
President's Budget Advisory Committee First Meeting March 4, 2:30pm

1 message

Peter Harvey <harvey@whitman.edu>

Thu, Feb 25, 2021 at 2:45 PM

To: Kathleen Murray <kmurray@whitman.edu>, Alzada Tipton <tiptona@whitman.edu>, "Balof, Barry" <balofba@whitman.edu>, "Biswas", 'Shampa' <biswassa@whitman.edu>, "Hoffman, Kurt" <hoffman@whitman.edu>, "Alker", 'Sharon' <alkersr@whitman.edu>, "Frew, Gillian" <frewga@whitman.edu>, "Giusti, Stacey" <giustisj@whitman.edu>, Charles Marr <marrce@whitman.edu>, Leslie Servine <servinl@whitman.edu>, Reily Wilken <wilkenr@whitman.edu>, Olivia Lipson <lipsonow@whitman.edu>, Ronaldo Edwards <edwardsr@whitman.edu>, Sara Frey <freysl@whitman.edu>

Dear Colleagues,

It is time to start the President's Budget Advisory Committee work. Thanks to all of you for serving on this committee. Our first meeting will be next Thursday, March 4 at 2:30pm. My colleague Sara will be sending out a zoom invite shortly.

For those of you new to the committee, you can learn more about our charge and work in recent years by going to the committee website: <https://www.whitman.edu/chief-financial-officer/presidents-budget-advisory-committee>

The work of the committee is being adapted this year to integrate it with the Financial Sustainability Review Committees. With that in mind, we have had to shorten our normal meeting schedule. Next week's meeting is timed to allow us to provide input to President Murray and the Cabinet on recommendations coming out of the FSR Committee reports. This input is important prior to the Cabinet making recommendations to the Trustees. President Murray will be joining us for this discussion. As in past years, President Murray will be sharing the Cabinet's initial thinking on the FSR recommendations, particularly as they relate to developing next year's budget.

Please note that ASWC has only appointed two of the four student representatives to the committee at this time, and they are attempting to name the remaining two prior to the meeting.

Regards, Peter

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Peter Harvey
Chief Financial Officer
Whitman College

[trustees] Fwd: FSR working group final reports

Kathleen Murray <kmurray@whitman.edu>
To: freysl@whitman.edu

Wed, Mar 3, 2021 at 12:51 PM

Dear members of the Whitman community,

Attached to this email you will find the final reports from each of our three financial sustainability working groups. I hope you will read this entire message before turning to those reports. Please keep in mind that these reports include recommendations, not decisions. The Cabinet will spend the next week reviewing all three reports in order to make a coordinated set of recommendations to the Board of Trustees. The Board will be the final decision makers, and they will share their decisions with the entire Whitman community in the coming weeks.

I want to start by acknowledging how difficult this work is, and offer my appreciation for everyone on campus who has fully engaged in a good-faith effort to steer this process toward the best possible outcomes. Any time the things we hold dear are held up to the light for examination and face possible change or even elimination is cause for anxiety and fear of loss. I want to honor that many of you have been simultaneously feeling that anxiety and loss while still fully participating in the FSR process, working toward our shared goals. Even when we have come to different conclusions, so many of you have worked to find compromise and have shown empathy for other viewpoints. It is these instincts that have served us well, and will continue to demonstrate the strengths of the Whitman community. Thank you.

At the risk of repeating myself, I want to take just a few minutes to review how we arrived at this point. This is challenging work; we face difficult decisions. There is someone who loves every single thing we do at this college; otherwise, we wouldn't be doing it anymore. And yet, we cannot just continue down the same path at a time when the world is changing all around us.

The financial sustainability working groups, which included students, faculty, staff and trustees, have done their work focused on Whitman's mission of student learning. Six of the working group members are also alumni of the college. They have proposed the particular changes included in their reports hoping to have the smallest negative impact on the fewest students. I sat in each meeting of all three groups and can assure you they have done their work in a deliberative manner with the best interests of the institution top of mind.

