

**Northwest Commission on
Colleges and Universities**



**WHITMAN
COLLEGE**

**Year Six
Standard Two:
Policies, Regulations, and
Financial Review (PRFR)**

February 2023

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Institutional Report Certification Form

INSTITUTIONAL REPORT CERTIFICATION FORM

Please use this certification form for all institutional reports (Self-Evaluation, Annual, Mid-Cycle, PRFR, Evaluation of Institutional Effectiveness, Candidacy, Ad-Hoc, or Special)



Institutional Report Certification Form

On behalf of the Institution, I certify that:

- There was broad participation/review by the campus community in the preparation of this report.
- The Institution remains in compliance with NWCCU Eligibility Requirements.
- The Institution will continue to remain in compliance throughout the duration of the institution's cycle of accreditation.

I understand that information provided in this report may affect the continued Candidacy or Accreditation of my institution. I certify that the information and data provided in the report are true and correct to the best of my knowledge.

Whitman College
(Name of Institution)

Sarah Bolton
(Name of Chief Executive Officer)

Sarah Bolton
(Signature of Chief Executive Officer)

February 10th, 2023
(Date)

Instructions to Readers

Hyperlinks in this document will take readers to one of two places:

1. Publicly facing webpages
2. Exhibits uploaded to Box

Mission Fulfillment One Page Executive Summary

Prior to Fall 2022, Whitman's accreditation efforts revolved around core themes. The college's first core themes, adopted in 2011, were 1) academic excellence; 2) student engagement, personal development, and leadership; and 3) collaboration and community. In 2018 and alongside a change in the college's mission, the core themes were changed to 1) an accessible, diverse, and inclusive community; 2) a rigorous liberal arts education; and 3) support for life and learning beyond the classroom.

In its 2020 Mid-Cycle Evaluation and NWCCU visit, evaluators encouraged the college to determine whether or not its core themes would continue to be useful leading up to its Year Seven self-study or whether the college would want to consider other ways of interpreting its mission. As of late Fall 2022, Whitman has opted to move away from utilizing core themes for the purposes of accreditation to alternative ways of interpreting its mission and demonstrating mission fulfillment.

While the core themes constructed in 2018 have been relevant and useful, they have neither been an explicit part of strategic planning nor planning and assessment regarding student learning outcomes and student success. Rather, Whitman's culture and practices firmly revolve around its mission. From mapping of student learning outcomes to hiring practices to budget decisions to ongoing strategic planning discussions, Whitman's mission is very much a part of the campus consciousness and its demonstration of institutional effectiveness.

Whitman is currently using a framework of mission interpretation and fulfillment as a central component of both its revitalized strategic planning process and accreditation efforts through the end of this current cycle. For both of these purposes, the college interprets [its mission](#) according to the following objectives and key performance indicators (KPIs):

1. To inspire students holding a wide range of perspectives, identities and experiences to choose Whitman, and to provide the resources that enable them to matriculate and graduate.

KPIs:

- Student recruitment data
- Demographics
- Access and financial aid data
- Retention data
- Degree completion data

2. To provide a breadth of opportunities for learning and growth through an excellent liberal arts education in a diverse and inclusive community, where students thrive and form lifelong connections.

KPIs:

- Academic excellence

- Learning outside the classroom
 - Diversity and Inclusion
 - Engagement and belonging
 - Thriving
3. To prepare students for meaningful and impactful lives in which they discover their purpose, fulfill their aspirations, and make a difference in the world.

KPIs:

- Post-graduate outcomes

4. To flourish as a leading college, so that we can realize Whitman's mission with distinction now and for many years into the future.

KPIs:

- Financial sustainability
- Recruiting and supporting the professional thriving of a faculty and staff
- Institutional stature and reputation

As the change from core themes to the aforementioned mission interpretation has only taken place recently, the college has yet to determine benchmarks and thresholds that constitute mission fulfillment. The college's Assessment Committee will determine these during the Spring 2023 semester.

Standard Two: Governance

Standard 2.A.1

2.A.1: The institution demonstrates an effective governance structure, with a board(s) or other governing body(ies) composed predominantly of members with no contractual, employment relationship, or personal financial interest with the institution. Such members shall also possess clearly defined authority, roles, and responsibilities. Institutions that are part of a complex system with multiple boards, a centralized board, or related entities shall have, with respect to such boards, written and clearly defined contractual authority, roles, and responsibilities for all entities. In addition, authority and responsibility between the system and the institution is clearly delineated in a written contract, described on its website and in its public documents, and provides the NWCCU accredited institution with sufficient autonomy to fulfill its mission.

Whitman College is a private liberal arts institution that provides its students with a rigorous liberal arts education of the highest quality and helps them translate their experiences into ethical and meaningful lives of purpose.

Whitman has an effective governance structure with clearly defined authority, roles, and responsibilities. The [Board of Trustees](#) is the college's governing body, holding fiduciary and broad oversight responsibility and providing strategic and policy counsel. The Board currently consists of 23 members and allows a maximum of 24 members. In addition, the president, one faculty and one student representative, and the chair and vice chair of the President's Advisory Board serve *ex officio* with voice not vote. None of the trustees has a contractual, employment, or financial interest in the college. The Board meets at least three times a year, with additional meetings and retreats taking place periodically as needed.

The Board acts only as a committee of the whole; no member or committee of the Board acts on behalf of the Board except by the governing board's formal delegation of authority. The Board delegates authority and responsibility to the college's president to implement and administer Board-approved policies related to its operation.

The key documents outlining the Board's responsibilities, structure and operations are Whitman's [Constitution and By-Laws](#). The By-Laws are reviewed every three years and updated as relevant.

In 2017, the Board undertook a major review of its organization and operations resulting in recommendations designed to ensure it was organized and operating with maximum efficiency and effectiveness to focus on the key strategic and policy issues facing the college and that it was incorporating best practices to the full extent possible. Two of the key recommendations adopted by the Board include:

- Increasing the Board size from a maximum of 18 to a maximum of 24 trustees to help the Board increase its diversity, skill sets and experiences, and financial resources essential to Whitman's future success.

- Reducing the number of Board committees from twelve to seven. Three of these committees cover broad policy areas (Advancing Whitman, Resources, and Whitman Experience), and four are functional committees (Audit, Governance, Investment, and Executive). The purpose of the change was to enable committees more time for in-depth discussion of issues of key strategic importance to the college. Each committee has a formal charter delineating its role and responsibilities; the charters are reviewed annually and updated as relevant.

The 2017 recommendations are reviewed and updated periodically as relevant.

The Board as a whole and each committee develops an agenda arc for each year and does an annual review of its activities, both to assess past performance and to provide guidance for future improvement. Based on its annual Board Self-Assessment which includes input from the president, trustees believe the changes made in 2017 have improved the effectiveness of the Board, helping the Board to maintain focus on the key strategic issues that matter to moving the college forward and helping its students and the college to thrive.

The Board also has an annual work plan for the Governance committee, which includes, among various items, a review of policies, By-Laws, etc. The Governance committee reviews and adopts its work plan at the beginning of each academic year. For Fall 2022 and Winter 2023, the Governance committee has specified the task, “Review Constitution, By-Laws, policies, and other governing/operational board documents and update, as needed” as part of its immediate work plan.

Whitman College is not part of a complex system.

Exhibits

[Exhibit 2.A.1.A Whitman Trustee Expectations May 2022](#)

[Exhibit 2.A.1.B Whitman Governance Committee Charter 2022](#)

[Exhibit 2.A.1.C Governance Recommendations 2017](#)

Standard 2.A.2

2.A.2: The institution has an effective system of leadership, staffed by qualified administrators, with appropriate levels of authority, responsibility, and accountability who are charged with planning, organizing, and managing the institution and assessing its achievements and effectiveness.

Whitman's [system of leadership](#) is designed and staffed by qualified administrators with appropriate levels of authority, responsibility, and accountability in the college's administrative structure. The [President's Cabinet](#) leads the college and is a deliberating body comprised of the following positions and individuals (including hyperlinks to CVs):

President: [Sarah R. Bolton](#)

Provost and Dean of the Faculty: [Alzada J. Tipton](#)

Chair of the Faculty: [Rebecca Hanrahan](#)

Chief Financial Officer: [Peter Harvey](#)

Vice President for Diversity and Inclusion: [John Johnson](#)

Vice President for Student Affairs and Dean of Students: [Kazi Joshua](#)

Vice President for Admissions and Financial Aid: [Adam Miller](#)

Vice President for Communications: [Gina Ohnstad](#)

Vice President for Development and Alumni Relations: [Steve J. Setchell](#)

The President's Cabinet is responsible for comprehensive, collegewide planning and decision making as well as assessing achievement and institutional effectiveness based on institutional data. The Cabinet meets weekly or as circumstances warrant. Each summer, the Cabinet participates in an annual retreat to set yearly priorities and to conduct long-term planning with a focus on continuous improvement consistent with the college's mission.

Members of the President's Cabinet supervise or lead [all units](#). Each Cabinet officer is responsible for organization, planning, and management within their respective areas. Cabinet officers meet regularly with leaders in their areas.

The duties and responsibilities of the president are explicitly detailed in the college's [Constitution and By-laws](#). Senior administrative staff are qualified and knowledgeable about their areas of responsibility and the college maintains detailed position descriptions for each member of the senior administration. The president reviews each Cabinet officer (except the Chair of the Faculty) annually.

Exhibits

Leadership Position Description Examples:

[Exhibit 2.A.2.A Provost and Dean of the Faculty Position Description](#)

[Exhibit 2.A.2.B Chief Financial Officer Position Description](#)

Standard 2.A.3

2.A.3: The institution employs an appropriately qualified chief executive officer with full-time responsibility to the institution. The chief executive may serve as an ex officio member of the governing board(s) but may not serve as its chair.

[Dr. Sarah Bolton](#) assumed the presidency of Whitman College in July 2022. Prior to coming to Whitman, Dr. Bolton served as president of The College of Wooster from 2016-2022.

Dr. Bolton was unanimously selected by the Whitman College Board of Trustees to be the college's 15th president. Dr. Bolton holds the position full-time. She is a physicist, professor and administrator with more than 25 years of experience in higher education and a long-standing commitment to the liberal arts.

Dr. Bolton earned a Bachelor of Science in Physics and Biophysics from Brown University, followed by a Master of Arts and a Ph.D., both in Physics, from the University of California, Berkeley. She served as Assistant Professor of Physics at Williams College from 1995-2000 and was promoted to Associate Professor in 2001 and Full Professor in 2007. While at Williams, Dr. Bolton served as Chair of the Williams' Physics department from 2007 to 2010 and won the college's Outstanding Mentor Award for Fostering Inclusive Academic Excellence in 2009. She then became Dean of Williams College, serving in this role from 2010-2016.

As defined in the college's [Constitution](#), President Bolton does not serve as the chair of the Board of Trustees. She serves as an ex-officio member of the Board. President Bolton participates fully in all Board meetings and Executive Sessions but does not have a vote.

Standard 2.A.4

2.A.4: The institution's decision-making structures and processes, which are documented and publicly available, must include provisions for the consideration of the views of faculty, staff, administrators, and students on matters in which each has a direct and reasonable interest.

The governance of the college and the relationships between the governing board, administrators, faculty, staff, and students are clearly articulated in various publications including:

- [Charter, Constitution, and By-Laws of Whitman College](#)
- [Whitman College Faculty Code](#)
- [Whitman College Faculty Handbook](#)
- [Whitman College Staff Handbook](#)
- [Whitman College Student Handbook](#)
- [Constitution of the Associated Students of Whitman College](#)
- [By-Laws of the Associated Students of Whitman College](#)

Beyond the aforementioned publications, the governing board, faculty, staff, and students all participate in orientations and/or retreats that further their understanding of the specific duties for which they are responsible. Many handbooks and documents are used to guide college processes, such as the [Department Chairs and Program Directors Handbook](#) and [Personnel Review Procedures](#).

There are ample opportunities for faculty, staff, and students to participate in the decision-making processes in which they have an interest. The college has numerous committees and task forces that meet regularly to conduct the business of the college. Several include a mix of faculty, staff, and students. Whitman prides itself on its strong tradition of shared governance and its inclusion of employees in college deliberations, as well as its inclusion of students, usually in an advisory capacity, on important policy-making committees.

Some examples of these opportunities include the following:

- The Board of Trustees meets three times a year. Meetings include presentations by faculty, students, and staff.
- The President's Cabinet meets every week and begins each academic year with a planning retreat.
- Faculty meet by academic division approximately ten times during the academic year. These division meetings are presided over by the corresponding elected division chair.
- The entire faculty meets approximately ten times or more, as necessary, during the academic year. These faculty meetings are presided over by the elected Chair of the Faculty.
- The Committee of Division Chairs, which includes the elected chair of each of the academic divisions, the elected Chair of the Faculty, the Provost and Dean of the Faculty, the Associate Dean for Faculty Development, and the Associate Dean for Academic

Affairs meets at least weekly. The Vice President for Diversity and Inclusion, while not an official member of this body, serves in a frequent consultative capacity.

