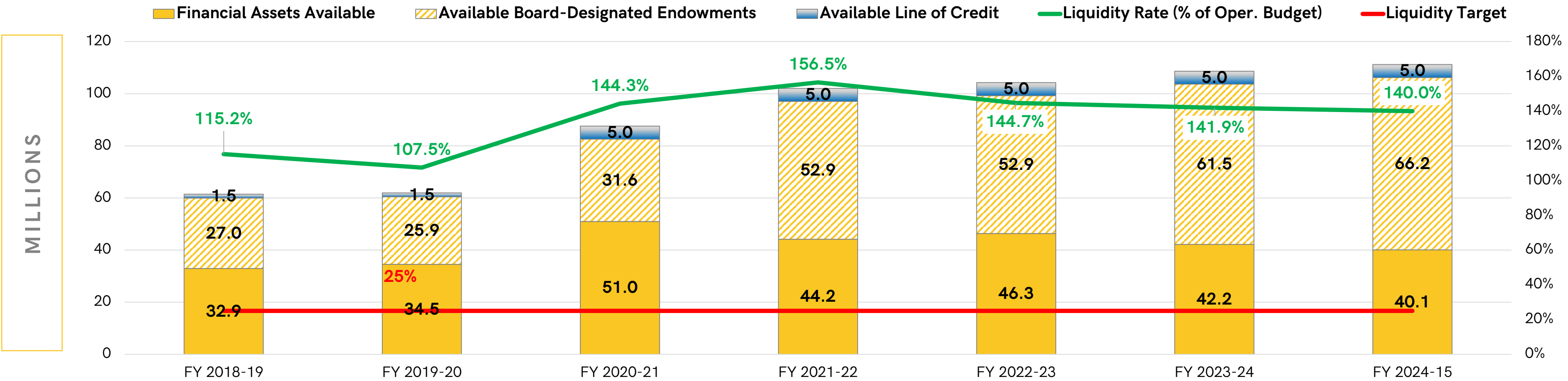
Liquidity

**FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.*

Liquidity target of 25% represents 3 months of operating expenses. The liquidity rate presented as a % of the operating budget fluctuates each year based on the actual operating expenses incurred.



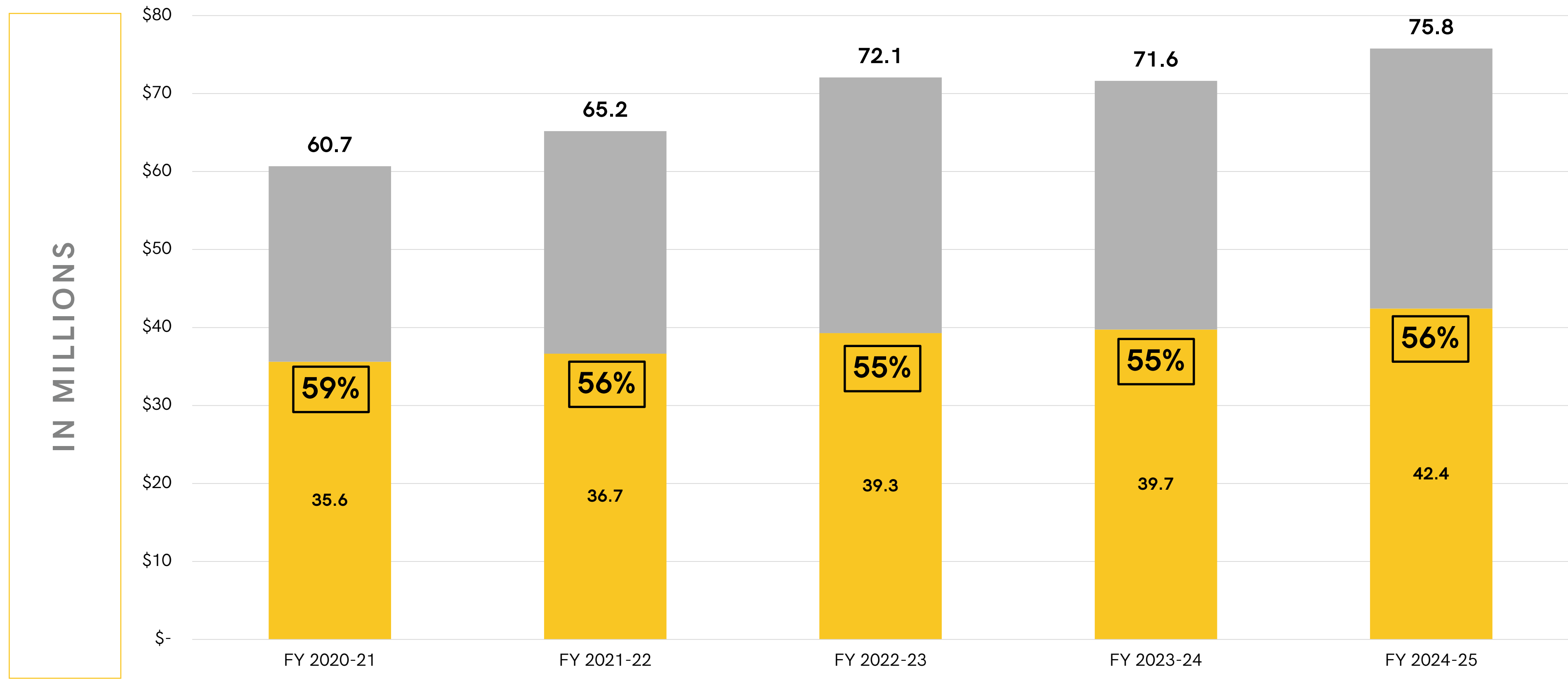
| UNIVERSITY LIQUIDITY | FY 2021-22 | FY 2022-23 | FY 2023-24 | FY 2024-25* |
|--|-------------|-------------|-------------|-------------|
| Financial assets available to meet general expenditures within one year | 44,167,193 | 46,335,769 | 42,162,927 | 40,054,781 |
| Available Board-Designated Endowments | 52,882,461 | 52,914,297 | 61,505,588 | 66,161,988 |
| Available Line of Credit | 5,000,000 | 5,000,000 | 5,000,000 | 5,000,000 |
| Financial assets available to meet general expenditures within one year With Board Approval | 101,989,657 | 104,250,006 | 101,613,436 | 106,080,496 |
| Liquidity Rate (% of Oper. Budget) | 156.5% | 144.7% | 141.9% | 140.0% |
| Liquidity Target | 25.0% | 25.0% | 25.0% | 25.0% |



Financials

Overall Compensation as a Proportion of the Operating Budget

Compensation Expenses includes all personnel-related costs for faculty, exempt staff, non-exempt staff (hourly), student workers, and administrators, including salaries, benefits, faculty/staff scholarships, and student wages. As revenue from enrollment, room, and board has decreased, greater resources are devoted to institutional aid, campus upgrades, insurance, depreciation and utilities, the percentage of compensation as total operating expenses has decreased.



*FY 2024-25 preliminary results are based on unaudited financial statements, as of October 10, 2025.

