

MEMORANDUM

TO: President's Budget Advisory Committee

CC: President's Cabinet

FROM: Jeff Hamrick, Vice President for Finance and Administration

DATE: December 4, 2023

SUBJECT: Our third meeting on Tuesday, December 5, 2023.

Our next meeting is Tuesday, December 5 at 3:00 p.m. in Memorial 331. I will open the meeting by reminding everybody of where we are currently positioned in the fiscal year 2025 budget-building process, and how the rest of the fiscal year is scheduled to unfold.

The next half-hour of the meeting will be for President Bolton to summarize the Cabinet's priorities in its tentative assessments of the various fiscal year 2025 budget initiative proposals (BIPs) advanced by the vice presidents on behalf of the various functions, offices, departments, and programs that roll up to them.

We will then take some time for ASWC President Basil Shevtsov to share ASWC's priorities inasmuch as the college's budget-building process is concerned. We will conclude this first hour by having the committee pose questions and offer feedback to President Bolton, the President's Cabinet, and ASWC President Shevtsov.

After the first hour, the President's Cabinet and President Shevtscov will leave the meeting, and the committee will continue its deliberations.

Attached are four documents to support our discussions tomorrow.

1. The revised budget parameter planning ranges that were approved by the Board of Trustees at a supplemental meeting in November 2024. The planning ranges are the same as the President's Budget Advisory Committee forwarded to the Cabinet, and that Cabinet advanced to the Board of Trustees with its recommendation. However, several trustees asked certain parameters to be added or displayed differently.
2. A Google sheet of the budget initiative proposals submitted from departments, with those proposals ranked as A (high), B (medium), and C (low) priorities, with a preliminary Cabinet decision in the column on the far right. Some low-ranking priorities were suppressed from display in this spreadsheet, since they are very unlikely to be funded and clutter up the spreadsheet. In most cases, the President's Cabinet is thinking of fully funding (in the base, or recurring, sense) or deferring proposals. A few are singled out for partial funding. The one-time requests for funding are ideal candidates for being

supported by the anticipated fiscal year 2024 operating surplus (if it is large enough), and will need to be prioritized by the President's Cabinet during the months of December 2023 and January 2024. Most of the one-time requests are related to capital projects, equipment purchases, or software implementations. The President's Cabinet welcomes feedback, comments, or insights about the one-time requests that ought to be prioritized by the college.

3. The third document includes additional supporting documentation connected to the budget initiative proposals.
4. Finally, please find a memorandum describing a major effort to reallocate budgets totaling \$3.9 million across the college, in light of transitions to post-pandemic behaviors and practices; recent high rates of inflation; and my suggestions concerning how the college's budgets ought to be updated after the recent retirement of its longstanding chief financial officer. This \$3.9 million does not represent budget cuts per se, but rather a sincere effort to make sure that all of the college's various budget lines more closely match recent operating practices and post-pandemic realities.

As we have discussed previously, the goal for our meeting is to get the committee's input on where the college should be in the ranges of key assumptions such as tuition increases, financial aid, target first year class size, and salary increases. We will then get the committee's input on budget initiative proposals.

This is a very important meeting that helps the President's Cabinet finalize a proposed fiscal year 2025 budget, which will then be presented to the Board of Trustees in February 2024. Thank you for your service on this committee, and I look forward to our discussions tomorrow.

FISCAL YEAR 2025 PROPOSED OPERATING BUDGET PARAMETER PLANNING RANGES

	FY24 Budget	Proposed FY25 Planning Range
Budgeted Total Enrollment (Forecast: 1,505) (10 students = \$219,000)	1409	1500 - 1550
Target Matriculants (FYFT and Transfers) (Actual Fall 2023: 465)	435 FTE	435 - 450 FTE
Net Operating Revenue* <small>*Defined as tuition revenue less Whitman scholarships, plus revenues from auxiliary operations, including unrestricted student fees</small>	\$93,722,000	\$95,500,000 - \$98,000,000
Net Operating Revenue Contingency (Target: 1.25% of budget)	\$1,025,000	\$1,190,000 - \$1,225,000
Tuition Increase (1% = \$398,000)	4.90% \$61,070	3.00% - 5.00% \$62,900 - \$64,120
Average Net Tuition Per Student** (over all students)	\$29,100	\$26,800 - \$27,400
Total Net Tuition** (over all students)	\$40,981,300	\$41,652,000 - \$42,460,000
Discount rate	54%	55.5% - 58.3%
Unfunded discount rate	27%	28.2% - 31.7%
Funded discount rate	27%	24.1% - 27.6%
Average Net Tuition Per Student** (over matriculants)	\$28,400	\$24,900- \$25,500
Total Net Tuition** (over matriculants) (0.50% = \$134,000)	\$12,087,600	\$10,858,000 - \$11,456,000
Discount rate	61.2%	58.5% - 61.5%
Unfunded discount rate	30.4%	31.0% - 34.0%
Funded discount rate	30.8%	26.5% - 29.5%
<small>**Excludes federal support.</small>		
Endowment Payout	5.0% \$35,065,526	5.0% \$37,139,298
Annual Fund Gifts	\$3,000,000	\$2,000,000 - \$2,500,000
Life Cycle Contributions	(0.49%) \$2,419,000	(0.50%) \$2,474,000
Merit/Promotion Salary Pool for Faculty (1% = \$237,000)	3.00%	1.50% - 2.50%
Equity Salary Pool for Faculty	1.00%	0.50% - 1.0%
Merit/Promotion Salary Pool for Staff (1% = \$277,000)	3.00%	1.50% - 2.50%
Equity Salary Pool for Staff	1.00%	0.50% - 1.0%
Fringe Benefits Rate (i.e., OPE) (0.50% = \$197,000)	35.5%	35.0% - 36.0%
Room Increase (1% = \$47,000)	3.0%	2.0% - 4.0%
Board Increase (1% = \$53,000)	3.0%	3.0% - 5.0%
Budget reallocations.	\$346,0000	Not anticipated, but depends on new budget initiative proposals approved.

Proposal #	Initiative Name	Department or Budget Name	Cabinet officer	Department or Budget General Ledger Number (include all 14 digits: X-XX-XX-XXXX-XX)	Current (FY24) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Priority	Explanation	Tentative Cabinet Decision
1	Library Digital Initiative	Penrose Library	2	1-60-21-20002-5090	1,853,518	5,800	16,134	College Librarian	A	See attachment.	Funded, pending corrections and adjustments by Jeff and Alzada. There is some confusion about the way this request was formulated and the extent to which it was approved by the CDC/PDOF.
2	Science Equipment Technician	Division 3	2	1-55-19-20094-XXXX	-	60,000		Division 3 Chair	A	Hire an individual capable of managing (non-computational) science equipment and systems on campus that are used in research and teaching.	Deferred.
3	Student Labor Increase	Division 3 Biology	2	1-55-19-20075-5090	131,463		2,000	Heidi Dobson, Department Chair	A	Student labor, minimum wage increase	Funded.
4	Establishing a program budget for 3-2 Engineering	3-2 Engineering	2	1-50-29-2XXXX-XXX X			1,000	Director of 3-2 Engineering (currently John Stratton)	A	Supplies, student labor.	Funded.
5	Hire additional DSS person to meet increasing student needs	Academic Resource Center (ARC)	2	1 87 29 20930 5010	229,037	50,000		Richard Middleton-Kaplan	A	Disability Support Services Specialist (DSS). Current staffing level is unsustainable for the demand; The incoming class contains the highest number and percentage in Whitman's history of students self-identifying as neurodiverse or as having cognitive, learning, physical, or behavioral disabilities for which they need accommodations; In order to fully and holistically meet the needs of these students, we need increased staff time from a DSS Specialist.	Funded.
6	Whitman @ WSP Program	Whitman @ WSP Program	2	1-50-29-2XXXX-XXX X	-		37,400	Mitch Clearfield	A	Create an official program that encompasses Whitman's academic relationship with the Washington State Penitentiary (WSP). Honoraria for WSP Partners, student wages, books for WSP students, supplies.	Referred back to the vice president for FY25 one-time funding by way of reallocation of existing budgets.
7	Social Justice Concentration Initial Program Budget	Social Justice Concentration	2	N/A (program will begin to be offered in 2024-2025)	N/A (no current budget)		2,500	Debi Morehead (I think? Program is interdisciplinary, and Lisa Uddin is the director for 2024-2025. Steering Committee is in Divs 1 and 2).	A	Supplies, Annual Academic and Pedagogy Events	Funded.

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8	Increased software funding for Blackboard Ally and GLEAN	Academic Resource Center (ARC)	2	1 87 29 20930 5341	10,955		16,929	Richard Middleton-Kaplan, Director of Academic Support Services	A	Add two softwares: 1. Blackboard Ally, an invaluable tool for students and instructors to easily convert materials into accessible formats and to comply with principles of Universal Design. It will benefit the students the most are neurodivergent students and students with physical challenges ranging from cerebral palsy to concussions. It will save instructors and ARC staff significant time that would otherwise be spent painstakingly repairing course documents that are not accessible. 2. GLEAN will allow students to take and organize class notes in real time and then to produce transcripts or audio of those notes.	Funded.
9	Community engagement programs funding	Center for Community Services discretionary	2	1-88-43-20871-5090	17,800		40,000	Kimberly Rolfe, CCEC co-director	A	The external grant which was used to support the programs will be gone in 2024-2025. Mainly will be used for student wages	Funded.
10	Student wage increase	Student Activities - Intramurals	2	1-58-41-20125-5090	5,600		4,168	Juli Dunn	A	Increasing student labor resources directly enhances the strategic initiatives outlined in the Whitman College 2028: Transformative Learning for a Changing World document: specifically Diversity, Equity, Inclusion, Anti-racism and Access and Enhancing a Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships. Intramurals at Whitman is run by a committee of 8 students (2 from each class year) that provide the intramural offerings to campus. Intramurals adds to the vibrant campus community through program that bring students together outside of the classroom in ways that support not only community building but also physical health and wellness. Prior to COVID, Intramurals was a pay-to-play endeavor, which limited access to all students. In an effort to move away from that they have secured funding from ASWC for equipment and shirts, but are not longer able to keep up with the cost of student labor. This program provides an additional 8 jobs to campus (8 students, 3 hours per week for 25 weeks @ 16.28. Requesting an increase of \$4160). Note this budget has not increased since 2019, while minimum wage has increase from \$12 in 2019 to an expected 16.28 in 2024, a 35% increase.	Funded.
11	Funds to support Assistant Event Management	SSRA Personnel Salaries	2	1-58-41-20445-5130	37,773	9,901		Kim Chandler/Alzada Tipton	A	Assistant Event Management/Head of Club Sports position from 0.75 to 1.00 FTE	Funded.

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12	DEI Programming - Athletics	Athletics	2	1-58-41-5200			12,500	Kim Chandler	A	annual DEI visiting lecturers	Referred back to the vice president for FY25 one-time funding by way of reallocation of existing budgets.
13	SSRA Student Wages	Athletics/SSRA	2	1-58-41-20346-5090	134,000		149,135	Kim Chandler	A	Student labor, minimum wage increase	Partially funded at the level of \$40,000. The responsible staff member is advised to optimize the use of student hours within this constraint, prioritizing student labor that services the largest possible footprint of students.
14	Student wage increase	DIVIII, Biology	2	1-53-19-20075	131,463		2,000		A	Student labor, minimum wage increase	Funded.
15	Student wage increase	DIV III, Chemistry	2	1-53-19-20076	97,476		1,000		A	Student labor, minimum wage increase	Funded.
16	Student wage increase	DIV III, Physics	2	1-53-19-20081	19,468		500		A	Student labor, minimum wage increase	Funded.
17	Student wage increase	Art Sculpture	2	1-54-18-20365			1,000		A	Student labor, minimum wage increase	Funded.
18	Maxey Museum discretionary	NorthWest Museum	2	1-53-29-20005	8,765		400		A	Student labor, minimum wage increase	Funded.
19	Brain Behavior and Cognition discretionary	New; Interdisciplinary Prog. BB&C	2	1-50-29-2XXXX			7,000		A	Supplies, student labor.	Funded.
20	Art Department discretionary	Art	2	1-54-19-20059	28,126		(2,250)		A	Reduce the budget by 2250. The Adobe subscriptions will be reallocated to the central budget to the Tech. budget. Per Darlene's 11/17/2023 email instruction.	This base reduction in budget was approved.
21	Support for SSRA assistant coaches wages	SSRA Assistant coaches	2	1-58-41-20590	545,399	60,000		Kim Chandler	A	Final year of three-year funding plan to support SSRA assistant coaches wages.	Funded.
22	Assistant Debate Coach	Debate & Forensics	3	1-71-25-30423-5010	58,510	39,000		Juli Dunn	C	See attachment	Deferred.
23	Debate & Forensics	Debate & Forensics	3	1-71-25-30423-5090	58,510		15,000	Juli Dunn	A	See attachment	Deferred.
24	LEAF Funding	Student Activities	3	8-97-43-30403 - become a budgeted item			12,000	Juli Dunn	B	See attachment	Deferred.
25	OP Staff Overtime	Outdoor Program	3	1-97-43-30023-5010	49,900	5,000		Juli Dunn	A	See attachment	Deferred.
26	Lifecycle Replacement for Climbing Center	Lifecycle Replacement for Climbing Center	3	1-97-43-30217-5090	60,300		5,100	Juli Dunn	B	See attachment	Deferred.

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27	Funding for continuing counselor position that was funded by an endowment for 3 years that end this fiscal year 2023	Counseling Center	3	1-89-42-30008-5010	86,136	51,000		Deanna Ortiz	A	Many students at Whitman need counseling to be successful academically. Counseling is the only way that many students can manage the rigorous educational demands, attend class, and build the resilience to stay in school. This funding would continue a much needed counselor position for a BIPOC counselor who offers a more accurate representation of Whitman's student population, gives BIPOC students the access to a person who looks like them and therefore may have an understanding of their experiences as diverse people in a predominantly white country and school.	Deferred on account of the need to resolve vacancies in budgeted positions.
28	The Community Health/Wellness and Sexual Violence Prevention Program needs a budget.	Counseling Center	3	New Budget GL Required for Request	-		20,000	Kersten Bergstrom	A	Students need to learn how to maintain physical, emotional, social, health and wellness in order to survive and thrive at Whitman College. Healthy people in the many areas of wellness are able to succeed in their academics and the many social learning experiences in college that make them vibrant people. The SVP program is necessary to change the culture of college by teaching students appropriate behavior and preventing harm. Funding is needed for everything from campus campaigns, posters, workshops, speakers, stipends for student work, SVP training at NSO and each semester, training of students and the Asst. Dir., travel for conferences required for the Culture of Respect committee to make Whitman a prestigious Culture of Respect school.	Referred back to the vice president for FY25 one-time funding by way of reallocation of existing budgets.

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29	Climbing Center Coordinator	Student Activities	3	1-97-43-30217-5010	60,000	43,333		Juli Dunn	A	This position directly enhances the strategic initiatives outlined in the Whitman College 2028: Transformative Learning for a Changing World document: By fostering a welcoming and inclusive climbing community, this position contributes to the strategic goal of Enhancing a Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships by providing additional engagement, supervision and coordination within the outdoor program community expanding the offerings for all levels in an area of the campus that is seeing increasing use, much of which is academic. The Climbing Center Coordinator position will actively support wellness—by enhancing resources for encouraging physical activity and skill development. The Climbing Center Coordinator position will offer students the opportunity to apply practical skills and engage in experiential learning outside of the classroom, aligning with the college's commitment to experiential education. Finally, the Climbing Center Coordinator position will provide support to ensuring the college is able to maintain all its wilderness permits (critical for the continued ability to get out and about in the PNW) and will provide on site supervision for the student-instructed for-credit climbing courses that support the College's work toward Academic Excellence and Distinction. We are proposing this as a 10-month position available to recent graduate for a period of no longer than 2 years.	Deferred.

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30	Student Labor Increase (RCC Building Managers and Info Desk Students)	RCC Operations	3	1-97-42-30211-5090	28,500		23,000	Juli Dunn	A	Increasing student labor resources directly enhances the strategic initiatives outlined in the Whitman College 2028: Transformative Learning for a Changing World document: specifically Diversity, Equity, Inclusion, Anti-racism and Access. By providing additional resources for student labor in the Reid Campus Center, we would be able to afford a fully-staffed student team from August - May (including breaks when many students still utilize campus spaces) at the new minimum wage (\$16.28), which in turn will assist in providing campus jobs (~22 student jobs during the academic year) that will allow students to work on campus, which is directly correlated to campus engagement by connecting them to the thriving life on campus while at the same time helping them lessen financial barriers. The Reid Campus Center is open from 8AM-11PM, M-F and 10AM-11PM Sa-Sun, August - May. We will not be able to maintain these hours without an increase in student labor. (96 hours per week for 33 weeks @ 16.28/hr. Requesting an increase of \$23000). This budget has not been increased since 2019, while minimum wage has increased from \$12 in 2019 to an expected \$16.28 in 2024, a 35% increase)	Funded.
31	Student Activities Assistant and Admin Assist (10--> 12 mo) Position Upgrades	Student Activities	3	1-97-42-30018-5010	22,753	13,640		Juli Dunn	A	Increasing the entry-level admin position to 12 months and elevating the RCC Admin Assistant position to a Student Activities Assistant position will provide better oversight of the Student Activities and ASWC budgets, which in turn will further support the vibrant campus community by making these staff positions ones that support Whitman's aspirations to make Whitman a great place to work and an employer of choice for staff with opportunities for professional development and advancement within the unit of Student Life.	Deferred.
32	Administrative Assistant for Residence Life and Housing	Residence Life & Housing	3	1-96-81-30127-5010	60,300	28,000		Andrew Johnson	A	This request is to make this position permanent at 12-months/year, 25 hours/week (fundable through Residence Life and Housing auxiliary revenue). The position was added in August, 2023, and is currently staffed through May, 2024. Over 75% of this position is committed to handling the many financial transactions stemming from community development programming and building maintenance for 800+ students in 19 facilities across campus. Furthermore, this position allows for other positions to focus on creating a VIBRANT CAMPUS COMMUNITY through community-focused programming and responding to an increasing number of urgent personal, mental health, and housing needs.	Deferred, but there will be continuing conversations between the Dean of Students and the VPFA about this matter.

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33	Administrative/Events Assistant	Dean of Students & Conf. Events & Scheduling	3	1-90-42-30001-5010	34,905	2,000		Bridget Jacobson	A	Requesting funds to support the current salary for this position.	VPFA will fund by reallocating budget from within his division.
34	Salary Enhancements	Dean of Students - Salary Enhancements	3	Various budgets within Student Affairs	34,905	80,000		Kazi Joshua	A	Salary enhancements for Residence Life and Health & Wellness Leadership.	Funded, with specific utilization to be influenced by a forthcoming report from Keeling and Associates.
35	Expand the security staff by two patrol officers.	Security	3	1-00-59-30032-5010	83,143	79,040		Greg Powell	A	I am requesting to add two more officers at the following cost: (\$19.00/hr x 40 = \$760.00 x 52 weeks = \$39,520). This request is to fulfill the previous year's submission and ensure that there are always at least two officers per shift every day of the year.	Partially funded, i.e., funding will be provided for salary and benefits for one of the two requested incremental patrol officers.
36	New Electronic Health Record System	Health, Counseling & Athletics - Health Record System	3	Various budgets	Various		40,000	Laura Norris, Deanna Ortiz, & Kim Chandler	A	Current Health and Counseling Center systems are siloed systems greater than a decade old that require multiple inputs of duplicate information for students and staff, allows no coordination of care, increases cybersecurity risk and management of multiple systems for IT staff. Current systems are inflexible and brittle and cumbersome. New single system creates seamless continuity of care for these and Athletics care, provides single information entry, decreases risk management, adds in additional capabilities and increases reporting ability and coordination of information.	This request was erroneously entered as base. It is one-time, and will be moved over to that separate conversational thread at Cabinet. The base costs (not mentioned here) will be managed by reallocation of existing budgets within the Division of Student Affairs.
37	ATS integration with BambooHR	Administrative Recruiting	4	1-98-59-40015-5090			10,000	Telara McCullough	A	This is an annual technology software/service cost integrating more enhancements between BambooHR and our Applicant Tracking System. It offers improved efficiencies for the hiring manager and HR team such as enhanced workflow solutions, robust data reporting, and support automating applicant references. We believe the added capabilities it affords to develop and manage talent communities would create new ways for us to support and sustain candidate pipelines. We are currently looking at 2 vendors with pricing between \$6,000 - \$10,000 per year. They are Jazz HR and Hirezon (tailored for higher ed). We began the search out of a need for more robust data to analyze our hiring and DEI trends and results.	Funded.
38	Increase in student wages in Office of Human Resources	Human Resources	4	1-98-59-40003-5190	6,943		700	Telara McCullough	A	Increase in student wages due to minimum wage increase January 2024 and anticipated increase January 2025 plus increase of 20 work hours. We have two student positions working about 5 hours each plus often one student working about 20 hours for 10 weeks during the summer. 130 hours plus 130 hours plus 200 hours during the summer for a total of 460 hours @ new minimum wage for 2024 and 2025 = \$7650. Increase needed is \$700.	Funded.