- The Elected Chairs Committee, which includes the elected chair of each of the academic divisions and the elected Chair of the Faculty meets at least weekly.
- The Provost and Dean of the Faculty meets with Department Chairs and Program Directors monthly during each semester.
- The Curriculum Committee, which includes two faculty members elected from each of the three academic divisions, the Chair of the General Studies Committee, the elected Chair of the Faculty, the Associate Dean for Academic Affairs, the Curriculum and Registration Analyst, and two students, meets at least monthly.
- The [Staff Advisory Council](#) meets every other week.
- The [President's Budget Advisory Committee](#) consists of staff, faculty, administrators, and students. This committee meets in order to advise the president on budgetary decisions that happen on a yearly basis.
- Students serve on many important policy-making committees. For example, ASWC leadership meets with the Board of Trustees during regular Board meetings to share updates and priorities. More specifically, students are included as non-voting representatives to the Board of Trustees and the Board's three policy committees. All tenure-track searches and Visiting Assistant Professor searches require robust student participation and feedback. Students are also invited to participate in some searches for staff and administrative positions.
- The Student Life Committee is composed of six students, three faculty members, the Dean of Students or a designee, the Sorority and Fraternity Adviser, and the Provost and Dean of the Faculty or the Associate Dean for Academic Affairs. The Student Life Committee may review and recommend policies on any matter which is not of a curricular or disciplinary nature relating to student life at Whitman College.
- The college's current strategic planning process includes students, staff, and faculty as [Steering Committee members](#). The process has included [numerous opportunities](#) for all constituents to discuss and provide feedback on strategic priorities, and the entire campus community is kept up-to-date with [periodic updates](#) that are made publicly available.

Whitman has several ways of communicating with faculty, staff, and students in order to disseminate information about policy concerns, institutional changes, and general information about the college:

- There are listservs for faculty, staff, and students.
- General news about the college is posted on the [college website](#).
- [Whitman Today](#), an email newsletter produced by the Office of Communications is emailed each weekday to Whitman College staff, faculty and students during the academic year and once a week on the first business day during the spring, summer and winter breaks.
- Faculty are informed of administrative decisions in faculty and division meetings, and via the faculty email listserv.
- The Staff Advisory Council meets biweekly, where announcements about policy concerns, institutional changes, and other information are shared.

- The President and President’s Cabinet members meet with director-level staff in a monthly President’s Council meeting where information is shared from the Cabinet to Council members and vice versa.
- The president hosts a faculty and staff meeting after each Trustee meeting to share highlights of the meetings and answer questions. The president also announces important items of business at faculty meetings.
- The [Whitman Magazine](#) informs the college community as well as alumni and friends about institutional changes and general information.
- Recent key decision-making processes such as the college’s [Financial Sustainability Review during 2020-2021](#) very intentionally included input from students, staff, and faculty through multiple stakeholder forums and opportunities to provide written feedback. For more information regarding the Financial Sustainability Review process, see various Exhibits linked below.
- The college frequently surveys students, staff, and faculty on matters such as racial climate and campus climate through national surveys such as HEDS and the National Assessment of Collegiate Campus Climates (NACCC). One example of a campus-wide announcement and invitation to both of these opportunities can be found [here](#).

Exhibits

[Exhibit 2.A.4.A Financial Sustainability Review-Academic Program](#)

[Exhibit 2.A.4.B Financial Sustainability Review-Administrative Units](#)

[Exhibit 2.A.4.C Financial Sustainability Review-Student Support](#)

[Exhibit 2.A.4.D Financial Sustainability Review Working Groups](#)

[Exhibit 2.A.4.E Financial Sustainability Review Working Group Final Reports E-mail](#)

[Exhibit 2.A.4.F Frequently Asked Questions about the Financial Sustainability Review](#)

[Exhibit 2.A.4.G President’s Cabinet Report 3.15.21](#)

Academic Freedom

Standard 2.B.1

2.B.1: Within the context of its mission and values, the institution adheres to the principles of academic freedom and independence that protect its constituencies from inappropriate internal and external influences, pressures, and harassment.

Academic freedom has been implicitly granted to the faculty through the college's [Constitution](#). Specifically, Article V, Section 2 of the Constitution states, "The Faculty shall have the power to arrange the course of study..." The faculty have complete jurisdiction over the content of the curriculum and the pedagogical methods of instruction.

In addition, the [Faculty Code](#), which is made publicly available by the college, specify the principles of academic freedom and independence that protect its constituencies from inappropriate internal and external influences, pressures, and harassment in a number of locations:

1. Chapter I, Article III, Section 4 (approved by the Board of Trustees in May 2017)
2. Chapter I, Article VII, B
3. Chapter III, Preamble

The Board of Trustees has been discussing this Preamble and anticipates a vote on endorsing this statement during its next meeting in April 2023.

To keep informed about the latest developments in academic freedom and freedom of speech, the college brings in an outside expert who periodically speaks to the campus about these principles in the context of higher education.

With regards to students, the [AAUP](#) recognizes that what constitutes academic freedom for students is an area of uncertainty and debate. The AAUP does recognize that "the freedom to teach and the freedom to learn are inseparable facets of academic freedom." At Whitman, freedom of speech, expression and the right to learn are protected in the [Student Handbook](#) as part of [Students Rights and Responsibilities](#). Please see 2.B.2 for further discussion.

Finally, the college's Committee on Academic Freedom and Due Process is an elected faculty committee whose charge includes annual evaluation of the college's Grievance and Dismissal policies according to changes in the law and AAUP principles and assessing how well they function, monitoring issues regarding academic freedom and due process at the college, and recommending changes to policies regarding academic freedom and due process.

Standard 2.B.2

2.B.2: Within the context of its mission and values, the institution defines and actively promotes an environment that supports independent thought in the pursuit and dissemination of knowledge. It affirms the freedom of faculty, staff, administrators, and students to share their scholarship and reasoned conclusions with others. While the institution and individuals within the institution may hold to a particular personal, social, or religious philosophy, its constituencies are intellectually free to test and examine all knowledge and theories, thought, reason, and perspectives of truth. Individuals within the institution allow others the freedom to do the same.

Whitman College promotes and protects an environment that supports independent thought in the pursuit and dissemination of knowledge. The college's mission, values, and policies support the principles of intellectual freedom. Specifically, the college's [Diversity Statement](#) details its commitment to fostering a diverse, open and inclusive learning environment: "We seek to foster an inclusive learning environment in which members draw from different intellectual traditions to engage with and challenge one another through studied, thoughtful, and respectful dialogue and debate."

Academic freedom is guaranteed for faculty and is granted in the college's [Constitution](#), [Faculty Code](#), and [Faculty Handbook](#). (See Associated Standard 2.B.1).

Academic freedom is also protected through Whitman's system of faculty governance, granting faculty authority over the academic program. Although obligated to teach in the subject areas for which they were hired, faculty, in consultation with their departments or academic programs, decide on the courses they teach, the content of those courses, and the pedagogical methods they employ. In addition, faculty have the opportunity to teach beyond the disciplines for which they are hired, in the college's interdisciplinary programs and through the First Year Seminars. Faculty are free to research and publish, exhibit artistic expressions, or perform as they deem appropriate. Established faculty reviews may comment upon the quality of a faculty member's professional activity, but never upon its content.

Freedom of speech for students is protected in the [Student Handbook](#) as part of [Students Rights and Responsibilities](#): "Every student has a right to conditions that are conducive to learning and favorable to the pursuit of higher education. These rights include freedom of speech, expression, and association; the right to study; the right to a safe and healthy environment; the right to pursue grievances; reasonable and fair processes in cases of student discipline; and the right to privacy."

Whitman also demonstrates its commitment to academic freedom and freedom of speech in its [Grievance Policy](#), as it pertains to the possibility of discrimination or harassment. Specifically, the Grievance Policy states, "It is not the proper role of the college to attempt to shield individuals from ideas and opinions that they find unwelcome, disagreeable or even deeply offensive. The college neither censors nor censures speech simply because it is offensive or uncomfortable. In determining whether an act or expression constitutes discrimination or harassment, the context must be carefully reviewed and full consideration must be given to protection of individual rights, freedom of speech and academic freedom." (Section 1.7) The

Grievance Policy is communicated to students, staff, and faculty during new student orientation and faculty and staff onboarding. The policy is also made available in the college's [Staff Handbook](#) and [Faculty Handbook](#).

Policies and Procedures

Standard 2.C.1

2.C.1: The institution's transfer-of-credit policy maintains the integrity of its programs and facilitates the efficient mobility of students desirous of the completion of their educational credits, credentials, or degrees in furtherance of their academic goals.

Whitman College's transfer of credit policies are available in the [Whitman College 2022-2023 catalog](#) on pages 49-53 and are published on the [college's Transfer Credit webpage](#). Whitman accepts credit that is academically oriented and within the tradition of the liberal arts from regionally accredited two and four-year collegiate institutions. A maximum of 70 credits may be transferred from other regionally accredited institutions; credit earned from two-year institutions is limited to the first 62 credits toward a bachelor's degree. This 70 credit maximum may also include credit allowed on the basis of scores earned for selected Advanced Placement (AP), International Baccalaureate (IB), and Cambridge A-level classes and test scores, although no AP, IB, or Cambridge A-level courses may count toward the college's distribution requirements. AP and IB courses and their Whitman equivalents are listed in the college catalog. Whitman also accepts credit from "College in High School" programs, provided they are transcribed on a regionally accredited college transcript.

If there is a credit discrepancy for a similar course, the credit amount from the institution where the course was completed will be the credit total transferred. For example, if a course was completed for 3 semester credits at another institution, it will not be eligible to transfer to Whitman for 4 credits, even in the case where it is considered to be satisfying the course requirements of a Whitman course worth 4 credits.

Conversely, if a transfer course is completed for 5 semester credits, 5 credits will be transferred to Whitman. A transfer course cannot be worth more than a Whitman course, so the additional semester credit(s) are likely to transfer as general degree credits to be used toward the 124 credits necessary to earn a Whitman degree.

Regarding transfer of quarter system credits, each quarter system credit is worth two-thirds of a semester credit. Whitman does not transfer partial credit (anything less than 1 whole semester credit) and does not round up. The sole exception occurs when multiple courses from the same college are transferable to Whitman. In these cases, the fractional credits are combined if the sum is at least one or more semester credits. These are then applied toward general degree credit requirements.

Whitman will review credit earned through the Running Start Program and similar dual enrollment programs on a course by-course basis. Credits awarded will be for classes at a commensurate level and in subject matter relevant to the Whitman College liberal arts curriculum.

Whitman does not accept credit through the College Learning Examination Program (CLEP).

Specific to the Walla Walla Community, the Gateway Program with Walla Walla Community College encourages students from diverse backgrounds, including low-income and first-generation students to pursue a liberal arts education at Whitman. More information about this program and its requirements is available on page 15 of the [Whitman College 2022-2023 catalog](#).

Students who earn credits from Running Start (either Washington's Running Start or a similar program from another state) will transfer no more than 14 Running Start credits and be considered first-year students for purposes of financial aid eligibility if they complete General Studies 175 and 176 (i.e. "First-Year Seminars") during their initial year of enrollment at Whitman (See [Financial Aid Website](#)). At the end of their first term of enrollment, students may notify the Registrar and Financial Aid that they wish to add the remainder of the Running Start credits to their academic record.

To the greatest extent possible, the Registrar's Office ensures by the systematic examination of the transfer students' official transcripts and by consulting other institutions' course catalog descriptions that all transferable work is comparable to course offerings at Whitman. Whenever substantial uncertainty exists regarding the suitability of a particular transfer course, the Registrar forwards the relevant documentation to the appropriate academic department for an evaluation and recommendation.

Beginning in 2021, Whitman has used the Transfer Evaluation System (TES) by College Source to publish and maintain an electronic transfer guide. The guide is a compilation of what has historically been accepted at Whitman and does not guarantee transferability, as each request is evaluated on an individual basis, but hopes to serve as a transparent database for current and prospective students to see how their [transfer credits are likely to be accepted by Whitman College](#). [TES](#) also provides an easy way for students interested in taking courses outside of Whitman (summer) to determine colleges and courses that can be taken and transferred back to Whitman.

Transfer credit from Whitman students' international study experiences is reviewed by the Off-Campus Studies Office, which works closely with the Off-Campus Studies Steering Committee, a body composed of faculty and staff representatives.

Whitman accepts transfer work on a course-by-course basis, and therefore and currently participates in no articulation agreements. This is a goal for the near future.

While Whitman does not currently have articulation agreements for incoming students, it does have articulation agreements for current Whitman students pursuing degrees in Engineering, Forestry and Environmental Management, and Oceanography. Please see information on Combined Programs in the [Whitman College 2022-2023 catalog](#) on pages 72-76.

Standard 2.C.2

2.C.2: The institution's policies and procedures related to student rights and responsibilities should include, but not be limited to, provisions related to academic honesty, conduct, appeals, grievances, and accommodations for persons with disabilities.

Whitman develops and widely publishes policies and procedures related to students' rights and responsibilities that are clear, accessible, and are administered in a fair, equitable and timely manner. The college publishes a [Student Handbook](#) which includes a section on [Student Rights and Responsibilities](#). Some of this information is also available in the [college catalog](#) on pages 39-40.

All procedures and regulations are subject to change or revision on a yearly basis. These policies and procedures are publicly made available online and discussed by various staff units during New Student Orientation in August. The college communicates to students that they are responsible for knowing and following all regulations and procedures contained in this publication, as well as changes that occur and are published during the academic year.

Whitman students have a right to conditions that are conducive to learning and favorable to the pursuit of higher education. These rights include freedom of speech, expression, and association; the right to study; the right to a safe and healthy environment; the right to pursue grievances; reasonable and fair processes in cases of student discipline; and the right to privacy.

When a student is alleged to have violated a college rule or regulation, the matter will be handled according to the [Disciplinary Procedures specified in the Student Handbook](#). A student who is the subject of a disciplinary action may appeal a decision according to the Appeals Process located in the [Disciplinary Procedures specified in the Student Handbook](#).

Academic Integrity

The college's [Academic Dishonesty Policy](#) prohibits the falsification of data, misrepresentation of another's work as one's own (such as cheating on examinations, reports or quizzes, purchasing material from the web), plagiarism from the work of others, knowingly helping other students cheat or plagiarize, or the presentation of substantially similar work for different courses (unless authorized to do so). This policy also outlines reporting policy, procedures and penalties.