University Relations

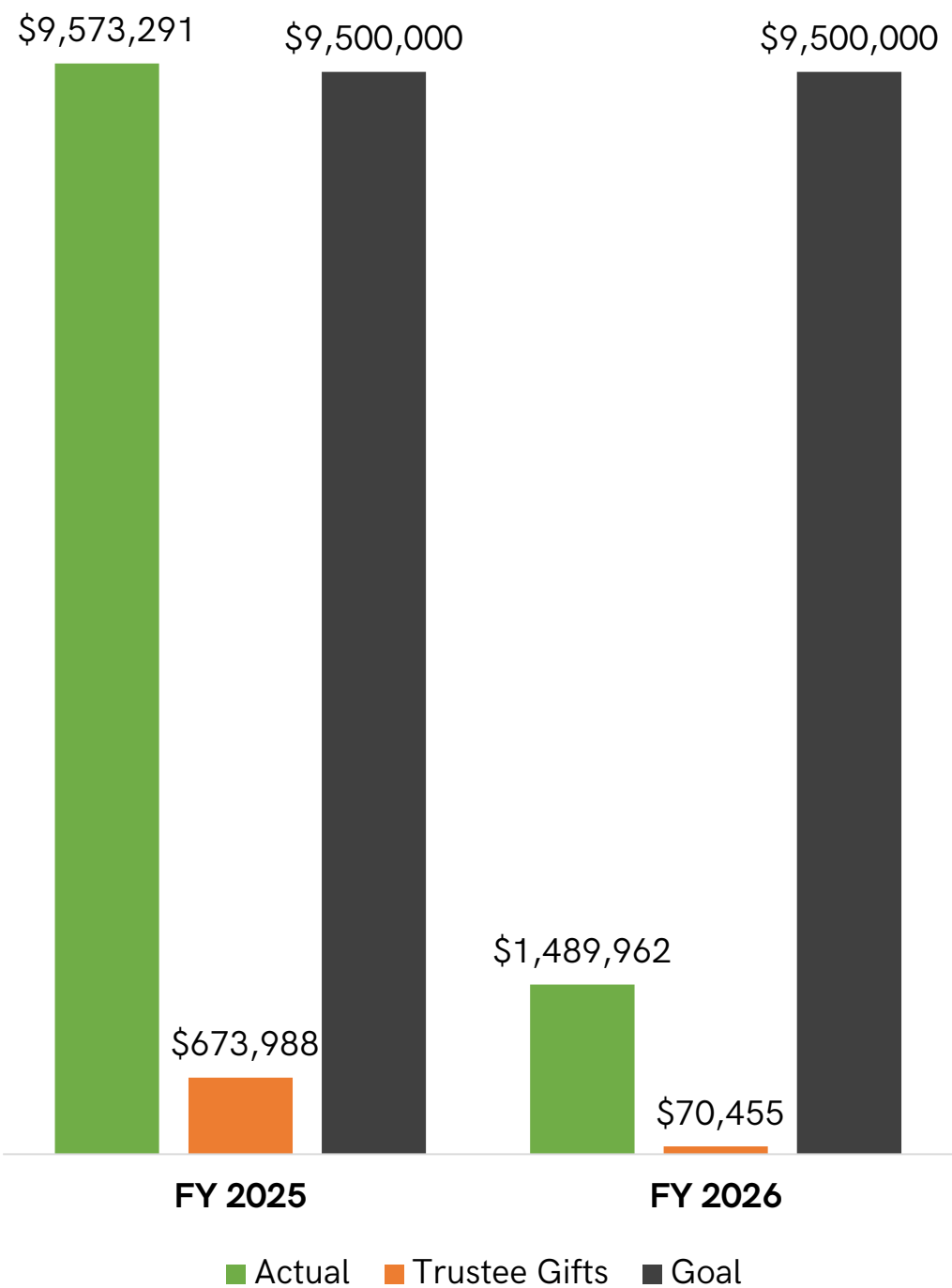
Progress Towards FY 2025 and FY 2026 Goals

Fiscal year-to-date progress on cash budget goals. Total gifts received through the first quarter of the year are running ahead of last year's first quarter, \$1.49 million compared to \$1.13 million last year.

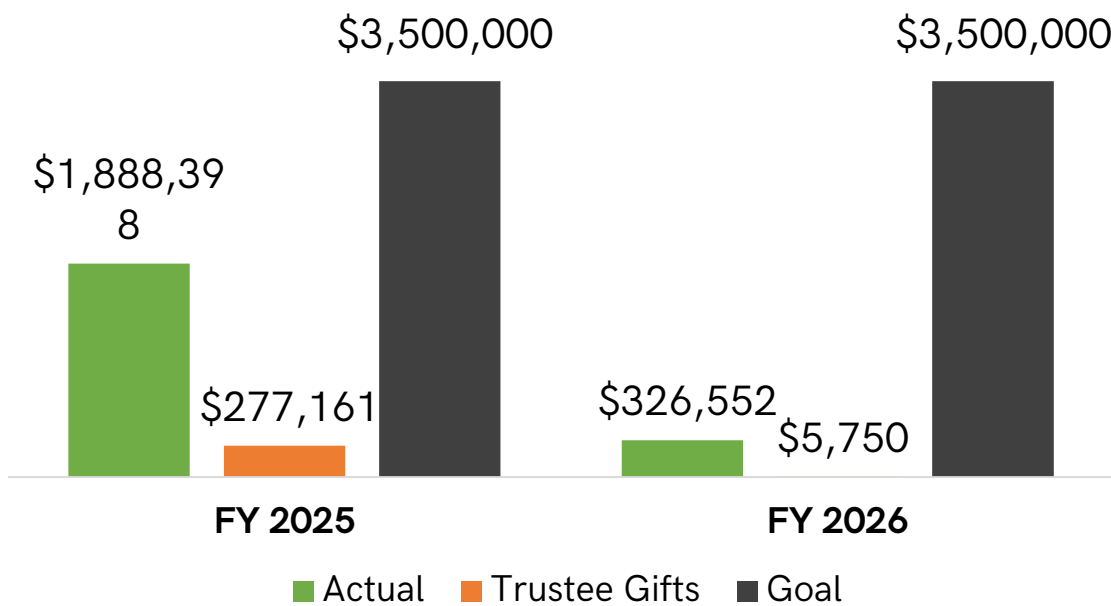
GOAL: \$9,500,000 in total gifts, \$3,500,000 in capital gifts, \$2,500,00 in endowment, \$1,600,000 in the Annual Fund, and \$1,900,000 in current restricted funds.



