



Our Sustainable Future: A Five-Year Strategic Plan for Sweet Briar College

This is a living document for the board and administration of Sweet Briar College, to serve as a vade mecum in operating the College in a planful manner for the period of FY2022/23 – FY 2026/27.

Background and Summary

Sweet Briar College has undergone drastic changes since 2017. With board approval, we have reset, broadly and comprehensively, the College's academic, financial and administrative practices. The purpose of these actions was to make Sweet Briar distinctive among liberal arts institutions, and thereby competitive.

The most notable change was a series of academic resets, consisting of the concise 10-course "Women's Leadership Core" that replaced the sprawling general education program; and the reduction of academic majors from 42 to 17. Other changes included a new academic calendar and the establishment of competitive financial awards to students for experiential learning.

We also reset the College's tuition by thirty percent in order to remain viable, since the College's main competitors are the public flagships in the Commonwealth; and we right-sized the workforce appropriate with the size of student body. At the same time, we made investments in physical infrastructure to improve the institution's appeal to prospective students (viz. renovations of the equestrian center and dormitories, creation of the turf field, vineyards, apiary and greenhouse.)

There are validations that the College is on the right path. These include its repeated recognition by U. S. News & World Report as one of the nation's most innovative liberal arts colleges; reaffirmation of its accreditation for the next decade by the Southern Association of Colleges and Schools Commission on College (SACSCOC); continued improvement in bond ratings; clean audits; balanced budgets, all of which

are buoyed by the extraordinary financial support of the alumnae; and finally, a marked uptick in the number of incoming students starting in the fall of 2020. It is worth noting that much of this occurred amid a pandemic that forced a series of disruptions and adjustments in the operation of the College.

This five-year plan (henceforth “the plan”) builds on the afore-mentioned changes. It identifies five distinctive areas that seek to make Sweet Briar a destination college for young women today: (1) an excellent program of liberal arts focusing on *women’s* leadership; (2) an extraordinary natural setting ideal for promoting a culture of sustainability; (3) a unique engineering program designed for women; (4) a nationally renowned equestrian program—and all of these situated (5) within the larger cultural context of central Virginia, anchored at Sweet Briar, especially in the summers. The plan spells out (co-)curricular steps to deepen the content in each area and infrastructural requirements. It also discusses steps to address the significant problem of deferred maintenance, big and small, and ways to finance them. The plan is replete with a 5-year budget model, and a discussion of capital financing and the next steps for the Priorities Campaign.

I. Five Years in Five Parts: Academic and Co-Curricular Priorities

1. Women's Leadership

Fostering leadership in women is an important mission of the College. This mission is integrated into our general education program, known as the Women's Leadership Core (henceforth, "the core.") Concisely comprised of ten courses, the core provides an interdisciplinary approach anchored in the liberal arts, promoting skills and habits of effective communication, problem-solving and decision-making. The leadership that Sweet Briar emphasizes is horizontal and not hierarchical; it is democratic, collaborative and humanistic—as women often tended to practice in the past and as the world will need in the coming years.

Over the next five years, we will deepen and strengthen the core by accomplishing the following:

(a) Implementing Sweet Briar's Plan for Building out Leadership Capacity

The Quality Enhancement Plan (QEP) is a major element in the College's decennial reaccreditation with SACSCOC. Given the centrality of leadership in our curriculum and our mission, the faculty developed the QEP on "Building Leadership" through integrated academic and co-curricular programming. The main elements are as follows.

- Refinement of a "leadership scaffold," consisting of four core courses with enhanced leadership content that will also connect seamlessly with sequential courses.
- Creation of professional and academic development workshops that will assist the faculty in infusing design thinking, globalism, ethics and leadership development throughout the entire core.

- Creation and launch of the co-curricular ROSE (Relationships, Opportunities, Service, Empowerment) leadership program, designed to give students hands-on, practical leadership training on and off campus. It encourages students to meet with faculty mentors, develop leadership competencies in the first year and practice them in subsequent years. Each year, the ROSE program will culminate in a student-run campus-wide leadership event, such as a conference or debates on issues of global importance.

(b) Administering and Developing the Leadership Core

We will appoint a core director from the rank of the faculty, responsible for implementing the QEP plans as described above. The director will further assist the vice president for academic affairs in infusing the ethos of leadership throughout the curriculum, assessing student learning outcomes and ensuring smooth operations of the core with respect to staffing and curriculum.

(c) The Core as an Iterative Process

The core will continue to evolve in content and methods. We will adopt new pedagogical approaches to help students internalize the habits of leadership. Faculty will be encouraged to develop project- and community-based assignments—for example, helping students participate in efforts to promote leadership of women in agriculture in the Commonwealth, partnering with area food banks and economic development agencies to reduce food insecurity and actively involving students with the work of the College in the next five years of implementing the plan. Faculty will also explore the use of an online portfolio for students to demonstrate their leadership development over the course of their time at Sweet Briar by uploading examples of their activities and accomplishments, in written, pictorial or video formats.

The coaches in the athletic and riding programs will facilitate the spread of leadership ethics, and all of this starts on the first day on campus, with orientation for new students.

(d) Renovations to Benedict.

Many of the core courses are taught in Benedict. A graceful Georgian Revival brick structure designed by Ralph Adams Cram, it is one of the 21 buildings comprising the Sweet Briar College Historic District. Its condition, along with that of the district's other buildings, was recently surveyed as part of the Historic Structures Assessment and Stewardship Plan produced by Mesick Cohen Wilson Baker

Architects (MCWB) in 2020. (The entire plan is available on our website: https://www.dropbox.com/sh/q3wfmamf7ufdvnw/AACCaCA4UH_ML15veXDeP9yna?dl=0 .)

Benedict has always been used for classrooms and faculty offices; it is currently the home base for faculty of the humanities and social sciences division. Plans for the building include renovating the lobby and Tyson Auditorium (a classroom with theatre-style seating) and updating other classrooms with the technology and furnishings needed to facilitate collaboration and engaged learning. Infrastructure needs include updated HVAC and electrical systems, and improved ADA accessibility.