Accommodation of Persons with Disabilities

Whitman College is committed to the education of all qualified students, regardless of disability status. In accordance with the American with Disabilities Act and subsequent updates to that legislation, we ensure that all programs and services provided by the college are genuinely accessible and offered to all our students. The [Academic Resource Center](#) and other campus partners are committed to reducing or circumventing the barriers to access that people with disabilities face.

Whitman College will not exclude otherwise qualified applicants or students with disabilities from participation in, or access to, its academic, housing, or extracurricular programs.

"Otherwise qualified" refers to students who without consideration of disability are admissible to the college. Program participation will not be denied to a student with a disability when that person, with or without a reasonable accommodation, can perform the essential functions required of that program. The college maintains a [publicly facing webpage](#) detailing our disability policy, relevant laws affecting students with disabilities, student responsibilities and other policies and guidelines pertaining to accommodations.

Standard 2.C.3

2.C.3: The institution's academic and administrative policies and procedures should include admission and placement policies that guide the enrollment of students in courses and programs through an evaluation of prerequisite knowledge, skills, and abilities to ensure a reasonable probability of student success at a level commensurate with the institution's expectations. Such policies should also include a policy regarding continuation in and termination from its educational programs, including its appeal and re-admission policy.

Admission Policies

Whitman recruits and admits students whose academic preparation and educational aspirations align with Whitman's [mission](#) to provide a rigorous liberal arts education of the highest quality to passionate and engaged students from diverse backgrounds. Policies governing the process of applying for admission to Whitman are located in the [college catalog](#) and [Admission website](#). Archives of Whitman's catalog from 2006-2007 to 2021-2022 are available on [this website](#), and previous copies are available through the Registrar's Office. Whitman's website is archived at the end of each semester.

Whitman's admission process is selective and holistic admission to ensure a student body with excellence in both academic and extracurricular pursuits and with a variety of lived experiences. Each application is reviewed by multiple application readers, including full-time Admission Officers, part-time seasonal application readers, and senior admission interns, all of whom receive training both at the beginning of the application review process as well as ongoing calibration throughout the application review season. The process includes reviewing an applicant's scholastic records, written essay, extracurricular activities, and letters of recommendation. Evidence of motivation, discipline, imagination, creativity, leadership, and maturity also are considered. Whitman has been test-optional since 2016, meaning applicants are not required to submit an ACT or SAT exam score as part of the application process. Because Whitman strives to operate as a need-aware institution, a student's need for financial aid may be a factor in their admission decision.

Appeals, Readmissions, and Deferrals

Whitman's catalog stipulates that students may defer an offer of admission, and information on [this website](#) details the process for making a request to take a gap year. The number of students who defer admission is typically between 20 and 40 each year, representing approximately 5-8% of a typical incoming class, though due to the COVID pandemic there were a record high of 89 deferrals in Fall 2020, representing more than a quarter of that year's incoming students. Students who withdraw from Whitman may apply for readmission by submitting an [application for readmission](#) to the Admission Office. Because Whitman's enrollment is limited by a number of factors, Whitman practices selective readmission. Whitman's readmission policy is currently documented through the application for readmission; language regarding the readmission process will be added to the next version of the catalog.

Admission decisions at Whitman are final and no appeals of admission decisions are considered. This policy is not currently documented and we are working to add language regarding appeals to the next version of the catalog.

Academic Standards

As outlined in the [Whitman College 2022-2023 catalog](#) on pages 59-60, Academic Standards state there are 5 criteria a student must meet to maintain good academic standing:

1. Earn a grade-point average of at least 1.700 each semester.
2. Earn a minimum cumulative GPA of 2.000 during the second semester of the first year and subsequently.
3. Subsequent to the first year, earn a minimum of 24 credits in the two immediately preceding semesters, except graduating seniors completing degree requirements with a normal load for the final (eighth) semester of study who may complete fewer than 24 credits in the previous two semesters.
4. Complete successfully the First-Year Seminars in the first full academic year after entrance. Any deficiency must be removed not later than the end of the fourth semester of college-level work or by the time the student has accumulated 57 degree credits, whichever occurs first.
5. Maintain a minimum cumulative GPA in the major study of 2.000 beginning with the end of the fifth semester of college-level work. A student with a combined major must maintain a minimum GPA of 2.000 in each subject area of the major.

Any student who fails to meet the standards listed above is reviewed by two faculty led committees, the Board of Review and the Council on Academic Standards (which includes members of the Dean of Students office and Academic Resource Center staff), following the end of each semester to determine academic sanctions including Academic Warning, Academic Probation, Academic Suspension, or Academic Dismissal.

Students on Academic Suspension are not allowed to complete registration for classes until they have the approval of the Board of Review. To obtain such approval, the student is expected to submit a plan of study that demonstrates the feasibility of completing a degree at Whitman.

Students on Academic Dismissal may be reinstated on probation upon vote of the Board of Review in response to a written petition. This petition must state clearly what actions the student will take in order to return to good standing.

Once sanctions are determined, the college Registrar will notify students of their academic status and inform them of the appeal process.

Looking ahead, the college aims to more clearly define what criteria constitute each academic sanction as well as define progression of sanctions. Regarding closing possible equity gaps, we are formulating a process to review related policies to determine whether they disproportionately impact individuals across various demographic groups. For example, the college's Council on Student Affairs is currently analyzing data regarding cases of Academic Dishonesty to address

issues of disproportionate representation of underrepresented students (e.g. international students, domestic students of color). We also plan to provide a concise plan of action for appeals for those who are suspended and dismissed.

Standard 2.C.4

2.C.4: The institution's policies and procedures regarding the secure retention of student records must include provisions related to confidentiality, release, and the reliable backup and retrievability of such records.

Student Record Confidentiality and Release

The Whitman Registrar's Office utilizes the Ellucian Colleague Student Information System. The college follows the student records management practices outlined by AACRAO (American Association of Collegiate Registrars and Admissions Officers).

Starting in 2020, the majority of official transcript requests are securely processed electronically via a third party vendor, National Student Clearinghouse. In compliance with FERPA regulations, students and alumni must complete a release form to request each transcript. All official transcripts that the Registrar's Office produces are printed on tamper-resistant paper stock and include the college's official seal as well as the Registrar's signature. Transcripts that were produced prior to the introduction of administrative computing at Whitman (1978) have been digitally imaged, and duplicate copies of those documents are maintained on the college's primary servers. These transcripts can only be produced by the Registrar's Office. Please see: <https://www.whitman.edu/registrar/transcript-info> for additional information on transcripts.

Whitman College's policy on access to records is stated in the 2022-2023 [college catalog](#) on pages 60-61.

No personally identifiable student or alumni information, other than directory information, is released to outside agencies without the explicit permission of the individual involved. Policies under the Dean of Students office, such as FERPA, Student Right to Know, and Information Security, are included in the [Student Handbook](#) and [Family Welcome Guide](#) and are shared annually with students via e-mail from the Dean of Students Office. Additionally, students are currently able to self-administer release of their grades and student account information to selected individuals via their myWhitman.edu portal. See [Exhibit 2.C.4.D](#) for a sample of these interfaces. Access to additional information is currently being developed with the Registrar's Office, Financial Aid, and the Business Office.

Additional confidentiality and release resources on the college's website:

- <https://www.whitman.edu/dean-of-students/right-to-know>
- <https://www.whitman.edu/business-office/student-resources/parent-info>

Looking ahead, the Registrar's office is working with Human Resources to develop a FERPA training not only for on-boarding of new staff but an ongoing annual FERPA training for all necessary staff and faculty.

Reliable Backup, Retrievability, and IT Security

Whitman adopts and adheres to policies and procedures regarding the secure retention of student records, including provision for reliable and retrievable backup of those records, regardless of their form.

The college maintains robust backups across multiple onsite and offsite locations for all of its servers. The backup procedures for each of the production Colleague (the student information system) servers is found in [Exhibit 2.C.4.A](#). Please note that given the nature of backups as a foundation of security with regard to reliable access, this document has been heavily redacted to only include the relevant systems for this section.

Whitman regularly tests the reliability and retrievability of backups of the student information system (Ellucian Colleague) when refreshing the TEST environment. TEST is rebuilt at least twice a year by using the backup media of production. In the past two years, the college has worked to get the cadence to approximately four times a year. Please refer to [Exhibit 2.C.4.B](#) for an actual schedule of testing backups.

The institution publishes and follows established policies for confidentiality and release of all data, including student records, all of which can be found in the following list of links. Additionally, all IT staff are required to sign a confidentiality agreement, a sample of which can be found in [Exhibit 2.C.4.C](#).

Additional IT security documentation on the college's website:

- <https://www.whitman.edu/technology-services/information-security/information-security-policy>
- <https://www.whitman.edu/technology-services/information-security/access-authorization-and-authentication-standard>
- <https://www.whitman.edu/technology-services/information-security/data-classification-standard>
- <https://kb.whitman.edu/display/public/KB/Information+Security+Procedure>
- <https://kb.whitman.edu/display/public/KB/Incident+Response+Plan>

Institutional Integrity

Standard 2.D.1

2.D.1: The institution represents itself clearly, accurately, and consistently through its announcements, statements, and publications. It communicates its academic intentions, programs, and services to students and to the public and demonstrates that its academic programs can be completed in a timely fashion. It regularly reviews its publications to ensure accuracy and integrity in all representations about its missions, programs, and services.

[Whitman College's website](#) is the primary source of information about the institution. The Office of Communications partners with [Ingeniux](#) for website management and hosting services designed to improve and simplify campus web publishing. Communications utilizes a [Web Editor's Guide](#), which includes web accessibility guidelines, in addition to providing information about and training for the guidelines and conducting regular content audits to ensure that web content meets the guidelines.

The Office of Communications tracks annual reviews of its publications and web content through our internal project management system and editorial calendar to ensure accuracy and timely updates. Specifically, timelines for updating admission materials are built into the system based on the admission cycle, and when new data or information becomes available from the college's Office of Institutional Research's annual Factbook (publicly available data on enrollment, academics, demographics, financial aid, outcomes/graduation rates, etc.), the Registrar's Office's course catalog (current programs, learning objectives, etc.) and other sources. Tasks are assigned along appropriate timelines so communications staff know what needs to be updated and when updates should be made.

The Office of Communications issues regular announcements, statements, and publications to inform the college community and the public about the institution. This communication includes [a daily email to faculty, staff and students](#) during the academic year and a [magazine](#), published three times a year, distributed on campus and to alumni. Before publication or email distribution, multiple individuals review each communication to ensure clarity, accuracy, and consistency.

The Office of Admissions in partnership with the Office of Communications uses multiple channels to communicate with prospective students and their families, including on [whitman.edu](#) and [social media](#), and through various printed pieces, including the [Whitman College Viewbook](#). Staff from both offices regularly review the college's webpages, publications and social media channels to ensure accuracy and alignment with the mission of the college and the goals of a Whitman education. Recruitment materials are reviewed and updated cyclically for accuracy; the process includes referencing the latest data from the college's [Office of Institutional Research Factbook](#). Whitman website content is updated on an ongoing basis by communications staff and various stakeholders, including faculty and staff from other departments, depending on the subject matter. Whitman Magazine content is vetted by the communications editorial staff and reviewed by sources and subject matter experts. The magazine is reviewed by college leadership during the planning phases as well as before the final product goes to print. In addition,

Communications office staff work with the college's data analysts to audit Whitman College's profiles on third-party sites annually, following a schedule created to ensure the information is accurate and up to date.

The [college catalog](#) is Whitman's guide to programs, courses, and policies and procedures. The catalog also states the mission of Whitman College and the goals of a Whitman education. The catalog is reviewed and updated annually. Consistent procedures are followed to ensure that stakeholders can modify or affirm the accuracy of catalog information.

General distribution requirements as well as the course requirements for each academic program can be found in the [college catalog](#). This includes information on courses that the student must complete before graduation as well as learning goals. This information is reviewed and updated annually and is available online to any current or prospective student.

Whitman College lists its accreditation by NWCCU and specialized accreditors in the [college catalog](#) and on the [Whitman College website](#). The college accurately represents its current accreditation status and avoids speculation on future accreditation actions or status. It uses the terms "accreditation" and "candidacy" (and related terms) only when a legitimate accrediting agency confers such status.

Standard 2.D.2

2.D.2: The institution advocates, subscribes to, and exemplifies high ethical standards in its management and operations, including in its dealings with the public, NWCCU, and external organizations, including the fair and equitable treatment of students, faculty, administrators, staff, and other stakeholders and constituencies. The institution ensures that complaints and grievances are addressed in a fair, equitable, and timely manner.

Whitman College advocates, subscribes to, and is committed to exemplifying the highest ethical standards in its interactions with all constituencies. This commitment is expressed in formal policies addressing conflict of interest, equal employment opportunity and non-discrimination, harassment and civility. These policies are described and made publicly available in the [Student Handbook](#), [Staff Handbook](#) and [Faculty Handbook](#). Across all its programs and activities, Whitman College does not discriminate on the basis of race, color, sex (including pregnancy and parenting status), gender, gender identity or manifestation, genetic information, sexual orientation, religion, age, marital status, national origin, disability, veteran's status, or any other basis prohibited by Civil Rights Act of 1964, Title IX of the Educational Amendments of 1972, Section 504 of the Rehabilitation Act of 1973 and applicable federal, state or local laws.

The [Grievance Policy](#) provides clear guidelines for addressing and resolving grievances involving conduct prohibited by Whitman College policy, as well as conduct prohibited by Title IX and other federal and state laws pertaining to higher education and employment. The Grievance Policy is posted publicly in multiple locations, including the [main college website](#) and [Human Resources website](#).