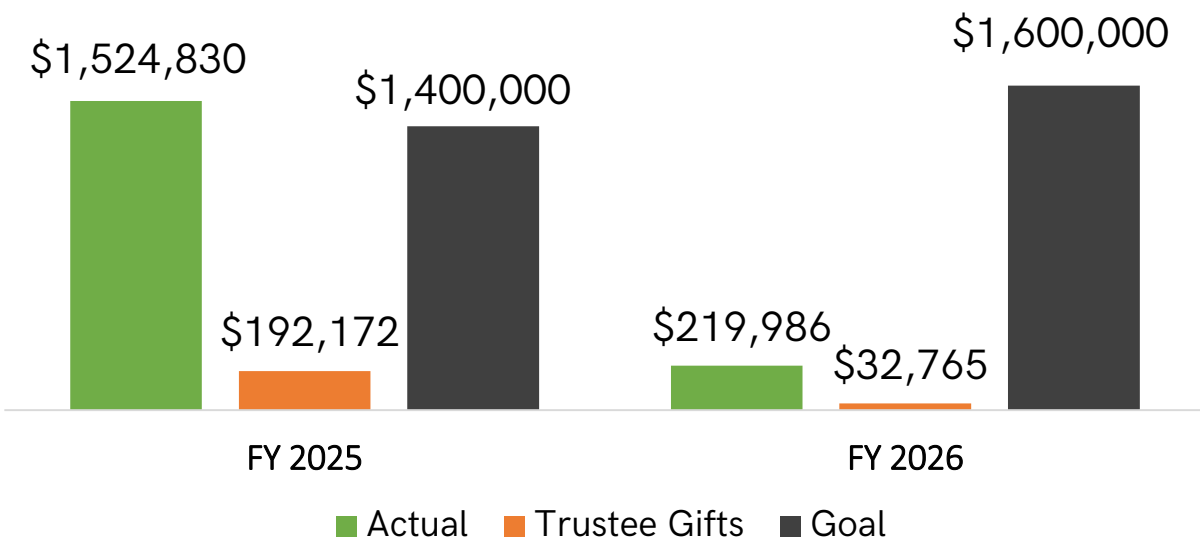
Total Gifts



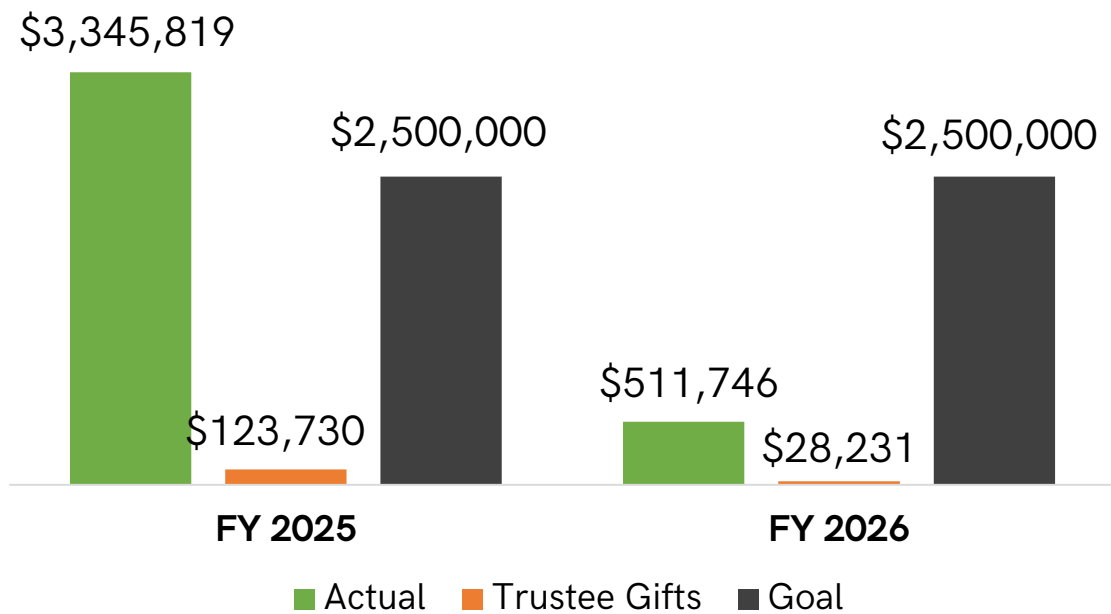
Capital



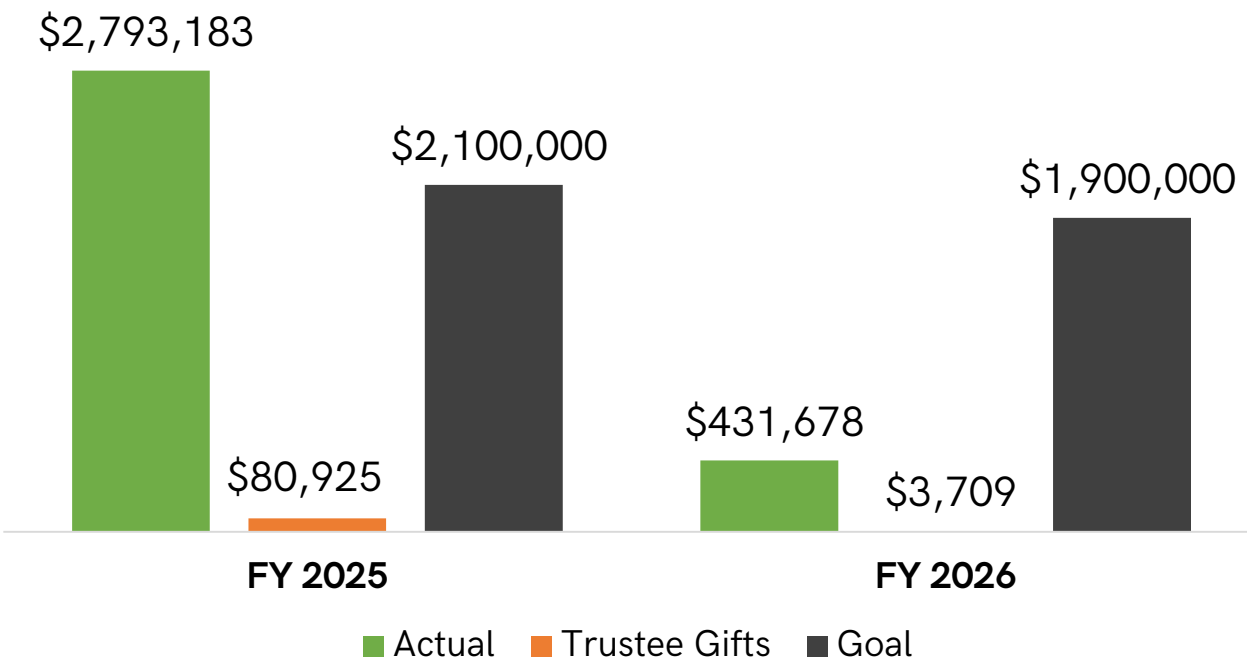
Annual Fund



Endowment



Current Restricted



Center for Career & Professional Development

CLASS OF 2024:

97.4% of graduates are employed, continuing their education, or volunteering.

86.2% of the Class of 2024 responded to the post-graduate survey.

GOAL: Maintain Southwestern's ranking. The Princeton Review ranked Southwestern **#19 in the nation** and **#1 in the state of Texas** in the "Best Career Services" category. CCPD received the 2024-25 Career Development College of Distinction Award.



WHAT ARE THEY DOING?

| | |
|--------------|------------------------------|
| 70.3% | Employed |
| 27.1% | Graduate/professional school |
| 2.6% | Other |

WHERE ARE THEY WORKING?

| | |
|------------|-----------------|
| 85% | Texas |
| 10% | 11 other states |
| 4% | Internationally |

WHAT DO THEY EARN?

| | |
|-----------------|----------------------------|
| \$53,353 | Average starting salary |
| \$50,000 | Median salary |
| | (\$12,000-\$125,000 Range) |

WHERE ARE THEY STUDYING?

| | |
|------------|---------------------------|
| 76% | Texas |
| 21% | 9 other U. S. states |
| 2% | Internationally |
| 73% | Graduate school |
| 11% | Advanced coursework |
| 7% | Law school |
| 5% | Other professional school |
| 3% | Medical school |
| 1% | Theological school |

Most popular schools: University of Texas, Baylor, Southern Methodist University, University of Houston, University of North Texas

PARTICIPATED IN INTERNSHIPS?

| | |
|------------|----------------------------------|
| 68% | At least one internship |
| 39% | Two or more internships |
| 1-5 | Range of internships per student |

Center for Career & Professional Development

Engagement Context:

- Top classifications represented in advising engagements: (1) Seniors (2) Juniors (3) Alumni
- Top majors represented in advising engagements: (1) Business (2) Biology (3) Psychology
- Top advising engagements by reason: (1) Career (resume/cover letter, interviewing, job search, networking, offers, etc. (2) Graduate & Professional School Advising (3) Internships



During 2024-25, CCPD held over a thousand advising sessions and hosted over 120 events for students and alumni covering a wide range of topics. These activities reached 71% of the 2024-25 student population.

All Activities

| | |
|---------------------------------|-------|
| Total number of students/alumni | 1,179 |
| Percent Female | 55% |
| Percent Hispanic | 29% |
| Percent People of Color | 44% |
| Percent First-Generation | 19% |

Advising Sessions

| | |
|---------------------------------|-----|
| Total number of students/alumni | 547 |
| Percent Female | 61% |
| Percent Hispanic | 27% |
| Percent People of Color | 41% |
| Percent First-Generation | 16% |

Internship & Career Fair3 Events

| | |
|---------------------------------|-----|
| Total number of students/alumni | 390 |
| Percent Female | 59% |
| Percent Hispanic | 34% |
| Percent People of Color | 51% |
| Percent First-Generation | 21% |

Curious Conversations7 Events

| | |
|--------------------------|-----|
| Total number of students | 99 |
| Percent Female | 23% |
| Percent Hispanic | 33% |
| Percent People of Color | 56% |
| Percent First-Generation | 24% |

Program to Go33 Events

| | |
|--------------------------|-----|
| Total number of students | 503 |
| Percent Female | 44% |
| Percent Hispanic | 32% |
| Percent People of Color | 48% |
| Percent First-Generation | 21% |

Center for Career & Professional Development

GOAL for new initiatives: 8-10 members will join the EAB; 50 students will engage with COMPASS; and student campus employment will be elevated by centralizing on-campus job postings in HireSU. These initiatives were launched in the summer 2025 move of CCPD to University Relations.



Employer Advisory Board (EAB) *Launching Spring 2026*

- A group of 8-10 professionals representing key industries and interested in investing in campus professional development initiatives, culminating in a new and co-authored campus recruiting strategy for SU students. Each representative will contribute \$3,000/year.