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39	Facilities Operations Director	Facilities Services	4	1-94-60-40088-5010		110,000	4,000	Tony Ichsan	A	This much needed position will provide leadership to both Academic and Residence Housing Custodial, Grounds, Maintenance, and Rental Property Maintenance departments. From a total cost of ownership due in large part to the increase of square footage stewardship with the largest single addition in Whitman's history with College Creek Village and the addition of a dozen rental houses and two apartment complexes. Along with the added footprint, there has been programmatic increases, such as a Panhellenic Interest House, Third Space House, potential Fraternity Houses, and new facilities, such as the Baseball Clubhouse. This position will also be very helpful and integral as Whitman launches a Campus Framework Plan 2024-2025. Having a position that can support the operations of these areas will help student recruitment and retention, as well as faculty and staff wellbeing by maintaining an optimum learning and working environment.	Deferred.
40	Sustainability Coordinator	Facilities Services Sustainability	4	1-00-60-40780-5010		53,000		Tony Ichsan	A	This position will provide the critical support for the Sustainability Manager, especially as we begin the implementation of the Campus Sustainability Plan. Currently, as a one-person department Sustainability has been fortunate to have the support of other Facilities Services departments and student assistants. However, to move forward with Strategic Priority #6 and achieve carbon neutrality the department would require additional technical full-time staff to accomplish the College's goal. In light of the recent <i>Art and Science</i> assessment, Whitman's sustainability leadership and progress is clearly a student recruitment and retention criteria.	Deferred.
41	ABS student wage increase	ABS Discretionary	4	1-00-59-40002	59,157		13,500	Darlene Wilson	A	The Accounting and Business Services (ABS) Office traditionally only employed one student worker. Starting in FY2023, ABS took on more student workers to help us keep up on our workload while dealing with high turnover with an increase of cost of \$12k that we absorbed. ABS now employs five student workers. With expected increases in minimum wage, we are requesting an increase in our discretionary budget of \$13,500 as a true-up to cover student wages for FY2025.	Funded.
42	Custodian	Custodial	4	1-94-60-40090		36,000		Kevin Wright	A	This much needed position will provide a Custodian to fill a vacancy due to the 2020 FSR initiative. This position will provide coverage for new square footage (e.g. Baseball Clubhouse, Third Space, Panhellenic Interest House) coming online spring 2024.	Deferred.

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43	General maintenance technician	Maintenance	4	1-94-60-40089		45,000		Randy Coleman	A	This critical maintenance position will provide support to both Academic and Residence Housing and fill a vacancy due to the 2020 FSR initiative. This position will provide coverage for new square footage coming online Spring of 2024, such as a Panhellenic Interest House, Third Space House, potential Fraternity Houses, and also new facilities, such as the Baseball Clubhouse.	Deferred.
44	Vehicle Replacement #1 (one-time)	Maintenance	4	1-94-60-40089			25,000	Randy Coleman	A	Replace a 2007 van requiring engine work with a used 1/2 ton truck w/lift gate (or a new hybrid truck with cost TBD) to safely move appliances, small equipment etc. for the Small Appliance Maint. Tech	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
45	Vehicle Replacement #2 (one-time)	Grounds	4	1-94-60-40094			35,000	Jeff Jensen	A	Replace a 1992 truck with over 100,000 miles with an electric cart or used 1/4 ton truck for grounds use assigned to a Landscape Technician	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
46	Vehicle Replacement #3 (one-time)	Grounds	4	1-94-60-40094			35,000	Jeff Jensen	A	Replace a 1994 truck with over 130,000 miles with an electric cart or used 1/4 ton truck for grounds use assigned to a Landscape Specialist	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
47	Vehicle Replacement #4 (one-time)	Fleet	4	1-94-59-40006			165,000	Jeff Jensen	A	Replace a much-used and in-demand 2012 Turtle Top van with over 100,000 miles with a Turtle Top that would allow a wheelchair lift. This will create an inclusive travel arrangement with removal benches as needed to accommodate motorized wheel chair on student outings (e.g. field trips, competition.)	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
48	LED lighting replacement (one-time)	Maintenance	4	1-94-60-40089			629,931	Tony Ichan	A	This would provide the next group of buildings (e.g. HOS, SAC, Maxey) to be retrofitted with LED lighting in support of strategic priority #6. This will also reduce our carbon footprint and reduce our utility usage with ongoing lifecycle savings.	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
49	Car Sharing Initiative	Fleet	4	1-94-59-40006		19,000	80,000	Jeff Jensen	A	This ZIP car option will support strategic priority #6 and encourage less vehicle on campus by providing students an alternative and utilize vehicles only when needed. The cost provides funding for minimal staffing of the program. The College had explored this viability before the pandemic and this is an opportune time to implement this program for our students.	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million. The base component would be funded by reallocation of existing budgets within the Division of Finance and Administration.

Proposal #	Initiative Name	Department or Budget Name	Cabinet officer	Department or Budget General Ledger Number (include all 14 digits: X-XX-XX-XXXX-XX)	Current (FY24) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Priority	Explanation	Tentative Cabinet Decision
50	Student Employment Coordinator	VP Finance & Administration - Staff salary & wage budget	4	1-00-59-40001		55,000	5,000	Jeff Hamrick	A	The Division of Finance and Administration is filing this proposal on behalf of the Ad Hoc Committee on Student Employment. This committee anticipates at least one recommendation related to creating a Student Employment Coordinator role -- potentially embedded in Financial Aid, Human Resources, or the CCEC -- that would help make the entire student employment process work better for students, faculty, and staff alike. The person in this role would help with standardization of position description writing and posting practices, hiring practices, advertising student employment opportunities across the college, implementing the recommendations of the Ad Hoc Student Employment Committee, etc.	Deferred. The President would like to review the recommendations of the ad hoc student employment task force prior to considering this initiative.
51	Admission Printing and Mailing Cost increases	Admission	5	1-00-42-50001-5630	150,000		20,000	Director of Admission Operations	A	An important piece of Whitman's recruitment of prospective students is print materials (e.g., viewbook, travel brochures, postcards, mailers), which help tell Whitman's story in a way that is different from the extensive digital outreach we already have. Notably, print materials are more likely to reach parents/families, who are important influencers in the college search process. Ensuring that Whitman continues high quality recruitment using a variety of tools is critical to achieving our enrollment goals. This amount of this request is based on two factors. First, inflation. The cost of paper, specifically the paper we use for some of our printed publications, has increased. Second, our new publications are slightly heavier than in the past, which increases mailing costs. The total projected cost increase is greater than the \$20,000 request we've submitted, due to some adjustments we're making to our mailing strategy to mitigate some costs.	Funded.
52	Identity & Access Management (IAM) System (recurring costs)	Enterprise Technology	6	1-00-54-60003-5090	401,921		40,000	Mike Osterman	A	Replacement of homegrown IAM with a modern IAM solution to reduce risk, provide automation and self service tools (password reset, request(s) for additional access, etc.) See attached supporting document.	Funded.
53	Identity & Access Management (IAM) System (one-time implementation costs)	Enterprise Technology	6	1-00-54-60003-5090	401,921		150,000	Mike Osterman	A	Implementation Services costs, critical to the success and efficiency of roll out of a new IAM solution	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
54	Operationalize Zoom site license	Multimedia Development \$ Serv	6	1-00-24-60006-5090	85,530		20,000	Jon Loney	A	Since the college licensed Zoom during COVID and beyond, much of the license costs have been covered with surpluses, this request is to create permanent operating budget to support the ongoing site license for Zoom Meeting	Funded.

Proposal #	Initiative Name	Department or Budget Name	Cabinet officer	Department or Budget General Ledger Number (include all 14 digits: X-XX-XX-XXXX-XX)	Current (FY24) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Priority	Explanation	Tentative Cabinet Decision
55	Network life cycle funding increase	Network & Server Replacement	6	1-00-24-60022-5090	211,013		17,500	Kevin Kelly	A	Increase to lifecycle budget to account for new inventory associated with the Wilke computational lab as well as new hardware for the High Performance Computing Cluster where components will need replacement in 5-10 years.	Funded.
56	Instructional technology replacement budget increase	Instructional Technology Replacement	6	1-00-24-60020-5090	292,600		15,000	Robert Fricke	A	Increase to lifecycle budget to account for 24 computers added to the inventory for the Wilke computational lab.	Funded.
57	Digital signature licensing	Enterprise Technology	6	1-00-54-60003-5090	401,921		11,500	Mike Osterman	B	Currently the college utilizes SignRequest for Digital Signatures. We have about 80 licenses now and growing equalling about \$9,000 per year. Licenses are currently paid for by the departments. This would fund a site license for digital signatures and centralize the budget.	Funded.
58	Software license increase (information security)	IT Security	6	1-00-54-60034-5909	107,233		22,000	Dorcas Attah	A	License cost are increasing substantially for the Intrusion Prevention and Detection Internet firewall, the vulnerability scanning appliance, our secret server admin password management tool, and multifactor authentication licensing.	Funded.
59	Backup solution for Google	Technology Infrastructure	6	1-00-54-60002-5090	300,771		90,000	Kevin Kelly	B	As the college becomes more reliant on the suite of Google applications, there is a risk in that the data is not "backed up". While Google has redundancies in place, there is no guarantee they could not have problems. And accidental file deletion cannot currently be recovered.	Deferred.
60	Client services consultant position	Client Support	6	1-00-24-60007-5010	207,853	55,000		Robert Fricke	B	Reestablish the eliminated client services consultant position to provide backup for our endpoint management personnel that are nearing retirement.	Deferred.
61	Annual support for high performance computing from CiQ	Academic Technology Consulting	6	1-00-24-60004-5090	378,463		54,000	David Sprunger	B	We are currently utilizing CiQ to provide support for the High Performance Computing environment. In lieu of asking for a full time HPC administrator position, being able to continue to utilize CiQ will help to provide support for HPC especially as its use grows over the next several years.	Deferred.
62	Establish a card access life cycle budget		6	1-00-24-XXXX-XXX X			65,000	Kevin Kelly	B	Since card access came to campus, we have grown to over 400 card reader doors. None of this equipment has been a part of any life cycle program and some readers are 15 years old and failing. This would establish a lifecycle budget allowing for regular replacement of card reader hardware.	Funded.
63	Professional Development Increase	Multimedia Development & Serv	6	1-00-24-60006-5090	85,530		3,000	Jon Loney	B	Accommodates new addition to IMS staff	Deferred.
64	Software License Increase (ILT)	Academic Technology Consulting	6		378,463		3,200	David Sprunger	A	Increases in licensing costs, including Microsoft, Qualtrics, Solar Winds (Web Help Desk) and Endnote	Funded.
65	Adobe Creative Cloud Licensing	Academic Technology Consulting	6	1-00-24-60004-5090	378,463		9,625	David Sprunger	A	See supporting documentation	Funded.

Proposal #	Initiative Name	Department or Budget Name	Cabinet officer	Department or Budget General Ledger Number (include all 14 digits: X-XX-XX-XXXX-XX)	Current (FY24) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Priority	Explanation	Tentative Cabinet Decision
66	Software License Increases (Enterprise Technology)	Enterprise Technology	6	1-00-54-60003-5090	401,921		41,200	Mike Osterman	A	Increases to licensing for DocLocator, EMS and other vendors. Renewal of Colleague license which will now include "Experience Premium" and On-Demand Training. Also includes a 5% increase to the annual license for Colleague. See supporting documentation.	Funded.
67	Campaign	Development	7	1-91-55-70187-5300			400,000	Steve Setchell	A	Needed to complete the campaign and drive endowment, operating, and capital project revenue across all strategic priorities	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
68	Gift and Data Processing Assistant	Development - Advancement Services	7	1-92-55-70004-5090		44,000		Setchell, Vice President for Development & Alumni	A	This position will support gifty entry and data processing, especially during our CRM conversion, while freeing up prospect research and development team members to fulfill their functions in service of our major gifts program.	Subject to ongoing conversations. Possibility it might be soft-funded for a period of two years.
69	Digital Advertising	Communications	8	1-95-59-80010-5294	8-95-59-80102		50,000	Heidi Pitts	A	See supporting document.	Funded.
70	Adobe software	Communications	8	1-95-59-80001	91,260		(3,600)		A	This decrease request is connected to WCTS's "Adobe campus license enhancement initiative"	This base reduction in budget was approved.
71	Third Space Center	Inclusive Excellence	9				140,000	John Johnson	A	The Third Space Center will be coming online midway through spring semester. Renovations to the building are underway and are costly. We are requesting a one-time allocation of \$140,000.00 to help allay the renovation costs to the Division.	Funded, but conditional on the extent to which the FY24 operating surplus allocable to the Board of Trustees exceeds \$1.5 million.
72	Senior Director of Identity and Belonging	Inclusive Excellence	9		65,500	30,000		John Johnson	A	Rather than replace the vacant (as of 12/29) DEIA Project Specialist position, we are updating the role to Senior Director of Identity and Belonging. This revised position has expanded responsibilities and will require additional salary in the \$22K-\$30K range depending on qualifications per HR.	Funded.
73	Chaplain Expansion	Inclusive Excellence	9		60,703	12,450		John Johnson	A	We believe the Stuart Religious endowment would be able to absorb most of the cost associated with this expansion. We are likely within \$5,000.00 of the total needed without OPE. This would bring the Interfaith Chaplain position in alignment with other Identity and Belonging staff schedules.	Deferred.
74	Position Budget Top-Offs: Aggregated to Protect Employee Confidentiality	various	4	various		43,400		Human Resources	A	Top-off of position budgets (mostly related to new, or imminent) hires for which actual compensation is greater than the originally-budgeted amounts.	Funded.

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Library	Staff salary & wage budget	1 60 21 20002 5010		1,001,549.00		512,553
Library	OPE budget	1 60 21 20002 5030		355,550.00		
Library	Discretionary Budget	1 60 21 20002 5090		496,419.00		
Library	Staff salaries	1 60 21 20002 5130	831,803.26			
Library	Overtime	1 60 21 20002 5140	280.44			
Library	Staff wages	1 60 21 20002 5150	130,324.60			
Library	Other payroll expense	1 60 21 20002 5160	347,977.88			
Library	WC-Student wages	1 60 21 20002 5190	75,307.58			
Library	FWS - Student wages	1 60 21 20002 5195	13,665.30			
Library	Services	1 60 21 20002 5200	344,298.03			
Library	Inter-Library Loan Expense	1 60 21 20002 5288	4,380.79			
Library	Supplies	1 60 21 20002 5300	2,281.38			
Library	Comp Software/Serv un \$10,000	1 60 21 20002 5341	5,527.86			
Library	Info/Tech Equip under \$10,000	1 60 21 20002 5343	1,601.70			
Library	Communications	1 60 21 20002 5600	4,257.63			
Library	Travel and meals	1 60 21 20002 5700	7,982.15			
Library	Mileage Reimbursement	1 60 21 20002 5701	625.71			
Library	Vehicle Fuel Purchases	1 60 21 20002 5702	38.35			
Library	Local Meals	1 60 21 20002 5703	1,036.42			
Library	Domestic Airfare	1 60 21 20002 5705	3,788.92			
Library	Foreign Travel	1 60 21 20002 5720	1,915.68			

Submitted by: _____



Ping Fu

Date: _____

10/27/2023

**FY 24-25 Budget Request
(Library: 1-60-21-20002)**

To: Alzada Tipton, Provost and Dean of Faculty
From: Ping Fu, College Librarian
CC: Library Advisory Committee
Date: 23 October 2023

Dear Alzada,

Regarding FY 25 Salary and Benefits, we anticipate a couple of significant changes in FY25. Firstly, the hours for the Cataloging Assistant position will increase from 35 to 40 hours per week. Additionally, the current salary for the Scholarly Communication Librarians is slightly lower than the median salary for this position.

Our FY25 Discretionary Funds Requests were formulated based on the data presented in Table 1. Our total request for FY25 is \$512,553, representing a \$16,134 increase (approximately 3.25%) compared to the FY24 approved budget of \$496,419. We have highlighted some key changes for the FY25 budget as follows:

1. Student minimum wage will increase by 3.4%, resulting in a total request of \$96,000 for student wages, compared to \$92,000 in FY24 (see Table 1, line 5).
2. In FY24, we budgeted \$7,000 for Interlibrary Loan Services, as we previously shared the cost with Walla Walla Community College (WWCC). However, WWCC has decided not to continue cost-sharing in FY24. Consequently, we anticipate paying \$7,210 in FY25, reflecting a 3% increase (see Table 1, Line 13).
3. We plan to implement Keenious and LibKey in FY24. Keenious costs \$1 per FTE for a one-year trial, totaling \$1,500 per year. After the trial, it will be \$4,500 per year.
4. LibKey costs \$4,255, with a one-time setup fee of \$850 for Whitman College. Fortunately, the vendor is collaborating with Orbis Cascade libraries, offering a 15% discount off the list price and waiving the setup fee. Therefore, the cost for LibKey in FY24 will be \$3,617, and for FY25, it will be \$3,726 (see Table 1, Line 8 for Keenious and Line 10 for LibKey).
5. There is a significant increase in the maintenance renewal cost for KIC/Opus/BSCAN ILL Systems. In FY24, we budgeted \$5,000 for equipment and maintenance, anticipating a 20% increase in FY25, resulting in a request of \$6,000 (see Table 1, line 15).
6. Membership fees increased in FY24 due to an additional CNI membership, totaling approximately \$8,660. Consequently, our total budget request for memberships will increase to \$40,685 in FY25 (see Table 1, line 16).
7. We request \$3,500 for library outreach and instruction to promote and host outreach activities, including dinners or coffee meetings with new faculty members, considering the return to in-person interaction (see Table 1, line 37).

8. We plan to host a speaker session in the fall of 2023, estimated to cost \$3,000. This cost includes speaker fees, advertising, accommodations, travel, meals, and receptions. We intend to host two such events in FY25, requesting a total budget allocation of \$6,000 for Local Meals/Events (see Table 1, line 40).
9. We will continue to support our librarians' attendance at one professional conference, excluding library-related official travel. We have requested a total budget allocation of \$44,100 for FY25, compared to \$42,000 in FY24, anticipating a 5% increase in travel expenses due to the return to in-person meetings (see Table 1, line 41).
10. Additionally, we have also been in the process of moving databases to the Library Materials object code (See Table 1, moved from line 7 to line 33)

In total, our budget will increase by \$16,134. We believe that this discretionary budget request aligns with our mission of providing quality library services and resources to our community. We appreciate your consideration of our budget request for FY25 and look forward to discussing any questions or concerns you may have.