Leadership from Human Resources, the Provost and Dean of Faculty Office, Student Affairs, and Diversity and Inclusion are involved in investigating and responding to any alleged violations of these policies. Students, faculty, and staff may lodge complaints under the terms of the [Grievance Policy](#), which is posted in multiple locations, including the Human Resources website. Members of the Whitman community who know about an incident or believe they have been subjected to a civil rights violation, such as harassment or discrimination, or who have a grievance concerning a serious interpersonal conflict are strongly encouraged to meet with individuals either in the Dean of Students Office (students), Human Resources or the Office of the Provost and Dean of the Faculty (staff and faculty), or the Title IX Administrator.

Students, employees, and third parties may also register complaints via a [centralized web-based reporting tool](#). All related investigations are focused on timely and fair response, prevention of recurrence, and remedying the effects of prohibited actions on individuals and the Whitman community.

In keeping with standards of equity and compliance, Whitman employs a practice of regularly reviewing its policies and procedures. Stakeholders meet to consider opportunities for policy and procedural improvement in partnership with legal counsel by identifying accessibility gaps and implementation barriers in major policies.

Standard 2.D.3

2.D.3: The institution adheres to clearly defined policies that prohibit conflicts of interest on the part of members of the governing board(s), administration, faculty, and staff.

Whitman adheres to clearly defined policies that prohibit conflicts of interest on the part of members of the governing board, administration, faculty, and staff.

Members of the Board of Trustees adhere to a Trustee Conflict of Interest Policy and are required to submit an annual Trustee Conflict of Interest Disclosure Form (See [Exhibit 2.D.3.A](#)).

The [Staff Handbook](#) specifies the college's policy concerning ethical conduct and conflict of interest issues for officers, staff, and faculty. Specifically, this policy addresses issues such as use of college resources, gifts, confidential information, interest in other business, and compliance with rules. Those employees who have significant budget and decision-making authority are required to sign a Conflict of Interest Statement each year (See [Exhibit 2.D.3.B](#) and [Exhibit 2.D.3.C](#)).

With respect to faculty in particular, the [Faculty Handbook](#) (Chapter IV, Section A 2) emphasizes that the college seeks to avoid all possible questions about participation in the faculty personnel review process of persons who may have a conflict of interest or whose participation in faculty personnel review process introduces a conflict of interest. The Faculty Handbook also states that any faculty member who has a close personal relationship with a faculty member under review for reappointment, tenure and/or promotion, and whose capacity to exercise impartial and fair judgment is subject to question as a result, should not participate in the evaluation of this individual.

Financial Resources

Standard 2.E.1

2.E.1: The institution utilizes relevant audit processes and regular reporting to demonstrate financial stability, including sufficient cash flow and reserves to achieve and fulfill its mission.

Whitman College undergoes financial statement and compliance audits annually. The audits are conducted by an independent certified public accounting firm in accordance with generally accepted accounting principles, generally accepted auditing standards, and the Uniform Guidance. The [Trustee's Audit Committee](#) selects the accounting firm (approved by the full Board of Trustees), reviews the annual audit reports to recommend approval to the Board of Trustees, and meets with the auditors annually in executive session to review management's performance. The college's most recent [audited financial statements](#) for the fiscal years ended June 30, 2022 and 2021 can be viewed on the college's website. [Exhibit 2.E.1.A](#) constitutes a copy of the college's signed management representation letter.

Management reports to the Trustee's Resources Committee three times a year on the financial stability of the college. The 2021-2022 fiscal year end operating budget report (see [Exhibit 2.E.1.B](#)) includes projected revenues and expenses and projections of net operating performance. Whitman includes a 2.5% contingency of budgeted net tuition revenue in the operating budget to protect from potential shortfalls in net tuition revenue or other operating deficits. In addition, the college maintains appropriate reserves for potential liabilities such as retiree medical, fringe benefits, enrollment shortfalls greater than the budgeted 2.5% contingency, facilities life cycle reserves, and more.

Additional financial information can also be found in our 2022 Annual Report of Gifts (see [Exhibit 2.E.1.C](#)) and our [most recent IRS Form 990](#) (page 9 details Whitman's five highest compensated independent contractors).

Standard 2.E.2

2.E.2: Financial planning includes meaningful opportunities by stakeholders and ensures appropriate available funds, realistic development of financial resources and comprehensive risk management to ensure short-term financial health and long-term financial stability and sustainability.

Meaningful opportunities for stakeholders to participate in the financial planning of the college occur primarily through the [President's Budget Advisory Committee](#). This committee includes four students, four staff, four elected faculty leaders, the Provost and Dean of Faculty, and is chaired by the Chief Financial Officer. Each fall, the members of the committee, the agenda, and timing for each meeting are announced to the entire Whitman community, and committee materials are [posted online](#). The committee makes recommendations to the President's Cabinet who in turn makes final recommendations to the Trustees. The president provides written reports to faculty and staff summarizing each Trustee meeting and follows these up with town hall meetings. A financial update on the college is often included in these reports/town hall meetings. The Chief Financial Officer periodically presents Budget 101 educational sessions to faculty and staff.

The planning process with the committee includes a comprehensive review of the previous year's operating results, projections for the current year, and five-year financial modeling. This report can be seen on the [President's Budget Advisory Committee website](#). The model includes the ability to easily change key assumptions such as tuition increases and salary pools as well as a sensitivity analysis for changes in key variables. A risk assessment around changes in enrollment, discount rate, and investment returns is provided to the Trustees annually (See [Exhibit 2.E.2.A](#)).

As the college also relies on charitable contributions to fulfill its educational mission, our Gift Acceptance Policy defines those policies adopted by the Board of Trustees to ensure that (1) all charitable contributions (gifts) are appropriately solicited, accepted, acknowledged and managed in accordance with applicable state and federal laws and codes; (2) the college's interests are being protected; and (3) donors are treated in a professional, ethical, and fair manner. This Gift Acceptance Policy is written and adopted to protect the interests of both Whitman and its donors by clarifying the types of gifts that are acceptable to the college and the conditions under which they may be accepted. (See [Exhibit 2.E.2.B](#))

Standard 2.E.3

2.E.3: Financial resources are managed with policies approved by the institution governing boards(s), governance structures, applicable state and federal laws.

Whitman's [Constitution and By-Laws](#) are the primary governance documents for financial resources management. These documents allow for the establishment of committees, and outline the responsibilities of the Chief Financial Office, including oversight of the budget, investments, and audit. The Trustees have established committees on Resources, Investment, and Audit, each with its own charter (See [Exhibit 2.E.3.A](#)). The Investment Committee has a separate Investment Policy (See [Exhibit 2.E.3.B](#)), and the Audit Committee has an Audit Policy (See [Exhibit 2.E.3.C](#)). For a description of the college's internal financial controls, please see Exhibits [2.E.3.D](#) and [2.E.3.E](#).

Compliance with state and federal laws is the responsibility of each department for their respective areas. Human Resources is responsible for compliance with employment and labor laws. The Business Office is responsible for compliance regarding the college's nonprofit status, employer tax laws, and regulations for grant awards. Environmental Health and Safety is responsible for compliance regarding hazardous materials and other employee safety laws and regulations. The Chief Financial Officer provides compliance oversight on all these matters, and the college has an attorney on retainer for legal advice.

Human Resources

Standard 2.F.1

2.F.1: Faculty, staff, and administrators are apprised of their conditions of employment, work assignments, rights and responsibilities, and criteria and procedures for evaluation, retention, promotion and termination.

Applicants for staff positions are first apprised of general conditions of employment when they begin the application process online through BambooHR, the applicant tracking system, used by the college. Job postings describe the community and introduce Whitman's commitment to enhancing inclusion and belonging. Job postings include the full job description and are reviewed and updated by the hiring manager and human resources prior to posting. A link to the current staff employment opportunities is found [here](#). A link to current faculty employment opportunities is found [here](#). A link for faculty and staff applicants celebrating attributes of our location is found [here](#).

In keeping with new Washington State regulations and with the intent of raising the level of pay transparency and assuring pay equity, the college has developed more comprehensive job posting information for candidates. Job postings now publicly show salary ranges in addition to all benefits, including discretionary benefits.

Either prior to or upon hire, transfer or promotion, all faculty and staff are made aware of their respective job descriptions, expectations of performance, or the process by which performance will be evaluated. These are communicated both verbally and in written form in the signed appointment letters. The human resource policies posted on the HR and Provost webpages describe the terms and conditions of employment, including standards of conduct, compensation, benefits, performance appraisal, training, advancement and the grievance process.

Information about these topics for faculty can be found [here](#).

Information about these topics for staff can be found [here](#).

Information about these topics for student employees can be found [here](#).

Standard 2.F.2.

2.F.2: The institution provides faculty, staff, and administrators with appropriate opportunities and support for professional growth and development.

Faculty, staff, and administrators are provided opportunities for professional growth and development on an ongoing basis, as appropriate to their respective positions and personal needs. These offers vary in content, timing and form, depending on the position and the person. They may include internal training and briefing sessions, committee and task force assignments and participation, webinars, off site workshops, seminars and conferences.

Staff and Administrator Professional Growth and Development

For staff employees, formally developed programs supporting the strategic priority of enhancing diversity, equity and inclusion have been developed that target supervisory skill development and learning and literacy opportunities regarding diversity, equity and inclusion. These sessions are offered throughout the year.

The New Staff Orientation (See [Exhibit 2.F.2.A](#)) consists of five 1 ½ hour sessions facilitated by cabinet officers and addressing topics key to creating a sense of belonging and also linking to several strategic priorities:

- Overview of the college, including mission, core values and guiding principles
- Overview of Whitman students and how we communicate the Whitman experience
- Overview of curriculum and student support services
- Diversity, equity, inclusion and antiracism at Whitman College
- Overview of the college's business model and role of alumni and friends of the college

Below are links to some of the programs developed:

[Hiring Manager Guide to Successful Recruiting and Hiring](#)

[Hiring Manager Guide to BambooHR](#)

[Inclusive and Equitable Hiring Training](#)

[Supervisor Guide to Orienting New Staff](#)

[Performance Management Process for Employees and Supervisors](#)

Whitman has recently organized a series of supervisory workshops, a strengths assessment and a communications/personality assessment for supervisors and teams that we hope to offer in 2023.

For staff, individual development opportunities can be identified and addressed through the triennial performance and goal setting processes.

Faculty Professional Growth and Development

Whitman provides faculty numerous and varied opportunities and resources to support their professional growth and development, especially in the realm of teaching and professional activity/research.

During the week before classes begin in the fall semester, all new tenure-track and non-tenure-track faculty are expected to participate in New Faculty Orientation, led by the Associate Dean for Faculty Development (See [Exhibit 2.F.2.B](#) for a recent agenda). This two and a half day series of onboarding sessions acquaint faculty with numerous departments and resources on campus that support them as teacher-scholars. Sessions also provide professional guidance to incoming faculty regarding topics such as course and syllabi design, professional development resources and the college's governance structure. Beyond the first week, the Associate Dean for Faculty Development also hosts a series of lunch-time sessions for new faculty focused on other topics such as course assessment, interpreting course evaluations, and preparing annual activity reports.

Whitman's [Center for Teaching and Learning \(CTL\)](#) provides resources to faculty for enhancing their teaching and learning and programs in response to timely and immediate issues. The CTL's [Pedagogical Inquiry Grant](#) opportunities provide funding and resources for faculty to examine and enhance their pedagogy, individually or in collaboration with members of their department and across disciplines. The CTL also sponsors numerous programs focused on topics such as inclusive and anti-racist pedagogy, designing meaningful course assessment, and syllabus and assignment design throughout the academic year to support teaching.

Additional programs associated with the CTL include [Faculty Mentoring programs](#) for tenure-track and non-tenure-track faculty to provide structured support and guidance consistent with faculty members' specific professional goals. The [Center for Writing and Speaking \(COWS\)](#) offers regular Faculty Writing Hours in the Center where faculty can have a devoted space and time to write and make progress on their scholarship.

Additionally, the college provides [professional development funding](#) to tenure-track and permanent non-tenure-track faculty to support their professional activity and instructional development. Funding can be used for a variety of purposes including attendance at workshops, seminars, conferences, or the acquisition of instructional materials. Faculty can also apply for [competitive internal grants](#) that support collaboration with undergraduate students for research undertaken during the academic year and summer. Faculty interested in [community-engaged learning](#) at Whitman may apply for support for short-term and long-term teaching and research projects that involve community partners.

Faculty members who apply for external grants are supported by Whitman's [Office of Grants and Foundation Relations](#), whose director also advertises grant possibilities and seeks eligible faculty members for external grants throughout the year. In addition, the Office of Grants and Foundation Relations and the Associate Dean for Faculty Development collaboratively offer workshops to help faculty learn about and prepare to apply for grants and fellowships.

The college also maintains an institutional membership with the [National Center for Faculty Development and Diversity](#) (NCFDD). Any interested faculty member may access NCFDD's resources which include support for scholarly work and writing, and academic mentoring

Outside of the college, Whitman has maintained an ongoing relationship with other small liberal arts colleges in the Pacific Northwest Region. The Northwest Five Consortium (NW5C), which includes Whitman College, Lewis and Clark University, Willamette University, Reed College, and University of Puget Sound, offers a number of opportunities for faculty to connect and partner with colleagues outside of their home institution to develop as teacher-scholars. These opportunities include arts and humanities-focused community-engaged learning partnerships through the [Northwest 5 Consortium for Community Engaged Learning](#), an [annual NW5C Retreat for Faculty of Color](#), and NW5C-sponsored virtual writing groups and workshops supporting publication.