As you know, even before the arrival of the COVID pandemic, Whitman was facing significant challenges, along with most of the colleges in our sector. We have a declining population of 18-year-olds nationally (which we've all been reading about for years), a drop in interest in the type of education offered in liberal arts colleges, an applicant pool with greater financial need (the number of applicants to Whitman with an expected family contribution below \$10,000 per year has doubled since 2016), and increasing price sensitivity among those most able to pay for this education. Add COVID to the mix, and we have to expect even greater financial need along with a reluctance to go to college very far from home. The much smaller first-year class that enrolled this fall will be with us for at least the next four years, and at the end of that four-year period, we will be at the precipice of a demographic cliff in terms of 18-year-olds in the population.

The college is well-positioned to pivot through these challenges, largely because of the careful management of the college over the years and our ability to plan thoughtfully for the future. Still, faculty and staff are appropriately concerned about when the retirement contributions and pay cut from this year's budget will be restored. We need to be concerned about restoring our non-personnel budget cuts, as well. And we need to be able to support a robust financial aid budget so that this education remains accessible to our students from a variety of

backgrounds. Our budget model for fiscal 2022 includes sustaining investments in financial aid and restoring salary cuts and retirement contributions, along with some of our non-personnel cuts, but it comes with at least a \$3.5 million deficit at this time. Our first charge is to find enough savings to build a balanced budget for next year. I think it is important to note that the savings we are working to identify in order to balance next year's budget constitutes about 4% of the college's total operating budget.

This financial sustainability review was necessary to help us determine which programs that we currently have might require additional investments to continue to be successful, which will be fine just as they are, and might which need to be transformed to be more meaningful to today's students. At the same time, we need to better understand the needs and wants of the current generation of prospective students and consider creating new programs that will help us achieve our enrollment goals. The work of planning for and building out new programs will be ongoing, so our second goal in this current work is to identify additional funding that will help us fund those new and innovative programs.

Following the release of draft reports from the working groups on February 2, the groups accepted feedback through February 15, via campus community open forums and written responses. They listened to and read every word of that feedback and made substantive changes to their final reports. In particular, you will see a commitment to retaining current staffing levels for Classics and Environmental Humanities while those two programs engage in an internal program review. You will also note a call for annual review of Cabinet discretionary budgets and language about additional staffing for the Student Engagement Center.

Unfortunately, much of the feedback we received was based on misinformation, so I think it is important to clarify what is based on misunderstandings and what is based on facts.

Misunderstanding: We are gutting the humanities, or more broadly, the liberal arts.

Right now, the total faculty FTE in the humanities division is 75, with 61.2 FTE in the social science division and 52.7 FTE in the natural sciences and math. The humanities division is by far the largest and will remain the largest even if all of the reductions proposed in the working group report are implemented. The largest number of proposed cuts are in the largest division, which is also the division with the smallest number of graduates.

When I arrived at Whitman, our student/faculty ratio was 8.2/1, one of the richest anywhere in the country. Not only is that very expensive, but there is no pedagogical evidence that 8/1 is better than 10/1. I was charged by the Board with returning us to a 10/1 student/faculty ratio, and we have made progress on that goal up to this point primarily through attrition. But it has taken us 6 years to move the needle to just above 9/1, and we don't have the luxury of continuing to move at this pace. With our lower enrollment this year due to COVID, we're actually back at 8.2/1. So, if we make all the reductions proposed through the 2023-24 academic year AND manage to grow our enrollment back to 1500 students (a big challenge in this moment), our student/faculty ratio will be 9.9/1, still a very positive number. There is simply no way to justify the rhetoric that we are gutting the humanities or the liberal arts more broadly.

Misunderstanding: We are killing the Environmental Humanities program.

Most of the student and alumni feedback on this issue focused on their transformative learning experiences in Don Snow's classes. It has been wonderful to read about the impact Don has had on so many students' lives. But Don is going to retire; we won't have Don Snow's classes anymore. This fact has nothing to do with the FSR and would be happening anyway. Environmental Humanities is, by its nature, an interdisciplinary program, and we have many faculty across the campus who contribute to that program. Its enrollments are strong, and faculty are dedicated to the program. The final report of the academic working group recommends maintaining current levels of staffing while the faculty in EH conduct an internal review of the program. Environmental Humanities will continue to be a distinctive program for the college.

Misunderstanding: Many humanities programs are being eliminated.