2. Sustainability

Sweet Briar's historic 2,840-acre campus provides a learning laboratory for sustainability, stewardship and cultural and natural resource management. By capitalizing on these unparalleled resources, we will integrate the science, public policy and ethics of sustainability throughout curricular and co-curricular programs and campus operations. The students will experience the pleasures of outdoor life and understand the paramount importance of wellness and sustaining themselves—and from there on, their families, their society and their future.

The central catalyst for this effort will be the College's Center for Human and Environmental Sustainability. The center facilitates curriculum, research and community engagement activities to improve environmental outcomes, economic development, equity and quality of life; and supports the College's natural environment and agricultural operations.

Over the next five years, working with the center, we will endeavor to make Sweet Briar's academic and co-curricular programming, as well as its campus operations, hallmarks for sustainability by doing the following:

(a) Learning through Agricultural Enterprises

Sweet Briar's agricultural enterprises—the apiary, pollinator habitat, vineyards and the 26,000 square-foot, four-season greenhouse—are among the most visible aspects of our sustainability culture.

Students are involved in many operational aspects of the big greenhouse (versus the smaller one by Guion). They take classes in it. They do projects in it. They raise crops from seed to harvest in both soil and hydroponics systems. They organize the

distribution and sale of produce, including for campus dining, the Community Supported Agriculture (CSA) subscription program, the farm stand market for campus and surrounding community residents and donations to area foodbanks.

In the next five years, we will ramp up hydroponics operations in the greenhouse to enable the year-round production of large quantities of produce for campus dining and commercial partners. This will require a consistent labor force of students (when available) and college employees to ensure production goals are met in a timely fashion. Soil bays not used for teaching will also need to be focused on cost-effective crop selection and management.

To further expand these activities, we may also consider augmenting existing agricultural spaces. (Currently, faculty teaching courses in the greenhouse have no nearby space to store classroom materials, lab equipment, or chemicals and must transport them back and forth to Guion or the Train Station.) The addition of a fenced outdoor area (2-4 acres) for outdoor crops may promote greater student involvement, attract the general public (to places such as a sunflower field or a pumpkin patch) and increase capacity to support campus dining services and sales.

The vineyards, as they enter their second year of production, will have Sweet Briar employees and students doing more of the growing activities and maintenance work. As some point, we need to make the capital decision regarding whether to extend the production cycle into winemaking and then retail hospitality operations.

(b) Interdisciplinary Curriculum on Sustainability

Studies in sustainability are not limited to environmental science, biology, engineering and other STEM classes. Sustainability is the focus of one of the core courses (CORE 140: Sustainable Systems) and it is covered in courses ranging across the humanities and social sciences, but further integration will require faculty training and development across disciplines.

One interdisciplinary example is the new certificate program in Leadership in Sustainable Agriculture and Food Systems, launching in spring 2022. Over the next five years, the certificate program may transition into a minor program and eventually become a major in Sustainable Agriculture and Food Systems. Launching the major will require continued offerings on climate change, water systems/hydrology and new courses in soil science, animal agriculture, animal physiology and viticulture, necessitating an addition of one new faculty member with expertise in either agriculture, environmental science, hydrology or climate change.

(c) A Culture of Wellness

The agricultural enterprises enable us to improve the dining experience for our community. For a residential college this is an important consideration as dining can serve as a tool for retention and recruitment of students. Over the next five years, we will establish and promote our dining services—in collaboration with Meriwether Godsey—as one of the best among the nation’s colleges. Dining services will be characterized by fresh, delicious, healthy food served in welcoming, homey spaces and a variety of dining options.

Sweet Briar’s wellness program will utilize more than the usual resources of athletic teams, playing fields and a fitness and athletics center. It will deploy our abundant natural resources, including the campus’ trails, hills, meadows and lakes, along with our outdoor program. We will encourage students and employees to get outside and improve signage for the campus trails and develop a trail map.

It is hoped that the above efforts will have an ameliorative impact on the current “mental health crisis” among young people today, as described by the surgeon general, and which is exacerbated by the pressures of social media and the ongoing pandemic. (We will also expand on-campus mental health services provided by Horizon Behavioral Health and offer wellness programming in areas including nutrition, study habits and prevention of substance abuse or self-harming behaviors.)

(d) Campus Sustainability

We are in the process of developing a campus-wide sustainability plan addressing issues of energy, land use and other elements of environmental stewardship. We hope to decrease reliance on fossil fuels through broader adoption of geothermal systems in certain areas of campus, a move to decentralized heating and cooling systems and the use of solar-generated power (see part II. Capital and Energy Infrastructure, below).

Improved waste management, increased recycling and the expansion of composting practices will also make important contributions to a sustainable campus. We transitioned from separated to single-stream recycling in 2020 but we need to maximize recycling outcomes and provide training to physical plant, housekeeping teams, students, campus residents and visitors. With the aid of an external grant, we have initiated a diversified composting operation that is diverting food waste at Prothro to generate resources for enhancing soil health to support food production on campus. We hope to expand the efforts to include landscaping waste and horse manure in

addition to food waste. Improved signage throughout campus will also aid recycling and composting efforts.

Students have been vocal about the need for food waste composting on campus, and the afore-mentioned initiatives will provide them with another opportunity to build leadership skills and obtain hands-on experience in sustainability practices.

3. Engineering

Sweet Briar's ABET-accredited Margaret Jones Wyllie '45 Engineering Program is unique. It provides immersive, project-based, hands-on learning that gives students a solid foundation in engineering fundamentals. At the same time, it provides students with an interdisciplinary skill set that empowers them to succeed in any engineering specialty. Sweet Briar's engineering graduates are admitted into prestigious graduate programs and have an exceptional job placement record, having been hired by leading companies such as NASA's Jet Propulsion Lab, IBM and the U.S. Navy.

Over the next five years, we hope to grow the size and depth of this unusual program by doing the following:

(a) Curricular Revision to Address Disparate Preparations

In our women-centered engineering program, we strive to educate and empower women to become engineers. We are reaffirming our commitment to having an engineering degree accessible to as many women as possible. We will address inequities in how women are educated in the scientific and mathematical fields. For too long, young women have been tracked out of higher math and science courses and discouraged from pursuing engineering and other STEM fields.