Finally, as detailed in [Chapter VI of the Faculty Handbook](#), the college offers a sabbatical program that allows faculty to have time and support to maintain an active professional activity agenda such that they can produce necessary accomplishments such as peer-reviewed publications, exhibits, and performances that enhance the teacher-scholar model and are required for tenure and promotion. Please see pages 17-18 of the [Faculty Code](#) for further information about the kinds of evidence of professional activity required for tenure and promotion.

Standard 2.F.3

2.F.3: Consistent with its mission, programs, and services, the institution employs faculty, staff and administrators sufficient in role, number and qualifications to achieve its organizational responsibilities, educational objectives, establish and oversee academic policies, and ensure the integrity and continuity of its academic programs.

Faculty

For the Academic Year 2022-2023, Whitman currently employs 204 faculty: 175 full-time faculty and 29 part-time faculty (See page 19 of the [Whitman College Factbook](#)). This figure includes tenured, tenure-track and non-tenure-track faculty at ranks of Instructor, Lecturer, and Assistant/Associate/Full Professor. One hundred seventy faculty hold the terminal degree in their field of study, and 138 faculty hold a Ph.D. Currently the faculty-to-student ratio is approximately 9.4 to 1 (See page 21 of the [Whitman College Factbook](#)).

Departments wishing to search for a tenure-track position undergo a rigorous vetting process that includes a justification of a position that will enhance the mission of the college, enhance the college's commitment to its core values of diversity, equity, inclusion, and antiracism, and fill curricular needs based on factors such as student demand, enrollment pressures, and other considerations relevant to a department or program. These initial proposals (pre-proposals) are then vetted by the Elected Committee Chairs who provide early feedback to departments as they consider submitting a full proposal for review by the Committee of Division Chairs. In addition, the entire faculty have the opportunity to provide feedback on the pre-proposals during a special faculty meeting (See [Exhibits 2.F.3.A](#) and [2.F.3.B](#)). Full proposals are ultimately recommended by the Provost and Dean of the Faculty to the president, who in turn makes recommendations to the Board of Trustees. The Board of Trustees gives the final approval to begin tenure-track searches.

Searches for tenure-track faculty undergo a rigorous search process according to guidelines that are reviewed and updated yearly by the Provost and Dean of the Faculty and the Committee of Division Chairs (See [Exhibit 2.F.3.C](#) and information in [Chapter II of the Faculty Handbook](#)). Job advertisements, semi-finalist interviews, and on-campus finalist interviews with candidates include a review of qualifications and expectations of the position. Tenure-track candidates conduct a teaching presentation and a research presentation. Candidates are evaluated by members of a search committee, which includes, at the least, all permanent department members, a Division Chair, an outside committee member and students.

Whitman also takes seriously its charge to employ highly qualified non-tenure-track faculty. These faculty allow for replacement of sabbaticals, help ease enrollment pressures and/or fill in for vacant tenure-track positions. The types of non-tenure-track teaching appointments are detailed in [Chapter II of the Faculty Handbook](#). Especially for visiting positions, departments are encouraged to undertake rigorous search processes which can include a national search for Visiting Assistant Professors (See [Exhibit 2.F.3.D](#)).

Staff and Administrators

For the Academic Year 2022-2023, Whitman currently employs 310 staff, 260 full-time staff and 50 part-time staff (See page 22 of the [Whitman College Factbook](#)). Currently the staff-to-student ratio is approximately 5.3 to 1. The college is an Equal Opportunity Employer and works toward hiring and employing a diverse staff.

The President's Cabinet considers needs, priorities, and alignment with mission before granting approval to search for new and vacant staff positions. Position descriptions clearly define qualifications and principal responsibilities based on periodic review and benchmarking of practices and staffing models of peer institutions. The college uses the budget planning process to allocate and invest in new staff positions that are consistent with institutional priorities.

The staff hiring process begins with a strategic planning meeting involving an HR representative, and either an equity advocate and hiring manager, or a hiring manager who has completed the DEIA hiring training series. In this meeting the group reviews the position description, minimum qualifications, and desired skills and abilities for both accuracy and to assure an inclusive and open process for all candidates. The group identifies key competencies and skills, develops a plan for rating candidates that minimizes bias (such as a matrix), creates a strategy for marketing the position, and outlines the search timeframe and interview format. Most searches involve a screening phase, remote preliminary interviews, and on campus interviews for up to three candidates.

Job postings are posted on the internal college website, and linked to applicant tracking software, where individuals can complete a short application online and include attachments, and search committee members can view and evaluate candidates. Postings are automatically placed in multiple online job boards, and strategically placed in the most appropriate key higher education and other professional print outlets, websites and job boards.

Depending on unique circumstances of the search, the processes for staff searches will usually involve either multiple committee members including people from other departments, or a smaller search committee with other individuals serving on individual interview panels and providing specific feedback about the candidates. The hiring manager completes references checks and makes a conditional offer pending sexual misconduct and criminal history background screening.

Whitman's support and operations functions are adequately staffed to meet the needs of the college, as confirmed by periodic review and benchmarking of the practices and staffing models of peer institutions. The CFO periodically conducts benchmarking with five peer small liberal arts colleges (See [Exhibit 2.F.3.E](#))

Additional Exhibits

[Academic Organizational Chart](#)
[Evaluation Policies and Procedures for Faculty - Chapter IV of the Faculty Handbook](#)

Standard 2.F.4

2.F.4 Faculty, staff and administrators are evaluated regularly and systematically in alignment with institutional mission and goals, educational objectives and policies and procedures. Evaluations are based on written criteria that are published, easily accessible, and clearly communicated. Evaluations are applied equitably, fairly, and consistently in relation to responsibilities and duties. Personnel are assessed for effectiveness and provided feedback and encouragement for improvement.

Staff and Faculty at Whitman regularly engage in structured performance management.

Staff Performance Reviews

After a temporary freeze during COVID response, Staff performance reviews converted from a traditional annual format to a more immediate triannual bi-directional process, with added components for peer feedback and individual and group goal setting. The human resources team offers performance management training sessions for all staff and supervisors, in multiple formats including in person, recorded, and published materials. Key objectives are:

- more frequent dialog about performance involving the employee and supervisor,
- timely recognition of accomplishments and developmental opportunities,
- to create a vehicle for peer feedback that is also responsive to the desire to be able to provide feedback about supervisors.
- to introduce more flexible goal setting for the individual and team that empowers the employee, facilitates teamwork, and is suited to the rapidly changing pace of work.
- Snapshots for group and department measurements of engagement and sense of value to target supervisory developmental needs.

Information about performance management for staff employees can be found [here](#).

Faculty Evaluation and Annual Reviews

Whitman has clear and systematic procedures for the regular evaluation of all faculty in the essential areas of teaching, professional activity, and service. All procedures for faculty evaluation are clearly explicated in the [Faculty Handbook](#). The Faculty Handbook is reviewed and updated on an annual basis.

Each year, all tenure-track and non-tenure-track faculty must submit an [Annual Faculty Activity Report](#). This report summarizes the faculty member's contributions in the areas of teaching, professional activity, and service during the previous calendar year. This report is primarily used by the Provost and Dean of the Faculty and the faculty member's Division Chair for annual reviews to set salary levels.

Faculty Personnel Reviews

Tenure-track faculty are typically reviewed for contract renewal in the fall of their third year after an initial three-year appointment. If this review is successful, they are given a second three-year contract. Faculty who successfully complete the first review are then evaluated for tenure and promotion to Associate Professor in the fall of their sixth year.

Although faculty may apply for promotion to Professor at any time after their promotion to Associate Professor, the Faculty Handbook lists eight years as the norm for time in rank for consideration of promotion from Associate Professor to Professor.

It is the responsibility of the Faculty Personnel Committee to evaluate tenure-track faculty for tenure, promotion, and contract renewal. The Personnel Committee consists of six elected tenured faculty members, two from each of the three academic divisions. Committee members are elected for three-year terms by the faculty as a whole from individuals nominated by their respective divisions. The Provost and Dean of the Faculty sits as an *ex-officio*, non-voting member of the Committee.

In the personnel review process, the primary responsibility for the collection of information lies with the candidate. Faculty to be evaluated are notified in a timely fashion so that they have sufficient time to prepare their materials. The Personnel Committee and the Provost and Dean of the Faculty meet with faculty to be evaluated, as a group, early in the process to orient them to the personnel review procedures, including deadlines, logistical information about the submission of materials, confidentiality, and review procedures.

Faculty are evaluated using multiple indices, including letters from colleagues; student evaluations; evidence of professional activity; narratives about teaching, professional activity, and service; and annual activity reports. Individuals being reviewed request letters of support from colleagues, and all members of the candidate's department are invited to contribute letters. In order to assess the candidate's teaching, letter writers are strongly encouraged to observe the candidate's classroom teaching on at least two separate occasions. Faculty seeking tenure or promotion to Professor must provide to the Associate Dean for Faculty Development the names of 8-10 established scholars, artists, or performers in the candidate's field outside of the college. Four of these individuals are selected by the Associated Dean and are invited to write letters concerning the candidate's professional activity.

More information about Faculty Personnel Guidelines and Procedures can be found in [Chapter IV of the Faculty Handbook](#).

Non-tenure-track faculty and faculty in Sports Studies, Recreation and Athletics (SSRA) are evaluated differently than tenure-track faculty. Non-tenure-track faculty are reviewed periodically and are expected to evaluate all the courses they teach using the College's standard student course evaluation form. These procedures are also detailed in [Chapter IV of the Faculty Handbook](#).

Student Support Resources

Standard 2.G.1

2.G.1: Consistent with the nature of its educational programs and methods of delivery, and with a particular focus on equity and closure of equity gaps in achievement, the institution creates and maintains effective learning environments with appropriate programs and services to support student learning and success.

Enhancing diversity, equity and inclusion is a top priority of [Whitman's Strategic Plan](#). Beginning in 2018 a working group compiled roughly [150 recommendations and goals](#) to advance the college's DEI efforts, many of which are focused on equity and closure of equity gaps in student achievement and creating and maintaining effective learning environments with appropriate programs and services to support student learning and success. Currently, the college is undergoing a review and update of its strategic priorities in these areas and continues to utilize internal data (e.g., retention data and student service utilization data) as well as outcomes data from national surveys such as HEDS, NACCC, and NSSE to improve upon its efforts. In addition, a Board of Trustees Committee (Whitman Experience Committee) has focused on 6 areas and associated metrics to advance the college's DEI efforts. Please see [Exhibit 2.G.1.A](#) for an October 2022 report from this Committee.

Supporting student learning and success is a collaborative effort that integrates work performed by many units across campus. At Whitman, the Division of Student Affairs, the Division of Diversity and Inclusion, and Academic Affairs work to provide a variety of student support services, delineated below.

The Division of Student Affairs

The philosophy of Student Affairs, overseen by the Vice President of Student Affairs and Dean of Students, includes providing excellent services for students, encouraging community development, involving students in life beyond the classroom, and providing leadership opportunities, all in an environment characterized by support and challenge. These tenets are consistent with [the mission of the college](#), and the VP/Dean of Students serves as an advocate for and mentor to students in this regard.

Rather than assuming gaps from the outset, the Division of Student Affairs relies on comparative analysis as it looks at retention and persistence data over time. Recently, Student Affairs has collaborated with the Office of Institutional Research to create a predictive model for retention and persistence which helps the college respond preemptively.

Programs and services in the purview of Student Affairs that support student learning and success include the following:

- [Campus Security](#)
- [Counseling Center](#)
- [Outdoor Program](#)

- [Reid Campus Center](#)
- [Residence Life](#)
- [Student Activities](#)
- [Welty Student Health Center](#)

The Division of Student Affairs also hosts a summer pre-orientation experience for first-generation and working class students who will enroll during a given fall semester. The [Summer Fly-In Program](#) emphasizes a sense of belonging and community building by providing opportunities to connect with other incoming first-generation and working class students as well as key faculty, staff and units across campus.

The Division of Diversity and Inclusion

Guided by principles of cultural pluralism, cultural humility, and cultural wealth, the Division of Diversity and Inclusion works to enhance the college's collective awareness and capacity around issues of diversity, equity, inclusion, and antiracism. Overseen by the Vice President for Diversity and Inclusion, this Division is trifurcated into three operational areas: Identity and Belonging, Equity and Compliance, and Inclusive Excellence. All three areas work to support student learning and success.

The offices under Identity and Belonging include student-facing units that contribute programmatically to the campus climate, facilitate exploration and development of student identities, and provide advocacy, support and resources for marginalized and/or minoritized communities. These units work collaboratively to aid the entire Whitman student body in better understanding themselves and their relationships to systems of oppression, as well as the development and delivery of structured opportunities for community healing, connection, and liberation.

This area includes the following offices:

- [Intercultural Center](#)
- [International Student and Scholar Services](#)
- [LGBTQIA+ Student Services](#)
- [Religious and Spiritual Life](#)

The Equity and Compliance area is focused on coordinating institutional compliance with federal and state discrimination, harassment, and retaliation laws and related college policies, with an emphasis on those related to sexual and gender-based misconduct and other forms of identity-based harassment and discrimination. This area is also involved in the response and resolution of bias incidents that may or may not have an identifiable respondent or constitute a violation of the law or college policy, but nonetheless impact the college community.

Inclusive Excellence is focused on the intra-Divisional horizontal influence work of diversity, equity, inclusion, and antiracism (DEIA) capacity building and change. This area involves the Division's work with student, staff, and faculty partners and collaborators across the college to

revise policies, shift practices, and modify systems in an effort to infuse inclusive excellence principles throughout the college.