The faculty on the academic program working group have been clear from the start of this work that they did not want to eliminate any departments or any tenured/tenure-track faculty positions. The committee worked to develop a plan that accomplished both of those things. We will continue to have programs in Chinese, Japanese, and Classics, and faculty will determine whether they want to support a major, a minor or a track within a broader major or some other structure. Overall enrollments in these programs have been very small, and it does not make sense to dedicate more resources there than enrollments warrant.

Misunderstanding: This work was done too quickly, and not enough people had a voice in the process.




I announced the formation of the financial sustainability working groups in mid-October, and each group included students, staff, faculty and trustees and was co-chaired by a member of the Cabinet and a Trustee. The groups met at least weekly throughout the rest of October, and all of November, December and January, including over the holiday break. The process continued throughout all of February before final recommendations were submitted this week. As I said earlier, the Cabinet will spend the first two weeks of March studying all three reports and developing a coordinated set of recommendations to present to the Board. The Board will meet during the latter half of March to make its decisions. The work must be concluded at that point in order to inform the preparation of the fiscal 2022 budget, which the Board will approve in May. The work to imagine and develop new programs to drive enrollment and revenue will be ongoing, with many more opportunities for input from the community.

I want to reiterate that it is because we are in a strong financial position that we have the opportunity to make choices, albeit difficult choices, about our path forward. It is our responsibility, our duty, to make those choices in order to maintain and sustain the transformational liberal arts educational experience that all of you so deeply appreciate.

Thank you,
Kathy Murray



3 attachments

-  **Academic Program Report (revised) (1).pdf**
179K
-  **FSR - Student Support Final Report - 03.03.21.pdf**
1491K
-  **FSR Administrative Unit Work Group - Final Report, March 1, 2021 (1).pdf**
285K

FINANCIAL SUSTAINABILITY REVIEW
ADMINISTRATIVE UNITS WORKING GROUP – DRAFT REPORT
FEBRUARY 1, 2021

Administrative units (Communications; Alumni Relations; Financial Aid; Human Resources; Fringe Benefits; Business Office; Facilities; Sustainability Office; Admission; Development; professional development funding for staff; overall staffing level)

COMMITTEE MEMBERS: Megan Clubb, Trustee Emerita (co-chair); Steve Setchell, VP for Development and Alumni Relations (co-chair); Christie Fuller, staff; Tony Ichan, staff; Susanne Beechey, faculty; Patrick Frierson, faculty; Lydia McDermott, faculty; Peter Harvey, CFO; Josh Jensen, VP for Enrollment & Communications; Bill Neff, Trustee; Reily Wilken, student rep to the Board Committee on Resources
 Staffed by Shannon Shearer
 Attending Kathy Murray, President

Brief process overview

In order to better understand the opportunities our group assessed, it is important to first understand how we arrived at them.

Timeline

	Nov	Dec	Jan	Feb 1st	Feb	Mar 1st
Charge to Group & Introductions						
Build Awareness & Understanding						
Identify Opportunities for Cost & Revenue						
Discuss Specific Solutions						
Prioritize Solutions						
Draft Report Due February 1st						
College Feedback on Draft Report						
Finalize Report						
Final Report Due March 1st						

In November and December, we focused on building awareness and understanding of the key drivers of costs and revenue. There were several presentations (including benchmark and comparison data) from program areas, such as: *Development and Alumni Relations, Enrollment and Communications, Financial Operations, Facilities Services, Human Resources, and Technology Services*. The committee also


sought input from all staff via a brief survey. We then developed a list of 128 opportunities for cost savings or revenue generation. We repeatedly checked our list against Whitman’s mission and strategic plan.




By January 6th we prioritized these 128 opportunities using 8 criteria agreed on by the entire committee: *Reduces Operating Costs, Improves Staff Satisfaction, Increases Development Revenue, Aligned with our Strategic Priorities, Increases Net Tuition Revenue, Increases Student and Parent Satisfaction, Increases Enrollment and is Consistent with a Liberal Arts Mission*. Of the 128 Opportunities, 33 rose to the top for further consideration. These 33 had the potential for high financial impact with varying degrees of potential negative impact.