Over the next five years, we will develop programs that address the disparity of preparations to pursue engineering science at Sweet Briar. To do so, we need additional faculty, course offerings and expanded programs to broaden our current scope and vision.

We will offer pre-calculus and/or college algebra to Sweet Briar students who have had insufficient, biased or discouraging experiences in mathematics prior to arriving at the College. We will investigate tutoring models with positive results such as the Supplemental Instructor program (<https://info.umkc.edu/si/>) in which student tutors are paired with courses and then lead peer review sessions.

The engineering science degree requirements are extensive, with 82-85 credits of required courses that leave little room for taking preparatory courses or having to reduce the course load per semester. We will develop a degree path that includes a fifth year for those students who require a preparatory curriculum to progress satisfactorily through engineering's rigorous curriculum. This fifth year will be application based and have financial aid attached to it to make it affordable for students.

(b) Sweet Briar Engineering Institute (SBEI)

Our engineering program is distinct in the level of hands-on experience that students get from their very first course, ENGR 110: Introduction to Engineering, where students work in teams to design objects such as a pinball machine and LED clock and learn to use tools. Central to that experience is having real-world, relevant projects for students and faculty to engage in. Toward that end, we will establish a Sweet Briar Engineering Institute (SBEI) to work with students and faculty to provide services to outside clients—mostly small businesses and community and other non-profit organizations. Examples of the types of services offered by the SBEI could include materials testing; engineering design and analysis advice; engineering assistance; special products testing; creation of prototype product parts; custom machining; 3-D printing; special analysis in fields in which faculty members have expertise, such as nano-materials, thermo-fluids, etc.

Sweet Briar faculty could be hired as consultants, giving them additional scope and opportunities to do high-level work in their fields of specialization, thereby increasing their job satisfaction. Projects could also be run through courses and involve student participation. SBEI would generate small revenues, although some projects for non-profits and community organizations could be done at no cost or for reduced fees.

(c) A Master of Science Degree in Integrated Engineering.

In the next five years, we hope to pursue the creation of an M.S. degree in Integrated Engineering. As currently conceived, this master's program is predicated on the recognition that there are no single-discipline engineering problems—21st century challenges require integrated, interdisciplinary solutions. Such a degree would be unique and the first of its kind—there is no such graduate program in the country. Engineering graduates can currently go on to earn a discipline-specific master's or an MBA, but they do not have this kind of opportunity. Industry demand for the program's versatile graduates likely would be high but needs to be discerned.

This M.S. degree would build upon our engineering science undergraduate curriculum, which is essentially an integrated engineering degree, integrating engineering with the liberal arts, with other STEM programs and with business. To determine the degree's feasibility, we would canvas opinions from leading engineering graduate programs, seek feedback from industry and the business community to understand demand and hire a research firm to do a market analysis. If we launch the program, we would hire additional faculty to create the discipline-specific courses needed to round out the program and fill in students' backgrounds. We would expand current collaboration with the business program, reach out to other campus programs to ensure interdisciplinarity and include an industry experience as part of the degree requirements.

We would pursue ABET accreditation of this degree. The program would be flexible, serving both residential full time and part-time students by offering some courses at night, or online. It would be co-educational, but we would market it heavily to women engineering students (at Sweet Briar and engineering programs across the country) and to women working in the field. It would raise Sweet Briar's visibility, create new sources of revenue, help strengthen existing corporate partnerships and build new ones.

To accomplish these goals, we will hire a director of the engineering program. This individual will lead the charge to develop and nurture relationships with local, regional, national and international business and industry leaders. The director will work with faculty in the engineering program and other programs in our STEM fields to evolve curricula to meet the needs of all students who want to pursue engineering or any STEM field. In addition, this person will be responsible for leading the study into the feasibility of the M.S. program.

(d) Renovating the Guion Science Center

As the engineering program grows, it will require additional, dedicated space within the Guion Science Center, which houses all of the College's STEM programs. Guion, a stately brick modernist structure with limestone trim, was built in 1964 with an addition in the early 1970s. Its interior requires updating to meet the instructional needs of today's STEM courses. It needs flexible classroom spaces with easily moveable classroom furniture to facilitate project-based, collaborative, experiential learning, as well as teaching and research labs that can meet the evolving pedagogy of the STEM faculty. Necessary infrastructure work includes electrical updates, lighting, plumbing, new windows, a new roof, new HVAC, upgraded fume hoods, upgraded and increased numbers of safety stations, a new elevator and ADA accessibility.

Preliminary estimates for the costs of Guion's infrastructure needs, not including interior renovations for programmatic improvements, range from \$9 million to \$11 million. A complication of committing to the rehabilitation of Guion versus constructing a new science facility is that we will be working on the building while it is use, necessitating careful consideration of how the project will need to proceed in stages.

4. Equestrian Program

Sweet Briar's equestrian program is one of the oldest in the nation and the most renowned among those at liberal arts colleges. In 2021, the Vixen riding teams captured both the ODAC Championship (their sixth) and the NCEA Single Discipline National Championship. Yet the program's emphasis is not just on competition; it includes field riding, recreation, training and schooling of horses and the equine studies certificate program.

The equestrian program trains horsewomen of all skill levels, from beginning to advanced riders. Through riding, women learn the benefits of perseverance, discipline and teamwork, and gain confidence in themselves. As practiced at Sweet Briar, riding is another aspect of women's leadership.

Over the next five years, we will elevate the equestrian program to an even higher level, as well as meet the needs and expectations of a rapidly increasing student body, through the following actions:

(a) Hiring a Veterinarian and Developing Additional Academic Course Offerings

Many leading riding programs with whom we compete for students—Emory & Henry, University of Findlay, Savannah College of Art and Design—have a veterinarian on staff. A staff vet would serve our on-campus animal population, spending 30-40 hours/month caring for both Sweet Briar's and student-owned horses and 10 hours/month on other animals, such as the growing population on campus of Emotional Support Animals (ESAs).