COMPASS *Goal: 50 Students Engaged*

- Student Networking and Shadowing Experience Program

| Students | Mentors | Participation Increased |
|----------|---------|-------------------------|
| 61 | 52 | +130% |

HireSU

- On-Campus job postings for students

| Fall 2024 | Fall 2025 | Postings Increased |
|-----------|-----------|--------------------|
| 4 | 48 | +1100% |

Student's "Four-Year Plan"

Roadmap/checklist for each student

- Inspired by FYE program and previous co-curricular plans
- Tracks critical professional development milestones for students to achieve

Board of Trustees

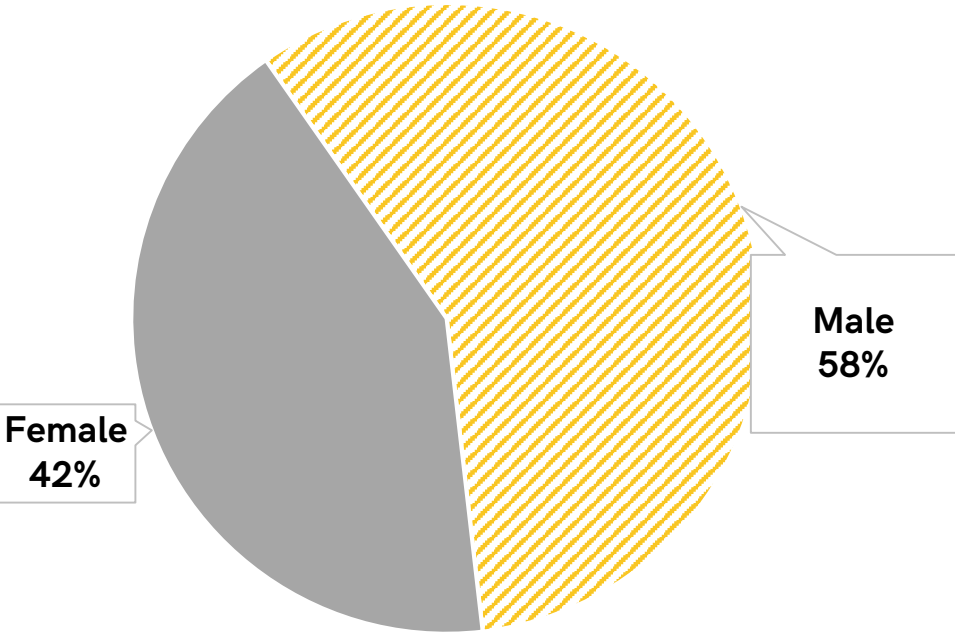
2025-26

GOAL: More diverse race/ethnicity and an even gender split.

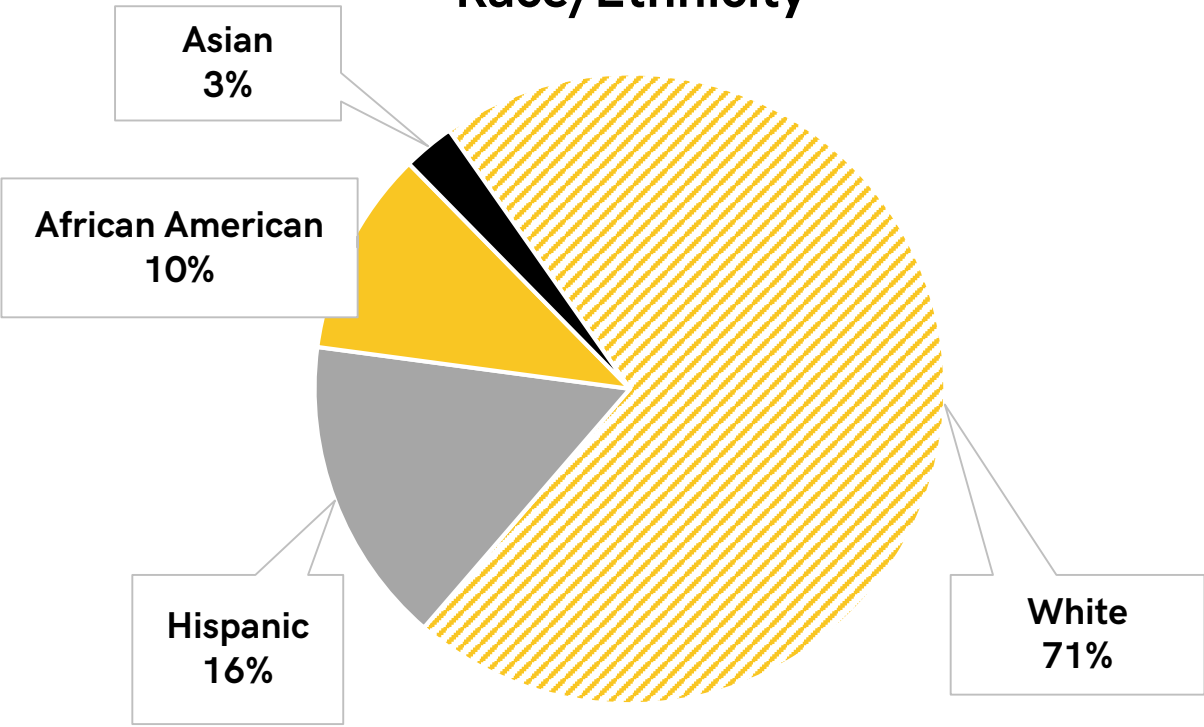
The 2025-26 Board of Trustees consists of 38 members, with 7 vacant United Methodist Church Conference seats as of July 1, 2025. According to the 2020 Association of Governing Boards (AGB) Board Policies, Practices and Composition Survey, the composition of governing boards for private non-profit institutions is 40% female and 84% White (non-Hispanic). Southwestern's board is 42% female and 71% White.