Thank you for your continued support.
Sincerely,


Ping Fu
College Librarian

Table 1: FY25 Budget Request (Library 1-60-21-20002)

Description	FY22 Actual	FY 23 Actual	FY24 Budgeted	Propose FY25 Increase	Total FY25 Budget Request	Notes
Student Wages	\$84,660.00	88,973	92,000	\$ 4,000	\$96,000	1/2024 min.wage increase 3.4% 1/2023 min.wage increase 8.6% 1/2022 min.wage increase 5.8%
Databases (on-going)	\$184,529.35	196,612	-	\$ -	\$0	move to materials object code
Keenious			1,500	\$ 3,000	\$4,500	Trail fee \$1 per FTE, and production \$3~\$4 per FTE
Library Systems	\$34,567.00	35,194	36,426	\$ 1,275	\$37,701	3.5% increase in FY 24, informed by
LibKey			3,617	\$ 109	\$3,726	This is a new product; FY24, \$3,617 subscription; FY25 3% increase
OCLC	\$47,920.34	48,304	51,000	\$ -	\$51,000	
Digital repository/preservation	\$18,703.54	24,658	35,000	\$ -	\$35,000	3% increase; ask FY 23 actual what is use if needed \$6,759.32 paid by gift funds; \$5,000 digital development?
ILL	\$4,948.05	4,381	7,000	\$ 210	\$7,210	split w/WWRL? (WWCC not interested FY24) +3% increase
<i>services sub-total</i>	<i>\$290,668.28</i>	<i>309,149</i>	<i>134,543</i>	<i>\$ 4,593</i>	<i>\$139,136</i>	
Equipment Maintenance	\$2,335.09	4,336	5,000	\$ 1,000	\$6,000	significant increase in the maintenance renewal cost for KIC/Opus/BSCAN ILL Systems. In FY 24, expect a 20% cost increase for the 2nd and 3rd years.Subsequent years will see the following increases: 4th and 5th years: 30%; 6th and 7th years: 40%; 8th and 9th years: 60% from the previous year's fee.
Memberships	\$29,789.80	30,038	39,500	\$ 1,185	\$40,685	3% increase; CNI added in FY 24 \$8660
Subscriptions web-	\$3,157.72	4,100	3,200	\$ 246	\$3,446	3% increase
Services Misc.	\$636.80	1,056	700	\$ -	\$700	
Computer Software	\$6,846.46	5,528	7,000	\$ 210	\$7,210	3% increase
Legal services	\$0.00	-	-	\$ -	\$0	
<i>services sub-total</i>	<i>\$42,765.87</i>	<i>45,058</i>	<i>55,400</i>	<i>\$ 2,641</i>	<i>\$58,041</i>	
Services	\$333,434.15	354,206	189,943	\$ 7,234	\$197,177	

Supplies	\$2,553.50	2,281	2,730	\$ -	\$2,730	
Info/Tech Equip <	\$1,474.77	1,602	3,000	\$ -	\$3,000	
Equipment < \$10K	\$493.35	-	-	\$ -	\$0	
Equipment > \$10K	\$0.00	-	-	\$ -	\$0	
Furniture/Fixtures	\$150.77	-	-			
	\$2,118.89	1,602	3,000	\$ -	\$3,000	
Library Materials	\$14,978.43	-	155,000	\$ -	\$155,000	moved databases (on-going) to
Postage & Shipping	\$4,754.53	3,753	3,846	\$ -	\$3,846	
Telephone	\$907.38	206	600	\$ -	\$600	
Communications	\$408.99	298	600	\$ -	\$600	
Outreach & Teaching			3,200	\$ 300	\$3,500	
Communications	\$6,070.90	4,258	8,246	\$ 300	\$8,546	
Local Meals/Events	\$1,040.36	1,036	3,500	\$ 2,500	\$6,000	We are going to host 2 speaker events every year. Outreach and instruction promotion
Travel	\$1,904.79	14,351	42,000	\$ 2,100	\$44,100	5% increase, support each librarian for one professional conference, library director for consortium meetings
TOTAL	\$445,720.66	465,671	496,419	\$ 16,134	\$512,553	3.25%

Science Equipment Technician

Proposal for 2024-25 Fiscal Year

Proposal

Hire an individual capable of managing (non-computational) science equipment and systems on campus that are used in research and teaching. Duties to include:

- Maintenance of instrumentation within the science division
- Working with faculty and vendors to set-up new instrumentation
- Develop standard operating procedures for instruments
- Handle small repairs of instruments and coordinate with vendors for larger repairs
- Monitor building infrastructure that is necessary for instrument functionality (water, compressed air, fume hoods)
- Develop training procedures for instruments and train students on the use of instruments
- Work with faculty on the use of instruments for research or teaching, including the development of new instrument-based experiments for teaching labs
- Oversee the science machine shop, the 3D printers, and the laser cutter in the Hall of Science.
- Work with faculty to fabricate demonstration equipment and classroom devices.

Skills

- Experience in instrumentation maintenance and repair. Familiarity with electrical and mechanical systems (pumps, motor, etc.) to effectively diagnose causes of instrumentation failure.
- Experience with basic fabrication. Ability to organize the various spaces that are the responsibility of this position.
- Able to collaborate with faculty and students.
- Able to teach students safe and proper use of instrumentation.

Cost

Full time position: \$60K-\$75k + OPE

Rationale

Faculty within the sciences are forced to spend our time maintaining instruments rather than using that time supporting our students through our teaching or research. Instrument maintenance is generally not the job of faculty and all of our peer institutions have an instrument technician (usually one per science department, let alone for the entire division). Additionally, because faculty do not have the bandwidth for regular instrument maintenance at the level that they should be supported, our instruments experience more significant failures that require even more time and/or money to fix. When an instrument does experience a significant failure, the downtime often directly impacts students' learning experiences, either through lab courses or research projects. While there are *many* examples of instrument failure impacting our work, a good illustration is the LC-MS instrument that failed this summer and Prof. Mark Juhasz spent an entire week of his research time working with the vendor to diagnose and solve the problem. Not only did this hinder the research experience of a number of chemistry research students this summer, but that week working on the instrument meant that Prof. Juhasz was unable to provide mentorship and training to his students during that time. A research technician will save the college money and dramatically improve the student experience. Because our current support is so far out of the norm, adding a research technician is also critical to hire and retain faculty in the sciences.

B10

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Division III - Biology	Discretionary Budget	1 55 19 20075 5090		131,463.00		135,963
Division III - Biology	Staff wages	1 55 19 20075 5150	537.50			[REDACTED]
Division III - Biology	Other payroll expense	1 55 19 20075 5160	645.70			
Division III - Biology	WC-Student wages	1 55 19 20075 5190	24,721.26			
Division III - Biology	FWS - Student wages	1 55 19 20075 5195	2,857.98			
Division III - Biology	Services	1 55 19 20075 5200	11,018.38			
Division III - Biology	Supplies	1 55 19 20075 5300	68,613.83			
Division III - Biology	Comp Software/Serv un \$10,000	1 55 19 20075 5341	381.45			
Division III - Biology	Info/Tech Equip under \$10,000	1 55 19 20075 5343	23.95			
Division III - Biology	Equipment under \$10,000	1 55 19 20075 5513	26,505.98			
Division III - Biology	Communications	1 55 19 20075 5600	2,030.34			
Division III - Biology	Travel and meals	1 55 19 20075 5700	2,588.45			
Division III - Biology	Mileage Reimbursement	1 55 19 20075 5701	518.76			
Division III - Biology	Local Meals	1 55 19 20075 5703	3,297.62			
Division III - Biology	Foreign Travel	1 55 19 20075 5720	-2,315.57			

→ 26,721
(+\$2,000)

→ 71,113
(+\$2,500)

Submitted by: Heidi Ewald

Date: Nov 9, 2023

WHITMAN COLLEGE

6 November 2023

Office of the Provost and Dean of the Faculty
Whitman College

Rationale for request for increase in base discretionary budget for the Department of Biology, 2024-25

We are requesting an increase of \$4,500. This is to cover two major increases in our needs:

1) **\$2,500 increase in lab supplies** arising from our redesign of the introductory course series, which will consist of two courses (Biology 101 + 101L and Biology 102 + 102L) and will take effect in Fall 2024.

Biology 101L is estimated to cost \$8,000 per year, Biology 102L 4,460; this totals \$12,460, which is \$2,000 more than our current budget for the introductory courses (\$10,400). We added to this total \$500 to allow flexibility in purchasing live cultures for the Biology 102 labs.

2) **\$2,000 increase in total wages of student Teaching Assistants** for our labs across all of our courses, mostly due to increase in WA minimum wage and increase in Tas for labs in Biology 101L (more sections will be taught per year than its the current equivalent Biology 112).

Submitted by Heidi E M Dobson
Chair of the Biology Department

Rationale for Budget Request

3-2 Engineering Program, November 2023

John Stratton, 3-2 Engineering Program Director

The accompanying spreadsheet outlines a request for a standing budget for the 3-2 Engineering program. The general purpose of this budget is to avoid burdening other campus or departmental budgets with expenses for the support of the 3-2 Engineering program, and to provision for various activities primarily for the benefit of the students in the program, expecting that participation will be maintained at 8-10 students per class year. Together, these funds will support activities to reduce the effort required of pre-major and program advisors to support students in the program.

The challenges of academic advising for the program has been repeatedly identified as a weak point by current and former students. Better supporting students through providing information to undeclared students and enabling a plurality of program advisors will significantly improve the student experience and support the strategic priority of academic excellence and a strong launch into their immediate life after Whitman, which for them will be in an engineering program at a partner institution. Funds to entice students to participate in group advising activities will provide support to undeclared students that do not feel adequately supported by their premajor advisers, and provide support to advisors in the program by reducing the amount of time needed in individual advising meetings.

These resources will also help students in the program feel less isolated or disconnected. Several students in the program have reported that they do not know other students in the program, and that they lack the shared experiences with their incoming classmates by facing their “last year” at Whitman out of sync with their peers. Funding for community building within the 3-2 Engineering program cohorts supports the strategic priority of building a vibrant campus community for these students.

Communications: \$50.00

- A nominal budget for printed copies of information sheets and other advising materials for distribution to prospective and current students

Local Meals: \$750.00

- Pizza for 4-5 student info sessions a year at roughly \$75.00 per session. These sessions should reduce the amount of time required of advisors in the program in one-on-one advising meetings, and help students in the program get to know each other a bit more. Specific info sessions include:
 - 1-2 “majors meetings” for declared pre-engineering students in their third year to share information and answer questions about the transfer application process

- Annual info session with a representative from a partner institution about their program for all interested students, faculty and staff
- An info session each semester targeted towards undeclared students with questions about 3-2 Engineering and how to get/stay on track for that program with their upcoming course selections
- \$75 for refreshments for about one lunch meeting a year for 3-2 Engineering Advisors when all other potential meeting times are unavailable.
- \$300 for an end-of-year celebration for students finishing their last year at Whitman before transferring to a partner institution

Supplies: \$200.00

- Budget for apparel or other small items for building community and belonging among the students declaring and on track to complete the engineering program

ARC 2024 Disability Support Services Specialist Hire Request

3 November 2023

Account Number 1 87 29 20930 5130

Current Budget: \$229,037

Requested increase: \$50,000

Rationale: This request is for a second, full-time Disability Support Services (DSS) Specialist.

The following points support the request:

- Students seeking accommodations must have access to an on-campus, student-facing, supportive presence in the form of an additional DSS Specialist.
- Current staffing level is unsustainable for the demand. The current caseload of 450+ is nearly twice the recommended industry standard of 250. An additional DSS Specialist is required to reduce the workload to a manageable, healthy, sustainable volume and pace.
- In the last two weeks alone, we have had more than 30 requests for new, renewed, or modified accommodations. Each new request absorbs several hours of staff time: initial contact, an hour-long intake meeting, gathering and reviewing documentation, possibly circling back for more documentation, determining accommodations, communicating with faculty, and in some cases holding ongoing weekly check-in meetings.
- The incoming class contains the highest number and percentage in Whitman's history of students self-identifying as neurodiverse or as having cognitive, learning, physical, or behavioral disabilities for which they need accommodations. We have an ethical obligation to support these admitted students who are among our most vulnerable and who have complex, intersecting needs affecting their learning and physical and emotional health. With the incoming class changing, ARC demand is increasing, and ARC budgeting must keep pace.
- Of all places, the ARC should be the last place on campus where students feel like they are just being processed. We are a human-centered office dedicated to helping the most complicated of humans on this campus. Yet the current level of staffing almost requires that students be hurried through the process. In order to fully and holistically meet the needs of these students, we need increased staff time from a DSS Specialist. Right now, we have a gap in our ability to meet student needs.
- With the departure of Antonia Keithahn and restructuring of the ARC, we went from 1.5 FTE DSS experts to 1.0. We have discovered that Antonia's 1.0 consisted of unsustainable extra hours that actually add up to far more than 1.0. The demand and pace are arguably detrimental to the health of any single person attempting to carry the job.

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities #1: Academic Excellence and Distinction; #2 DIEAA; #4: Strong Launches After Whitman; and #5: Connecting Whitman, Walla Walla, and the World.

All students admitted to Whitman deserve an equitable opportunity to succeed, to achieve academic excellence and distinction, to have access to learning materials and supports that fulfill

their accommodations, and to build strong academic and ethical preparation for their launches. As the learning researcher Vincent Tinto has said, “Access without support does not equal opportunity.” At a time of increasing student need and changing incoming class profile, an understaffed DSS office risks leaving the most complex, needy, and vulnerable admitted students without adequate support for their legally mandated accommodations.

Does the request directly support health and safety? Yes. This is true in two ways. First, as noted in the last bullet above, the current demand and pace are arguably detrimental to the health of a single individual attempting to fulfill the job. Second, the psychological, emotional, and sometimes the physical health of students seeking accommodations is put at risk, and can quickly deteriorate, if their legally mandated accommodations are not fulfilled and supported in a reasonable amount of time.

Does the request mitigate cost, particularly of large losses? Yes. The cost of a lawsuit would be immense if Whitman were sued for non-compliance with ADA regulations or failure to provide accommodations or engage in a thorough interactive process. We have gaps in past documentation which we are doing our best to remedy, but we need additional staff time in order to make sure that all of our files are in order.

Does the request reduce future costs? Yes, in terms of reduced staff sick time and burnout from working at an unrelenting and unsustainable pace that is not conducive to health or to work-life balance.

Can the request be scaled down: Yes. A 0.75 or 0.5 FTE position could work. It is most crucial that this position be on-campus rather than remote.

Proposal: Creation of the “Whitman @ WSP Program”

Mitch Clearfield, Nov. 2023

I am submitting this proposal to create an official program that encompasses Whitman’s academic relationship with the Washington State Penitentiary (WSP). This would formalize the work that others began and that I have already been doing there since 2019, and put in place a structure and budget to continue expanding that collaboration.

If this request is approved, I will separately submit a proposal for the creation of a Directorship position for the program, with specific responsibilities for supporting new faculty and overseeing the program. I will also request to be the inaugural Director of this program, and anticipate being willing to continue in that role for the foreseeable future.

Background and Context

- Whitman’s relationship with WSP goes back at least to the 1970s, with a lot of variation over the years.
- Classes that combined “outside” students (from Whitman’s campus) and “inside students” (incarcerated at WSP) began (I think) in Spring 2016, with one offered 8 of the next 9 semesters until the pandemic interrupted. After several false-starts, I was finally able to resume such classes in Fall 2022.
- For each class, I had two outside students as paid course assistants. They helped facilitate groups’ discussions during class, provided peer support for outside students, and joined me for weekend “study hall” meetings to provide support for inside students. In addition to benefiting the class, it was a fantastic opportunity for them to deepen their engagement with the material and with the environment.
- In 2023 I was also approved for the first time to run a combined summer reading group, with outside students and faculty along with inside folks who took my class this past spring.
- That reading group has continued this semester, with some old and some new participants (both inside and outside). Meanwhile, my current class is in a different part of the prison.
- By DOC policy, each class and reading group requires at least one WSP staff partner, to handle all of the administrative procedures at WSP and to escort the group for each class.
- There is great interest among the incarcerated populations in those two parts of the prison for a greater number and variety of classes, as well as other forms of intellectual engagement such as reading groups and lecture series.
- There is more than enough interest among Whitman students to support a greater number and variety of combined classes. This summer, I met with 6 other Whitman faculty who are concretely interested in developing such classes and offering them within the next several years.

- There has also been a strong resurgence of interest among members of the Whitman community for other forms of involvement at WSP. I am aware of: one senior thesis and one class project last year that directly engaged with WSP; several students and one staff member who are collaborating with folks at WSP through the STAR Project and Black Prisoners' Caucus; one student and one staff member who would like to offer new program opportunities at WSP; and quite a number of students, faculty, staff, and administrators who have attended recent cultural events.

Proposed Plans for the “Whitman @ WSP Program”

- 2 combined classes per semester, drawn from a range of departments and programs
- at least 1 ongoing combined reading group, that can also serve as a body to work with faculty who are developing new classes to offer at WSP
- other academic opportunities for incarcerated folks, such as lecture series and art or writing workshops
- ongoing volunteer opportunities for folks from campus, both directly through WSP and within the structures of other organizations such as the STAR Project
- continued support of WSP cultural events by the campus community, perhaps with particular connections between relevant campus affinity groups and the planners of those cultural events

NOTE: I met recently with Superintendent Rob Jackson and Associate Superintendent Sandi Jacobson, and they are fully supportive of these expansions of the partnership with Whitman.

Proposed Budget

per course: \$8300

\$4000 for WSP staff partner

\$1500 for books and materials for incarcerated students

\$300 for food for the final meeting

\$2500 for outside-student course-assistants (*if desired by each instructor*)

reading group each semester: \$2100

\$1500 for WSP staff partner

\$500 for books for incarcerated participants

\$100 for food for the final meeting

other academic activities (lecture series, art/writing workshops, etc.)

no additional costs anticipated

TOTAL = \$37,400 annually

Alignment with Strategic Priorities

#1 – Academic Excellence and Distinction: Strongly Aligned

Combined classes are clearly a “high impact practice,” and combined reading groups share important aspects of that (with less workload). While such classes are not unique to Whitman, they are unusual across U.S. higher ed – and even large universities generally have only occasional offerings, and generally only related to the field of criminology. It would be quite distinctive for a SLAC to have such a robust and wide-ranging set of offerings.

Most certainly, this program would “leverage our unique location to develop distinctive curricular and programs of study that will be compelling to current and future students.” Incarceration in particular is identified as one of the “crucial emerging issues” with which Whitman’s location enables us to engage.

Having such a wide range of classes offered at the Penitentiary would “[b]roaden experiential and community-engaged learning opportunities across the curriculum.”

Finally, by necessity all classes taught within the Penitentiary would practice “inclusive pedagogy [and] universal design.”

#2 – Diversity, Equity, Inclusion, Anti-Racism, and Access: Strongly Aligned

The website’s description of this priority begins by stating: “We want our college to reflect the diversity of the nation...” There are nearly two million incarcerated people in our country, and so a robust Whitman @ WSP Program would expand our student body to include that otherwise excluded segment of the population. As the website goes on to state, doing so is not only a “moral imperative[,]” it is necessary as part of “preparing all students for lives of purpose and impact.”

As well, combined classes and reading groups at the Penitentiary are sites of deep engagement across many dimensions of difference, which would help students develop important skills and mindsets related to inclusivity, which could in turn be beneficial for Whitman’s “institutional culture, climate, and community.”

#3 – Vibrant Campus Community: Somewhat Aligned

Since classes and reading groups at the Penitentiary are by definition not on campus, I don’t think the Whitman @ WSP Program can be strongly aligned with this strategic priority.

Nevertheless, I believe such a program could contribute to that priority. The explanation of this priority emphasizes the importance of “teams with a diversity of voices and perspectives, collaborating,” and says that Whitman “will elevate the importance of constructive civil discourse, where honest conversation from different points of view is valued, and leads to deeper understanding and creative collaboration.” Those are inherently the focus of any combined course or reading group.

#4 – Strong Launches into Life after Whitman: Somewhat Aligned

The website's explanation of this strategic priority emphasizes connections to businesses, nonprofits, graduate programs, and individuals who might be able to assist students in their career goals. A robust Whitman @ WSP Program wouldn't directly do those things (assuming that few if any students will want careers in the Department of Corrections).

But the Whitman @ WSP Program would still help contribute to students' preparedness for life after Whitman in important ways. Most directly, it does provide experiences that are not otherwise available on campus, for students who are interested in careers in law, public policy, social work, mental health, and other related fields.

More broadly, the elements of the Whitman @ WSP Program would be squarely in line with the goal of "provid[ing] new ways for students to learn and prepare for a rapidly evolving professional landscape." Combined classes and reading groups foster communication, understanding, and close collaboration across differences of background and perspective – all of which are essential skills and mindsets in contemporary workplaces.

#5 – Connecting Whitman, Walla Walla, and the World: Strongly Aligned

The Penitentiary is a dominant presence within the Walla Walla Valley, and Whitman could not legitimately "seek[] to make the most of the unique strengths of our region and communities" without partnering with the Penitentiary as fully as possible. Combined classes and reading groups provide a unique opportunity for participating students to gain perspective on a significant institution within our community, and within our society as a whole. That perspective can then be shared through further conversations those students have, both informally and in their other classes.

But it must also be stressed that the Whitman @ WSP Program would be fully reciprocal. Just as it benefits students on campus, so does it benefit the incarcerated students and reading group participants, who receive course credit as well as the intellectual, emotional, and personal value of such academic engagement. There are also indirect benefits to other incarcerated people and to the staff who work there, through the ways that academic engagement can help incrementally to shift the prison culture in those housing units. Finally, higher education in prison has been demonstrated to reduce recidivism, providing benefits to the taxpayers and broader outside communities in the state.