The vet would teach two courses per year in the academic program (such as animal nutrition, animal science, animal physiology), enabling the program to expand its academic offerings, potentially leading to a B.S. degree program in Equine Science. The vet will mentor students through independent study courses and assist with pre-vet advising; in future, we aspire for the vet to anchor an on-campus equine rehabilitation

facility, offering experiential learning opportunities for students, generating revenue, and filling a regional need.

In addition to synergies with the biology program, the riding program's expanded academic offerings will also intersect with our programs in business, art and sustainability (especially for the latter through the development of an aerated static pile composting system). The program may also build collaborations with psychology through the creation of an additional certificate program in Equine Assisted Learning/Leadership/Therapy.

(b) Facilities Improvements

As Sweet Briar's enrollment has grown, so have the numbers of students interested in riding. In recent years, over one-third of our students identified as riders, either competitively or for recreation and that percentage is likely to increase. In order to meet the student demand, augment programming and thereby strengthen its national reputation, we must continue to renovate and expand the riding center's facilities.

In 2021, we completed the first phase of the riding center's improvements. This \$2.1 million project involved renovations to the main riding stable (now renamed the Howell Lykes Colton '38 Stables), renovations to the Bailey Room and adjacent offices, and landscaping improvements.

One of the program's pressing needs is for more all-weather teaching spaces to accommodate the growing numbers of students who ride. The current indoor arena can only accommodate two riding lessons at a time. A second (and smaller) indoor ring will increase space for riding lessons, along with providing an appropriate teaching space for the veterinarian, as well as a better and safer area for shoeing horses.

More riders mean more horses—both a need for additional College-owned horses and a greater number of student-owned horses that are boarded. We currently have the capacity for 80 horses in our facilities. The number of stalls may be adequate for the next year, but we will need more turnout spaces. This will require wooden fencing to section off several fields into smaller spaces for paddock and field grazing rotation, and additional run-in sheds in the fields so the horses can live outside comfortably and safely.

Other needed riding center renovations include a new roof and sides for the covered competition arena, upgrades to the outdoor riding rings, auxiliary stables, a combined indoor/outdoor viewing area and others.

(c) Auxiliary Programs

Expanding auxiliary programs throughout the academic year, and particularly in the summer, will help market the equestrian program and generate revenue. Current programming includes hosting horse shows and clinics, which bring well-known professionals to campus. In the summers, the program offers riding during the weekends of graduation and reunion, and summer camps during two long weekends.

Programming must be expanded. Examples of new programming ideas include an “All Things Horse” annual conference, featuring leading professionals; and hosting horse shows for profit, as well as several U. S. Hunter Jumper Association (USHJA) programs, including Certified Trainer programs and Emerging Athletes programs. We could offer a “Boot Camp” for equestrians. We would bring in a group of professionals to run the event, which would be inspired by Daniel Stewart’s Boot Camp programming (featuring riding, sports psychology, athlete nutrition, athlete fitness, etc.). Adults and junior riders can bring their own horses, and we could add another weeklong camp for riders on a variety of levels.

5. Destination Sweet Briar

One of the main reasons for the 2015 decision to close Sweet Briar was its location—the College was “thirty minutes from the next Starbucks,” it was said, when college students preferred urban settings. While location has long been considered a barrier to Sweet Briar’s future, it need not be so. This plan seeks to position the College’s location as an asset, as a cultural and recreational destination.

Only 10 miles from the Blue Ridge Parkway and Appalachian Trails, and 20 minutes from Lynchburg (and respectively one hour from Charlottesville and from Lexington), Sweet Briar is already part of a cluster that includes the nation’s second largest residential artist colony—the Virginia Center for Creative Arts (VCCA) —and the last of Sam Snead-designed golf courses. Within the College, there is an extensive slate of hospitality services, agricultural enterprises, arts facilities, and athletic and outdoor facilities.

Requirements for vitalizing the cluster entail the infrastructural upgrades that are a *sine qua non* for the College in any event—Babcock, Pannell and dormitories—and the development of various outdoor and cultural programming, particularly in the summer. The benefits are myriad, including raising the College’s visibility through arts events, aiding in recruitment and retention of students, increasing auxiliary revenue and utilizing the campus in a period (the summer) when it might otherwise remain

underutilized and somnolent. The arts events and activities will strengthen the College's own arts programs, and foster positive town-gown relationships that will help boost the regional economy.

For most of its history, Sweet Briar College served one of the main purveyors of arts and cultural events for this region of Virginia. We now seek to re-double our efforts to have the College serve as a regional anchor for art and culture and put central Virginia "on the map" as a destination for arts and cultural programming—in the setting of unparalleled natural beauty. The result will be a creative, eclectic and diverse community, even somewhat akin to New York's Chautauqua. It will bring together the Sweet Briar community, fellows from the Virginia Center for Creative Arts (VCCA), local residents and tourists. It will appeal to arts aficionados, food and wine mavens, and outdoor enthusiasts.

Over the next five years, we plan to make Sweet Briar and the region a destination location for unique arts, cultural, and outdoor programming by doing the following:

(a) Remapping of Cultural Assets

The College and the region already possess many of the assets that will help establish the cultural corridor. They include: the Elston Inn & Wailes Conference Center, the Babcock Performing Arts Center, the Mills Chapel, the Cochran Library, the Pannell Gallery and the fine arts collection, the history museum, the academic and residential buildings of the National Register Historic District, the Fitness & Athletic Center, the turf field (once established), the Boathouse and the Harriet Howell Rogers Riding Center. There are also the College's 20 miles of trails, Dairy Loop, its forest sanctuaries and lakes, the Quad, the Dell and bandstand, Monument Hill and the plantation community cemetery, the agricultural enterprises (greenhouse, apiary, vineyards, pollinator habitat) and its farm-to-table dining.

The College's staff (inn, conference center, Bookshop) has expertise in managing auxiliary programs. The food service provider, Meriwether Godsey, has full-service catering ability and excels at creating farm-to-table meals. We will tap into faculty expertise as well, as many faculty in arts and humanities maintain contacts through their professional networks and may provide programming opportunities in their own right.