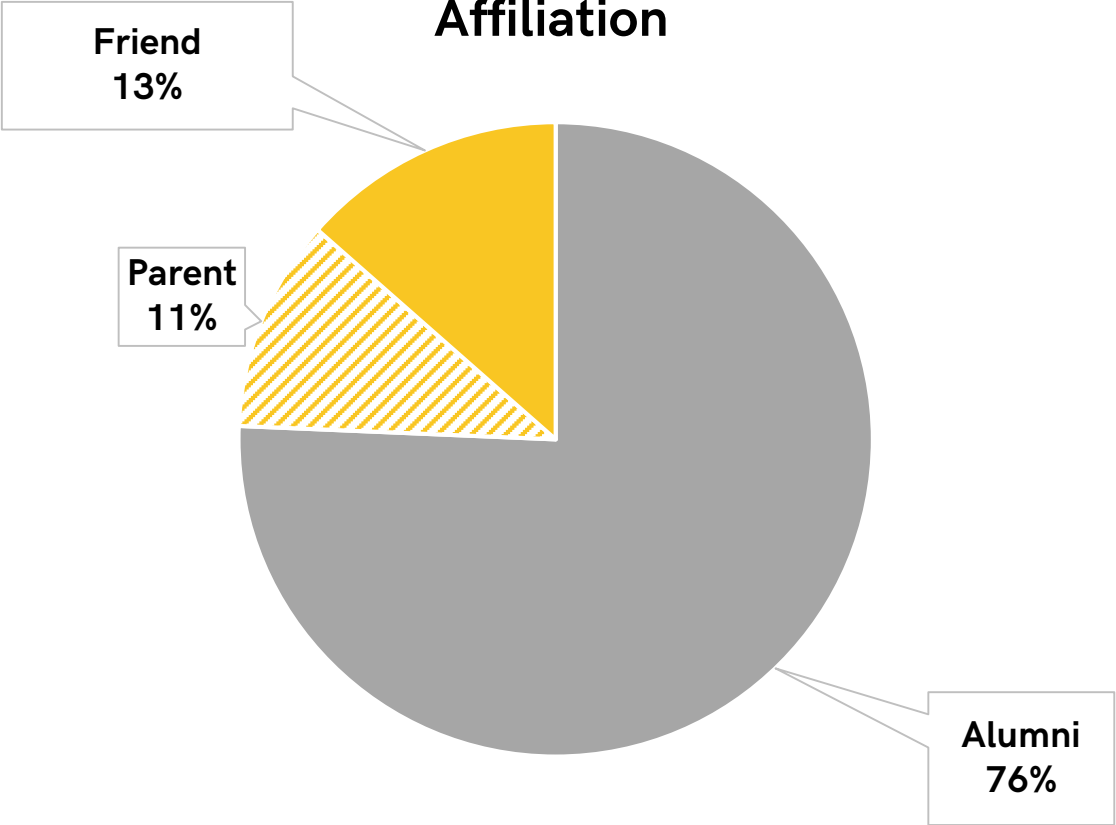
Gender



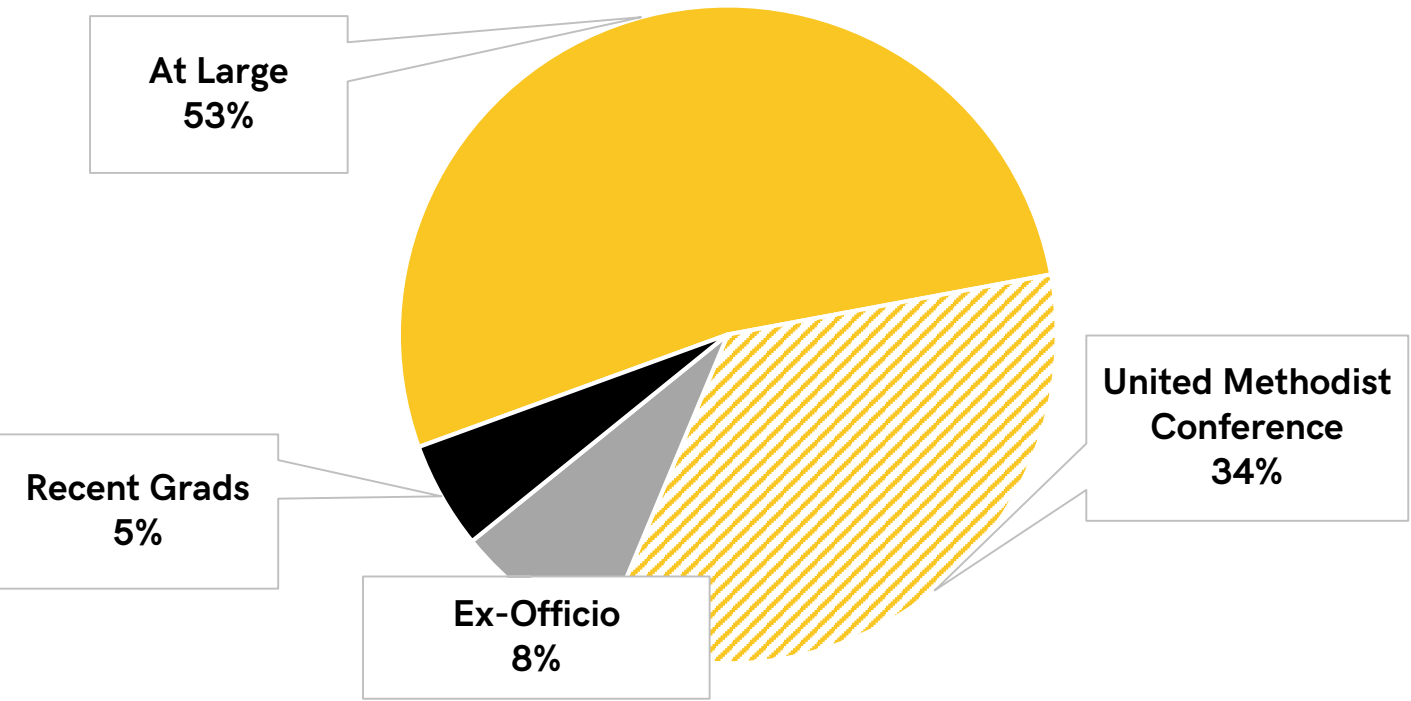
Race/Ethnicity



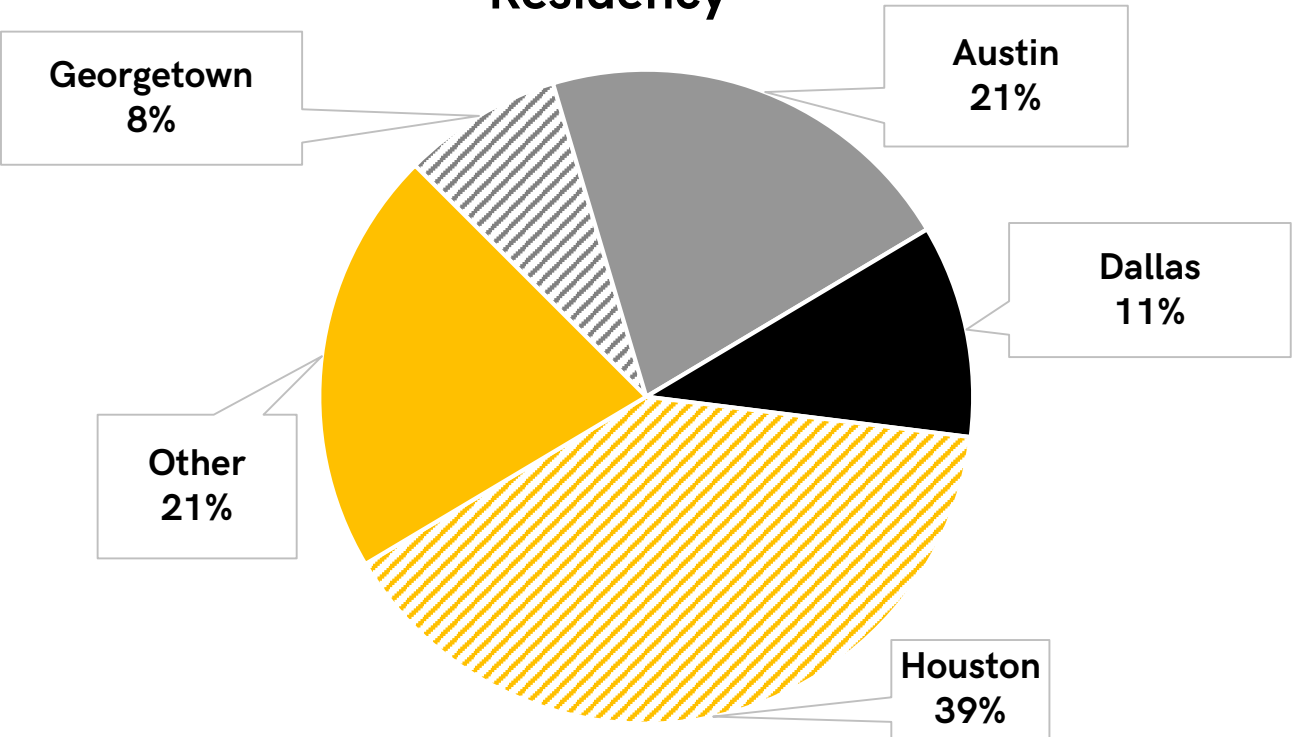
Affiliation



Board Seat Type



Residency



GEOGRAPHY

87% In State
11% Out of State
3% International

Student, Faculty, and Staff Diversity

Fall 2025

In 2023, 34% of undergraduate enrollment at institutions with the Carnegie Classification of Baccalaureate Colleges: Arts & Sciences Focus was comprised with students of color. In comparison, 45% of SU’s student population is comprised with students of color in Fall 2025.



| FACULTY | | | |
|----------------------------------|----|--------|--------------|
| | N | % | National Avg |
| Alaskan Native/Native American | 1 | 0.63% | 0.30% |
| Asian | 20 | 12.66% | 6.33% |
| Black | 8 | 5.06% | 9.59% |
| Hawaiian Native/Pacific Islander | 1 | 0.63% | 0.35% |
| Hispanic | 29 | 18.35% | 5.03% |
| White | 95 | 60.13% | 69.10% |
| Multiple Races | 1 | 0.63% | 1.38% |
| Unknown | 3 | 1.90% | 5.47% |
| Faculty of Color | 60 | 37.97% | 22.98% |

| STAFF | | | |
|----------------------------------|-----|--------|--------------|
| | N | % | National Avg |
| Alaskan Native/Native American | 2 | 0.57% | 0.38% |
| Asian | 13 | 3.72% | 2.69% |
| Black | 28 | 8.02% | 14.07% |
| Hawaiian Native/Pacific Islander | 0 | 0% | 0.45% |
| Hispanic | 97 | 27.79% | 7.13% |
| White | 199 | 57.02% | 68.93% |
| Multiple Races | 2 | 0.57% | 1.43% |
| Unknown | 8 | 2.29% | 4.52% |
| Staff of Color | 142 | 40.69% | 26.13% |

| STUDENTS | | | |
|----------------------------------|-----|--------|--------------|
| | N | % | National Avg |
| Alaskan Native/Native American | 4 | 0.28% | 0.41% |
| Asian | 48 | 3.35% | 4.11% |
| Black | 104 | 7.25% | 13.51% |
| Hawaiian Native/Pacific Islander | 2 | 0.14% | 10.74% |
| Hispanic | 424 | 29.57% | 0.46% |
| White | 676 | 47.14% | 54.65% |
| Multiple Races | 63 | 4.39% | 4.50% |
| Unknown | 80 | 5.58% | 4.79% |
| International | 33 | 2.30% | 6.83% |
| Students of Color | 645 | 44.98% | 33.73% |

National average is derived from IPEDS comparison for Fall 2023 Baccalaureate Colleges: Arts & Sciences Focus.