To: Qi Jia; Alzada Tipton

Date: November 3, 2023

Subject: Budget Line for New Social Justice Concentration Program

The Social Justice Concentration requests a **\$2500** budget for the 2024/2025 Academic Year, broken down into the following items:

<i>Supplies</i>	:	\$500
<i>Advertising/Info and Student Social Programming:</i>		\$600
<i>Academic and Pedagogy Events:</i>		\$1400

Rationale:

The Social Justice Concentration is a new academic program at Whitman, starting in 2024-2025, and this is our first budget request. We are requesting the initial budget above to fund three main priorities. First, it's imperative that we have resources to advertise the new program. This will include some supply money for posters/flyers and for informational materials that will introduce students to the concentration. We also hope to host 1-2 events where students can learn about the program, meet affiliated faculty, and talk with one another, and would like to be able to provide light apps/refreshments for those events to help attract student interest. Second, we will need some supplies for teaching the intro course, as well as possibly for affiliated faculty who are hoping to assign materials that put their current course offerings in more direct conversation with the intro course material. Finally, we hope to host a visiting speaker or educator using the existing VE grant, but are asking for some additional money to host a workshop, film screening, or other social justice education event, as well as potentially to make the honorarium larger and enable us to invite a more prominent VE speaker. We see these events as important for creating a faculty community around the concentration in its first years as well as facilitating student engagement with social justice practice and engagement beyond those students who take the Introduction to Social Justice course.

The specific line items above are based on affiliated departments' experience of the costs of similar events.

Submitted By: Math E. Best Date: 11/3/2023
Math Best on behalf of
Social Justice Planning committee

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Academic Resource Center	Staff salary & wage budget	1 87 29 20930 5010		229,037.00		
Academic Resource Center	OPE budget	1 87 29 20930 5030		81,308.00		
Academic Resource Center	Discretionary Budget	1 87 29 20930 5090		92,415.00		109,344.00
Academic Resource Center	Staff salaries	1 87 29 20930 5130	161,485.59			
Academic Resource Center	Overtime	1 87 29 20930 5140	6,356.22			
Academic Resource Center	Staff wages	1 87 29 20930 5150	34,295.54			
Academic Resource Center	Other payroll expense	1 87 29 20930 5160	72,863.67			
Academic Resource Center	WC-Student wages	1 87 29 20930 5190	58,261.26			
Academic Resource Center	FWS - Student wages	1 87 29 20930 5195	12,082.39			
Academic Resource Center	Services	1 87 29 20930 5200	5,009.00			
Academic Resource Center	Supplies	1 87 29 20930 5300	9,879.82			
Academic Resource Center	Comp Software/Serv un \$10,000	1 87 29 20930 5341	10,955.29			
Academic Resource Center	Furniture and fixtures	1 87 29 20930 5515	109,121.78			
Academic Resource Center	Communications	1 87 29 20930 5600	5,318.01			
Academic Resource Center	Local Meals	1 87 29 20930 5703	78.42			
Academic Resource Center	Events	1 87 29 20930 5742	1,467.97			

109,344-924,115=16,929

Submitted by:

Rachael Matthews-Kaplan

Date:

11/3/2023

ARC 2024 Software Budget Request

3 November 2023

Account Number 1 87 29 20930 5341

Current Budget: \$10,955

Requested increase: \$16,929

Rationale: Our current budget covers our annual license for Kurzweil (\$4,000 per year) and approximately half of Blackboard Ally (\$12,955 with tax for one year; \$12,621 pre-tax for the discounted 3-year-renewal rate for 2024).

Kurzweil helps students who have reading difficulties with reading comprehension and allows them to take notes and create outlines on assigned reading materials.

Blackboard Ally has proven an invaluable tool for students and instructors to easily convert materials into accessible formats and to comply with principles of Universal Design. With additional professional development for instructors from ARC, instructor usage would increase; student usage is already high. Among the students who benefit most are neurodivergent students and students with physical challenges ranging from cerebral palsy to concussions, but as with so many ADA compliance modifications, everyone benefits from the increased accessibility. Blackboard Ally also saves instructors and ARC staff significant time that would otherwise be spent painstakingly repairing course documents that are not accessible.

In the past, ARC had a gift budget could be put toward these efforts (as the gift was intended to support dyslexic students). We no longer have those funds, however. During 2022-2023, the Educational Technology branch of WCTS contributed \$2,000 of its budget to offset part of the cost. In 2023-2024, we will overrun our budget in order to continue the contract. Our request for 2024-2025 will allow us to build Blackboard Ally into the baseline budget so that we do not have to scramble for funds from gifts, the provost's budget, and WCTS each year in order to provide this essential tool for ensuring ADA compliance and accessible texts.

Our request also includes baseline funding for the software GLEAN. GLEAN allows students to take and organize class notes in real time and then to produce transcripts or audio of those notes. In addition to benefitting all students, GLEAN is especially valuable for students who have difficulty with note taking and students with learning disabilities or cognitive differences. GLEAN will also save us hours of staff time in the cumbersome process of finding and hiring note takers; save the cost of paying note takers; eliminate all the problems attendant on note takers, such as note takers missing class or not getting notes to students or not taking notes in a way that is useful to the recipients; eliminate unevenness of quality in notes among note takers; allow us to measure whether students are actually accessing and making use of the notes they have requested; and above move the receiving students from passive recipients of someone else's notes into active agents in their own learning who can shape the notes themselves.

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities #1: Academic Excellence and Distinction; #2 DIEAA; #4: Strong Launches After Whitman; and #5: Connecting Whitman, Walla Walla, and the World.

As Whitman’s incoming classes reflect the challenges endured by pandemic-era students, and an increasing percentage of neurodivergent students and students with physical and cognitive disabilities, we have an obligation to make course materials as accessible as possible. “Access without support does not equal opportunity,” as learning researcher Vincent Tinto has said, and these software programs offer essential supports for our most vulnerable and needy students—and, as with many modifications originating out of rights of access, improved opportunity for all students.

Does the request directly support health and safety? Yes. It supports the psychological health of vulnerable students who already wrestle with learning challenges, decreasing their stress during learning, and provides access to learning materials for students with physical challenges ranging from low vision to temporary injury accommodations to chronic illness.

Does the request reduce future costs? Some costs, yes, though not directly enough to offset the expenditure. Costs of paying note takers will be eliminated, and there will be significant cost savings in reducing staff hours correcting inaccessible, non-compliant course materials and in the hiring and management of student note takers.

Can the request be scaled down: Yes. The figure of \$12,263 for GLEAN includes a live captioning feature; eliminating that feature would reduce the cost by \$2,813 to \$9450. We can also save several hundred dollars on the annual Blackboard Ally license fee by agreeing to a five-year commitment.

CURRENT BUDGET FOR SOFTWARE:	\$10,955
TOTAL EXPENDITURES REQUESTED: KURZWEIL:	\$3000
BLACKBOARD ALLY:	\$12621 + tax
GLEAN:	<u>\$12263</u>
TOTAL:	\$27,884
MINUS CURRENT BUDGET FIGURE:	<u>\$10,955</u>
REQUESTED INCREASE:	\$16,929

Memorandum

DATE: 11/3/2023

To: Provost & Dean of Faculty, Alzada Tipton
Committee of Division Chairs
Budget Advisory Committee

From: Kim Rolfe & Noah Leavitt, co-directors of the CCEC

RE: Budget initiative proposal

We respectfully submit the following budget requests for consideration for the FY 2024-25 budget. Supporting documentation is included with the budget breakdowns.

Priority #1 – Increase Center for Community Service discretionary budget (\$49,440) to allow continuation of current Community Engagement programs. Past funding has included \$39K in grant funding that has been used within the set grant timeline. Building support for these programs into our base budget will solidify the long-term sustainability of these important programs that address 5 of the 6 strategic priorities, with strong alignment to priorities #4 & #5. (supporting budget breakdown, page 3)

Priority #2 – Increase CCEC salaries budget to adjust Community Engagement Coordinator position from .75 FTE to 1.0 FTE with respective salary increase (\$11,358). The anticipated introduction of day-long excursions into the first-year orientation program will exceed the capacity of our current staff. Extending this position to a year-round 1.0 FTE position will ensure the ability to better manage all existing academic-year programs and launch any new orientation efforts. This request addresses the same strategic priorities as above.

Priority #3 – Increase CCEC discretionary budget to ensure CCEC staff have access to professional development and new learning. The CCEC discretionary budget has not increased since its inception in 2011, although the staff has increased in size from 5 to 14. Investing in the knowledge and growth of our team is critical to maintaining an engaged staff and ensuring responsive and relevant resources for students. With little ability to increase staff salaries at the level of inflation, this type of investment will directly address priority #3 with indirect connections to priorities #4 & #5.

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Center for Community Services	Discretionary Budget	1 88 43 20871 5090		17,800.00		46,624.00
Center for Community Services	Other payroll expense	1 88 43 20871 5160	596.57			
Center for Community Services	WC-Student wages	1 88 43 20871 5190	33,025.19			
Center for Community Services	Travel and meals	1 88 43 20871 5700	128.25			

2023-2024 approved budget is 23,513, not 17800 as this spreadsheet shows. See the screen shot below

Priority 1

The request should be 49,440+23,513=72,953

Submitted by: 

Date: 11/3/2023

U

1-88-43-20871-
5090 Center for
Community
Services :
Discretionary
Budget

\$23,513.00

CCEC Community Engagement programs

Proposed budget AY 2024-2025

Program Name	Line item explanation	Budget	Current Source(s)		Number of students impacted
Community Fellows	educational awards per Fellow	\$39,000.00	Sherwood Trust endowment	\$39,000.00	12 fellows @ \$3250 ea
	program/operation expenses	\$1,000.00	Sherwood Trust endowment	\$1,000.00	
CE Volunteer programs	programming budget for 8 CE programs	\$16,000.00	Center for Community Service endowment	\$14,000.00	185+ volunteers
CE Student Leadership team	student wages for leadership of 8 programs	\$58,240.00	Center for Community Service disc. budget	\$16,800.00	20 paid student leader positions
					1400+ participants
Additional operational expenses	Walla Walla 101, WW Family Gift Drive, Spring Into Walla Walla event, Tri-College Community Day, volunteer recruitment & appreciation, Community Partner appreciation	\$5,000.00			
Transportation	CE van maintenance and fuel	\$1,000.00	Center for Community Service disc. budget	\$1,000.00	
		\$120,240.00		\$71,800.00	

Note: Previous FY budgets have included \$39K in grant money from the Carrie M. Welch & Stubblefield Charitable Trusts. Those grants were spent in accordance with their timelines and are not available after FY24.

Total CE budget	\$120,240.00		
current CE discretionary budget	\$17,800.00		
current CE endowment payout (avg.)	\$14,000.00		
Sherwood Trust endowment payout (avg.)	\$40,000.00		
2024-25 budget shortfall	-\$48,440.00		

Priority II

Total	Department Number	GL#	2024 FTE	2024 approved salary	requested	requested salary increase
Community Engagement Coordinator	20868	1-88-42-20868-5130	0.75	\$ 34,072.00	1.0	\$ 11,358.00

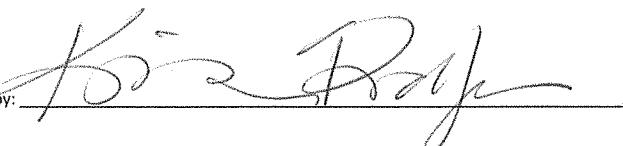
**Coordinator salary increase does not include any cost of living or merit increase earned in 2023-24*

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Career & Comm Engagement Ctr	Staff salary & wage budget	1 88 42 20868 5010		532,913.00		
Career & Comm Engagement Ctr	OPE budget	1 88 42 20868 5030		189,184.00		
Career & Comm Engagement Ctr	Discretionary Budget	1 88 42 20868 5090		63,123.00		484,481.00
Career & Comm Engagement Ctr	Staff salaries	1 88 42 20868 5130	421,796.07			
Career & Comm Engagement Ctr	Overtime	1 88 42 20868 5140	5,035.16			
Career & Comm Engagement Ctr	Staff wages	1 88 42 20868 5150	88,783.88			
Career & Comm Engagement Ctr	Other payroll expense	1 88 42 20868 5160	186,818.49			
Career & Comm Engagement Ctr	WC-Student wages	1 88 42 20868 5190	46,545.22			
Career & Comm Engagement Ctr	Services	1 88 42 20868 5200	23,234.49			
Career & Comm Engagement Ctr	Supplies	1 88 42 20868 5300	12,472.63			
Career & Comm Engagement Ctr	Comp Software/Serv un \$10,000	1 88 42 20868 5341	823.93			
Career & Comm Engagement Ctr	Info/Tech Equip under \$10,000	1 88 42 20868 5343	236.31			
Career & Comm Engagement Ctr	Equipment under \$10,000	1 88 42 20868 5513	668.96			
Career & Comm Engagement Ctr	Communications	1 88 42 20868 5600	11,402.69			
Career & Comm Engagement Ctr	Travel and meals	1 88 42 20868 5700	4,547.89			
Career & Comm Engagement Ctr	Local Meals	1 88 42 20868 5703	4,286.87			
Career & Comm Engagement Ctr	Domestic Airfare	1 88 42 20868 5705	1,009.23			
Career & Comm Engagement Ctr	Events	1 88 42 20868 5742	8,945.88			

the 2023-2023 approved budget is 70,541, not 63,123 as this budget sheet shows. See the screen shot below

Priority III for staff professional development

84,481-63,123=21,358 increase request

Submitted by: 

Date: 11/3/2023

^ 5090

\$70,541.00

Discretionary Budget

U

1-88-42-20868-

\$70,541.00

5090 Career &

Comm

Engagement Ctr :

Discretionary

Budget

Provost & Dean of the Faculty

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Discretionary Budget amount	Personnel costs without OPE	Non-personnel costs	Responsible staff person or position	Priority
	Total for all pages				45,901	207,635		
1	SSRA Discretionary Budget	SSAR	1-58-41-20108		9,901		Kim Chandler	A
2					36,000		Kim Chandler	A
3						20,000	Kim Chandler	A
4						12,500	Kim Chandler	A
5						6,000	Kim Chandler	A
6						149,135	Kim Chandler	A
7						20,000	Kim Chandler	B
8								
9								

Provost & Dean of the Faculty

Memo or justification

1	1	Assistant Event Management/Head of Club Sports position from 0.75 to 1.00 FTE
2	2	Volleyball and men's soccer to FT positions
3	3	ARMS software platform for recruiting, facility scheduling and campus
4	4	annual DEI visiting lecturers
5	5	Annual Professional development for SSRA staff, Sarah Bell and Al Reiser
6	6	Student labors
7	7	Two Cameras
8	8	
9	9	

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Division III - Chemistry	Discretionary Budget	1 55 19 20076 5090		97,476.00		
Division III - Chemistry	Other payroll expense	1 55 19 20076 5160	579.88			
Division III - Chemistry	WC-Student wages	1 55 19 20076 5190	16,733.86			
Division III - Chemistry	FWS - Student wages	1 55 19 20076 5195	1,990.18			
Division III - Chemistry	Services	1 55 19 20076 5200	8,108.73			
Division III - Chemistry	Supplies	1 55 19 20076 5300	58,207.70			
Division III - Chemistry	Comp Software/Serv un \$10,000	1 55 19 20076 5341	10,241.06			
Division III - Chemistry	Info/Tech Equip under \$10,000	1 55 19 20076 5343	275.61			
Division III - Chemistry	Computer under \$10,000	1 55 19 20076 5511	600.72			
Division III - Chemistry	Equipment under \$10,000	1 55 19 20076 5513	10,883.24			
Division III - Chemistry	Communications	1 55 19 20076 5600	3,659.17			
Division III - Chemistry	Travel and meals	1 55 19 20076 5700	3,332.20			
Division III - Chemistry	Vehicle Fuel Purchases	1 55 19 20076 5702	117.23			
Division III - Chemistry	Local Meals	1 55 19 20076 5703	4,841.25			
Division III - Chemistry	Domestic Airfare	1 55 19 20076 5705	2,340.90			
Division III - Chemistry	Events	1 55 19 20076 5742	368.08			
Division III - Chemistry	Institutional aid	1 55 19 20076 5800	250.00			



WHITMAN COLLEGE

Dalia Biswas
Associate Professor and Dept. Chair
Department of Chemistry
345 Boyer Ave.
Walla Walla, WA 99362
(509) 527-5953
rokhsad@whitman.edu

Date: Nov. 3, 2023
To: Provost & Dean of Faculty, Committee of Division Chairs
From: Dalia Biswas
RE: 2024-2025 Budget Request

The Chemistry Department has two areas where we are asking for an increase in our budget. The requested increases are based on the projected expenses from 2023-2024. The increased budget amounts do not provide for any additional supplies or student employment hours; these merely allow us to avoid cuts.

High priority – maintain existing student jobs (no increased hours or new positions):

Minimum wage will increase by 3.4 % (from \$15.74 in 2023 to \$16.28 in 2024), which means more funds will be needed to maintain existing levels of student employment in the department. Our budget request includes an increase of 3.4% (~ \$16248 projected student wages in 2023-24) to support student wages (an amount commensurate with the average minimum increase for the upcoming year). This will maintain the existing number of positions and hours for students working as laboratory assistants in introductory lab courses (gen chem and organic), drop-in tutors (6-student hours per week), and a modest number of hours each week for students who assist with teaching lab preparation. I note that these positions provide resumé-friendly work experiences that demonstrate leadership, teaching ability, and/or laboratory skills. We continue to follow best practices of advertising positions broadly and hiring work-study-eligible students wherever possible.

High priority – supplies and chemicals for laboratory courses:

We have continued to experience continued increases in the cost of lab supplies and hazardous shipping fees for our laboratory courses. In 2022-2023, we spent ~ \$58208 on chemicals and supplies for our laboratory courses. Our projected expense for 2023-24 was \$61736. We estimate that costs for chemicals and supplies will increase by approximately ~ 6% next year, and we are requesting an additional **\$3704**.

The total requested change to our budget allocation is based on the requested budget in 2023-24:

Student wages: \$552
Lab chemicals and supplies: \$3704
Total: \$4257

All other requested amounts are unchanged from the 2023-2024 budget requests.

Object	Account Number	2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2023/2024 Requested Budget	2024/2025 Requested Budget
Discretionary Budget	1 55 19 20076 5090	\$ 94,460.17	\$97,476.00		\$ 106,311.35	\$ 110,567.97
Other payroll expense	1 55 19 20076 5160	\$ 579.88				
WC-Student wages	1 55 19 20076 5190	\$ 16,733.86			\$ 15,156.53	\$ 15,671.85
FWS - Student wages	1 55 19 20076 5195	\$ 1,990.18			\$ 1,091.40	\$ 1,128.50
Services	1 55 19 20076 5200	\$ 8,108.73			\$ 2,332.30	\$ 2,332.30
Supplies	1 55 19 20076 5300	\$ 58,207.70			\$ 61,736.49	\$ 65,440.67
Comp Software/Serv un \$10,000	1 55 19 20076 5341	\$ 10,241.06			\$ 8,456.31	\$ 8,456.31
Info/Tech Equip under \$10,000	1 55 19 20076 5343	\$ 275.61			\$ 516.17	\$ 516.17
Computer under \$10,000	1 55 19 20076 5511	\$ 600.72			\$ 1,541.34	\$ 1,541.34
Equipment under \$10,000	1 55 19 20076 5513	\$ 10,883.24			\$ 6,920.74	\$ 6,920.74
Communications	1 55 19 20076 5600	\$ 3,659.17			\$ 5,439.82	\$ 5,439.82
Travel and meals	1 55 19 20076 5700	\$ 3,332.20			\$ 284.35	\$ 284.35
Local Meals	1 55 19 20076 5703	\$ 4,841.25			\$ 1,921.64	\$ 1,921.64
Domestic Airfare	1 55 19 20076 5705	\$ 2,340.90			\$ 384.61	\$ 384.61
Events	1 55 19 20076 5742	\$ 368.08			\$ 279.66	\$ 279.66
Institutional aid	1 55 19 20076 5800	\$ 250.00			\$ 250.00	\$ 250.00
Vehicle Fuel Purchases	1 55 19 20076 5702	\$117.23				

Thank you for considering this request. Please feel free to contact me if you have any questions.