In the first years of the cultural corridor's programming, most events would be held at Wailes, the library, the Dell and bandstand, the Quad, the campus trails and the geothermal field adjacent to the greenhouse. The bandstand and athletic field will

require maintenance updates and vendor support (carpentry, electrical hookups, tenting, etc.) for use. Over time, activity locations would evolve as the College's major arts facilities (Babcock and Pannell) are renovated.

(b) Renovating Babcock and Pannell

Babcock, like its neighbor Guion, was built in a modernist style and opened in the early 1960s. This once state-of-the-art facility will need significant renovations to support the technical requirements of contemporary performances and performing arts instruction. Necessary infrastructure work includes electrical updates, new HVAC, enhanced bathroom facilities and ADA accessibility, including elevators. Performance updates and upgrades for Murchison Lane Auditorium include computerized lighting and sound systems and new auditorium seating. Renovations should also include the conversion of the old studio theatre into a musical recital space and the creation of a new studio theatre/black box theatre. We have not yet engaged an architectural firm to assess the scope and costs of improvements to Babcock.

Pannell, a Georgian Revival brick structure designed by Cram, is part of the historic district. Built in 1906 as the College's Refectory, its original interior was significantly altered in 1984 when it was renovated to become the College's main art gallery and house the fine art collection and art library. Its infrastructure needs include updated HVAC and electrical systems—improvements vital to the safe and responsible storage and stewardship of the College's collections—as well as improved ADA accessibility. Renovations will enable the Pannell Gallery to showcase the College's own collection and host traveling exhibitions through creation of additional gallery space. The history museum may be relocated to Pannell and will require its own exhibit space. With support from a grant from an alumna, we have just hired an architectural firm to assess the scope and costs of the building's improvements.

(c) Establishing Programming Partnerships

We have already begun to initiate conversations about this concept, with a focus on anchor local organizations as partners for its launch. VCCA has confirmed its involvement as a lead partner. Other initial confirmed partners include Amherst Second Stage, Amherst Glebe Arts Response and the Amherst County Government. Other local entities to approach include the town of Amherst, the Monacan Indian Nation, the Academy Center of the Arts in Lynchburg, Wolfbane Productions, Endstation Theatre Company, local wineries and Meriwether Godsey. We will also reach out to Poplar Grove golf course and area historical sites, such as Thomas Jefferson's Poplar Forest.

Future partners may include Chautauqua Institution (which has expressed interest), the city of Lynchburg, James River Association (for potential environmental education activities) and more. Other regional and national partners will be identified and solicited.

(d) Programming

Programming in Years 1-3 will center on smaller scale events of less than 100 attendees and will take place in summer months when the College is not in (in-person) session. Larger events may use the College's acreage across Route 29 (the Amherst Country Fair has been held there in recent years) or the venues of partners, such as VCCA. By Year 4 and beyond, activities will be on a 12-month schedule and will be integrated with the College's academic year events. By this time, renovations may have taken place in Pannell and Babcock that will allow their use; this will increase the scope of overall programming.

Programming will rely primarily on hired or touring talent. The types of programming currently envisioned for Years 1-3 include: summer camps; musical and theatrical performances in collaboration with national and/or local arts organizations, combined with farm-to-table dinners and/or wine tastings; weekend residential masterclass programs featuring well-known instructors on arts, humanities and lifestyle topics; guided campus and regional history tours; guided campus trail hikes; a running or mountain bike race; and environmental art installations using materials from the land. The frequency of the events will evolve depending on demand and capacity. In Year 4 and beyond, programming will expand to include traveling exhibitions at Pannell and large-scale performances at Babcock.

The success of this ambitious project requires coordination by a person with expertise in arts and culture programming and managing large-scale projects. We are in the process of recruiting the new director of the Center for Creativity, Design and the Arts to help launch and sustain operations of the cultural corridor.

6. Cross-Cutting Priorities

A number of needs and priorities cut across the distinct academic and co-curricular areas discussed above.

(a) Staffing

Cross-cutting support is required for the academic program, as additional faculty resources and/or faculty hires will be necessary to realize our plans for the core, sustainability, engineering, and the equestrian program. Across the disciplines, we will need to make additional, strategic faculty hires as enrollment grows. To support faculty development and encourage a strong expectation for faculty innovation and scholarship, we may need to reinstitute sabbatical leaves.

(b) Student Support

To better serve the diverse learning needs and styles of our students and to support their intellectual and personal growth in and out of the classroom, we need to expand our academic support services. Our students increasingly need support with writing and quantitative skills, to prepare them for college-level work and prime them for success. Many students, especially those who are first-generation, need help in “navigating” college. We also need to expand accessibility services for students with learning and physical accommodations needs.

(c) Global Engagement

We need to expand global engagement opportunities for our students. This can be accomplished, in part, by increasing the numbers of travel courses offered during the three-week terms and by encouraging study abroad for a semester or an academic year. We can also bring the world to Sweet Briar, through inviting outside speakers to campus for academic and cultural corridor programming. Globalized engagement is central to our core curriculum and it is vitally important to our sustainability efforts. It will bring added distinction to the cultural corridor—and should be instituted across the curriculum.

(d) Community Engagement

Sweet Briar’s engagement and partnerships with the local and regional communities is critical to the success of the plan. For the core, such efforts will facilitate project-based learning and leadership training. In sustainability, such networks will boost the College’s ability to serve the state’s agricultural community—particularly women—through offering in-house and partner-provided training, workshops, seminars and conferences, and demonstrating best practices in conservation agriculture. In

engineering, expanded networks will be the basis for the launch and ongoing success of the Sweet Briar Engineering Institute, helping to draw regional in-service engineers to enroll in the M.S. degree program. Finally, the launch and operations of the cultural corridor will be dependent upon our community ties.

Other important aspects of community engagement include strengthening our relationship with the Monacan Indian Nation, considering the provision of educational outreach opportunities to incarcerated women in local jails and prisons, developing a business plan with the goal of re-establishing the campus pre-school, and hiring an admissions counselor with the goal of recruiting long-lasting pipelines of students from the region.