Academic Affairs

Whitman's Academic Affairs Division, led by the Provost and Dean of the Faculty, supports student learning and success through the work of multiple units within this division. Guided by [Academic Affairs Staff Core Values](#), these offices and programs include the following:

- [Academic Resource Center](#)
- [Career and Community Engagement Center](#)
- [Center for Teaching and Learning](#)
- [Center for Writing and Speaking](#)
- [Off-Campus Studies](#)
- [Penrose Library](#)
- [STEM Hub](#)

All of the above offices and programs have an embedded focus on equity and reducing equity gaps and work in diverse ways to support student learning and success. In addition to information that is on the web pages listed above, please see the exhibits below for examples.

Exhibits

[Exhibit 2.G.1.B STEM Hub Arthur Vining Davis Proposal](#)

[Exhibit 2.G.1.C STEM Hub HHMI Proposal](#)

[Exhibit 2.G.1.D Academic Resource Center Testing and Tutoring Coordinator – Budget Request 10.24.22](#)

[Exhibit 2.G.1.E Academic Resource Center Testing Furniture One-Time Request 12.5.2022](#)

[Exhibit 2.G.1.F - Career and Community Engagement Center First Year Coaching Report, 2022](#)

[Exhibit 2.G.1.G - Career and Community Engagement Center Career Coaching Analysis 2018-2022](#)

Standard 2.G.2

2.G.2: The institution publishes in a catalog, or provides in a manner available to students and other stakeholders, current and accurate information that includes: institutional mission; admission requirements and procedures; grading policy; information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings; names, titles, degrees held, and conferring institutions for administrators and full-time faculty; rules and regulations for conduct, rights, and responsibilities; tuition, fees, and other program costs; refund policies and procedures for students who withdraw from enrollment; opportunities and requirements for financial aid; and the academic calendar.

Whitman publishes an [annual catalog](#) which includes institutional mission; admission requirements and procedures; grading policy; information on academic programs and courses, including degree and program completion requirements, expected learning outcomes, required course sequences, and projected timelines to completion based on normal student progress and the frequency of course offerings; names, titles, degrees held, and conferring institutions for administrators and full-time faculty; rules and regulations for conduct, rights, and responsibilities; tuition, fees, and other program costs; refund policies and procedures for students who withdraw from enrollment; opportunities and requirements for financial aid; and the academic calendar.

The annual review of the college catalog is coordinated by the Registrar's Office. The review includes all departments as well as individuals from key units across campus to ensure that updates are made with the most current information available.

Starting with the 2023-2024 catalog, Whitman will be publishing the annual catalog using Clean Catalog. While we are just starting with the implementation and use of this software, over time the catalog production will be less time consuming and more efficient for all involved. In addition, the catalog will be hosted on its own website that will increase access and ease of navigation.

In addition, the Registrar's Office produces an [online Senior Handbook](#). The handbook provides seniors and others with important information about credits, major and minor requirements, Honors in Major Study, application for degree candidacy, final grades, transcripts, and commencement requirements.

The Dean of Students office also provides students and parents the links below that contain information and assistance regarding students' rights and responsibilities and rules and conduct:

<https://www.whitman.edu/dean-of-students/student-handbook>

<https://www.whitman.edu/documents/Global/Brochures/family-welcome-guide-2022.pdf>

Standard 2.G.3

2.G.3: Publications and other written materials that describe educational programs include accurate information on national and/or state legal eligibility requirements for licensure or entry into an occupation or profession for which education and training are offered. Descriptions of unique requirements for employment and advancement in the occupation or profession shall be included in such materials.

Information on the availability of various occupational opportunities is listed in the Careers and Professions section of the [Whitman College 2022-2023 catalog](#) on pages 77-85. The opportunities include the following:

- Business Management and Finance
- Education
- Foreign Service
- Health Professions - Dentistry, Medicine, Nursing, Occupational Therapy, Pharmacy, Physical Therapy, Physician Assistant, Public Health, and Veterinary Medicine
- Law
- Library and Information Science
- Ministry
- Public Service
- Social Work and Human Services
- Sport Studies, Recreation and Athletics
- Theater and Dance

Advisors in the academic departments and in the [Career and Community Engagement Center](#) regularly discuss advanced study and immediate and long-range occupational opportunities with students. In addition, the college has selected special pre-professional advisors to help in those areas of interest which warrant particular attention because of their general appeal. Advisors are assigned to administer each of these programs, and provide students a list of suggested courses to take at Whitman and with specific details on eligibility requirements, as well as the admission and advancement criteria associated with each of these programs.

Also, our daily internal newsletter, Whitman Today, regularly features pieces focused on news and trends in employment. Written by the director of the Career and Community Engagement Center, the dissemination of these articles increases the likelihood that faculty, staff, and administrators can reinforce the information and opportunities discussed therein, especially with students. A recent example of this feature can be found [here](#).

Standard 2.G.4

2.G.4: The institution provides an effective and accountable program of financial aid consistent with its mission, student needs, and institutional resources. Information regarding the categories of financial assistance (such as scholarships, grants, and loans) is published and made available to prospective and enrolled students.

Information regarding financial aid at Whitman College is available in the [Whitman College 2022-2023 catalog](#) on pages 24-31.

The college provides a comprehensive and diversified program of financial aid that includes scholarships, grants (including both state and federal), loans, and student employment opportunities that assist students in financing a Whitman education. The goal of financial aid is to make a Whitman education possible for admitted students who may not otherwise be able to afford the costs. Information is readily and publicly available to prospective and current students and their families on the [Admission and Financial Aid website](#), which includes information about costs, loans, scholarship opportunities, work study, and deadlines. The website also includes Whitman's Net Price Calculator and Early Financial Aid Guarantee, which makes it possible for students to learn what their financial aid will be before they have even applied for admission.

In 2021-22, Whitman provided scholarships and/or grants to 91% of the students attending. Approximately \$41.1 million was disbursed to the student body in the form of institutional scholarships during the 2021 academic year. Of the students attending in 2021-2022, 50% received need-based scholarships. The average need-based aid package for 2021-2022 was \$52,533 which includes scholarship, grant, loan and employment. The average need-based scholarship students received from the college in 2021-2022 was \$40,650.

Information about the financial aid programs available at Whitman is published in the [college catalog](#) and the [Office of Admission and Financial Aid website](#). These sources detail the different types of financial aid administered by the college and include the necessary downloadable forms to apply for financial aid as well as any other forms required by the Financial Aid Office. When students are admitted to the college, those who have applied by submitting the required financial aid forms are sent financial aid award information about scholarships, loans, grants, and work--study opportunities. All financial aid offers include the amount of each component of the award, a description of each component of the offer, information about options for financing a college education, explanations of satisfactory academic progress and financial aid probation, and details on how and when to re-apply for financial aid in subsequent years. The college also provides [information about applying for federal loans](#) and [how to apply for a federal work study job](#).

Whitman offers both non-need-based and need-based scholarship, and students may be offered only non-need-based scholarship, only need-based scholarship, or a combination of the two. Need-based scholarship eligibility is determined through information provided on the FAFSA, CSS Profile, WASFA (for undocumented students in the state of Washington), and/or Whitman International Student Financial Aid Application (for non-US citizens). Non-need-based scholarships are awarded on the basis of academic achievement, talent in specified areas (fine

arts, music, theater, and debate, leadership), or as an incentive to enroll for a student who does not qualify for need-based scholarship.

In 2021-2022, 42% of all Whitman students received some form of non-need-based scholarship. In 2021-2022 the total amount of non-need-based scholarship awarded to Whitman students was \$9.6 million. Whitman awarded more than \$31,500,000 in need-based scholarships to students in 2021-22. Whitman also includes up to \$8,500 of self-help in the form of federal loans and federal work-study in financial aid offers to families who qualify.

In the Fall 2021 semester, 61 international students matriculated at Whitman. Because Whitman meets the full need of international students, the amount of scholarship, combined with a modest student work expectation (\$750 for the first year) will cover the full cost of attending Whitman, including tuition, food, housing, books, and incidentals. Supporting international students at Whitman is an integral part of the college's mission to provide a rigorous liberal arts education that prepares students for global citizenship.

Regarding veterans who attend Whitman, the college publishes information regarding the Veterans' Education Assistance Program, housing assistance, an annual scholarship, and other support programs and resources on [this webpage](#).

During 2021-2022, 220 students received Pell Grants ranging from the minimum of \$623 to the maximum of \$6,495. The total awarded to Whitman students was more than \$1,073,874.

In partnership with Walla Walla Community College, the Gateway Program encourages low-income and first-generation community college students to pursue a liberal arts education at Whitman. More information about the Gateway Program can be found on page 15 of the [college catalog](#). This academic year, seven students are participating in the Gateway program. Between 2017-2022, two to three students participated in this program each year. Assuming eventual matriculation at Whitman, this increase provides an example of ways that the college aims to diversify the student body and provide financial aid consistent with our mission and student needs.

Whitman attracts and retains talented students and continues to invest in financial aid to support current students and recruit new students. As a result of this continued investment, the percentage of students receiving need-based awards has increased to 50% in the Fall 2021 entering class, a notable increase when compared to 43% for the Fall 2017 entering class. These students are also receiving more generous need-based scholarships. Over the past five years, the percentage of incoming students with 100% need met has increased from 49% to 61% and the maximum gap (the difference between a student's demonstrated financial need and the total amount of financial aid awarded) has decreased from \$6,000 to \$4,000.

Each year many Whitman students work on campus through one of three employment programs: federal work-study, state work-study, or Whitman student employment. During the 2021 school year, students earned over \$2.1 million working on campus. Priority is given when possible to students who have a work expectation in their financial aid package.

The college will continue to address issues of access and affordability in its financial aid policies. Key goals include:

- Meeting 100% of the demonstrated need of all students
- Expanding institutional resources and endowments to support these goals
- Increasing the socioeconomic diversity of the student body
- Reducing other financial barriers (such as miscellaneous fees, student employment, and textbook costs)
- Continuing to strengthen the ways we facilitate opportunities for students with financial need to access on-campus jobs

Standard 2.G.5

2.G.5: Students receiving financial assistance are informed of any repayment obligations. The institution regularly monitors its student loan programs and the institution's loan default rate.

The Financial Aid and Admission offices work closely together to determine the policies that provide students the funds to enroll and continue their education at Whitman. Every student applying for need--based financial aid must submit documents that are reviewed annually by the Office of Financial Aid Services in order to determine their family's current ability to contribute to the student's educational expenses and to provide a financial aid package that makes attendance at Whitman possible without incurring large amounts of debt. The average debt for graduating seniors in 2021 was \$19,164, among the lowest amounts for private colleges in the country. This represents an increase of \$1,453 since 2011, compared to an increase in tuition from \$40,180 to \$55,560 (\$15,380) over that same 10-year period.

Aid for students who receive any form of federal student aid is strictly regulated by rules administered by the Department of Education and is tracked by the Financial Aid Office with regard to amounts and disbursement of funds. Each student's file is reviewed by Financial Aid staff if they are selected for verification by the federal government to ensure that federal regulations are followed. The Financial Aid Office also reviews all applications for need-based aid on a yearly basis, comparing the information provided on the application forms (CSS Profile and FAFSA) with supporting documentation such as IRS tax forms and W-2 forms, if necessary. All discrepancies are resolved and the student's aid is adjusted when necessary.

Receipt of outside funds for a student, such as grants and scholarships from external sources (i.e., non--institutional grants and outside scholarships), triggers a review of the student's financial aid to prevent over-awarding. If necessary, loan funds are returned or the student's loan is changed from subsidized to unsubsidized as the situation warrants.

Direct federal student loans are disbursed to students on a bi-weekly basis. When the loans are transmitted to student accounts, multiple safeguards are in place to prevent any funds being transmitted to a student who is not registered at the college or who is not taking at least six semester credit hours. Any loan funds that cannot be disbursed within 72 hours are returned to the lender or processor in compliance with federal regulations.

Every year the Office of Financial Aid Services submits reports to the Department of Education and the Higher Education Coordinating Board of Washington showing the amount of state and federal aid received by each student and confirming the Office's compliance with both state and federal regulations. In the early fall, the Fiscal Operations Report and Application to Participate (FISAP) documents are completed and sent to the Department of Education, and the Unit Record Report is completed and sent to the Higher Education Coordinating Board of Washington. Whitman also employs an outside accounting agency to conduct a yearly audit of student financial aid files.

Each fall, students receiving need-based financial aid or any other student loans are invited to attend a financial aid presentation to provide financial aid information for the coming year. During the session, students are provided information about their financial aid package, federal loans and grants, necessary forms and deadlines, and the importance of re-applying for financial aid each year. They are also informed about their rights and responsibilities as student loan borrowers. All first-time student loan borrowers must complete online “Entrance Counseling” through the student’s Department of Education portal before any federal loans can be disbursed for the student.

In the spring, all students who will graduate with student loan debt are requested to attend an “Exit Counseling” meeting and also receive correspondence with a recommendation to complete online Exit Counseling. Students are provided with instructions about their rights and responsibilities as a student borrower, as well as the repayment options available to them through their federal financial aid portal on studentaid.gov.

The college’s “hands-on” approach to the “Entrance” and “Exit” Counseling, along with high retention and graduation rates, contributes to low loan default rates. The current cohort default rate is 0.0%, due to the federal pause on repayment and due to the COVID-19 pandemic. The default rate for the five years prior to this has ranged from 0% - 1.4%.

Standard 2.G.6

2.G.6: The institution designs, maintains, and evaluates a systematic and effective program of academic advisement to support student development and success. Personnel responsible for advising students are knowledgeable of the curriculum, program and graduation requirements, and are adequately prepared to successfully fulfill their responsibilities. Advising requirements and responsibilities of advisors are defined, published, and made available to students.