Sincerely,



Dalia Biswas

Associate Professor and Department Chair for Chemistry

Physics

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Division III - Physics	Discretionary Budget	1 55 19 20081 5090		19,468.00		\$23,000
Division III - Physics	Other payroll expense	1 55 19 20081 5160	15.65			
Division III - Physics	WC-Student wages	1 55 19 20081 5190	14,181.53			
Division III - Physics	FWS - Student wages	1 55 19 20081 5195	952.10			
Division III - Physics	Services	1 55 19 20081 5200	283.62			
Division III - Physics	Supplies	1 55 19 20081 5300	10,757.23			
Division III - Physics	Comp Software/Serv un \$10,000	1 55 19 20081 5341	145.88			
Division III - Physics	Communications	1 55 19 20081 5600	12.86			
Division III - Physics	Mileage Reimbursement	1 55 19 20081 5701	121.20			
Division III - Physics	Local Meals	1 55 19 20081 5703	1,179.19			
Division III - Physics	Events	1 55 19 20081 5742	423.50			

Submitted by: Moira Gresham (department chair)



Date: 11/6/23

Whitman College Physics Department Requested 2024/25 Budget Justification

In 2022/23, physics department expenditures totaled \$28,072.26. We went about \$3,000 over our allocated \$20,000 + \$5,000 budget. (Since 2021/22, the Provost's office has counted on the department funding \$5,000 of its regular departmental expenses with the Highberg endowment.) Laboratory and classroom equipment and student wage increases account for the overage. Departmental endowments and a \$1,170 gift covered the overage. We provide many opportunities for student work in our department and we give preference to students who qualify for need-based work-study funding. At some point in time, our budget should reflect the change in basic costs of operation compared to several years ago. **This year we are requesting to "true-up" our budget to \$23,000.** With an additional contribution of \$5,000 from the Highberg endowment for equipment purchases, that makes \$28,000— enough to cover departmental spending at a level similar as in 2022/23.

Please note that the Physics department is well aware of its endowment monies. We have plans to use them for (1) undergraduate research (student stipends and equipment) and (2) to complement SERF funds in our anticipated revamping of our introductory and advanced laboratories. Laboratory curriculum revision will commence *beginning next spring*, now that we have hired Andrés Aragonese Aguado and Ashmeet Singh. We have been loosely aiming to fund summer research students at a rate that would spend down our endowments on a 10 to 20 year timescale. Please note that on average over the past 10 years, the department has spent about \$7,000 more than endowment payouts each year. We expect this amount to increase dramatically over the next 5 years, as Professors Aragonese and Singh come online as student research advisers, and as we start implementing curricular changes—especially changes to our laboratory curriculum.

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Sculpture	Budgeted revenue	1 54 18 20365 4010			-6,000.00	
Sculpture	Course fees	1 54 18 20365 4120	-6,150.00			
Sculpture	Course fee expense budget	1 54 18 20365 5075		6,000.00		
Sculpture	Discretionary Budget	1 54 18 20365 5090		10,575.00		12,575.00
Sculpture	WC-Student wages	1 54 18 20365 5190	3,989.81			
Sculpture	Services	1 54 18 20365 5200	173.38			
Sculpture	Supplies	1 54 18 20365 5300	8,142.60			
Sculpture	Fee course - Supplies	1 54 18 20365 5320	5,162.19			
Sculpture	Comp Software/Serv un \$10,000	1 54 18 20365 5341	381.45			
Sculpture	Travel and meals	1 54 18 20365 5700	11.00			
Sculpture	Local Meals	1 54 18 20365 5703	22.47			

Please accept the following rationale for increasing the Sculpture area budget by \$2000:

Many of the staple materials used in Sculpture courses have increased in price by sizable amounts, since this budget was allocated 17 years ago. These are: wood, steel, plaster, clay, primarily, but also the many blades, discs, tools, and storage mechanisms (cabinets, tool boxes, etc.)

In addition, several mid-size items (\$200-\$500) like miter saws, bench grinders, drill press, MIG welders are in need of replacement.

In addition, student workers, i.e. Wood and Metal Techs, now make \$3 more per hour. These Techs serve the entire department and the senior art majors rely very heavily on them throughout the year for help in executing their projects. I would like to keep staffing these areas at the same and increased levels in the future. Recent faculty turnover has resulted in greater ambition generally in student work. This is a wonderful thing but I'd like the area budget to be able to accommodate the increased traffic and dedication to safety in these high-stakes areas.

Thanks for your consideration,

M Acuff

Submitted by: 

Date: 11.3.23

Department	Object	Account Number	Last Year 2022/2023 Actual	2023/2024 Current FY Budget	2023/2024 Budgeted Revenue	2024/2025 Requested Budget
Northwest Museum	Discretionary Budget	1 53 29 20005 5090		8,765.00		11,000
Northwest Museum	Staff salaries	1 53 29 20005 5130	29,923.00			
Northwest Museum	Other payroll expense	1 53 29 20005 5160	10,777.16			
Northwest Museum	WC-Student wages	1 53 29 20005 5190	10,056.62			
Northwest Museum	FWS - Student wages	1 53 29 20005 5195	1,344.33			
Northwest Museum	Services	1 53 29 20005 5200	1,665.32			
Northwest Museum	Supplies	1 53 29 20005 5300	1,222.60			
Northwest Museum	Communications	1 53 29 20005 5600	103.03			
Northwest Museum	Local Meals	1 53 29 20005 5703	479.67			
Northwest Museum	Events	1 53 29 20005 5742	681.17			

- I HAVEN'T RECEIVED A BUDGET INCREASE SINCE AT LEAST FY 2018
- STUDENT WAGES HAVE INCREASED
- THE COST OF MATERIALS HAS INCREASED SIGNIFICANTLY DUE TO INFLATION
- HISTORICALLY, THE SHEEHAN HAS PAID FOR A LOT OF MAKEY MUSEUM MATERIALS. I'M TRYING TO BREAK THE HABIT OF RELYING ON THEIR RESOURCES.

Submitted by: LIBBY MOLLER

Date: 11/07/2023

Nov 3, 2023

RE: New budget request to support BBAC program for 2024-25

To support the newly-approved BBAC program in its second year, we request program-specific support as described below. We already have 13 rising seniors who have declared BB&C as their major, and need to be prepared for 2-3 late-declaring students who will have senior status next year. Sophomores have only begun declaring, and at this time, 15 additional students have indicated intent to declare.

An itemized list of the request can be found here: [Spreadsheet](#)

Course support, \$5,000

Rationale: The BBAC program will offer both a new senior seminar (BBAC 499) and capstone research/thesis experience (BBAC 490). To offer these new courses, we request support for the seminar series, program specific content including software to analyze and represent data, and modeling, and research support (divided amongst primary faculty in the BBAC program who agree to be responsible for providing research experiences for BBAC majors).

Note: At this time, the other primary courses with labs that contribute to the BBAC major labs will continue to be covered within the budgets of the home departments, including the following list:

BIOL 111 Biological Principles Lab

BIOL 320 Neurobiology Lab

BIOL 323 Neurophysiology Lab

PSYC 225 Behavioral Neuroscience Lab

PSYC 390 Psychology of Learning Lab

ST courses offered by VAPs in either the Biology or Psychology Departments

Student support, \$4,070

Rationale: We anticipate hiring students to help support the major in a variety of ways, including a program assistant (to coordinate scheduling senior exams, etc.), program liaisons and research mentors (experienced juniors and seniors who can help promote the program, and advise students earlier in the major), and lab assistants (to help maintain research resources used by the BBAC major, e.g. animal colonies, ordering of supplies, etc.). These student positions will provide valuable hands-on experiences that will equip them for success in post-Whitman careers.

Student professional development opportunities, \$1,450

Rationale: Although the program is just beginning, we anticipate a number of opportunities for students to participate in national professional societies and meetings, most of which offer price breaks for students who hold membership in their organization. We include memberships for ~10 students to different organizations including Society for Neuroscience, Sigma Xi, Society for Integrative and Comparative Biology (SICB). We also will offer program-specific networking and mentoring activities, including an end-of-year celebration.

TOTAL 2024-25 BBAC Request

\$16,040

BBAC Budget 2024-2025				
		Multiplier	Total	Subtotal request/categor
Course Support				
Seminar Series (per speaker)	\$250.00	4	\$1,000.00	
Program-specific content & software (i.e. Graph	\$1,000.00		\$1,000.00	
Thesis Research Support (per BB&C faculty me	\$500.00	6	\$3,000.00	
<i>Subtotal</i>				\$5,000.00
Student Support				
		# Hours		
<u>Wages</u>	\$16.28	250		\$4,070.00
Liasons				
Research Mentors				
Facility Lab Assistants				
Program Assistant				
<i>Subtotal</i>				\$4,070
Student Professional Development				
Professional Society Undergraduate Membersh	\$50/student	10		\$500
Abstract Fees	\$150/submissior	3		\$450
Inclusion, Networking, and Professional Development Activities for Majors	misc.			\$500.00
<i>Subtotal</i>				\$1,450
Total				\$16,040.00

From: [Amber Connor](mailto:Amber.Connor@whitman.edu)
To: jiaq@whitman.edu
Cc: [Justin Lincoln](mailto:Justin.Lincoln@whitman.edu); [Darlene Wilson](mailto:Darlene.Wilson@whitman.edu); [Maria Lux](mailto:Maria.Lux@whitman.edu); [David Sprunger](mailto:David.Sprunger@whitman.edu)
Subject: Re: Go ahead about Adobe Funding
Date: Friday, November 17, 2023 10:50:40 AM

Will do. Thank you, Qi.

.....
A M B E R C O N N O R
Administrative Assistant
Fouts Center for Visual Arts
Whitman College
Ph. 509-527-5204
Fax 509-527-5042

Whitman College is located on the traditional Cayuse, Umatilla and Walla Walla homelands. We pay our respect to tribal elders both past and present and extend our respect to all indigenous people today. We honor their stewardship of the land and ecosystem and commit to continuing that important work.

On Fri, Nov 17, 2023 at 10:35 AM Qi Jia <jiaq@whitman.edu> wrote:

Hi Amber, would you help the Chair to submit the Google sheet to reduce \$2250 for 2024-2025 budget request for the Art department general budget (20059). Below is the link.

https://docs.google.com/forms/d/e/1FAIpQLSfUZPoSIWwL3p5p6lA_iqMQrCVI0HVvSbqUVLnqbQu-wM__OA/viewform

I am in the office and feel free to call me at 5397 if you have questions.

Thanks, Qi

From: Maria Lux <luxmc@whitman.edu>
Sent: Friday, November 17, 2023 6:46 AM
To: David Sprunger <sprungde@whitman.edu>
Cc: Justin A Lincoln <lincolja@whitman.edu>; Amber Connor <connorae@whitman.edu>; Qi 'Chee' Jia <jiaq@whitman.edu>; Ronnelle Partlow <itinvoices@whitman.edu>
Subject: Re: Go ahead about Adobe Funding

That sounds very reasonable to me. :) Thanks for doing all this work to streamline things, David, and i hope it helps you all have a bit less to keep track of!

Maria

On Thu, Nov 16, 2023 at 2:02 PM David Sprunger <sprungde@whitman.edu> wrote:

Justin and Maria,

Thank you! If it's ok with you, can I please round this up by \$7.66 to make is an even \$2250?

With appreciation,
David

On Thu, Nov 16, 2023 at 1:59 PM Ronnelle Partlow <partlorl@whitman.edu> wrote:

Here you go!

~Ronnelle

Ronnelle Partlow
Assistant to the CIO
Whitman College
Technology Services
345 Boyer Ave
Walla Walla, WA 99362
itinvoices@whitman.edu

Phone: 509-527-5415

Fax: 509-527-4962

----- Forwarded message -----

From: **Justin Lincoln** <lincolja@whitman.edu>

Date: Wed, Nov 15, 2023 at 1:01 PM

Subject: Go ahead about Adobe Funding

To: Jia, Qi <jiaq@whitman.edu>, Maria Lux <luxmc@whitman.edu>, Amber Connor <connorae@whitman.edu>, Partlow, Ronnelle <partlorl@whitman.edu>

This morning I discussed David's plans to roll the \$2,242.44 collective costs for faculty Adobe Subscriptions (which come out of Art department Area Budgets) into a larger fund with David and Maria Lux (our chair.) It looks like that will, in the long term, allow the school to save money, streamline many processes and lower a burden on Ronnelle. It will also grant access for all Whitman employees to Adobe Acrobat. The Hickman Fund will not be rolled directly into that Adobe plan, but will continue to be used to allow the computers in the Hickman Lab to have access to these Adobe Cloud services.

So Qi, this is the note to say, please feel free to proceed on that front.

If there are any other concerns or questions, or if I mischaracterized anything here, please let me know. Thanks, Justin

--

Justin Lincoln

Associate Professor, New Genres & Digital Art

Studio Art

Whitman College

<http://justinlincoln.com/>

"Don't interpret. Experiment." - Gilles Deleuze

--

Maria Lux

Associate Professor of Art

Whitman College

345 Boyer Ave., Walla Walla, WA 99362

Located on Cayuse, Umatilla, and Walla Walla homelands

Pronouns: She / Her / Hers

Zoom meeting link:

<https://whitman.zoom.us/j/94888702748>

I often send emails at odd hours, but I don't expect you to reply outside of your normal working times.

Debate & Forensics Budget Proposal

Ask 1: Increase in budget to cover travel funds for growing program

Rational: The Debate and Forensics Team budget for 2022-2023 totaled \$96,000.00 (including all funding sources), while the actual amount spent totaled \$133,240.00. The difference (\$37,000.00) was supplemented by an endowment with a rollover fund (Walker). The remaining rollover funds from the Walker Endowment will only sustain the discrepancy in spending for the 23-24 academic year. Additionally, the team has grown in size by 30% from the previous year, and will be hosting a national tournament on Whitman College's campus Spring 2024.

Alignment with College's Priorities:

DEIAA: The Debate & Forensics Team continues to be the only Whitman College program that regularly travels students with electronic mobility devices to national competition. There are several cost barriers associated with this travel, including: accessible transportation (beyond the College's internal fleet), ADA accessible hotel rooms, and upgraded seating on domestic flights.

Connecting Whitman, Walla Walla, and the World: The program regularly participates in assisting local and regional debate programs, such as the Portland Urban Debate League and the Pioneer Middle School afterschool program. The ability for the Debate & Forensics Team to support Whitman Student's engagement in local and regional community outreach is heavily impacted by the ability of the program to fund regular scheduled tournaments.

Academic Excellence and Distinction: The Whitman Debate and Forensics Team continues to finish within the top 5 nationally, with 3rd (debate) and 4th (forensics) place national finishes in the 22-23 academic year. Additionally, Whitman will be hosting a national championship debate tournament in the Spring of 24 (National Parliamentary Tournament of Excellence).

- (1) Total 2022-2023 tournament travel expenses equaled \$133,240.00. The projected tournament travel expenses for the 2023-2024 equals \$145,000.

The Debate and Forensics Team is seeking a 25% increase in the Debate & Forensics operating budget (\$58,010.00) totaling: **\$15,00.00**, to help offset the cost of the depleted rollover endowment.

Ask 2: Creation of the position Assistant Coach

Rational: The Debate & Forensics program currently hires external consultants as well as hires weekend judges to meet the needs of the program and facilitate tournament attendance. Last year the total cost of contracted work was **\$27,170.00** or approximately 27% of the total team budget (\$96,000).

The Debate and Forensics Team is seeking the creation of the position "Assistant Coach" within Student Affairs as a full-time (10 month) staff position. The annual salary would be **\$39,000.00**.

MEMORANDUM
Office of Outdoor Programs

October 30, 2023

TO: Juli Dunn, Kazi Joshua

FROM: Brien Sheedy

RE: FY 24/25 Outdoor Program Budget Requests

Summary:

\$12,000 LEAF (Leadership Education Advancement Fund)

\$5,000 for Staff Overtime

\$43,333 Outdoor Program & Climbing Center Coordinator

\$5,100 in 5 years/ \$50000 in 10 years Climbing Wall ASANA Pad LifeCycle Upgrade/Replacement

Details:

\$12,000 LEAF (Leadership Education Advancement Fund)

The financial burden of Outdoor Program Sports Studies, Recreation and Athletics (SSRA) leadership and certification course fees can serve as a barrier to entry for Whitman students. Students interested in leading trips and/or working for the OP or at the Climbing Center may not be able to afford the required leadership and certification courses.

This fund was started roughly ten years ago by alumni donors and has been a game changer in terms of enabling equitable access for all students. Funds have recently run out and this needs to become either a budgeted fund or the focus of fund raising.

[https://www.whitman.edu/life-at-whitman/outdoor-program/classes/leadership-education-advancement-fund-\(leaf\)](https://www.whitman.edu/life-at-whitman/outdoor-program/classes/leadership-education-advancement-fund-(leaf))

These courses qualify for LEAF funding:

SSRA 240 – Wilderness First Aid

SSRA 242 – Wilderness First Responder

SSRA 244 – Swift Water Rescue

SSRA 248 – Climbing Wall Instructor

SSRA 300 – Outdoor Sport Climb Instructor

SSRA 331 – Canoe Guide Leadership

SSRA 332 – River Guide Leadership

SSRA 334 – Sea Kayak Guide Leadership

SSRA 350 – Advanced Kayaking

SSRA 380 – Outdoor Leadership

SSRA 387 – Advanced Climbing: Single Pitch Instructor Course

Other SSRA and OP Activity Courses are not eligible for the LEAF aid.

Students seeking a subsidy of their course fee will apply with the financial aid office by filling out the LEAF financial aid application. This application will include a waiver permitting the financial aid office to share financial need information with the OP Director. **The need-based awards will be targeted to students demonstrating high financial need and a strong desire to participate in leadership within the OP.**

Preference will be given to underclassmen.

1. How does LEAF work and what does it cover?

Students with demonstrated need requesting funding are eligible for **up to full funding for 1 WFR course and 1 leadership course** during their time at Whitman based upon a formula for granting higher percentages based on a combination of student need, academic year, and unmet gaps in funding but financial assistance between 25-75% is not uncommon.

2. What if I want to take another SSRA leadership course?

Students that have already taken a WFR course and/or a leadership course can make a proposal for why they should receive funding for another course. Proposals for additional leadership courses will consider how students have given back to the college and the OP after completing their WFR and/or first leadership course. Furthermore, the LEAF administrator will look at plans for how students hope to contribute to the OP, SSRA and/or outdoor clubs and campus as a leader during their remaining time at Whitman. Priority and higher levels of funding will be allocated towards underclassmen.

(Up to full percentage for first years, up to 75% for second years, up to 50% for Juniors, and up to 25% for seniors)

\$5000 for Staff Overtime:

OP Professional staff are no longer Salary exempt and while we are working as hard as possible to stay within a 40hour work week; there are some weeks and trips where that is not possible in order to deliver some of the most powerful and popular student experiences. This has created tremendous stress on staff and has already resulted in cutting back on many programming experiences.

\$43,333 Outdoor Program & Climbing Center Coordinator

The climbing center went into operation in September 2009. It has not had a true dedicated climbing manager to manage the deposits and staff since it was opened despite budget requests made in FY2009-2010 and FY 2010-2011 for an SSRA outdoor lecturer/coach to manage the climbing wall and teach SSRA courses and then in FY2013-2014, FY2014-2015, FY2015-2016, FY 2019-2020 and FY 2020-2021 for a climbing center manager. I have details from past proposals but I just wanted to note **that the need for help in this area has not gone away but has actually gotten worse.**

The OP Rental shop manager and the OP Assistant Director were changed from salary exempt to hourly positions and it is just a matter of time before the OP Director is no longer able to be in the salary exempt category.

The loss of the permit coordinator during the Financial Sustainability Review process also put additional stress on the OP Director to take over that job on top of overseeing the climbing wall since those tasks could not be put on the plates of other OP staff who are already challenged to stay within a 40hr week.

The Permits coordinator job could be combined with the climbing manager tasks and coordinating OP trips since that tends to be a bit too much for the student coordinator.

For the Future:

Climbing Wall ASANA Pad LifeCycle Upgrade/Replacement:

ASANA estimates that roughly 50% of the HR topper will need to be addressed or replaced within 5 years of the install, as well as 25% of the seam covers below the Tarp. The current cost of HR foam for your system is \$5/ sqft. This would equate to around \$3000 The current cost of seam covers is \$7 a linear foot which would equate to \$2100.

\$5100 in 5 years
\$50,000+ in 10 years (today's cost) Entire pad system replacement today's cost.

How these requests are grounded in the strategic priorities:

Academic Excellence and Distinction

... —creating learning opportunities that inspire students to come to Whitman, broaden their horizons, support their interests and aspirations, and empower their futures.

Areas for focused action:

Explore ways to leverage our unique location to develop distinctive curricula and programs of study.

- **Advance inclusive academic engagement**—inclusive pedagogy, universal design, and **expanded support for learning and teaching**—so that all students have the fullest opportunity to learn and contribute in their classes.
- Broaden **experiential and community-engaged learning opportunities** across the curriculum, so that every student can take their learning into action.