II. Capital and Energy Infrastructure

Large-scale capital projects associated with academic priorities have been discussed in Part I. This section will discuss projects, smaller in scale, that are financed under “capital depreciation” in the budget; improvements associated with student life; and energy systems on campus currently under study.

1. Addressing Deferred Maintenance: Continuous Upkeep and Renovation

In 2013 the Stone House Group conducted a deferred maintenance study for the College. The resulting study—the estimated cost requirement was \$29 million over ten years—suggested financial challenges that appeared insurmountable and contributed to the decision to close the College. In 2021, we asked the same group to update their report (henceforth, “Stonehouse 2021”). (*Nota Bene*: Stonehouse 2021, previously shared with the board, is based on the enrollment assumption of 800 and includes the cost of building a new dormitory. The group was also asked to address all deferred maintenance at Sweet Briar without considerations as to cost.)

The challenges are great but not insurmountable. In the last few years, we have chipped away at the problem through a steady renovation and upkeep of our buildings. Often dubbed “refreshes,” and funded through the College budget or gifts, they are the “small wins” that improve the quality of life for our students and employees.

Guion was “refreshed” in this manner. Its exterior has been scrubbed for the first time in more than fifty years, with the interior getting new lights, new paint, new water bottle filler stations, refinished floors and a refurbished auditorium. We will put a new roof on the building, extending its life and reducing the costs of its complete renovation. We anticipate that Guion’s essential infrastructure renovations will lower the total cost of deferred maintenance by millions of dollars. Babcock is likewise undergoing a refresh prior to major renovation, starting with the lobby.

Other “refresh” examples include the renovation of the expansive kitchen in Prothro, replacing its waste lines, fixing its floors, degreasing and painting its walls and installing new LED lights. New HVAC systems were installed in the Prothro Josey Dining room as well.

Residence halls have undergone improvement. Funded largely by reunion class gifts, student and common rooms have been refreshed with new paint and new furnishings. New elevators—starting in Manson, for instance—are being installed. The same applies to faculty and staff housing on campus, which has undergone renovation. Grounds improvements, road maintenance and repair, tree removals and additions are also part of the constant reinvestment in our land.

2. Student Housing and Other Buildings

According to Stonehouse 2021, the College is able to sustain an enrollment of 650 students without a new residential life building. However, to provide enough beds for them, we will need to bring back online currently unused buildings, such as Gray and a few of the smaller structures.

In some years in the past, the College housed more than 650 students—but most of them had roommates. Today’s students prefer single rooms, as many have grown up with the experience of having their own room at home and expect the same in college. We also have more students who require special accommodations within a single room. Residence halls have also lost rooms due to expansion of communal areas and the addition of elevators and internal fire escapes.

We hope to restore Gray as a residence hall. Built in 1906 as a dormitory, Gray is a Cram-designed Georgian Revival brick structure that is part of the historic district. Gray was repurposed in the early 2000s to house faculty offices and small classrooms, but has not been used since 2018, since those faculty were relocated to Benedict. The building, surveyed in MCWB’s report on historical preservation, needs updated HVAC and electrical systems, water infiltration mitigation and improved ADA accessibility. If it has lead-based paint, asbestos and mold growth, they will require removal. We have hired an architectural firm to assess the scope and costs of the improvements for converting Gray for residential use. (This is being done simultaneously with the scoping study for the renovation of Pannell.)

On Faculty Row, which is also part of the Historic District, buildings #1 and #3 have been converted into apartments for faculty and staff. Previously they were student

residences. Buildings #2 and #4, currently off-line, need significant rehabilitation. It may be more cost-effective per square foot to renovate them for student residential housing. In addition, Patteson House, now used for semester break housing and for COVID-19 isolation, may need to be used for full-time student residential use.

The five dormitories in the upper quad—Carson, Grammer, Manson, Randolph and Reid—are undergoing improvement, including in the rooms, halls, parlors and other common areas. Structural concerns for these buildings are discussed in MCWB's report. All require updated HVAC and ADA accessibility.

In the long run, we would like to see Harley, formerly the Student Health Center, become the new home for admissions. Another Georgian Revival structure that is part of the historic district, Harley is arguably the most graceful of all the buildings on campus. It is not in use now, but it will provide a more welcoming and elegant future home for admissions and is close to parking. While the extensive renovation of Harley is not among the central priorities of this five-year plan, we will move ahead if a donor could be identified for this specific project.

3. Energy Systems: The Steam Plant and HVAC

The College's existing central steam plant provides heating for 25 buildings on the central campus. The system is old, inefficient, uses a fossil fuel (propane) and has a considerable risk of failure. Sweet Briar House and the Fitness and Athletics Center utilize local geothermal bore fields. Many of our residential rentals have been converted to heat pump systems.

To decide energy options for the central campus, we hired 2RW Consulting to conduct a campus-wide analysis of the College's steam, electrical and HVAC-related systems. The report was completed in the fall of 2021.

To replace the existing centralized steam plant, 2RW investigated three options: (1) geothermal; (2) a new centralized plant operating on fossil fuels (propane); and (3) a decentralized cooling and heating system which would place equipment next to each building, utilize power generated through electricity and/or natural gas and connect to solar power sources or geothermal lines.

(1) Geothermal system: The mechanical installation alone is estimated to be \$25-\$30 million, most of it for bore field drilling. Bore fields will divide the campus into

“precincts” (clusters of buildings), with each bore field serving different precincts. Electrical installation first cost investment is estimated to be \$1-\$1.25 million.

(2) Centralized system: The mechanical installation first cost investment is between \$20-\$25 million, with electrical installation first cost investment another \$500,000-\$750,000.

(3) Decentralized system: The mechanical installation first cost investment is estimated to be \$12.5-\$17.5 million, with electrical installation first cost investment at \$3-3.5 million.