Academic Advising Design and Maintenance

Academic advising is conducted primarily by faculty with a few select staff members. Advising is considered an essential part of the faculty's teaching responsibilities and is expected to reflect excellence (See page 16 of the [Faculty Code](#)). The college expects tenure-track faculty, after their first year, to participate in pre-major and major advising (See pages 69-70 of the [Faculty Handbook](#)). As such, faculty are expected to be well-informed about the overall curriculum, graduation requirements, and their particular department or program curricular requirements.

Prior to the Summer of 2020, pre-major advising was administered by staff in the Dean of Students Office and Academic Resource Center. Students were assigned to advisors based on responses to their common application questions and a pre-major advising questionnaire, which is administered over the summer. During the Summer 2020, due to the need to move online for advising and registration, advisors met with incoming pre-major advisees during the summer. Pre-major advisors also worked with incoming students during Summer 2021 and 2022 and will continue to do so in subsequent summers to ensure connection with the college during a key transitional period.

Up until the 2022-23 Academic Year, Whitman also ran a [Student Academic Advisors \(SAs\) program](#). SAs serve as peer-advisors and live in the residence halls with new students during the fall semester. Selected for their solid academic and personal accomplishments, and trained extensively, SAs have responsibilities to model good study habits, help new students discover effective ways to study and learn, introduce new students to the academic culture of the college and its resources, and assist new students with their academic transition.

During Spring 2022, focus groups were convened to discuss the strengths and growth areas for this academic transition program. The college has recently decided to discontinue this program and allocate the financial resources dedicated to this program in other ways to support and improve academic advising.

Academic Advising Education and Training

Prior to the Summer 2020, advisors participated in a comprehensive training during the summer. Advisors who were new to advising altogether were required to participate in a full-day training that provided a broad overview of the curricular structure at Whitman including topics such as General Education, First-Year Seminar sequence, and pre-arrival assessments in Writing, Chemistry, Calculus, and Foreign Languages. Returning advisors were invited to attend a half-

day refresher course for advisors where they learned about the specific intricacies of advising subpopulations (international students, first-generation/working class students, varsity athletes, etc.). During the half- day training, individual departments also provided content for pre-major advisors to assist in the specific task of advising and assisting with the registration of first-year students. Pre-major advisors, specifically, received timely advising notifications about key deadlines (last day to add, last day to drop, last day to withdraw, etc.) via email and a series of Lunch and Learn workshops designed to provide timely information for advisors.

In 2020 during the early stages of the COVID-19 pandemic, education and training for advisors and first contact with incoming new students began taking place during the early summer rather than the early fall to connect and engage with students virtually.

During Summer 2022, Academic Advising moved from the Division of Student Affairs to Academic Affairs. In addition, the college transitioned to a new course planning system and advising platform.

Faculty and staff who were assigned new students as pre-major advisees attended virtual advisor training sessions offered during multiple points throughout the summer. In addition, [recordings of training videos](#) were made available to advisors to learn at their own pace.

Also as part of [new student advising](#) during the summer, incoming first-year and transfer students have the opportunity to meet with several advisors to learn about college processes and expectations and specific department requirements, as well as to create their course wish list in preparation for course registration. Students complete a pre-major advising questionnaire which asks students about their academic interests, strengths, and concerns. Questionnaire responses are then reviewed in order to match new students with pre-major advisors. Incoming students also have the opportunity to participate in group advising sessions during the summer.

[Student training videos](#) on academic course planning and advising are made available to incoming students throughout the summer and are available throughout the academic year.

Academic Advising Evaluation

Whitman has previously collected data from incoming first-year students about their experiences with academic advising during first-year orientation (2017-2019) and their experiences with summer advising during 2020 and 2021 (See [Exhibit 2.G.6.A](#)). This data has previously been reviewed by the Division of Student Affairs in order to make changes to advising training and program design.

Improving Academic Advising - Future Changes

The transition of Academic Advising from Student Affairs to Academic Affairs has provided the college an opportunity to take stock of the quality and effectiveness of academic advising. In this vein, during November 2022 the Provost and Dean of the Faculty convened a new Advising Committee whose charge includes the following:

- to increase the quality of students' advising experience, including making advising more equitable and culturally inclusive
- to positively affect student retention
- to assist in fitting advising into faculty workload equitably, effectively, and efficiently
- to assist in effective information sharing regarding academic programs and resources

Membership of the committee includes the Provost and Dean of the Faculty, the Associate Dean for Faculty Development, the Associate Dean for Academic Affairs, the Director of the First Year Seminar Program, the Chair of the General Studies Committee, the senior most faculty member of the Admissions and Financial Aid Committee, and the senior most faculty member of the Student Life Committee. Other staff will be invited to participate when topics under discussion are relevant. Examples of these key staff include the Director of Institutional Research, the Registrar, the Director of Off-Campus Studies, and the Senior Associate Dean for Student Affairs.

The Advising Committee has begun looking at National Association for Academic Advising (NACADA) core competencies as the possible basis of defining effective advising, developing more robust evaluation mechanisms, and improving training. In addition, the committee has begun looking at draft evaluation mechanisms produced by the college's Assessment and Accreditation Committee during the 2018-19 Academic Year. These evaluation instruments were proposed to the faculty during Spring 2019. However, continued work stalled the following year, primarily due to COVID.

During Spring 2023, Whitman will participate in the NSSE Academic Advising Module, which is based on NACADA core competencies. This will be the first time that Whitman has participated in this module, and we expect that this data will help inform changes and improvements to academic advising in the near future.

We anticipate that future education and training offerings to new and continuing advisors will take place at least annually.

Library and Information Resources

Standard 2.H.1

2.H.1: Consistent with its mission, the institution employs qualified personnel and provides access to library and information resources with a level of currency, depth, and breadth sufficient to support and sustain the institution's mission, programs, and services.

Working in conjunction with Whitman College faculty is essential to the work of the Penrose Library. Each member of the [library staff is qualified](#) to implement the overall mission of Penrose Library, and staffing expenditures are reported annually on the [Association of College and Research Libraries Academic Library Trends and Statistics survey](#). In addition to liaison partnerships with various departments, the Library Director serves on the Faculty Library Advisory Committee and the Academic Information Technology Advising Committee (AITAG) and collaborates with representatives of the faculty on issues related to the academic program.

The collections at Penrose Library have always been a particular strength of Whitman College. As a college situated in a rural community far from large university libraries, there is sensitivity to the importance of our holdings as they relate to faculty scholarship and the ways in which that research impacts and shapes our students' classroom experiences. Penrose Library has measured its collections with a focus on currency and connection to the curriculum in several ways. First, Penrose has implemented and continues to use a [Green Glass analysis](#) of the collection. Aside from documenting strengths, it also helps to shape our [analysis, review, weeding, and withdrawal projects](#). Additionally, Penrose has systematically surveyed faculty and students in 2013 ([via MISO](#)), 2017 ([MISO](#)), and [2022 \(local survey\)](#) regarding their [satisfaction with our collections](#). Annual participation in the ACRL Academic Library Trends and Statistics survey [provides a benchmark for comparison with peer groups](#), such as the *Oberlin Group* and our *Panel of 19*. Lastly, Penrose addresses needs for materials that it does not own via membership with the [Orbis Cascade Alliance](#). The consortium of 38 college libraries provides breadth in areas that are outside of our collection mandate (for example, foreign language titles).

Each of these highlighted exercises helps Penrose understand and address areas that need improvement. As an example, Green Glass has helped in implementing actions such as the withdrawal of duplicate copies and multiple editions which now provides additional shelf space for more contemporary titles. These longitudinal surveys have illustrated that digital collections are meeting the needs of patrons, and that the transition from paper to digital continues to create opportunities for increased student learning. Penrose Library collections are more than adequate for the needs of the college's faculty and students.

Penrose Library spends its resources in a responsible and systematic manner. Through detailed policies, [strategic planning](#), and statements of [Mission, Values](#), and [commitment to DEIA](#), Penrose has shaped its services and collections to be a model of a contemporary and modern liberal arts college library. The strategic plan, which is updated annually via strategic initiatives and is closely aligned with [Whitman College's Strategic Plan](#), provides the context in which policies are developed and enacted. Policies for [collection development](#), including a supplemental [policy for archival collections](#), inform the ways in which resources are added.

Additionally, faculty may submit requests through their library liaison or via our online purchasing program and are actively engaged in deselection decisions. Collaborations with faculty, in terms of instruction, are illustrated through an Instruction plan that focuses on [learning goals](#), especially as they relate to our First Year Seminar program. Penrose's [Information Literacy Scaffold](#) guides the way that we teach our students to effectively and efficiently utilize our materials. Lastly, Mission, Values, and DEIA statements ensure that planning and project development occurs within the confines of who Penrose is. They guide Penrose toward acknowledging and addressing long-standing social inequalities. Actions are always motivated by processes of planning informed by wide ranging input and participation from across the entire library staff and the campus community.

In addition to the strength of collections, and planning processes, Penrose Library serves the community by creating spaces for teaching and learning. These can happen here in our physical library building, online and in virtual spaces, and in our faculty members' classrooms. Creating a sense of belonging and ensuring that the building is safe are foundational to its mission. [Policies regarding library use](#) are clearly stated on the webpage, and a [commitment to accessibility](#) continues to be strengthened as an area of professional focus. During the Covid-19 pandemic, Penrose shifted to an online chat service to support reference and instruction, and learned that many students find that mode of communication provides a good supplement to face-to-face interactions.

Faculty and students benefit from our [Institutional Repository](#) and [policies and procedures for acquisition and ingestion of materials](#) which recognizes the existence and importance of content that is born-digital. A [data management](#) guide and a campus-wide [Copyright and Intellectual Property policy](#) help users make informed decisions regarding their intellectual property rights and responsibilities. Penrose [invests in open access initiatives](#) and is working with faculty on Open Educational Resources (OER) at the departmental level. Lastly, students benefit from an [Instruction program](#), articulated in Penrose's [statement of teaching](#), that is guided by learning outcomes and driven by collaboration with the faculty, and that provides a systematic path toward integrating information literacy. Penrose staff [work closely with the First Year Seminar program](#), are integral to many departments' senior thesis or capstone experience, [teach four library-focused credit courses](#), and serve as a significant partner for students as they grow and become responsible and sophisticated consumers and producers of information.

Physical and Technology Infrastructure

Standard 2.I.1

2.I.1: Consistent with its mission, the institution creates and maintains physical facilities and technology infrastructure that are accessible, safe, secure, and sufficient in quantity and quality to ensure healthful learning and working environments that support and sustain the institution’s mission, academic programs, and services.

Integral to Whitman’s mission and strategic initiatives, the college continues to maintain an accessible, safe, and secure learning, working and living environment. This commitment is reflected in the programs and resources available for creating and maintaining the physical facilities consistent with higher education best practices in support of equitable student success. Accordingly, the college’s instructional and support facilities are sufficient and adequate to meet the institution’s mission, programs and services.

The main steward of Whitman’s built and natural environment is the Facilities Services Division with programs that range from planning, design, construction projects, and agency interaction to lifecycle projects maintenance, custodial, conference, events, scheduling, surplus, grounds and landscaping, snow removal and deicing pavement, rental properties, sustainability, recycling, environmental health and safety, emergency management, and utility/energy efficiency.

Serving 1,500 students and 500 faculty/staff, the college encompasses 1.3 million gross square feet comprising 114 acres of grounds, 55 institutional facilities, and 60 rental (student, faculty/staff, business) properties, on the Walla Walla campus, Johnston Wilderness Center, and two observatory locations.

All physical facilities *created* through new construction, modernization and renovation include building and engineering standards such as life cycle, accessibility, fire life safety, and security systems. All of these projects are compliant with current and emerging codes and regulations.

Whitman’s facilities master plan, called the Campus Framework Plan, was created by the Building and Grounds Committee and adopted by the Board of Trustees in 2012. This plan was most recently revised and approved in 2017. The plan provides “historical context and long-term underlying principles and guidelines for ongoing campus planning and development decision making”. The central concept of the Framework Plan is that the campus should, to the greatest degree possible, support the mission of the college and enhance the integration of student academic and residential life.

The Campus Framework Plan (See [Exhibit 2.I.1.A](#)) provides a broad general guide for the college in developing the building and grounds physical facilities. Rather than call for specific buildings in specific locations, it provides thirteen guiding principles for campus expansion and renovation. The plan is used by the college in siting new buildings and it is provided to architects working on college projects.

To ensure facilities are *maintained* and modernized in a timely manner in order to reduce deferred maintenance, the college engaged in a [2022 Facilities Condition Assessment \(FCA\)](#) that will support a planned approach towards prioritizing needs and appropriate funding in five-year increments allowing for building optimization.

Whitman adheres to the principle of total cost of ownership (TCO), whereby the college plans and budgets for not just the initial costs, rather for the facilities' and components' costs throughout the asset's lifecycle. This approach looks at both the initial costs of building a facility as well as the replacement of building components such as energy, utility, and safety systems; continual maintenance of the building exterior and interior and replacement of materials; updates to design and functionality; and other critical requirements.

For years, these physical assets have been maintained with support of Whitman's Life Cycle funding program. The strategic TCO approach is now combined with the updated FCA to keep facilities at an optimum performance level for learning, working, and living at Whitman.

The Life Cycle Program provides continuous funding for major renovation, renewal and replacement work on a physical facility or component at the end of the useful life. This is determined periodically based upon the FCA, operational performance, appearance, and physical audits, rather than on an estimated time period established for depreciation, amortization, or other periodic accounting purposes. If, during the course of performing life cycle work, it is determined that additional scope is required in order to comply with regulatory requirements, that work will be completed as part of the life cycle project.