The 33 were further analyzed. We clarified their descriptions, their rationales for recommendation, and their net financial impacts. The committee then voted on whether each of the 33 opportunities should: 1) be suggested for further consideration and study, or 2) not be suggested for further consideration and study. In this process some opportunities were combined, resulting in the 24 opportunities listed below. This report was approved by the Committee at its January 28th meeting.

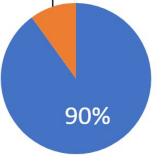
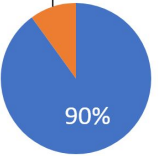
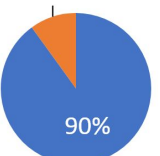
Opportunities for budget reduction

The following opportunities would strengthen financial sustainability by cutting costs. All costs and savings are broad estimates and will need to be further verified. They are ranked according to the committee’s votes for further consideration, represented by the pie charts. In total, there are 10 budget reduction opportunities for consideration, totaling **\$2,877,000 annually**, with an approximate one-time cost of **\$160,000**. Note that some items have no estimated cost or savings at this time. Details of possible actions are included as footnotes. Some of these opportunities may overlap. In addition, some will require further study, particularly where there are unknown costs, in conjunction with the other opportunities from this committee and the Academic Committee and Student Services Committee.

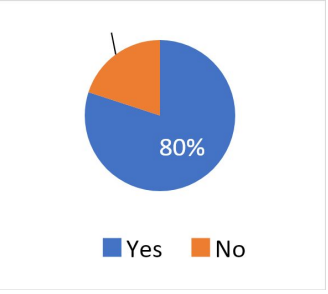
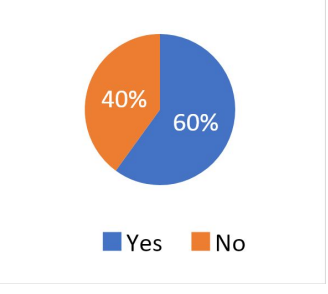
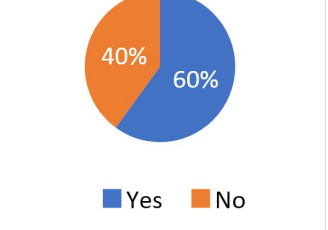
Committee Vote in Favor of Further Consideration	Opportunity Description and Rationale	One-time Costs	Annual Costs	Annual Projected Savings	Annual Net Impact
 <p>A pie chart with a single blue slice representing 100%. The text '100%' is in the center of the slice. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>Financial Aid for Off-Campus Students Match student housing and food budgets to state recommendations for off-campus students.</p>	0	0	First-year savings: \$300,000 additional savings when fully imple-	0

				mented: \$300,000	
 <p>100 %</p> <p>■ Yes ■ No</p>	<p>Offset Restricted Endowments</p> <p>Secure savings by finding flexibility in restricted endowment revenues for offsetting budgeted expenses. This financial impact figure reflects only those in areas related to the administrative units work group.</p>	0	0	\$106,000	0
 <p>100 %</p> <p>■ Yes ■ No</p>	<p>Energy Efficiency #1</p> <p>Replace older light fixtures before newer (about 60-70% of lighting), as they use significantly more energy than LED's. This project aligns with Whitman's Climate Action Plan. Aligning with this plan provides a possible recruitment tool.¹</p>	\$160,000	0	\$46,000	Break even in four years, then \$46k annually
 <p>100 %</p> <p>■ Yes ■ No</p>	<p>Printing and Mailing Services</p> <p>Eliminate the revenue expectations in printing and mailing services by charging individual departments actual costs.</p>	0	0	TBD	TBD

¹ Older light fixtures are T-8, T-12, "fluorescent." Two projects are ready to proceed, one of which is the Fouts CVA. The project cost would be \$162,718 after \$3,500 of incentives from Pacific Power. After a year of operations, we can verify the projected annual savings of estimated \$46,000 (which includes utility and operational costs). With these annual savings, the estimated payback period is 3.25 years. Additional benefits of this project include addressing total cost of ownership, such as: 1) end-of-life maintenance issues, replacement), 2) modernizing the emergency lighting system, 3) reducing carbon emissions by 75 tons.