Diversity, Equity, Inclusion, Anti-racism and Access

... **We will advance access to Whitman for all students by growing need-based and merit-based scholarship and financial aid resources.** And, we will take actions that increase the diversity of staff, faculty and students along every dimension, and **focus on ensuring inclusive and equitable working and learning environments so that Whitman is a place where all members of the community feel deeply welcome and can flourish and grow.**

Areas for focused action:

- **Strengthen affordability, meet full need, and lessen financial barriers to full access to the curriculum, to co-curricular opportunities, and to thriving life on campus.**
- **Cultivate an institutional culture, climate and community that increases and supports the diversity of staff, faculty and students.**
- **Focus on ensuring inclusive and equitable working/learning environments and on thriving and retention as well as recruitment.**

A Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships

Areas for focused action:

For everyone:

- **Build and nurture a community of belonging, where all experience meaningful connection, deep welcome and the opportunity to thrive.**
- **Invest in activities that bring people together, engage our values and mission, and celebrate the Whitman community.**
- **Build on inclusive opportunities to connect with our amazing outdoor spaces and landscape.**

For students:

- **Enhance options for engagement across many kinds of interests—supporting student clubs and organizations, as well as music, theater, athletics, outdoor programs, and community-engaged work, so that students can participate, both as beginners and at a high level, in co-curricular activities that interest them.**

Connecting Whitman, Walla Walla, and the World

Connecting students beyond the campus—to the extraordinary learning opportunities in our region and around the world—provides students crucial opportunities for growth, exploration and ethical action. The biggest opportunities and challenges of our future go beyond national boundaries, and call for global perspective. At the same time, **place matters, and Whitman College celebrates and seeks to make the most of the unique strengths of our region and communities, and to strive to act as an excellent citizen of our region. We will prioritize an education for all students that is both locally grounded and globally engaged, and that provides students excellent ways to expand their learning—here in the Walla Walla valley, across our region, and around the world.**

Areas for focused action:

- **Contribute actively and ethically as a partner in and around Walla Walla.**
- **Broaden opportunities for experiential and community-engaged learning in our region.**

Whitman College
 40002 ABS Student Wages Analysis
 July 2017 to October 2024

2018		2019		2020		2021		2022		2023		2024	
Pay Period	Hours	Pay Period	Hours	Pay Period	Hours	Pay Period	Hours	Pay Period	Hours	Pay Period	Hours	Pay Period	Hours
07/08/17	113.50	07/08/18	67.88	07/08/19	111.00	07/08/20	52.00	07/08/21	92.50	07/08/22	212.50	07/08/23	176.50
08/08/17	26.00	08/08/18	79.15	08/08/19	61.00	08/08/20	154.50	08/08/21	112.75	08/08/22	193.15	08/08/23	211.50
09/08/17	57.00	09/08/18	117.05	09/08/19	98.50	09/08/20	113.50	09/08/21	91.00	09/08/22	163.64	09/08/23	127.50
10/08/17	45.00	10/08/18	53.50	10/08/19	47.50	10/08/20	47.00	10/08/21	57.50	10/08/22	83.25	10/08/23	103.92
11/08/17	67.60	11/08/18	63.50	11/08/19	55.75	11/08/20	55.00	11/08/21	64.75	11/08/22	91.75		
12/08/17	48.15	12/08/18	48.75	12/08/19	44.45	12/08/20	48.25	12/08/21	50.50	12/08/22	58.04		
01/08/18	16.00	01/08/19	9.00	01/08/20	47.25	01/08/21	90.50	01/08/22	51.00	01/08/23	61.50		
02/08/18	39.80	02/08/19	65.00	02/08/20	100.00	02/08/21	63.50	02/08/22	64.00	02/08/23	117.50		
03/08/18	44.90	03/08/19	56.25	03/08/20	76.50	03/08/21	46.00	03/08/22	41.25	03/08/23	93.75		
04/08/18	31.30	04/08/19	38.50	04/08/20	56.75	04/08/21	66.00	04/08/22	60.75	04/08/23	158.99		
05/08/18	67.35	05/08/19	88.25	05/08/20	48.18	05/08/21	71.75	05/08/22	40.50	05/08/23	147.00		
06/08/18	54.11	06/08/19	77.00	06/08/20	50.00	06/08/21	89.50	06/08/22	163.00	06/08/23	191.50		
Average	50.89	Average	63.65	Average	66.41	Average	74.79	Average	74.13	Average	131.05	Average	154.86
\$ 11.00	357.25	\$ 11.50	429.83	\$ 12.00	418.20	\$ 13.50	470.25	\$ 13.69	469.00	\$ 14.49	802.33	\$ 15.74	619.42
11.50	253.46	12.00	334.00	13.50	378.68	13.69	427.25	14.49	420.50	15.74	770.24	16.28	-
0.50	610.71	0.50	763.83	1.50	796.88	0.19	897.50	0.80	889.50	1.25	1,572.57	0.54	619.42
	-		-		-		-		-		-		-
	\$ 3,929.75		\$ 4,943.05		\$ 5,018.40		\$ 6,348.38		\$ 6,420.61		\$ 11,625.76		\$ 9,749.67
	2,914.79		4,008.00		5,112.18		5,849.05		6,093.05		12,123.58		-
Estimate	\$ 6,844.54		\$ 8,951.05		\$ 10,130.58		\$ 12,197.43		\$ 12,513.66		\$ 23,749.34		\$ 9,749.67
Actual	\$ 6,841.06		\$ 8,949.56		\$ 10,089.71		\$ 12,174.35		\$ 13,537.65		\$ 25,233.30		\$ 9,857.58
	3.48		1.48		40.87		23.08		(1,024.00)		(1,483.96)		(107.91)
Student Wages Increase		\$ 2,108.50		\$ 1,140.15		\$ 2,084.64		\$ 1,363.30		\$ 11,695.65			

\$ 15.74	769.21	\$ 12,107.37
16.28	770.24	12,539.51
0.54	1,539.45	\$ 24,646.87
For pay rates above minimum wage		\$ 1,500.00
FY2024 Estimate		\$ 26,146.87
FY2025 w/ estimated minimum wage increase		\$ 27,000.00
Jump from FY2022 w/ No BIP		\$ 13,462.35
FY2025 BIP		13,500.00

DRAFT

WHITMAN COLLEGE JOB DESCRIPTION

DATE: November 2023

JOB TITLE: Assistant Director of for
Student Employment

Commented [1]: At some point we will need to determine what department this position falls under.

FLSA: Nonexempt

OFFICE/DEPARTMENT: TBD
SUPERVISOR: TBD
DEPARTMENT HEAD: TBD
BUDGET OFFICER: TBD

POSITION PURPOSE

Whitman College has a robust student employment program that employs more than 55% of the student body each year (822 student students). The College administers more than \$1.9 million each year in institutional, federal, and state funds to student employment. Not only does student employment provide students with income to support their educational expenses, but it also serves as an opportunity to provide critical career preparation.

The Assistant Director will have oversight of student employment for Whitman College. The specialist will lead student employment operations, including campus hiring practices, position management, budget management, student and supervisor training, and support. The role directs policy development, regulatory compliance, strategic planning and community engagement and works with key campus partners including the Career and Community Engagement Center, Financial Aid, Human Resources, and Student Payroll.

PRINCIPAL ACCOUNTABILITIES

Administer the Student Employment Program, including ensuring compliance with state and federal employment law and Federal Work-Study program regulations.

- Act as the central liaison between all departments involved in student employment, including the Career and Community Engagement Center, Financial Aid, Human Resources, Provost's Office and Student Payroll to ensure best practices across the student employment program.
- Provide training to student employees to contribute to their success as student employees as well as their future career readiness.
- Provide training to and support supervisors in creating and maintaining diverse, inclusive, and compliant hiring and supervision practices.

- Maintain campus employment aspects of Handshake, the online database of student employment opportunities.
- Assist new students in finding employment opportunities.
- Manage data pertaining to student employment and produce annual reports.
- Work with the budget officer and relevant departments to develop and manage the student employment budget.
- Assist the Student Payroll Office by ensuring student employees submit hours and supervisors approve them in an accurate and timely manner.
- Supervise one or more student employees who can provide administrative support to the Student Employment program.
- Develop and maintain a robust student employment website and student employee handbook.
- Complete additional responsibilities as needed where bandwidth allows.

REQUIRED KNOWLEDGE, SKILLS & ABILITIES

Candidates must demonstrate their ability to safely perform the essential functions of the job, with or without reasonable accommodation, by explaining or showing they possess the necessary knowledge, skills, and abilities.

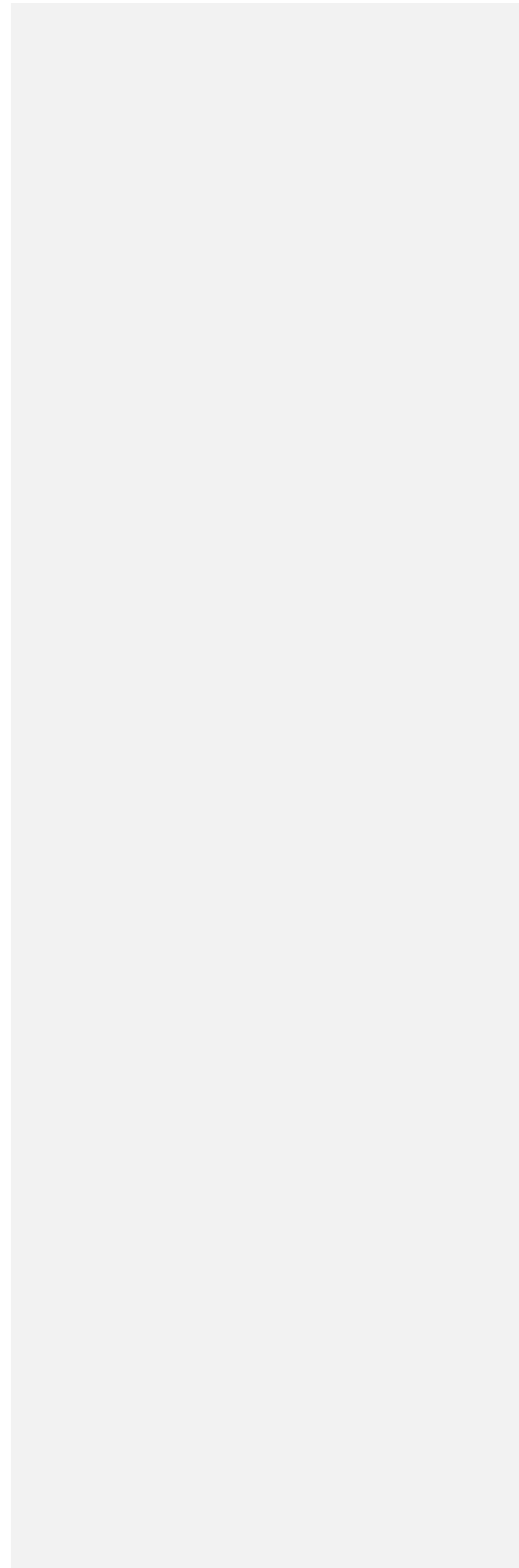
- Understanding of federal work-study program and Washington state student employment regulations
- Demonstrated leadership skills, including ability to build rapport across teammates, motivate others, foster genuine and meaningful collaboration, and share knowledge effectively
- Demonstrated ability to meet the needs of an increasingly diverse student population
- Ability to positively and actively advance the College's core values of diversity, equity, inclusion and antiracism
- Ability to work self-assuredly and independently to build new systems and engagements;
- Strong interpersonal skills
- Strong written and oral communication skills
- Organized with a good attention to detail and maintains confidentiality of records and information
- Strong customer service, organizational, analytical & problem-solving skills

MINIMUM QUALIFICATIONS

- 3-5 years of work experience
- Bachelor's degree

PREFERRED QUALIFICATIONS

- Prior experience working in student employment programs and/or supervising student employees
- Understanding of F-1 visas work authorizations and knowledge of Curricular Practical Training and Optional Practical Training.



Identity and Access Management at Whitman

Identity and Access Management (IAM) is an integrated system of people, policies, business processes, and technologies that enable organizations to both facilitate and control users' access to critical applications and IT resources. In short, IAM ensures the right people get the right access to the right resources at the right time for the right reasons, enabling the right business outcomes.

Why is this important for Whitman? Whitman's current Identity and Access Management system is a homegrown solution that was built in the early 2000's and requires some manual processes to manage account creation, access to resources and authentication to resources. The current system was also built on the predication that we have three general types of users on campus: students, faculty, and staff. Hence it is very inflexible with regards to the numerous other affiliate users we may have or need. Some examples are research assistants, guests, volunteers, music instructors, etc. These affiliates may be short term or long term and may only need access to a small number of IT resources or can only have access to certain resources due to licensing constraints (e.g., Microsoft services, library collections, etc.). Because of the inflexibility of the current system, it is difficult if not impossible to create such granularity of access to systems and services. Also, because there is manual intervention needed in both the onboarding and offboarding of account holders, it poses risk that account holders do not receive the access they need when they need it (making for lost productivity) or that accounts and access are not offboarded in a timely way, providing access for longer than is appropriate (information security risk).

Technology Services engaged the services of Moran Technology Consulting to evaluate our current state of IAM, identify gaps, and recommend opportunities for improvement. The key opportunities are reducing the reliance on one or two individuals (with the knowledge of the system); automating account creation, account/access fulfillment (onboarding), and account/access removal; creating role-based access versus position-based access; providing self-help tools to users (e.g. self-service password reset, requests for additional access, etc.); and better reporting tools for auditing of access (reducing access "creep" and reducing risk).

Identity and Access Management is not just about technology nor a project, but rather a program. It is a program that looks at business processes and policies in collaboration with campus partners (e.g. HR, Admissions, Registrar, Development, Library, and more). It is a program that incorporates technology to drive automation. It is a program that focuses on data and integration.

From the engagement with Moran Technology Consulting, Technology Services is requesting the funding for an annual license for an IAM solution (\$40,000/annually) and one-time funding for implementation services (\$150,000). The implementation services are critical to the success of the program as it will bring expertise to the roll out of an IAM solution.

Item	Cost*	Justification
Maintenance and support increases	\$6,171.09	Variable increases for Localist, DocLocator & EMS. See "Other Vendors" for details.
New required Modernization products	\$ 20,146.50	Renewal requires Experience Premium and On-Demand Training
Ellucian Colleague and Partner licensing increase	\$14,836.05	Expected 5% increase (3% for prior 5 year term) for Colleague subscriptions
Total Request	\$41,153.64	

*All costs include sales tax calculated on current 8.9% rate

Vendor	FYE 2017	FYE2018	FYE2019	FYE2020	FYE2021	FYE2022	FYE2023	FYE2024	FYE2025 (Projected)	FYE 2024 to 2025 Delta	Comments
PeopleAdmin, Inc.	\$15,981.77	\$17,260.32	\$18,641.14	\$20,132.43	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	Transferred to HR to cover BambooHR
Localist	\$14,102.55	\$14,102.55	\$14,102.55	\$14,807.68	\$15,548.06	\$16,325.46	\$17,141.73	\$17,998.82	\$18,898.76	\$1,757.03	5% increase year-to-year
ColumbiaSoft	\$9,857.64	\$9,857.64	\$9,961.09	\$10,172.35	\$10,383.62	\$10,591.29	\$10,977.12	\$11,352.83	\$11,693.41	\$716.29	3% increase past two cycles
ROC Software	\$1,310.00	\$1,310.00	\$1,310.00	\$1,310.00	\$1,376.00	\$1,498.46	\$1,558.36	\$1,706.40	\$1,868.51	\$310.15	One time jump; monitoring
Scantron	\$3,397.68	\$3,397.68	\$3,397.68	\$3,397.68	\$3,737.45	\$3,737.45	\$3,737.45	\$3,737.45	\$9,256.50	\$0.00	Increase in FYE2024 is new SaaS subscription price
Ingeniux	\$10,890.00	\$10,890.00	\$10,890.00	\$10,890.00	\$10,890.00	\$11,434.50	\$11,434.50	\$11,434.50	\$11,434.50	\$0.00	5% increase began FYE 2022
EMS Accruent	\$8,320.32	\$8,736.34	\$9,173.14	\$9,631.81	\$10,113.39	\$12,346.43	\$14,815.72	\$16,325.86	\$18,203.33	\$3,387.61	5-10.7% increase year-to-year
Total					No Increase	No increase				6,171.09	

No increases from vendor

Wherescape	7,623.00
Tableau	5,063.85

EMS Accruent	5.0%	5.0%	5.0%	5.0%	22.1%	20.0%	10.2%	10%
--------------	------	------	------	------	-------	-------	-------	-----

13,604.88
\$11,337.40 17%

0.1019282222

\$16,325.86

	FYE2020 Actual	FYE2021 Actual	FYE2022 Actual	FYE2023 Actual	FYE2024 Actual	FYE2025 Projected
Subscription Software @ 3%	\$234,827.00	\$241,871.00	\$249,129.00	\$256,606.00	\$264,306.00	\$277,521.30
Increase		3%	3%	3%	3%	5%
Sales Tax	\$20,899.60	\$21,526.52	\$22,172.48	\$22,837.93	\$23,523.23	\$24,699.40
Perpetual Software @ 5%	\$5,226.00	\$5,487.00	\$5,761.00	\$6,049.00	\$6,351.00	\$6,795.57
Increase		5%	5%	5%	5%	7%
Sales Tax	\$465.11	\$488.34	\$512.73	\$538.36	\$565.24	\$604.81
Total	\$260,952.60	\$268,884.55	\$277,062.51	\$285,492.96	\$294,180.26	\$309,016.31

\$14,836.05 Delta of FY2024 and FYE2025

Estimated delta for newly required services from upcoming Modernization renewal	Experience	\$	15,246.00
	ODT	\$	4,900.50
	Total	\$	20,146.50

	Base	W/ Tax	Increase
FYE2017	\$9,052.00	\$9,857.64	
FYE2018	\$9,052.00	\$9,857.64	0%
FYE2019	\$9,147.00	\$9,961.09	1%
FYE2020	\$9,341.00	\$10,172.35	2%
FYE2021	\$9,535.00	\$10,383.62	2%
FYE2022	\$9,785.00	\$10,655.87	3%
FYE2023	\$10,080.00	\$10,977.12	3%
FYE2024	\$10,382.40	\$11,306.43	3%

	Base	W/ Tax	Increase
FYE2017	\$10,000.00	\$10,890.00	
FYE2018	\$10,000.00	\$10,890.00	0%
FYE2019	\$10,000.00	\$10,890.00	0%
FYE2020	\$10,000.00	\$10,890.00	0%
FYE2021	\$10,000.00	\$10,890.00	0%
FYE2022	\$10,500.00	\$11,434.50	5%
FYE2023	\$11,025.00	\$12,006.23	5%

Inv Number	Base	Tax	Total	TERM	Increase		Base	Tax	Total
IN100168983	\$8,844.64	787.17	\$9,631.81	4/1/2019 - 3/31/2020		5% Projection	\$10,628.81	\$945.96	\$11,574.78
617839	\$9,286.86	826.53	\$10,113.39	04/01/2020 - 03/31/2021	4.8%	8% Projection	\$10,932.49	\$972.99	\$11,905.49
INV00009381	\$10,122.68	900.91	\$11,023.59	04/01/2021-03/31/2022	8.3%				
	\$11,337.40	1009.03	\$12,346.43	04/01/2022-03/31/2023	10.7%				
	Projection								
FYE2023	\$12,584.51	\$1,120.02	\$13,704.54						
FYE2024	\$13,968.81	\$1,243.22	\$15,212.03						

FYE2021	\$14,277.37	\$1,270.69	\$15,548.06	
FYE2022	\$14,991.24	\$1,334.22	\$16,325.46	5%
FYE2023	\$15,740.80	\$1,400.93	\$17,141.73	5%
FYE2024	\$16,527.84	\$1,470.98	\$17,998.82	5%

	FYE 2017	FYE 2018	FYE 2019	FYE 2020	FYE 2021	FYE 2022	FYE 2023 (Projected)	Delta	Comments
Colleague CORE	\$199,720.42	\$208,332.23	\$218,745.25				\$229,682.51	\$29,962.09	Based on a 5% increase each year. 5% contracted increase ends June 30, 2019.
Self-service		\$7,522.81	\$7,974.75				\$8,373.48	\$850.67	Based on a 6% increase through FYE 2019. Assuming 5% going forward
Partners (Unidata)	\$20,056.11	\$19,968.99	\$22,109.97				\$10,882.21	\$ (9,173.90)	Removed a line item for Unidata licensing. FYE2020 projected as a 5% increase of remaining required licensing.
Total Annual	\$219,776.53	\$235,824.03	\$248,829.97				\$248,938.20	\$21,638.86	
Total Increase in Colleague licensing for past 3 years							\$21,638.86		

\$234,057.42

September 28, 2023

Re: Important Update to Renewal Agreements

Dear Ellucian Customer,

Thank you for your ongoing partnership with Ellucian. We want to share an update regarding our customer fees. Over the last five years, Ellucian has accelerated our commitment to help institutions transform by rearchitecting our solutions to be more scalable and agile, developing new tools and platforms, and building disaster recovery services to meet the future needs of our customers. All of these investments are designed to propel higher education institutions forward and prepare our customers to adapt and thrive in an evolving landscape.