2RW recommends a campus-wide geothermal system, given our interest in sustainability and the existing geothermal systems used by Sweet Briar House and the FAC. Given the initial cost, however, a hybridized approach may make more sense. By combining geothermal and electrical usage, we may be able to balance the College’s capital commitments and operating costs over the longer term. Of course, all of these upgrades will need to tie in with systems in the buildings as we migrate away from our steam plant.

Before new systems are phased in, we must take steps to mitigate the risk of failure in our current steam plant. We are conducting an analysis to install steam shutoff valves to isolate specific legs of the steam system when necessary for maintenance. It will locate the sections in need of repair, which will extend the system’s life and reduce the steam return loss.

2RW also recommended that the College evaluate the campus’s antiquated electrical system. We will proceed with a survey to map out electrical distribution pathways and locate all primary transformers; verify existing primary conductor and transformer sizes; and perform condition assessments on conductors, conduit and transformers. 2RW also recommended that we install meters that will report data back to a central systems control at all buildings.

We are also implementing an electrical design for redundancy. Currently, the electrical feeds to the campus come from two separate directions and are not cross-connected to give us backup. We have engaged 2RW to determine a way to create a ring structure that would connect both of our north and south feeds together so that our campus would have redundancy if one of the two feeds went out. The project also examines removing the switching gear in the physical plant building.

The Stone House Group is advising us on potential solar fields. This consulting project is being carried out during the first half of 2022. We are examining the construction and external financing of an approximately 3 million watts (3 MW) solar field that could provide power to the entire campus. Ideal locations would be near our campus electrical feeds and aesthetically acceptable. Generating power through solar energy would reduce our utility costs and signal to the outside world our commitment to sustainability. As part of the project, we will also examine the creation of a separate solar field for auxiliary revenue generation.



III. The Financial Resources to Ensure Sweet Briar's Sustainable Future

1. The Five-Year Operating Budget Model

The five-year budget model, follows the accepted budgeting methodology in higher education. On the revenue side, it focuses on college-generated and unrestricted donor funds. College-generated funds include tuition, fees, room, board, auxiliaries and other related revenue. Unrestricted donor funds are primarily annual giving funds. On the expense side, it includes salaries, benefits, utilities, insurance, instructional costs, administrative support costs and depreciation to fund both debt payments and more minor capital refurbishments.

The Issue of Size

A critical question for the five-year operating model is the size of the student body. Enrollment growth impacts virtually all of the College's operations, altering revenues and expenses as student count increases. In terms of residential space, as previously discussed, the College can accommodate 650 students, but this will require renovations and rehabilitations to certain buildings not currently in use. An enrollment of 800 will require construction of additional residential buildings. We do have sufficient academic and athletic space for as many as 800 students, however.

While the enrollment model of 800 students would contribute resources to enable new construction, there is a risk that we may commit to new residential facilities without achieving 800 students. More importantly, we must prioritize capital fundraising for the renovation and rehabilitation of existing buildings over new construction.

We recommend an enrollment target of 650 students. Leaving aside the capital requirements discussed above, the recommendation is based on the need to be more selective, enrolling gifted students who are also a "good fit" for Sweet Briar. Success in this regard will greatly improve retention. Other considerations include the

“demographic cliff” that anticipates significant decline in numbers of high school graduates in our region, and the alarming enrollment expansion by Virginia Tech, often targeting the same prospective students as Sweet Briar. Furthermore, economic volatility that impacts endowment draw is always a concern. Finally, there will be an expected reduction in annual giving due to the focus on the Priorities Campaign.

How the Model is Built

The intent of this 5-year budget model is to develop reasonable revenue expectations, and then fit inside this envelope all anticipated expenses for the next five years, including the new costs from the section I of the plan that are academic and programmatic in nature (e.g. “non-capital”). The latter were determined by the vice president of academic affairs, working together with the faculty and the associate vice president/controller. It is our view that the projected revenue increases in this budget model are sufficient to cover the new academic and programmatic expenses generated by the plan.

The model assumes a target size of 650 students.

In this model we strove to remain conservative, as external economic conditions can change quickly. For each year of the plan, we will build a realistic operating budget pulling the key elements from this 5-year budget model, as well as assessing actual data and reviewing the priorities of the plan as needed, for that upcoming year.

The mechanics of creating the model began by tracking enrollment data by class year, along with the percentage of students who return each semester. Projected attrition rates are based on those of the two or three preceding years (by semester and class year) and will be adjusted as updated data is obtained, such as at “census date” or at the end of a semester.

For student revenue, we used a placeholder increase of 2% on tuition, and 2.7% on room and board across the five years. In the winter prior to each new fiscal year, we will discuss appropriate rates and propose them for board approval at that time. All other revenue lines were set based on past trends and future goals and remain conservative in light of the uncertain environment within higher education.

On the expense side, compensation includes cost of living and merit increases built in across each year in order to attract and retain talented employees. We also assumed continuing improvement in the College’s contribution to retirement. Growth in student count demands an increase in faculty and staff. For the model, we added one faculty

and one staff line for every 30 additional students. During the annual budget development, we will determine the actual needs of the College and adjust the compensation budget appropriately.

Departmental expenses are increased in the range of 1% to 4% based on the division. For example, academics, athletics and technology will receive higher percentage increases, while support areas such as administrative offices will increase at slightly lower percentages. These increases generate significant new dollars in the expense lines.

Below is a snapshot of the model based on the current built in assumptions. The annual budget, through anticipated releases, will have a surplus each year. Student revenue increases by 76% over five years with total revenue increasing 28%. Importantly, student revenue rises from 46-63% of total revenue in the model.