Academic Affairs

Southwestern Average Faculty Salaries and AAUP Percentile Ranks

GOAL: Increase average salaries for Southwestern faculty to fall between the 55th and 60th percentile within an estimated 5 years.



| | | SOUTHWESTERN AVERAGE SALARY | | | | | 24-25 % Change in SU Average Salaries |
|----------------------------------|------|-----------------------------|---------|---------|---------|---------|---|
| | | 20-21 | 21-22 | 22-23 | 23-24 | 24-25 | |
| Professor (n=35) | 80th | 117,278 | 117,103 | 119,894 | 124,864 | 132,514 | \$98,937 + 1.02% 52.1 Percentile |
| | 70th | 103,614 | 105,833 | 105,937 | 109,633 | 112,386 | |
| | 60th | 94,906 | 97,007 | 99,249 | 103,451 | 105,532 | |
| | 50th | 89,245 | 90,348 | 93,044 | 96,757 | 97,152 | |
| Associate Professor (n=30) | 80th | 93,481 | 93,992 | 95,432 | 98,725 | 103,498 | \$82,815 -1.87% 54.0 Percentile |
| | 70th | 82,442 | 82,905 | 86,116 | 88,514 | 91,337 | |
| | 60th | 78,088 | 78,644 | 81,107 | 83,900 | 85,503 | |
| | 50th | 73,096 | 74,023 | 77,056 | 79,663 | 80,992 | |
| Assistant Professor (n=38) | 80th | 77,075 | 78,998 | 81,621 | 84,352 | 87,322 | \$69,798 -0.92% 45.8 Percentile |
| | 70th | 71,101 | 73,188 | 74,325 | 76,567 | 79,852 | |
| | 60th | 66,712 | 68,344 | 70,783 | 73,686 | 74,995 | |
| | 50th | 64,092 | 64,925 | 66,830 | 69,272 | 71,340 | |

Academic Affairs

Faculty Compensation, Resources, and Support

In addition to compensation, Southwestern provides resources to support faculty in teaching and lab materials, professional development, and scholarship activities.



| Annual Faculty Compensation, Resources, & Support | |
|---|-------------|
| COMPENSATION AND AWARDS: | |
| Faculty Salaries * | \$9,535,929 |
| Retirement | \$623,729 |
| Health Insurance Premiums | \$1,898,228 |
| Summer Faculty-Mentored Research – 21 faculty mentors | \$31,500 |
| Teaching and Research Awards (Every other year) | \$5,000 |
| REIMBURSED PROFESSIONAL EXPENSES: | |
| Start-Up Funds to Support New Faculty Teaching & Research | \$140,728 |
| Professional Travel Award (PTA) | \$120,000 |
| Discretionary budget allowance (\$600/yr) | \$600,000 |
| Competitive Faculty Professional Development | \$35,000 |
| ENDOWED CHAIRS AND PROFESSORSHIPS: | |
| Endowed Chairs and Professorships carry additional funding towards research stipends (\$247,325), student researcher wages (\$47,750), and support for the departments (\$42,875) where the chairs/professorships are housed. | |
| * Portion of Salaries Paid during Sabbatical Leaves | \$598,000 |

Academic Affairs

Undergraduate Research

GOAL: 53 students will participate in SURF Summer Research Program and all students engaged in faculty-mentored research will present their work before a broad public audience at our annual on-campus Research and Creative Works Symposium. Of that total, at least 50 students will present their work at national or international conferences and an additional 10 will be listed as co-authors on peer-reviewed publications with their faculty mentors.



| 2024-25 | All SU Graduates | Undergraduate Research Participants | |
|------------------|------------------|-------------------------------------|-----|
| | N | N | % |
| Total | 313 | 43 | 14% |
| Female | 175 | 34 | 19% |
| Male | 138 | 9 | 7% |
| Asian | 9 | 0 | 0% |
| Black | 13 | 1 | 8% |
| Native Amer/Alas | 1 | 0 | 0% |
| Hispanic | 82 | 16 | 20% |
| Multiple | 20 | 4 | 20% |
| White | 180 | 21 | 12% |
| Unknown | 4 | 1 | 25% |
| Non-Resident | 4 | 0 | 0% |
| Of Color | 125 | 21 | 17% |
| First-Gen | 51 | 9 | 18% |
| Pell-First | 67 | 10 | 15% |
| Ever-Pell | 103 | 20 | 19% |

Example of paper authored by Southwestern faculty and students:

Howell, J. L., Giuliano, T. A., & Hebl, W. I. (2023). How Common Is Undergraduate Publication in Psychology? An Examination of Faculty Vitae From Top Colleges and Universities. *Collabra: Psychology*, 9 (1), 84521. doi: <https://doi.org/10.1525/collabra.84521>

One of Southwestern’s four pillar High-Impact Experiences (alongside Study Abroad/Away, Internships, and Community-Engaged Learning) and a major tool for recruitment and retention, Undergraduate Research is an absolutely indispensable part of what we offer at Southwestern, an opportunity for students to work closely and collaboratively with faculty mentors to make an original contribution to the world of knowledge and creativity. Our students are not merely supporting faculty in their scholarly efforts, but rather take a real ownership stake in designing and executing their projects, such that undergraduate research at SU becomes a launch pad for deeply meaningful and highly prestigious, tangible outcomes, from peer-reviewed presentations and publications in national and international venues to graduate-level training at top programs and highly-sought-after job placements.

- Undergraduate research experience pays major dividends when it comes to graduate school acceptance and success. 27.1% of graduates in the Class of 2024 enrolled in graduate or professional school within one year.
- Four 2025 SURF students have already published a peer-reviewed article with their faculty mentors.
- Eight research teams from 2024-25 have published peer-reviewed articles in Psychology, Chemistry, Education, Biology, Kinesiology, and Chemistry.
- Three public-facing Humanities projects were produced and one fine arts performance.
- A Sociology student researcher received an honorable mention for the prestigious Joe Feagin Undergraduate Paper Award.

Academic Affairs

Advising

Southwestern administers the National Survey on Student Engagement (NSSE) to first-year and senior students. Southwestern began assigning first-year students to Professional Advisors in 2021. First-year students rank the “Quality of interactions with academic advisors” 24 percentage points higher than other institutions in our Carnegie Classification. Academic advising is Southwestern’s highest performing NSSE student engagement indicator relative to peer institutions.



| NSSE Academic Advising Topical Module* | SU First-Year Students Responding Quite a bit + Very much / Often + Very often | | |
|---|--|-------------------------------|------------|
| | 2019 (prior to Prof. Advisors) | 2025 (with Prof. Advisors) | % Increase |
| To what extent has your advisor been helpful regarding your academic interests, course selections, academic performance, or future plans? | 46% | 80% | +74% |

Thinking of academic advising, how much have people and resources done the following:

| | | | |
|--|-----|-----|------|
| Provided information about learning support services | 73% | 90% | +23% |
| Reached out to you about your academic performance | 52% | 61% | +17% |
| Actively listened to your concerns | 63% | 82% | +30% |

Thinking of academic advising, about how often did someone discuss the following with you:

| | | | |
|---|-----|-----|------|
| Your academic goals and future plans | 59% | 88% | +49% |
| Special opportunities (High-Impact Experiences) | 54% | 92% | +70% |
| Participating in co-curricular activities | 47% | 67% | +43% |
| Resources for your wellbeing | 55% | 66% | +20% |

| HEDS Sense of Community Survey to All Students | Other institutions | Southwestern | |
|---|--------------------|--------------|------|
| To what extent were you <i>taken seriously</i> by your advisors | 4.27 | 4.66 | +.39 |
| To what extent were you <i>treated fairly and with respect</i> by your advisors | 4.47 | 4.72 | +.25 |

2024 HEDS* Sense of Community Survey: Students scored interactions with advisors higher than interactions with SU faculty, staff, administrators, other students, and advisors at peer institutions. The difference between the scores is statistically significant.