 <p>90%</p> <p>■ Yes ■ No</p>	<p>Reduce Staff/Admin FTE</p> <p>Eliminate 6.5 staff/admin FTE (estimate still being reviewed by cabinet), mostly through attrition.</p>	0	0	\$250,000	\$250,000
 <p>90%</p> <p>■ Yes ■ No</p>	<p>Life Cycle</p> <p>Lower the life cycle breakeven from 23 years to 17 to reduce expenses while still leaving enough time for the college to make adjustments in the future if this model is inadequate.</p>	0	0	\$456,000	\$456,000
 <p>90%</p> <p>■ Yes ■ No</p>	<p>Energy Efficiency #2 (facilities)</p> <p>Pursue creative ways to improve facilities energy efficiencies, such as efficiency-as-a-service (EaaS) models which allow efficiency upgrades with no upfront costs (those are outsourced to external partner) and immediate reduced operating expenses.²</p>	0	0	TBD	TBD

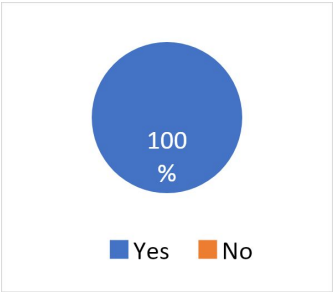
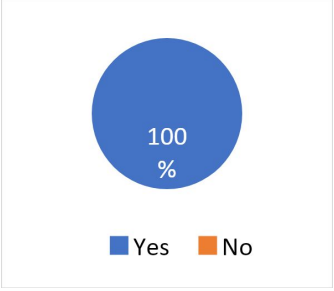
² This strategy for funding is an example of a variety of longer term opportunities available to Whitman, such as Solar PV, High Efficiency Boilers etc. Specifically, "Efficiency-as-a-service [EaaS]," is one of the strategies described by the US Dept. of Energy as a pay-for- performance, off-balance sheet financing solution that allows customers to implement energy and water efficiency projects with no upfront capital expenditure." A provider selected by Whitman would pay all project costs. Whitman would immediately reduce operating expenses by paying the provider a charge per unit of energy saved that is below the baseline utility price. Contract terms typically range from 5 to 15 years, with periodic buy- out options. The provider bears the performance risk, meaning they get paid less if the project savings are lower than expected - Whitman would only pay for efficiencies that are actually achieved. These type of funding models may also be a good option when Washington implements Clean Building Standards with energy efficiency compliance requirements and penalty notices sent out to building owners by 7/1/2021.

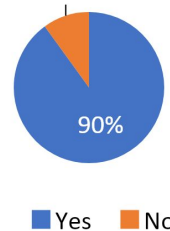
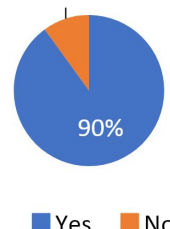
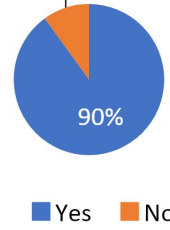
 <p>A pie chart with a blue segment representing 80% and an orange segment representing 20%. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>Increase Flexibility In Gapping</p> <p>Whitman has been working toward eliminating gapping in financial aid, but may need flexibility in this area to balance access and revenue goals in the future. By removing the hard limit on gapping, Whitman could increase net tuition revenue by an estimated \$219,000 with an across-the-board 25% increase in gapping. Note that this does not take into account changes in yield due to increased gapping.</p>	0	0	\$219,000	\$219,000
 <p>A pie chart with a blue segment representing 60% and an orange segment representing 40%. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>Efficiency Improvement Project</p> <p>Conduct an Efficiency Improvement Project to increase efficiencies.³ The ratio of student/staff is a significant lever arm for cost savings. Increasing the student/staff ratio from 4.85 to a student/staff ratio of 5.24 (this is 5% more efficient than available benchmarks) would reduce costs by \$1.5million (proposed FTE's 295 down from 319). Some of these savings may overlap with other staff efficiency items in this report and the reports of other work groups.</p>	Unknown	0	\$1,500,000	TBD
 <p>A pie chart with a blue segment representing 60% and an orange segment representing 40%. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>Staff Satisfaction</p> <p>As is a best practice, regularly assess staff satisfaction across departments and use this information to help recruit and also reduce turnover.</p>	Unknown	Unknown	Unknown	TBD

³ The goal would be to reduce staffing not compensation levels; eliminate less- essential or non-essential services and reduce service levels; consolidate and collaborate between departments; digitize/streamline processes.