To support Ellucian's ongoing commitment to innovation, enhancing security standards and protocols, and in response to the current economic environment, effective January 1, 2023, we increased our standard fee escalators by 2 percentage points, including for multi-year renewal options. The new fee structures and terms and conditions will be applied to upcoming renewal quotes. We are sending this letter to all impacted customers.

Under the terms of your institution's current Agreements with Ellucian (for these purposes, "Agreements" means each contract that your institution has with Ellucian, including maintenance, software subscription, managed cloud, and SaaS product/services), we are required to inform you if Ellucian will not renew the Agreements on the current terms and conditions. This letter is intended to provide your institution with that notice. This notice is not applicable to the Ellucian CampusLogic, Inc. (dba CampusLogic) contracts.

An Ellucian renewal specialist is preparing your quote to be sent via email to the primary contact for your Ellucian account. If you would like to schedule time to review your account and renewal options, please contact your renewals specialist directly or reach out to renewals@ellucian.com.

Thank you, and we look forward to continuing our partnership.

Sincerely,



Bill McCallion

Senior Director, Renewals

ellucian® | 2003 Edmund Halley Drive, Suite 500, Reston, VA 20191

Una versión en español de esta carta está disponible a pedido. Envíe su solicitud a Ellucian a asklegal@ellucian.com.

RE: Assistance getting cost of next EMS renewal (and following year) [ref:!00DE00JbPc.!5003n02hsEB4:ref]

Accruent Renewals <accruentrenewals@accruent.com>
To: "ostermmg@whitman.edu" <ostermmg@whitman.edu>

Tue, Nov 7, 2023 at 5:25 AM

Well, it is unlikely that this price will change much, perhaps it will be around 13% or 15% if the market changes considerably or our price policy.

Best regards,



Felipe de Freitas
Renewals
Accruent | Commercial

E: felipe.defreitas@accruent.com

W: www.accruent.com

----- Original Message -----

From: Mike Osterman [ostermmg@whitman.edu]

Sent: 11/6/2023 3:38 PM

To: accruentrenewals@accruent.com

Subject: Re: Assistance getting cost of next EMS renewal (and following year) [ref:00DE00JbPc.!5003n02hsEB4:ref]

Thank you, Felipe. I can work with that.

That appears to be a 10.2% increase. Is there any hope of the renewal escalator stabilizing so we can budget accordingly?

Thank you,
Mike

[Quoted text hidden]

MEMORANDUM

DATE: November 14, 2023

TO: Dan Terrio, Chief Information Officer

FROM: Jon Loney, Manager of Instructional Multimedia Services

SUBJECT: 1-00-24-60006 Budget Request, 2024-2025

	20-21 Approved	21-22 Approved	22-23 Approved	23-24 Approved	24 -25 Request	Change
Student Wages	15,000	15,000	15,000	15,000	15,000	0
Services	2,400	2,400	2,400	3,900	3,900	0
Supplies	4,320	4,320	4,320	6,000	6,000	0
Capital Expenditures	55,600	55,600	55,600	51,855	51,855	0
Communications	275	275	275	275	275	0
Travel/Meals	7,935	7,935	7,935	8,500	11,500	+3,000
Total	85,530	85,530	85,530	85,530	88,530	+3,000
Service Credits	-3,000	-3,000	-3,000	-3,000	-3,000	0

Justifications:

1-00-24-60006-5700 +\$3,000

- *Increase travel budget to provide opportunities for the new IMS staff position to seek professional development. Classroom technology rapidly changes, and classroom tech staff should stay up to date on the latest trends and trainings.*

BIP form answers:

- Initiative name: Professional Development for New Staff Position
- Dept or Budget name: Instructional Media (?)
- GL number: 1-00-24-60006
- Current (FY24) Budget amount: \$8,500
- Incremental Personnel Budget without OPE: N/A
- Incremental Non-Personnel Budget: N/A
- Responsible Staff Person or Position: Jon Loney
- Strategic Priority Alignment:
 - Strategic Priority Alignment #1: NOT ESPECIALLY ALIGNED
 - Strategic Priority Alignment #2: SOMEWHAT ALIGNED
 - Strategic Priority Alignment #3: STRONGLY ALIGNED
 - Strategic Priority Alignment #4: NOT ESPECIALLY ALIGNED

- Strategic Priority Alignment #5: NOT ESPECIALLY ALIGNED
- Strategic Priority Alignment #6: NOT ESPECIALLY ALIGNED
- Is the request one-time or to base? BASE
- Is the request a capital project? NO
- If the request is a capital project, does it involve a software implementation? N/A
- Is the request related to an existing contractual commitment? NO
- Is the request a true-up or true-down to recent actuals? NO
- Is the request truly non-discretionary? NO
- Does the request directly support health and safety? NO
- Does the request mitigate risk, particularly of large losses? NO
- Does the request directly enhance revenues? NO
- Does the request reduce future costs? NO
- Can the request be scaled down? YES

Reinstatement of Client Services Consultant Position - \$55K annually

In 2020, a vacated Client Services Consultant position was put on hold and eventually eliminated due to the Financial Sustainability Review. The loss of this position has created a hardship in the Client Services team of WCTS as the work that was spread amongst two consultants is now handled mostly by one. Administrative lifecycle replacements (~120/year), unresolved Help Desk tickets, and printer support have fallen on the shoulders of the one support consultant. This consultant also assists with hardware provisioning/retirement. They are currently supported by our PC Endpoint System Administrator whose position it is to maintain our Windows fleet of computers on campus. Our Endpoint System Administrator is dedicating about $\frac{1}{3}$ to $\frac{1}{2}$ of their time to support the C.S. Consultant. This has pulled them from essential duties of supporting the security of our PC fleet of computers. This support is critical as more computers are being used off campus. Due to the lack of support consultants, ticket response time has also been extended resulting in clients having to wait longer to have incidents resolved. Ticket counts have also increased as the campus moves out of the pandemic. We have seen a 25% increase in service request tickets since 2020. Also, the total number of employees to support has increased back to near pre-COVID numbers. In 2019, the campus had a total of 591 employees, in 2021 that number dropped to 508 and in 2023 we are now seeing employment numbers return to 560+.

Currently, we have no redundancy in positions within the Client Services team which has resulted in a single point of failure if one of our team becomes ill or is away from the office for an extended amount of time. Also, one of our staff has reported he is within a year of retirement with another a couple of years behind that. Neither person has a support backup leaving these critical positions in a vulnerable position. I am proposing that the aforementioned Client Services Consultant position be reinstated to help alleviate this vulnerability. This position would start at a salary of approximately \$55,000/year. Attached below is the most recent job description for this position with proposed additional preferred qualifications (points 6 & 7).

The reinstatement of this position would assist in workload balance amongst the Client Services team, allow for cross training to give backups to each position, and reduce the overall response time to tickets and issues reported by our clients. Additionally, this would free up our Endpoint System Administrator to focus on his assigned role and to work on upcoming initiatives that affect the campus' PC fleet of computers. Finally, as the college

continues to focus on the strategic priorities, more staff and additional software solutions are being introduced and require the attention of the front-end support team.

WHITMAN COLLEGE JOB DESCRIPTION

DATE: June 9, 2023 JOB TITLE: Client Services Consultant

FLSA DESIGNATION: Non-Exempt OFFICE/DEPARTMENT: WCTS

SUPERVISOR: Director, Client Services

DEPARTMENT HEAD: Director, Client Services

BUDGET OFFICER: Chief Information Officer

POSITION PURPOSE

The Client Services Consultant provides desktop hardware and computing support, network

printer repair and installation, and assistance to all technology users on campus. This position

collaborates with other IT members to provide an information technology environment that is

consistent with the goals of Whitman College and meets the needs of faculty, staff, and students.

PRINCIPAL ACCOUNTABILITIES

1. Perform service calls. This includes configuring, delivering and installing computers and other peripherals, solving issues with desktop & laptop computers, supporting classroom and lab technology, and consulting with staff and faculty on the use of computer hardware and software.
2. Resolve problems, perform maintenance, and repair networked printers across the institution.
3. Resolve problems, perform maintenance, and repair laptop and desktop hardware issues for Whitman-owned computers.
4. Participate in endpoint management projects to continue efforts in building an environment of greater efficiencies through automation and feature development.
5. Perform other essential duties and implementation of projects as needed.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

Individuals must be able to explain and demonstrate that they possess the knowledge,

skills and abilities to safely perform the essential functions of the job, with or without reasonable accommodation:

1. Advanced operation of Macintosh and Windows computers and other peripheral devices.
2. General computer and network printer hardware repair.
3. The installation of standalone and networked computer applications.
4. The use of common application software, such as Microsoft Office applications, email, web browsers.
5. Problem solving techniques and ability to read and interpret service manuals.
6. Consulting with users on various software, hardware, and network problems.
7. Familiarity with enterprise level network printer functions, troubleshooting, and repair & maintenance.
8. A commitment to customer service to provide timely, attentive care and making sure needs are met in a manner that reflects positively on the college and Technology Services department.
9. Strong team orientation.
10. Good interpersonal and communication skills enabling the establishment of cooperative and collaborative working relationships with a variety of campus constituencies.
11. The ability to positively and actively contribute to Whitman College's core values of diversity, equity, and inclusion.
12. A clear ability to make technical issues understandable.
13. An ability to work occasional evenings or weekends.
14. An ability to perform manual labor, including heavy lifting (30 lbs.) regularly a short distance.

MINIMUM QUALIFICATIONS

1. One or more years of experience in computer user support in a networked computing environment.
2. Experience working in and supporting Windows, macOS, and Linux operating

systems.

3. Ability to obtain CompTIA A+ certification within the first year of employment.
4. Ability to obtain Dell & Apple hardware repair certifications

PREFERRED QUALIFICATIONS

1. 5+ years experience or a combination of education and experience
2. Experience working in user services in higher education.
3. Experience working on an IT Help Desk.
4. CompTIA A+ certification
5. Experience and/or a desire to supervise an IT Help Desk and student staff.
6. Experience working with Endpoint Management products (SCCM, Jamf Pro)
7. Experience with PC and/or Apple hardware repair

Strategic Priorities:

- #1 – Academic Excellence and Distinction.
- #2 – Diversity, Equity, Inclusion, Anti-Racism, and Access.
- #3 – Vibrant Campus Community.
- #4 – Strong Launches into Life after Whitman.
- #5 – Connecting Whitman, Walla Walla, and the World.
- #6 – Environmental Sustainability, Justice, and Climate Acti

Binaries:

Is the request one-time or to base? To Base

Is the request a capital project? NO

If the request is a capital project, does it involve a software implementation? N/A

Is the request related to an existing contractual commitment? NO

Is the request a true-up or true-down to recent actuals? True-up

Is the request truly non-discretionary? Yes

Does the request directly support health and safety? NO

Does the request mitigate risk, particularly of large losses? NO

Does the request directly enhance revenues? NO

Does the request reduce future costs? NO

Can the request be scaled down? NO

MEMORANDUM

DATE: November 16, 2023

TO: Dan Terrio, Chief Information Officer

FROM: David Sprunger, Director of Instructional and Learning Technology

SUBJECT: 2024-25 Budget Request for 1-00-24-60004 Academic Computing

	<i>FY</i> 2021-22	<i>FY</i> 2022-23	<i>Budget</i> 2023-24	<i>Request for</i> 2024-25	<i>Change</i>
Student Wages	152,298	99,647	116,100	120,000	3,900
Services	11,193	26,110	15,380	15,380	0
Supplies	5,678	6,740	8,525	8,525	0
Software Licenses	153,501	162,119	187,632	200,457	12,825
Capital Expenditures	15,699	54,366	31,227	31,227	0
Communications	417	236	500	500	0
Travel & Meals	5,892	13,702	19,100	19,100	0
TOTAL 60004	344,319	362,921	378,463	395,188	16,725

Justification and BIP form answers:

Student Wages, +\$3,900

Justification

January 2024 will bring about a 3.4% increase to minimum wage. In addition, in Client Services and Instructional and Learning Technology* areas, we have increased the number of student positions. The increase in funds will help us keep up with rising costs.

*Does not include Classroom and Event Technology student workers wages, those are paid for by a separate GL fund.

BIP form answers:

- Initiative name: Student Wages
- Dept or Budget name: Academic Technology
- GL number: 1-00-24-60004
- Current (FY24) Budget amount: \$116,100
- Incremental Personnel Budget without OPE: *not sure. Does personnel include students?*
- Incremental Non-Personnel Budget: N/A
- Responsible Staff Person or Position: David Sprunger
- Strategic Priority Alignment:

- Strategic Priority Alignment #1: Somewhat Aligned
- Strategic Priority Alignment #2: Strongly Aligned
- Strategic Priority Alignment #3: Strongly Aligned
- Strategic Priority Alignment #4: Strongly Aligned
- Strategic Priority Alignment #5: Not Especially Aligned
- Strategic Priority Alignment #6: Not Especially Aligned
- Is the request one-time or to base? BASE
- Is the request a capital project? NO
- If the request is a capital project, does it involve a software implementation? N/A
- Is the request related to an existing contractual commitment? NO
- Is the request a true-up or true-down to recent actuals? NO
- Is the request truly non-discretionary? YES
- Does the request directly support health and safety? NO
- Does the request mitigate risk, particularly of large losses? NO
- Does the request directly enhance revenues? NO
- Does the request reduce future costs? NO
- Can the request be scaled down? YES

Software Licenses, +\$12,825

Justification

Increase request is subdivided into two separate requests:

A. Rising costs of existing software licenses, +\$3,200

Software vendors rising costs continue, budget request will significantly mitigate risk of insufficient funds to pay our contracts and commitments. Of particular note, projected (based on cost-trend analysis) increases in licensing costs of will come from Microsoft, Qualtrics, Clarivate Analytics (EndNote), MDI (Jade), and SolarWinds (Web HelpDesk).

B. Adobe campus license enhancement initiative, +\$9,625

Large numbers of Whitman employees use Adobe products, yet our collective approach to date has been to purchase single licenses individually. This initiative is a much needed and sizable improvement to Whitman's licensing posture with Adobe products.

i. Features and benefits for Whitman:

- **Adobe Acrobat Pro for all employees**

This very widely used business-critical application will no longer need to be paid for by individuals/departments; it will be available in a similar way to Microsoft Office.

- **Adobe Creative Cloud licenses** for currently subscribed employees and computer labs, at a **stunning 72% cheaper per license** (from \$200 per license to \$70 per license). New licenses will also be available at this cheaper cost.

- **Adobe Express Premium for all students.** Adobe is including Express Premium (similar service to Canva, but includes a light version of Photoshop) in the overall licensing contract in such a manner as to be very low cost AND reduce the licensing cost of Creative Cloud licenses (see above. If Express Premium is not included, the overall cost of the Adobe contract increases by \$8,000). A significant number of people at Whitman use Canva. Since it is currently unclear if Express Premium would be a suitable alternative to Canva, and it is equally uncertain if the student body would make significant use of Express Premium, we will commit to this purchase **as a pilot project for the next two years**, at the end of which we will evaluate whether or not to continue purchasing it.

ii. Funding detail

- **The actual “new money” request for the college is \$3,775, not \$9,625.**
 - Three departments - WCTS, Art, and Communications - are collaboratively working to make this initiative a reality by requesting increases *and* decreases to their operating budgets:
 - The **Art Department** is requesting a **decrease of \$2,250**, which is the money their faculty members typically spend per year on Adobe products (and will no longer need to thanks to this initiative).
 - The **Communications Department** is requesting a **decrease of \$3,600**, which is their staff typically spend per year on Adobe products (and will no longer need to thanks to this initiative).
 - **WCTS’ increase request counterbalances** Art’s and Communications, and has an additional **amount of \$3,775**.
 - True cost of the initiative is approximately \$25,000 per year. This amount is achieved thusly:

Source	Amount
Academic Technology GL existing Adobe funding	\$3,750
Academic Technology GL reallocated funds	\$8,000
Annual contribution from Hickman Endowment	\$3,625
Art Dept. annual operating budget decrease	\$2,250
Communications Dept. annual budget decrease	\$3,600
Academic Technology GL budget increase	\$3,775
Total	\$25,000

BIP form answers:

- Initiative name: **Rising costs of existing software licenses**
- Dept or Budget name: Academic Technology
- GL number: 1-00-24-60004
- Current (FY24) Budget amount: \$183,882
- Incremental Personnel Budget without OPE: N/A

- Incremental Non-Personnel Budget: N/A
- Responsible Staff Person or Position: David Sprunger
- Strategic Priority Alignment:
 - Strategic Priority Alignment #1: STRONGLY ALIGNED
 - Strategic Priority Alignment #2: STRONGLY ALIGNED
 - Strategic Priority Alignment #3: SOMEWHAT ALIGNED
 - Strategic Priority Alignment #4: STRONGLY ALIGNED
 - Strategic Priority Alignment #5: NOT ESPECIALLY ALIGNED
 - Strategic Priority Alignment #6: SOMEWHAT ALIGNED
- Is the request one-time or to base? BASE
- Is the request a capital project? NO
- If the request is a capital project, does it involve a software implementation? N/A
- Is the request related to an existing contractual commitment? YES
- Is the request a true-up or true-down to recent actuals? NO
- Is the request truly non-discretionary? YES
- Does the request directly support health and safety? NO
- Does the request mitigate risk, particularly of large losses? NO
- Does the request directly enhance revenues? NO
- Does the request reduce future costs? NO
- Can the request be scaled down? NO

- Initiative name: **Adobe campus license enhancement initiative**
- Dept or Budget name: Academic Technology
- GL number: 1-00-24-60004
- Current (FY24) Budget amount: \$3750 (Academic Technology). Other departments spend a combined total of \$22,380, most of which can not be easily pooled together into one fund.
- Incremental Personnel Budget without OPE: N/A
- Incremental Non-Personnel Budget: N/A
- Responsible Staff Person or Position: David Sprunger
- Strategic Priority Alignment:
 - Strategic Priority Alignment #1: STRONGLY ALIGNED
 - Strategic Priority Alignment #2: STRONGLY ALIGNED
 - Strategic Priority Alignment #3: STRONGLY ALIGNED
 - Strategic Priority Alignment #4: STRONGLY ALIGNED
 - Strategic Priority Alignment #5: NOT ESPECIALLY ALIGNED
 - Strategic Priority Alignment #6: SOMEWHAT ALIGNED
- Is the request one-time or to base? BASE
- Is the request a capital project? NO
- If the request is a capital project, does it involve a software implementation? N/A
- Is the request related to an existing contractual commitment? NO
- Is the request a true-up or true-down to recent actuals? NO
- Is the request truly non-discretionary? NO
- Does the request directly support health and safety? NO

- Does the request mitigate risk, particularly of large losses? NO
- Does the request directly enhance revenues? NO
- Does the request reduce future costs? YES
- Can the request be scaled down? NO

Digital Advertising

In an increasingly competitive higher ed landscape, it is critical that Whitman use all the tools available to reach and recruit prospective students and their families. Given the prevalence of digital media use for our target audience, digital advertising is a key resource to help increase the number of our inquiries and applicants—and ultimately admitted students. When we look at what our panel of 19 peers are spending on recruitment marketing, many competitors like Reed and Macalester spend double what we currently spend on marketing the college to prospective students. For that reason, the Office of Communications is asking for an additional \$50,000 to be added to the discretionary budget for fiscal year 24-25.

In fiscal year 22-23, we saw some success using surplus funds for a small-scale digital advertising campaign focused on increasing applications from students from Washington State. We also saw the largest number of attendees at Admitted Student Days after a digital advertising campaign to increase campus visits.

This fall, Communications is using one-time funds allocated for fiscal year 23-24 to partner with higher ed marketing firm Carnegie Higher Ed to execute a targeted digital advertising campaign to increase brand awareness, drive visits and drive applications.