Faculty and Staff

Attrition Rates of Full-Time Faculty and Staff

*2025 data represent a partial year. This chart represents the attrition rates of full-time tenure, tenure-track faculty (by academic year), and full-time staff (by calendar year) as compared to College & University Professional Association (CUPA) national averages. Attrition rates do not include retirements.



ANNUAL FACULTY & STAFF PAY INCREASES

| Year | Faculty | Staff |
|---------|----------|-------|
| 2021-22 | 2% | 2% |
| 2022-23 | 0.5-1.5% | 1.3% |
| 2023-24 | 2.5% | 2% |
| 2024-25 | 2.25% | 2.25% |
| 2025-26 | 4% | 3% |
| Average | 2.35% | 2.11% |

Staff Attrition

In the calendar year 2024, Southwestern experienced a staff attrition rate of 21.8% as compared to a national CUPA average of 29%.

Faculty Attrition

In the academic year 2024-25, Southwestern had a faculty attrition rate of 1.1% as compared to a national CUPA average of 6%.

Student Life

First-Year Engagement with Student Life Programming

Student Life departments tracked interactions with first-year students during the 2024-25 academic year. Goals included having every student interact with the Center for Career and Professional Development and increasing first-year participation in intramural sports; both of these efforts were supported by collaborations with Residence Life.

The 2024 first-year cohort was 374 students. Of those, 354 (94.6%) were engaged in at least one Student Life activity (Residence Life programs, Student Activities programs, Intramurals, CCPD events, etc.) during the 2024-25 academic year.

95% of the first-year cohort will engage in at least six Student Life programs



| | N | % |
|--|-----|-------|
| First-Year 2024 Cohort | 374 | 100% |
| Overall Unique First-Years Engaged in Student Life activities | 354 | 94.6% |
| Fall 2024 to Fall 2025 Retention of FY students engaged with Student Life | 300 | 84.7% |
| Fall 2024 to Fall 2025 Retention of all FY students regardless of engagement | 312 | 83.4% |

Overall retention of the first-year cohort from Fall 2024 to Fall 2025 was 83.4%.

Retention of the 354 students who engaged with Student Life programming was 84.7%, **1.3% higher than overall first-year retention.**

Student Life

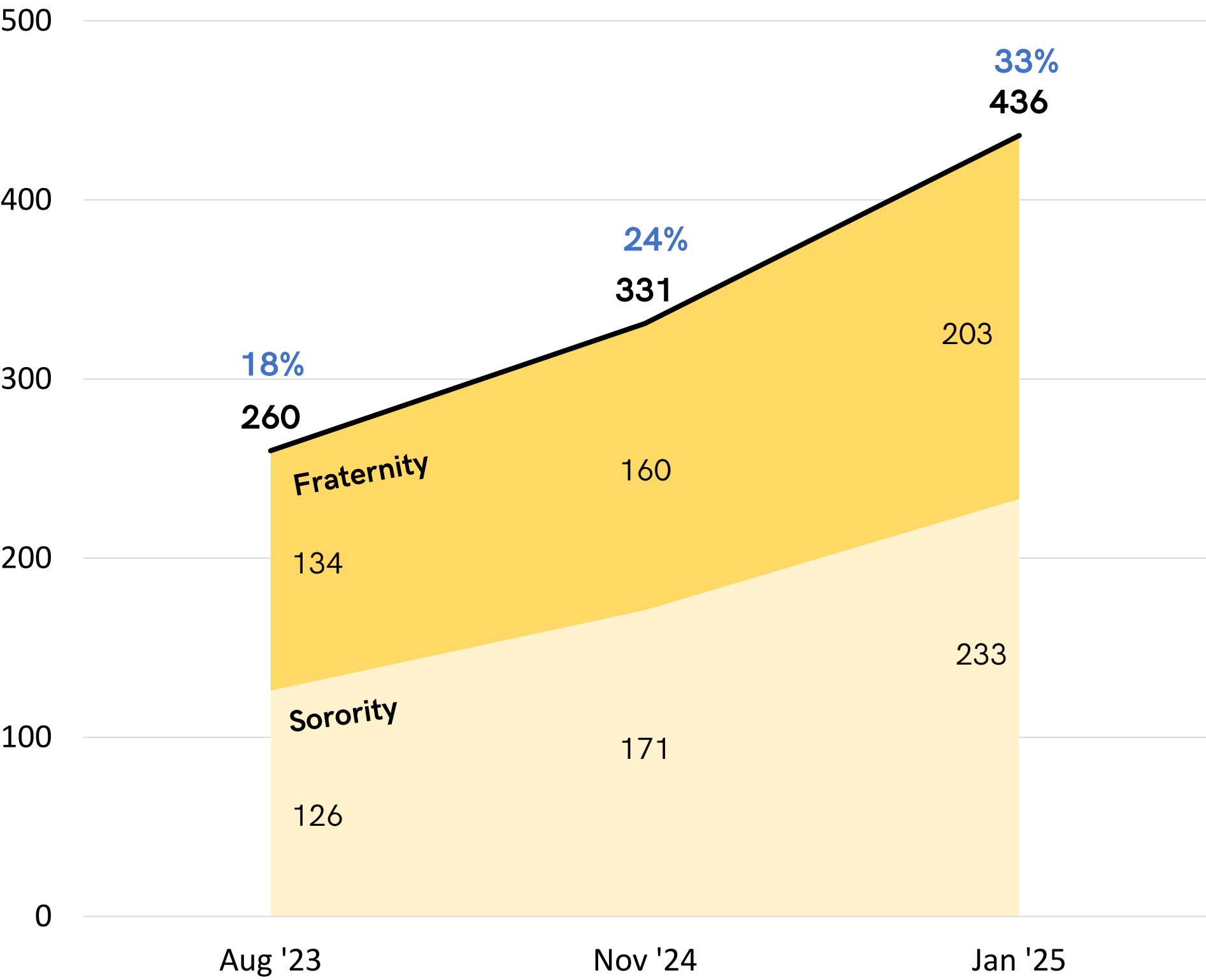
Greek Life

GOAL 2024-25: Increase membership to 33% of all students by 2027

GOAL 2025-26: Increase membership to 36% of all students



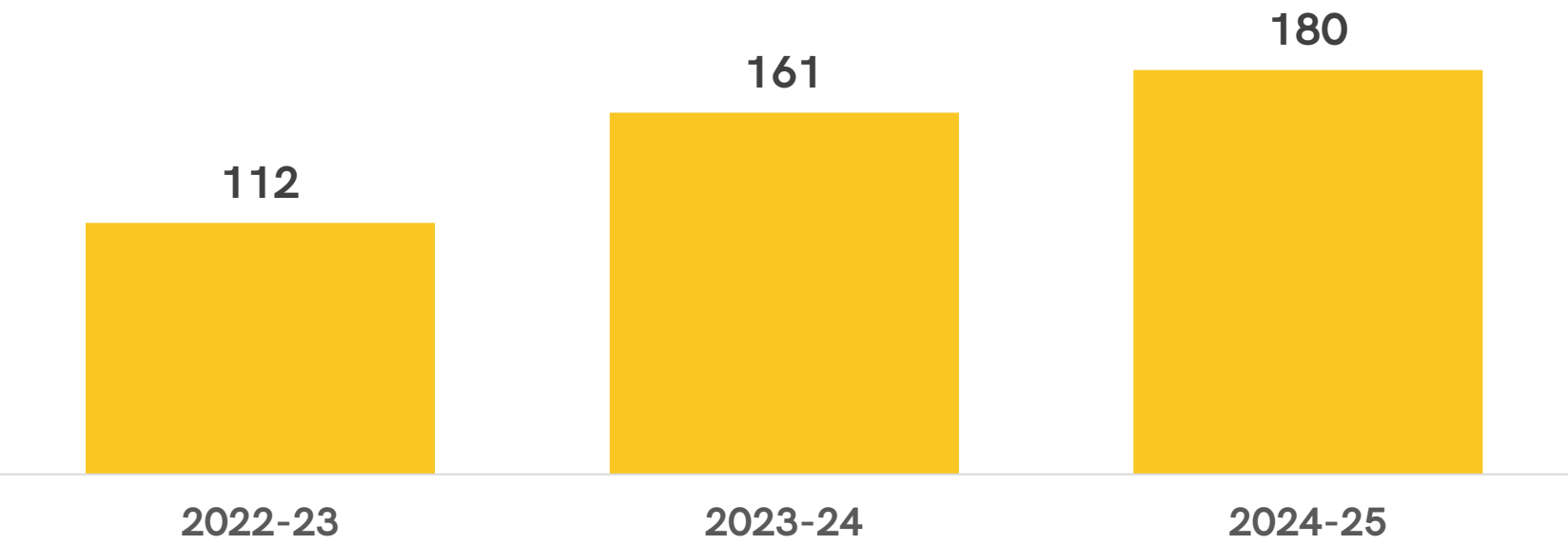
Greek Life Growth since Fall 2023



First to Second Year Retention

| Cohort | Greek in First Year | Not Greek |
|--------|---------------------|-----------|
| FY22 | 96.6% | 79.7% |
| FY23 | 91.6% | 76.6% |
| FY24 | 94.3% | 79.1% |

New Pledges



Student Life

Pirate Adventures

Initiated in Fall 2024, Pirate Adventures remained a central component of Welcome Week programming. The goal for Fall 2025 was to increase participation from Fall 2024. The goal for Fall 2026 will be to increase participation to 75% of new students.