For both new projects and ongoing life cycle maintenance/modernization, principles of sustainable design are applied to construction and renovation of campus buildings and environs, wherever practical. Such principles include, but are not limited to: design and construction resulting in energy efficiency and minimized site impacts; US Green Building Council's Leadership in Energy and Environmental Design (LEED) principles: partnering with design professionals, contractors and other advisors to pursue "green" design and construction practices; incorporating appropriate techniques and efficient fixtures to minimize offsite flows of storm water, consumption of water and sewage generation; and using recycled content materials in building construction and renovation, minimizing waste, and reusing/repurposing/ recycling materials.

For information on all Facilities Division's departments and programs, see [Facilities Services](#).

In addition to Whitman facilities having appropriate *access* for the physically disabled, the college continues to improve accessibility with a [2022 compliance survey of college facilities](#). This survey identifies existing building conditions that deviate from current state and federal ADA standards, and provides a priority and cost for proposed solutions for physical barrier mitigation. A newly formed College Accessibility Committee also serves as an advocate for students with disabilities and works with Facilities Services to address accessibility issues when they arise, both during everyday use and during special events (e.g., Commencement).

The Environmental Health and Safety (EHS) Department is responsible for providing a *safe and secure* learning, working and living environment through prevention, education, training, and preparedness. The college has an Accident Prevention Program which is designed to involve faculty, management, and staff in identifying and eliminating hazards that may be present or develop in the classroom and workplace. Other EHS programs include a Hazard Communication Plan to protect all employees from workplace chemical hazards, and a Chemical Hygiene Plan to protect faculty, students, and staff in the sciences, arts, and theater programs.

EHS conducts workplace safety inspections, training and outreach. They partner with a variety of agency-having-jurisdictions (e.g., Walla Walla Fire Department for regularly scheduled walk throughs, ensuring all facilities are inspected annually for fire life safety). EHS also manages Hazardous Waste removal and disposal on a regularly scheduled basis in coordination with departments and the academic calendar. EHS also provides an available resource to assist departments in preparing safety plans specific to their activities.

As part of a safe and secure environment, the Emergency Operations Plan, coupled with regularly scheduled training, protects the Whitman community in the event of a natural, human-caused or technological disaster affecting the college or surrounding area. The plan enhances the emergency response capability for any large-scale emergency or disaster and optimizes the welfare and safety of students, faculty, staff, and visitors.

The college maintains a welcoming, diverse and inclusive community of people who know, respect, and watch out for each other. The Office of Security, which operates 24/7, plays an essential role in protecting the Whitman community. In addition to routine campus patrol, other services provided include personal safety education, escort services, Whitman ID cards, lost and found, and first responder.

For access to current policies and procedures pertaining to environmental health and safety, please see <https://www.whitman.edu/environmental-health-and-safety>.

For access to the Emergency Operations Plan, please see [EHS – EOP](#).

For access to the Office of Security, please see <https://www.whitman.edu/security>

For access to the college's past and present Annual Security Reports, please see <https://www.whitman.edu/security/annual-security-report>.

Technology Master Plan and Planning Process

Due to the rapid changes in technology, it is difficult to have a multi-year technology plan that allows for the agility and nimbleness needed to react to the ever-changing landscape of the technology space. Thus in lieu of a technology plan with goals and objectives for the coming years, Technology Services has a set of guiding strategies/principles that are broad in nature but help to prioritize projects that Technology Services undertakes and plans for. These guiding strategies/principles are reviewed on an annual basis by the Technology Services Department and its various governance structures (advisory committees) and adjusted if deemed necessary.

The guiding strategies/principles are tied closely to the college's 2017-2018 strategic plan efforts to prepare students for life on campus and beyond college, supporting diversity, equity and inclusion; supporting efforts that increase access and affordability; working with faculty to innovate with technology in the classroom to enhance student learning; and supporting efforts that showcase our location. Other guiding strategies/principles are Cloud First, protecting our information assets, etc.

While not every project that Technology Services undertakes fits nicely into a guiding strategy/principle, they do provide a roadmap for projects and budget requests.

Technology Services assesses our guiding strategies/principles and how we are doing through surveys and governance structures. Technology Services has participated in the [MISO survey](#) (Measuring Information Services Outcomes) with the Library in the past with the last time happening in 2018. The survey is sent to students, faculty and staff and assesses the services provided by Technology Services. Technology Services has a standing faculty advisory committee that is focused on instructional technology issues/priorities, and they have been instrumental in updating IT policies, advising Technology Services on information security related issues and initiatives; providing critical feedback to the redesign of the campus portal (myWhitman) and implementation of Ellucian Self-Service (for student planning and online registration); and thinking about how to reduce student printing at Whitman. The CIO reports to both the CFO and the Provost, providing access to the president's cabinet and raising IT issues that need cabinet discussion or approval. We also have a Data Advisory Committee that is focused on understanding what data the college keeps and maintains, where it is maintained, who needs access and why, and generates data definitions to ensure accurate reporting across the college. The survey and governance structures provide a feedback loop into understanding where we need improvement and if our guiding strategies/principles are correct or need refinement. It should be noted that other governance structures emerge as projects/processes evolve. For example, we are evaluating our Identity and Access Management (IAM) strategy and may need to weave some governance around IAM into the Data Governance Committee.

Technology/equipment Update and Replacement Plan

Whitman employs a regular technology update and replacement plan for computers, servers, storage, network, and telephone equipment. Desktop computers are currently replaced on a regular six-year cycle and laptop computers are replaced on a regular four-year cycle. Servers, storage, network, and telephone equipment have varying schedules for replacement, but are consistent with best practices.

The replacement schedule is supported and funded through a lifecycle program. Technology Services has an annual operating budget for lifecycle replacement of technology equipment and we also are able to maintain a reserve as some years we may spend more than the budgeted amount and other years spend less (which is moved to the reserve). The lifecycle program is extremely useful for the college to maintain its technology infrastructure and has the strong support of the college to increase it as we add inventory to our technology assets. Whitman has prioritized keeping technology up to date and sustainable to best meet the needs of students, staff, and faculty, and to meet the goals of the college's mission to "develop their intellectual and

creative capacities in a supportive scholarly community that prioritizes student learning within and beyond our classrooms.”

Further information about Technology Services can be found at:

<https://www.whitman.edu/technology-services>.

Moving Forward

Whitman is working on the following high-level changes and improvements as it prepares for its Year Seven Evaluation of Institutional Effectiveness and Mission Fulfillment.

Fostering a Vibrant and Inclusive Campus Community that Supports Student Learning and Thriving

The college has initiated a number of efforts in the last few years to think creatively and carefully about a sense of community at Whitman College for students. Relatedly, the college has been considering moving toward a greater proportion of students, particularly juniors and seniors, living in college-owned housing in the context of a more robust residential life program. One possible outcome from this work is greater proximity of younger students living closer to older students, with the possibility of increased mentoring and stronger orientation to the college. See [Exhibit A](#) for more information about the college's efforts regarding junior and senior housing.

With COVID-19, mental health concerns have become more pronounced on Whitman's campus. In 2020, Whitman became a [JED School](#) and has and will be engaged for the next two years with the JED strategic planning process to enact a holistic approach to wellness. This approach allows the college to be more proactive than reactive to issues of well-being. Also, as part of responding to the mental health needs of students, Whitman has added an option for students to access [UWill online counseling services](#). The college is in its second year of utilizing these services and will be studying outcomes data to determine whether it will continue with UWill or change to another online service provider to help meet student needs.

Strategic Planning

In 2017, the college identified five top priorities as part of its five year Strategic Plan: increasing access and affordability, enhancing diversity, equity and inclusion, innovating the curriculum, connecting to life after Whitman, and celebrating its location. A summary of current priorities and progress reports can be found [here](#).

With the arrival of President Sarah Bolton, the college is currently [updating these strategic priorities](#) to build upon accomplished efforts and seek new and improved ways to build upon these priorities, consistent with its mission.

The Strategic Planning process (see [Exhibit B](#)) has included input from a variety of stakeholders including students, staff, faculty, and Board of Trustees members. In addition, the college will be launching discussions with alumni about the capacities and skills that will help students have a strong post-college launch and positive impact across a variety of fields of work. The college will also conduct a market study of prospective students to learn more about what is important to them as they consider their college choices.

Faculty Governance Changes

During Spring 2019, an elected Ad Hoc Committee on Internal Faculty Governance was convened to address ongoing concerns regarding faculty morale and a perception that faculty have not always been fully or productively engaged in decisions that involve areas of responsibility under faculty purview. This Ad Hoc Committee, which currently includes three faculty from the Division of Natural Sciences and Mathematics, three faculty from the Division of Humanities and Fine Arts, and one faculty from the Division of Social Sciences, has studied the college's faculty governance structure and governance structures at other institutions and has submitted to the faculty proposed changes to its committee structure. See [Exhibit C](#) for more information about these efforts.

During the February 15, 2023 all faculty meeting, this Ad Hoc Committee proposed a motion to amend the Faculty Code so that the implementation process of the new governance structure can begin July 1, 2024. This motion passed with a majority vote.

General Education Reform, Assessment of General Education Outcomes, and New Majors and Concentrations

With the passage of a new General Education program (see [Exhibit D](#)) via faculty vote during Spring 2022, the college has been preparing to implement this program beginning with students who will matriculate during Fall 2024. During Fall 2022, the General Studies Committee, composed of faculty across all Divisions, the Director of the First Year Seminar program, the Director of the Center on Writing and Speaking, two student representatives, and the Associate Dean for Academic Affairs, collectively vetted applications from faculty who wished to count courses toward Whitman's new General Education requirements. The General Studies Committee has reflected upon and will improve this process for new courses that will count toward General Education during subsequent academic years.

During Spring 2023, the General Studies Committee will work toward a process for assessing new student learning outcomes for General Education courses. This process will be vetted by the college's Assessment and Accreditation Committee during Spring 2023 and will take effect during Fall 2024.

In addition, a number of innovative curricular initiatives including new interdisciplinary majors and concentrations have recently been approved and will take effect beginning Fall 2023. See [Exhibit E](#) for more information about these changes.

Advancing Institutional Inclusive Excellence and DEIA Efforts

As part of its membership with the Liberal Arts Colleges Racial Equity Leadership Alliance (LACRELA) Whitman has participated in the National Assessment for Collegiate Campus Climates (NACCC) during Spring 2021 (student survey) and Spring 2022 (staff survey). Faculty will be surveyed during Spring 2023. Participation in the NACCC allows the college to compare its campus climate outcome data to LACRELA averages across 25 institutions as well as a smaller comparison group of five peer institutions.

The NACCC utilizes six specific frames to gauge campus climate: Racial Learning and Literacy, Cross-Racial Engagement, Mattering and Affirmation, Encounters with Racial Stress, Appraisals of Institutional Commitment, and Impact of External Environments.

Analysis of Whitman's NACCC outcomes data has contributed to development of a DEIA Maturity Matrix that helps units across campus identify areas where important progress on climate has been made and areas of growth and improvement regarding the college's racial climate. Analysis of the NACCC outcomes for staff and faculty during 2023 and beyond will continue to inform Whitman's work on improving campus climate. To increase awareness of these efforts, the college's Vice President for Diversity and Inclusion has and will continue to meet with different campus constituencies to discuss the NACCC and DEIA Maturity Matrix. More information about the NACCC and the DEIA Maturity Matrix can be found in [Exhibit F](#) and [Exhibit G](#). Examples of communications to campus constituencies can be found in [Exhibit H](#) and [Exhibit I](#).

Regarding accessibility, in Fall 2021, a new College Accessibility Committee (CAC) was convened at the request of college leadership to review accessibility needs of the college and work with the broader campus community to prioritize and address these needs and other accessibility issues as they arise. During Summer 2022, an accessibility audit was performed by an outside expert with a report forthcoming. The results of this report will be shared with the campus community, and the CAC will gather community input to prioritize recommendations and propose a plan to accomplish necessary changes.

Also, the College's new [Inclusive Excellence Council](#) has begun work to advance inclusive excellence. During Spring 2023, the council and subcommittees are focused on a number of efforts including professional development opportunities for faculty and staff, assessment of departmental and unit level DEIA plans, reviewing and awarding DEIA grants to support inclusive excellence, and promoting and disseminating results from internal surveys.

Finally, regarding hiring practices, in collaboration with Human Resources, the Division of Diversity and Inclusion provides counter bias training for hiring managers. This component of a two-part workshop on inclusive hiring practices is designed to provide hiring managers with an in-depth review of the college's principles of inclusive excellence, an enhanced understanding of implicit bias and how it can show up in the hiring process, and familiarization with useful counter bias strategies. In 2023-24, we plan to expand access to this learning opportunity to all search committee participants.

For all tenure-track faculty searches, committees meet with the VP for Diversity and Inclusion and the Associate Dean for Faculty Development (ADFD) to discuss best practices for attracting a diverse candidate pool. In 2022, the college added a subsequent meeting with the ADFD to review strategies for mitigating cognitive biases in the vetting process and to establish group norms for inclusive deliberations. In the 2023-24 hiring season, the college will work to provide more clarity, for candidates and committees, around expectations of candidates to address inclusive excellence. Additionally, in future years, Whitman aims to infuse hiring processes for visiting faculty with the same attention to generating diverse candidate pools and ensuring

vetting processes that maintain that diversity, while keeping the workload for these frequent searches manageable. Faculty-wide professional development events will be a key for meeting this aim. The college also wishes to better communicate with underrepresented candidates about campus initiatives that foster cultural pluralism and belonging, for example through a dedicated webpage for faculty recruiting.