By partnering with Carnegie, we have access to a live dashboard that allows us to monitor, track and review in real-time key performance indicators and metrics throughout the campaign, allowing us to consistently evaluate strategies and optimize to enhance results. Most importantly, Carnegie offers integration with our CRM so we can better track those who engage with our ads to see which viewers of our ads applied and eventually matriculated. The campaign is currently underway but preliminary results are positive.

In October, clicks on paid ads resulted in 48 requests for information and 28 applications. In addition, ten visits were scheduled as a result of the paid ads. So far in November, we've had 25 requests for information, 29 applications, and 6 visits scheduled from those who clicked on our ads. So, from one and a half months of ads, that's 73 total requests for information, 53 total applications, and 16 total visits scheduled. We've spent just over \$13,000 so far on this campaign so the cost per application is about \$245 but the cost per all conversions is just under \$90.

It is worth noting that in the fall of 2023, I transitioned a vacant role in communications (Director of Media and Public Relations) to an Assistant Director of Digital Marketing and Media. This new position is responsible for developing, implementing and managing a digital advertising strategy and budget aimed at recruiting prospective students.

Communications is requesting the same amount budgeted for fiscal year 23-24 as a one-time allocation (\$50,000), to be added to our discretionary budget in perpetuity to continue growing our digital advertising strategy.

FY 25 Budget Adjustments for Inclusive Excellence

The Division receives an annual allocation for the Power and Privilege Symposium. This allocation is combined with an ASWC contribution to support the annual program. The ASWC fee allocation for P&P this year was \$19,120.80. ASWC already budgets to cover the stipends provided to the P&P Executive Team. If ASWC is amenable, we would propose that ASWC discontinue their fee based contribution to the Division associated with the annual symposium. We would ask that the institutional support for this signature program increase from \$14,000.00 to \$30,000.00. (up \$16,000.00)

The Title IX Discretionary budget can be adjusted to reflect a shift in the spending process recently shared with the VPFA. Legal expenses associated with Title IX operations will be paid out of a different account, so the allocation to Title IX can be reduced from \$120,000.00 to \$85,000.00. (down \$35,000.00)

The Whitman WISE program is a local outreach program that is no longer managed by the Division of Diversity and Inclusion. There are endowment funds that supported the operation of a summer, overnight outreach and recruitment program for local students. The allocation to the Division was to supplement the expenses associated with the coordination and execution of the program. The \$12,000.00 allocated to the Division to support WISE can be discontinued or redirected to the appropriate area to support the delivery of the program. (down \$12,000.00)

The Office of Religious and Spiritual Life (RSL) is able to leverage resources from the generous Smead endowment in the delivery of programs and services to the campus community. The discretionary budget allocation to RSL can be reduced to \$12,000.00 annually in light of the unit's access to additional resources elsewhere. (down \$3,000.00)

The Identity and Belonging unit provides support to a number of identity-centering affinity clubs on campus. While these organizations are accessible to all students, we recognize that based on their missions focused on cultural affirmation and belonging, a large number of students on campus may elect not to engage with these organizations. For that reason, rather than fund such groups through the all-student ASWC fee structure, Identity and Belonging provides these organizations with fiscal sponsorship. As the student community grows in diversity, we have seen a comparable growth in affinity clubs supported by Diversity and Inclusion. We would like to increase the institutional allocation Diversity Affinity Support that is used to fund the activities of these student organizations from \$12,500.00 to \$15,000.00. (up \$2,500.00)

The Intercultural Center has relocated over to the Glover Alston Center. The relocation of the Intercultural Center to the GAC will result in the IC Director assuming oversight of the space and lead to some increased costs associated with student staffing and programming. The GAC is a solidarity space where students who hold a range of identities connect and gather. It also houses the unit's three equity programs (Textbook Lending Library, Clothing Closet and Food

Pantry). We have seen an increase in the total number of first generation and Pell-eligible or limited income students and the College and support for FG/WC initiatives is provided through an annual allocation to 1st Generation Support. While the IC does have access to some resources that could be leveraged to support FG/WC students, we would seek an increase to the 1st Generation Support allocation in the amount of \$6,795.00 from \$7,500.00 to \$14,295.00. (up \$6,795.00)

Our LGBTQIA+ Student Services office is an emerging contributor to the campus landscape. With the relocation of the Intercultural Center to the GAC, the space on the 3rd floor of Reid Campus Center is now a dedicated LGBTQIA+ space. The various programs and activities offered by LGBTQIA+ Student Services include Lavender Graduation, the Community Pride Picnic, attendance at the Queer Student of Color Conference and many other activities designed to ensure that Whitman LGBTQIA+ students feel valued and affirmed. We are depleting funds available to support this unit in specific endowments, so we would like to increase the annual budget allocation from \$15,000.00 to \$20,000.00 to support the programming in that unit. (up \$5,000.00)

These changes reflect a net reduction in the budget allocation for the Division of -\$19,205 which I would like to have assigned to a new Third Space Center Discretionary line item that will be used to support the programming and activities of the Third Space Center.

In terms of one-time expenses, we would like to request one-time funds in the amount of \$65,000.00 to complete the renovations and fully furnish the Third Space Center.

MEMORANDUM

TO: Resources Committee, Board of Trustees
President's Budget Advisory Committee

CC: President's Cabinet

FROM: Jeff Hamrick, Vice President for Finance and Administration

DATE: December 3, 2023

SUBJECT: True-up/true-down initiative built into fiscal year 2025 operating budget.

Context, Rationale, and Summary. It is customary for any new vice president for finance and administration to undertake several exhaustive reviews of their institution's operating budget. My reviews of the college's operating budget suggest that, both within the Division of Finance and Administration but also in other divisions, certain budgets have not been updated on account of three factors:

1. Transitions to post-pandemic realities, practices, and behaviors;
2. A period of unusually high rates of inflation that appears to be on the verge of settling down a bit; and
3. The phenomenon that naturally occurs when a longstanding and respected chief financial officer retires and the operating budget is subjected to fresh eyes for the first time in many years.

The President's Cabinet and I ("we") are proposing a package of adjustments ("true ups and true downs") to a collection of budgets across the college. The combination of increases and decreases to revenue budgets, as well as increases and decreases to expense budgets, makes the package essentially self-funding, as summarized below:

- Favorable increases to revenue budgets: +\$1,586,900
- Unfavorable decreases to revenue budgets: (\$1,413,038)
- Favorable decreases to expense budgets: +\$2,289,774
- Unfavorable increases to expense budgets: (\$2,444,822)

The sum of these proposed changes is approximately zero and hence, these changes represent budget reallocations. The total dollar value of the budget reallocations we are proposing is approximately \$3.9 million, or a bit more than 4% of the college's draft fiscal year 2025 operating budget.

Additionally, we do not expect to propose a large package of budgetary changes such as this one every year. Rather, we view this as a relatively one-off task that is a function of the three above-mentioned factors. Going forward, the college will need to occasionally effect true-ups and true-downs to budgets, but we expect to process those proposals at a more granular level as budget initiative proposals submitted through the annual budget-building process.

In the sections below, we provide some additional (and, for the reader, possibly optional) details about the true-ups or true-downs within each of the aforementioned four categories.

Favorable increases to revenue budgets. The President's Cabinet is proposing the following favorable changes to revenue budgets:

- Increasing the interest income budget on the college's current fund cash holdings from \$500,000 to \$1.6 million, a change of \$1.1 million. Fiscal year 2024 current fund interest income is currently forecasted to come in at approximately \$2.0 million.
- Creating a new 2-fund to capture current-use gifts intended for scholarships at the level of \$400,000. Note that this proposal has to be viewed in connection with a proposal to true down the annual giving revenue target from \$3,000,000 to \$2,000,000 (see the section on unfavorable decreases to revenue budgets).
- Updating the budget for the college's share of revenues from residence hall fees (in connection with administrative support) from \$198,170 to \$260,000, a change of \$61,930.
- Updating the budget for the college's share of revenues from food services fees (in connection with administrative support) from \$84,930 to \$110,000, a change of \$25,070.

The sum of these four changes is the \$1,586,900 figure mentioned on the first page of this memorandum.

Unfavorable decreases to revenue budgets. The President's Cabinet is proposing the following unfavorable changes to revenue budgets:

- Decrease the annual giving budget from \$3,000,000 to \$2,000,000, a change of (\$1,000,000). This proposal should be viewed in connection with the above-mentioned proposal to create a \$400,000 current-use scholarships budget supported by annual giving efforts. The college has recently fallen short of its annual giving objectives on account of a shortfall in leadership-level gifts to the annual fund, possible cannibalization from other capital campaign priorities, and now-corrected historical miscommunications between the college's development and accounting personnel.
- Decrease an internal chargeback budget connected to phone lines in residence halls from \$70,000 to \$0, a change of (\$70,000). This proposal is connected to a proposal to reduce a parallel expense budget; see below.
- Decrease an internal chargeback budget associated with rental of college vehicles from \$120,000 to \$90,000, a change of (\$30,000). In the aftermath of the pandemic, faculty, staff, and students are traveling less intensively and are therefore renting college vehicles less often. This proposal is connected to a proposal to reduce a parallel expense budget; see below.
- Decrease an internal chargeback budget associated with making photocopies from \$90,000 to \$55,000, a change of (\$35,000). In the aftermath of the pandemic, faculty, staff, and students are not making photocopies as frequently or printing as much. This proposal is connected to a proposal to reduce a parallel expense budget; see below.
- Decrease a revenue budget related to a grab-bag of miscellaneous fees, rental charges, etc. from \$161,037 to \$120,000, a change of (\$41,037). While the reasons are not not entirely clear, this budget has not been satisfied since the pandemic ended.
- Decrease the summer conferences, events, and rentals budget from \$358,001 to \$125,000, a change of (\$233,001). Essentially, this category of revenue generation more or less collapsed after the pandemic and does not seem inclined to see a recovery in the near-term. This proposal is connected to a proposal to reduce a parallel expense budget; see below.

The sum of these changes is the (\$1,413,038) figure mentioned on the first page of this memorandum.

Favorable decreases to expense budgets. The President's Cabinet is proposing the following favorable changes to expense budgets:

- In connection with the above-mentioned true-down in revenue budgeted for internal chargebacks related to telephone lines in residence halls, we are proposing to true down a linked expense budget (which covers a variety of functions) from \$359,630 to \$309,630, a change of \$50,000.
- In connection with the above-mentioned true-down in revenue budgeted for internal chargebacks related to vehicle rentals, we are proposing to true down a linked expense budget from \$148,000 to \$90,000, a change of \$58,000.
- In connection with the above-mentioned true-down in revenue budgeted for internal chargebacks related to photocopying and printing, we are proposing to true down a linked expense budget from \$60,000 to \$55,000, a change of \$5,000.
- In connection with the above-mentioned true-down in revenue budgeted for summer conferences, events, and rentals, we are proposing to true down a linked expense budget from \$223,754 to \$70,000, a change of \$153,754.
- The college would create a \$550,000 staff compensation contraexpense budget to capture the effect of probable annual unplanned staff compensation expenditures. Currently, the college does not budget for anticipated staff compensation non-expenditures – due to vacancies, positions being deliberately held open, lags between postings and hirings, challenges filling staff positions in a timely manner, etc. This new budget would capture this phenomenon. (Faculty compensation non-expenditures are substantially small enough each year that we do not recommend budgeting for them at this time.)
- The college would lower the other personnel expense (OPE) rate from 35.5% to 35.0% and realize annual savings of \$170,000. While there are some concerns that fiscal year 2025 OPE expenses might exceed budget, they would probably do so by approximately \$100,000 to \$300,000, and then draw down the OPE restricted reserve, which has grown in recent years to nearly \$5 million.
- The college owes a bullet payment (i.e., a large payment of principal) of \$36.24 million on its debt on January 1, 2029. Thanks to two generously-sized lines of debt servicing budget built into the college's operating budget, the college has been setting aside funds in its endowment in order to pay back this bullet. The amount set aside is approximately the same amount as the bullet payment due on January 1, 2029. This situation opens up the possibility of defeasing the bullet and then shrinking, to some extent, the amount that the college sets aside each year to support repayment of the bullet. (Right now, the annual endowment payout associated with the funds set aside to pay the bullet is pointed at the

operating fund.) The proposed decrease in two lines of the operating budget committed to preparing for the budget is \$1,303,020.

The sum of these changes is the \$2,289,774 figure mentioned on the first page of this memorandum.

Unfavorable increases to expense budgets. The President's Cabinet is proposing the following unfavorable changes to expense budgets:

- We are proposing to increase the expense budget set aside for reimbursement of staff moving expenses from \$17,900 to \$60,000, a change of \$42,100. This budget has not been updated for at least a decade. Not only have staff moving expenses increased, but the longstanding policy for reimbursement of staff moving expenses – up to 7% of the first year's salary – means that this budget should be indexed to the general level of staff salaries. Finally, staff turnover has increased since the end of the global pandemic, which means that the college must more frequently provide reimbursements for staff moving expenses.
- We are proposing to increase the expense budget set aside for recruitment of staff from \$43,500 to \$110,000, a change of \$66,500. Again, this budget has not been updated for at least a decade.
- We are proposing to increase the discretionary budget that pays for the college's audit and tax filing expenses from \$155,000 to \$185,000, a change of \$30,000. This budget has not been updated since the college started paying more in unrelated business income tax and the federal excise tax related to having a large endowment.
- The college's current budget for all legal expenses (except for those expenses related to Title IX) is \$30,000. The college has not stayed within this budget for at least a decade. (The historical practice was to clear each year's realized unfavorable variance from the operating surplus available to the trustees for designation.) The college's new vice president for finance and administration prefers for this budget to more closely resemble the recent actual annual legal expenses faced by the college. So, we are proposing to set this budget at \$350,000, a change of \$320,000.
- The college has historically not explicitly budgeted for banking fees, which should be viewed as a contrarevenue item connected to the college's current fund interest income. The college's new vice president for finance and administration prefers to do so, if the college is to update its interest income budget at the same time (as mentioned above, from \$0 to \$1,600,000). Hence, we are proposing to set this budget at \$80,000, a change of \$80,000 from its current value of \$0.

- The college's current annual maintenance budget – the discretionary line, and not salaries and benefits for maintenance technicians – is set at \$397,000. The college has not remained within this budget for the past half-decade. Accordingly, we are proposing to set this budget near its actual recent annual average values, or \$800,000, which is a change of \$402,778.
- The same observations can be made about the college's plant administration budget, which we are proposing to increase from \$29,000 to \$50,000, a change of \$21,000.
- The discretionary line for the college's custodial services budget – which covers things like purchases of cleaning chemicals, mops, brooms, garbage bags, etc. – is approximately where it should be. However, we are proposing a slight change from \$144,7000 to \$150,000, or \$5,300, to account for recent inflationary pressures.
- The discretionary line in the groundskeeping budget – which covers items ranging from small equipment purchases to gasoline to shrubs – has not been updated in a half-decade. We are proposing to update it from \$67,820 to \$120,000, an increase of \$52,180.
- The discretionary line in the physical plant operations budget has also not been updated for several years. This budget is where the college's utilities (e.g., water, natural gas, electricity) are paid. We are proposing to update this budget to the level of actual average expenses realized over the past several years, i.e., to change it from \$1,423,195 to \$1,600,000, a change of \$176,805.
- The property insurance budget for the college has not been updated for several years. We are proposing to update it from \$409,000 to \$575,000, or a change of \$166,000.
- The liability insurance budgets (i.e., automobile liability, general liability, and educator's legal liability) for the college have not been updated for several years. We are proposing to update these budgets from \$627,284 to \$702,284, a change of \$75,000. In addition to covering recent liability insurance increases, this increase will allow the college to add an additional \$10,000,000 in excess educator's legal liability coverage with its reinsurer, United Educators.
- The budget that covers the supplemental insurance connected to injuries related to our varsity athletes is approximately where it should be, but needs to be slightly updated from \$53,000 to \$58,800, a change of \$5,800.
- The admission office faces increasing overtime expenses due to regulations being promulgated by the State of Washington, including when its employees are caught traveling for longer than expected on account of a flight delay or cancellation. We are proposing to add \$28,159 in salary and benefits budget to the pool from which such overtime is paid in this area.

- Like many areas, the admission office has seen rising expenses related to student employment. These increases are driven by minimum wage laws, but also by the Financial Sustainability Review, which swapped out some staff labor and replaced it with student labor. Finally, student employment expenses have increased in this office because it is more active and engaged with in-person activities in the post-pandemic environment. We are proposing to add \$40,000 in expense budgets to cover this phenomenon.
- We are proposing to add \$8,000 to the discretionary line in the admission office to account for its previously-unbudgeted use of Wrike, which is project management software.
- We are proposing to add \$30,000 to the discretionary line in the admission office to account for the rising costs of purchasing leads that this office has seen in recent years.
- As the admission function transitions to post-pandemic realities, we are delighted to acknowledge that more prospective students are visiting campus more frequently. However, the college traditionally covers meals for these visitors, which gives the college the opportunity to showcase the Cleveland Commons. These additional meals require funding, and so we are proposing to add \$26,000 to the discretionary line in the admission office to account for this heightened activity.
- In that same vein, the admission office has seen rising travel costs, both for its admission officers (who recruit across the country), its vice president (who recruits in China as well as in the United States), and to fly in students who lack the financial means to do so. We are proposing to add \$40,000 to the discretionary line in the admission office to recognize these added and recent pressures.
- Finally, we are trueing up the discretionary line in the admission office for a previously-unbudgeted expense, i.e., that office's ongoing outside consultations with Blue Icon Advisors. This true-up amounts to \$50,000. In the future, if we are able to develop or hire internal staff who have the analytical capacity to manage the work currently being handled by Blue Icon Advisors, we will repurpose this budget (i.e., to staff salary and benefits) accordingly.
- The college recently approved the creation of a new major gifts officer position that rolls up to the Vice President for Development and Alumni Relations. However, no budget was created to support travel, airfare, meals, or lodging for this gift officer. We propose to correct this oversight by adding \$28,000 to the discretionary line in the general ledger department associated with this major gift officer.
- Additionally, travel expenses (e.g., airfare, hotels, local meals, etc.) have increased for all development-related employees who travel to raise money for

the college, both in general but in particular in connection with the current capital campaign. We are proposing to recognize these recent inflationary impacts by adding \$12,000 to discretionary lines rolling up to the Vice President for Development and Alumni Relations.

- The college's Vice President for Inclusive Excellence (formerly, Vice President for Diversity and Inclusion) has never had a non-zero discretionary budget to cover their own office's expenses (e.g., for professional development, for programming originated at the direction of the vice president, etc.). We propose to add \$25,000 to the discretionary line within this vice president's general ledger department.
- The college's varsity athletics program has consistently been over budget each year over the past half-decade. While there are a number of factors that have driven this failure to adhere to budget, key drivers include the rising expenses of travel, charter buses, airfare, food, hotels, etc. To that end, we are proposing to add \$240,000 to discretionary lines throughout those general ledger departments rolling up to this program.
- The college's recent expenses related to emergency preparedness have been captured in a restricted fund which has run a negative (and growing) balance for some time. Since the college's commitment to training (e.g., Cabinet tabletop trainings) and to equipment purchases (e.g., evacuation chairs) is ongoing, the vice president for finance and administration has proposed to clear the deficit in the aforementioned restricted fund and then provide base funding for emergency preparedness for the duration. We propose to create a new departmental general ledger code related to emergency preparedness in the operating fund, and to place \$100,000 in funding in its discretionary line.
- The college has set aside some one-time funding to address accessibility-related priorities as they are identified by the College Accessibility Committee. Additionally, the Life Cycle Fund periodically and opportunistically (and, sometimes, inadequately) provides some funding to make buildings, grounds, and spaces more accessible. However, the college urgently needs an identifiable budget for managing routine small- and medium-sized accessibility initiatives. To that end, we are proposing to create a new departmental general ledger code related to accessibility projects, and to place \$250,000 in funding in its discretionary line.
- The college currently budgets in an ad hoc and one-time way whenever it must pay the (often substantial) costs of recruiting new executives (or, sometimes, mid-level administrators). We are proposing to create a general ledger department, specifically dedicated to headhunting expenses, that will close unto itself (i.e., roll over and accumulate from year, since executive searches can be occasional and unpredictable). The initial proposed level for this budget is \$125,000. This budget's rolling and accumulating balance will, as mentioned,

also be used occasionally for mid-level administrator search support (e.g., an assistant vice president, an information security officer, etc.) and it may also be used to cover the costs of transitioning an executive back to the faculty.

The sum of these changes is the (\$2,444,822) figure mentioned on the first page of this memorandum.