Across Fall 2024 and Fall 2025, a total of 27 trips were conducted, serving 326 students at an overall cost of \$20,275. Comparative analysis indicates a 6% increase in student engagement and a 27% reduction in program costs during Fall 2025, demonstrating improved participation outcomes alongside greater fiscal efficiency.

Trips included: Tubing the San Marcos River, Georgetown Taco Crawl, Cameron Park Zoo, and Typhoon Texas.

GOAL 2024-26: Increase percentage of students participating

GOAL 2026-27: Increase participation to 75% of new students



| Pirate Adventures | | |
|-------------------|-----------|----------------|
| | Fall 2024 | Fall 2025 |
| Number of Trips | 18 | 9 |
| Student Attendees | 158 | 168 (+6%) |
| Total Cost | \$11,739 | \$8,536 (-27%) |

COMBINED DATA HIGHLIGHTS

Welcome Week: Fall 2024 and Fall 2025

Total Trips: **27**
Total Students Served: **326**
Total Program Cost: **\$20,275**
Year-Over-Year Engagement: **+6%**
Year-Over-Year Cost Reduction: **-27%**

Marketing & Communications

Earned Media Report: 2024-25



Major U.S. Publication Mentions: **8**
(Goal: 1)

- **CBS News**
- **Inside Higher Ed**
- **MSN News** (x2)
- **MSN Sports**
- **USA Today**
- **Yahoo! News**
- **Yahoo! Sports**

Major Texas Publication Mentions: **8**
(Goal: 4)

- **CBS Austin** (x3)
- **FOX 7 Austin**
- **Houston Chronicle**
- **KVUE** (x2)
- **KXAN**

The 2023–2024 media mentions included significant coverage of the solar eclipse, featuring our expert, Professor of Physics Mark Bottorff. The eclipse drove a dramatic spike in mentions last year, but as the data shows, quantity doesn’t always equal impact. While we had fewer mentions in 2024-25, they appeared in larger, more influential publications, which expanded both advertising equivalency and readership.

2024-25 Goals:

- **Achieve mentions in 1 major U.S. publication and 4 major Texas publications this year.**
- **Secure \$20,000 in ad equivalency and 8 million views each quarter.**

Major U.S. and Texas publications are categorized based on their national and state influence, circulation, and focus areas. Examples include New York Times, The Wall Street Journal, USA Today, TIME, Politico, AP (Associated Press), Texas Monthly, Texas Tribune, and Houston Chronicle.

Note: These goals do not include the SU 560 development media targets. We will realign our goals once the launch timeline is established.

| | 2023-24 | 2024-25 |
|----------------|-------------|-------------|
| Mentions | 457 | 53 |
| Ad Equivalency | \$638,666 | \$6,562,678 |
| Readership | 320,587,716 | 897,862,543 |

National Rankings



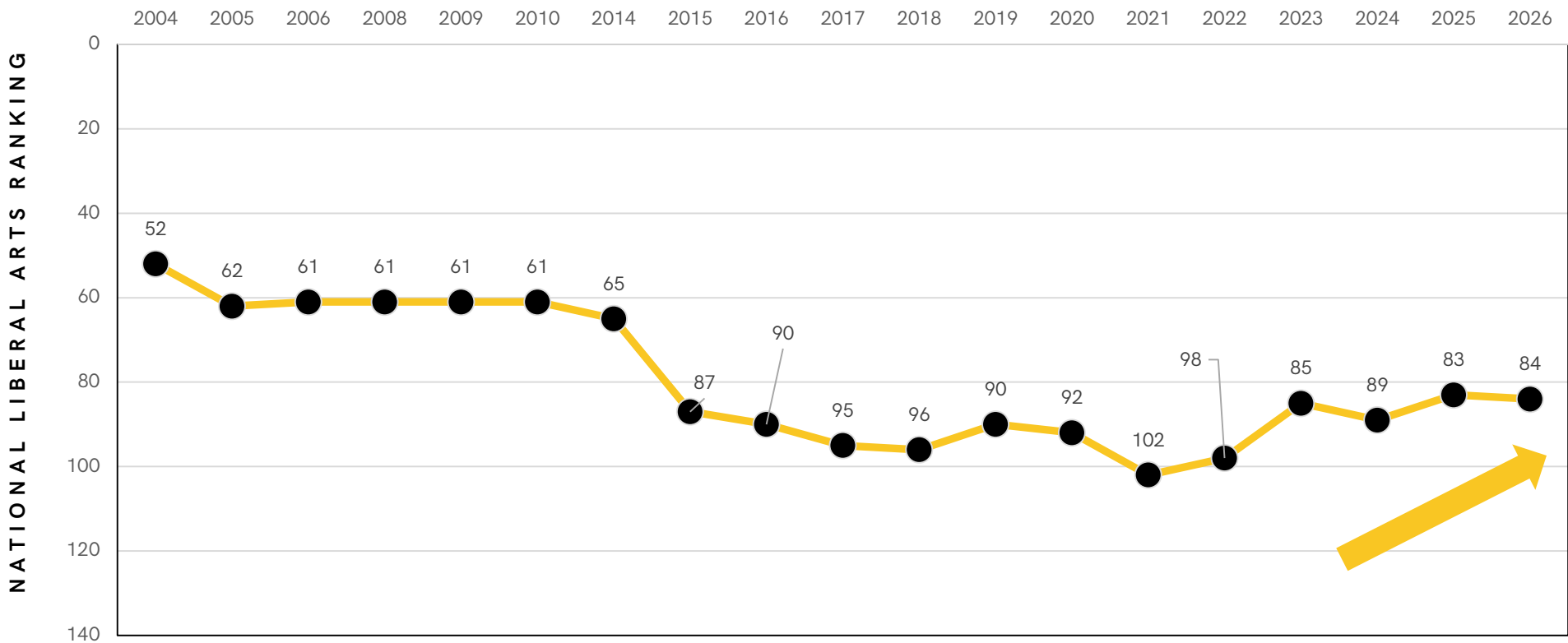
U.S. News & World Report – National Liberal Arts

Southwestern’s rank decreased because of these factors and their weight in the total score as compared to peer institutions:

- Faculty Salary Rank -3.39% (8% weight)
- Percentage of faculty who are full-time rank -6.67% (3% weight);
- Pell Grant graduation rate rank -15.31% (5.5% weight);
- Pell Grant graduation performance rank -24.72% (5.5% weight);
- First year retention rank -17.71% (5% weight);
- Graduation rate performance rank -25.3% (10% weight).

Southwestern is tied with Austin College, Drew University, Hope College, Saint Mary’s College, St. John’s College (MD), Ursinus College, and Washington & Jefferson College for the 84th overall rank.

Southwestern University’s U.S. News & World Report Ranking from 2004-2026



The Princeton Review – Best 391 Colleges

- Top Career Services: 19
- Professors Get High Marks: 12
- Everyone Plays Intramural: 24

Money – Best Colleges in America

"Renowned for its unwavering commitment to academic excellence, innovative programs, and nurturing learning environment, the University solidified its place among the nation’s top educational institutions."

The New York Times – College Access Index

- National Liberal Arts: 21
- Most Selective: 28

College Raptor – Best Colleges in Southwest U.S.