	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27
	FINAL BUDGET	Proforma				
REVENUE						
Student Revenue	11,218,120	13,412,543	15,712,222	17,781,408	18,990,499	19,764,374
Giving Revenue	8,083,620	7,520,000	6,320,000	5,070,000	4,820,000	4,820,000
Other Revenue	5,298,800	5,870,600	6,118,600	6,366,600	6,614,600	6,962,600
TOTAL REVENUE	24,600,540	26,803,143	28,150,822	29,218,008	30,425,099	31,546,974
EXPENDITURES						
Compensation	14,001,065	14,922,187	15,843,973	16,744,466	17,349,903	17,889,596
Departmental Expenses	5,665,370	5,810,903	5,960,939	6,043,451	6,127,246	6,212,346
Auxiliary Services	1,984,220	2,023,904	2,064,382	2,105,670	2,147,784	2,190,739
Non-operating (Util, Int, Depr)	4,562,060	4,566,006	4,568,289	4,540,230	4,508,575	4,494,784
TOTAL EXPENDITURES	26,212,715	27,323,000	28,437,583	29,433,818	30,133,507	30,787,466
OPERATING SURPLUS/DEFICIT	(1,612,175)	(519,857)	(286,761)	(215,810)	291,592	759,509
Anticipated releases	1,700,000	-	-	-	-	-
NET SURPLUS/DEFICIT	87,825	(519,857)	(286,761)	(215,810)	291,592	759,509

2. Capital Project Needs and Resources

Major capital expenditures for academic buildings, student life and co-curricular needs, and energy systems are included in the identified needs of the Priorities Campaign (see below). Once major renovations are completed, future updates, repairs, and maintenance of these buildings will be supported by the annual depreciation budget, and/or temporarily restricted gifts, and income from the stewardship endowment to be established through the campaign. Smaller scale capital improvement and building refreshes will be funded with the same means.

Major capital projects should be launched when construction costs can be covered by received pledges. If the cash conversion of the pledges is slower than the construction cost outflow, we will need to obtain the board's approval for a bridge loan against those pledges from the endowment. There is a limit to bridge financing, however. For large-scale capital projects, the College may need to look at refinancing its existing debt to obtain a new funding tranche. Given the College's rural location, USDA loans could be very attractive. USDA loan requirements have numerous conditions associated with them, and the process must be followed meticulously.

In terms of debt capacity, we currently have a public Amherst County Industrial Development Authority bond (IDA Bond) of \$12,160,000 at 4-5% rates with semiannual payments and a final maturity of September 2030. The current annual payments total approximately \$1,425,000 (principal and interest) per year. We also have an internal debt of \$6,000,000 owed to the endowment at 2.97%, with all principal due Dec. 31, 2036. Unless paid off earlier, we will initiate a six-year principal and interest payment of approximately \$550,000 every six-months, starting on March 1, 2031, to retire the debt by Sept. 1, 2036. This amounts to an annual debt service of approximately \$1,100,000 for 2031 through 2036.

The current IDA Bond has a negative pledge covenant prohibiting any assets pledges. Accordingly, any new financing will need to retire the existing debt and fund the new board authorized projects.

Finally, we will need to build cash reserves, as the College lacks a line of credit or operating reserves backed by cash. This is a significant financial management concern. One way to build the cash reserves would be to change the current policy regarding unrestricted bequests, by redirecting them from the annual fund and operating budget towards "strategic reserves." We expect to bring this issue to the board.

3. The Next Step: Recalibrating the Priorities Campaign

In April 2018, the board approved a plan, tentatively titled the Priorities Campaign. Less a traditional "campaign" than a comprehensive survey of urgent needs to compel the College beyond the phases of rescue and reset, it focused on four areas: presidential scholarships, academic innovation, stewardship of the natural and built environment, and student life. The projected total was \$128 million, although by the fall of 2020 it crept up to \$131 million.

Pending the discussion and approval of the board of this plan, we will move to recalibrate the Priorities Campaign as approved in 2018 and revised in 2020. It is worth noting, however, that there is a large and essential congruence between the Priorities Campaign and the requirements of this plan. This is because the strategic vision of the College has remained steady, even as the vocabularies of our aspiration have changed.

We anticipate that as the result of this plan, the following recalibration is likely to take place. First, the non-capital portion of the “academic innovation” pillar of the Priorities Campaign will be funded through enrollment-related revenue increases. Other areas, like Presidential Scholarships and the Women’s Leadership Core, will remain in the Campaign. Second, the capital portion will now include renovation of buildings like Gray and Harley (on top of Guion, Babcock, Pannell and Benedict). It will also include the modernization of the energy systems as well as infrastructural upgrades to the athletic and co-curricular facilities (agriculture, turf field, riding center, residential hall upgrades). Third, there will be greater focus on building the endowment for the long-term support of the Presidential Scholarships, the Women’s Leadership Core and the stewardship in perpetuity of our magnificent buildings and grounds.

As we look forward to the new phase of the Priorities Campaign that will follow on the heels of this plan, it is worth remembering that in reality, the College has been in a campaign mode since the summer of 2015, raising a total of nearly \$100 million in annual funds and Priorities Campaign combined. (The funds raised for the latter is approximately \$17 million to date.) This fact points to the possibility that a fundraising campaign at Sweet Briar is essentially a different beast than those at other liberal arts colleges. We have been exceptionally successful in communicating the strategic vision and needs of the College to our base of alumnae and friends and keeping them invested in Sweet Briar’s future. At this point, we believe that a shift from an annual funds focus to capital projects focus is a natural one for which much of the important preparatory work has been done.



Concluding Thoughts

This plan is entitled “Our Sustainable Future.” It is designed to situate Sweet Briar on a trajectory that is financially and operationally stable and capable of growth over a prolonged period. At the same time, the plan imagines a future that is sustainable in another sense of the term, sustainable: defensible in terms of its value.

At a time of digital revolution when college-level instruction can be delivered anywhere, any time and at a reduced cost that comes with the economy of scale, Sweet Briar seeks to create a distinctive niche for itself by excelling in areas that buck the trend: superlative liberal arts education that is tailored for the challenges of tomorrow, delivered in small classrooms and in a community that fosters the habits of mind that can help our students live a life well lived. Sweet Briar will always be a residential college where women will grow through experiences that can never be delivered digitally, on-line, anytime, anywhere: it will only be here and now.

The five areas that we identified—liberal arts education centered on women’s leadership, a unique program of engineering for women, sustainability in the remarkable historical and ecological contexts of our land, excellence in equestrian sport and the town-gown effort to bring greater visibility to the campus and the region—are unique to Sweet Briar. We look forward to the next five years of working together as a community to implement our vision for Sweet Briar into a reality.