Opportunities for increasing revenue

The following opportunities would increase revenue. They are ranked according to the committee’s votes for further consideration, represented by the pie charts. In total, there are 5 revenue building opportunities for consideration, totaling approximately **\$5,450,000**, with known approximate annual costs of **\$2,415,000**. Details of possible actions are included as footnotes. Some of these opportunities may overlap. In addition, some will require further study, particularly where there are unknown costs, in conjunction with the other opportunities from this committee and the Academic Committee and Student Services Committee.

Committee Vote in Favor of Further Consideration	Opportunity Description and Rationale	One-time Costs	Annual Costs	Annual Projected Revenue	Annual Net Impact
 <p>A pie chart showing 100% of the vote in favor (Yes). The chart is entirely blue. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>Financial Development Invest in Development for an additional major gifts officer to increase fundraising results.</p>	0	\$115,000	\$250,000	\$135,000
 <p>A pie chart showing 100% of the vote in favor (Yes). The chart is entirely blue. Below the chart is a legend with a blue square for 'Yes' and an orange square for 'No'.</p>	<p>The Whitman Fund Continue to grow The Whitman Fund for FY22 to provide immediate, unrestricted operating budget support.</p>	0	0	\$200,000	\$200,000

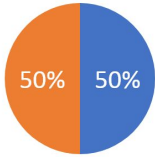
 <p>90%</p> <p>■ Yes ■ No</p>	<p>Summer Term</p> <p>The college could potentially have a summer academic term that could be open to Whitman students. <i>This item overlaps with the Academic FSR group and the Student Services FSR Group.</i></p>	Unknown	Unknown	Unknown	TBD
 <p>90%</p> <p>■ Yes ■ No</p>	<p>Increase Target Enrollment</p> <p>Increase the target enrollment size by 250 students over the base case without a substantial increase in facilities and other costs.</p> <p>Possibilities for consideration include: summer sessions (see above); a three-year degree option; off-campus options, such as a Semester in Seattle, and offering appropriate courses in an online platform.⁴</p>	Unknown	<p>\$2,300,000</p> <p>Rent in Seattle is estimated to be \$1,200,000. Consider a donation of space</p>	\$5,000,000	\$2,700,000
 <p>90%</p> <p>■ Yes ■ No</p>	<p>Increase Resources for Enrollment –Communications</p> <p>Add additional funds to bolster development of the college website, social media and other enrollment communications channels. Adding resources could speed up work and increase the quality of a number of critical communications projects. Resources could be used to hire agencies</p>	Up to \$300,000	Up to \$50,000/yr	Unknown	TBD

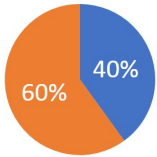
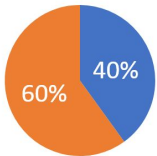
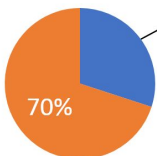
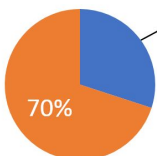
⁴ In the **Semester in Seattle** case, 200 of the additional students would be in WW and 50 would be in Seattle. Assume the discount rate would have to increase by 10 percentage points on the added students relative to the base case (say 50% to 60% on the added 250 students); 200 students in WW absorbed by the faculty to decrease the faculty/student ratio by 1; the student/staff ratio would go from 4.85 to 5.4. In addition, add 1 faculty and 1 support staff in Seattle, provide these 2 Seattle employees with a monthly housing allowance; and rent 2000 square feet for lecture space. Assume no increase in housing inventory in WW. A rough guess is \$2.7million in positive Financial Impact per year (\$5.0 million in Net Tuition Revenue and \$2.3million in expenses). Note the cost to rent space in Seattle is \$1.2 million. We should explore the possibility of a donation of space adding \$1.2 million to the positive Financial Impact. **Housing additional students in Walla Walla** is a different challenge. One possible asset would be re-opening North Hall, which could provide approximately 80 beds. **For a Summer Session**, we would recommend looking at the Hanover Study to assess demand. **A three-year degree option** would need to be further studied by the financial aid office to assess the impact particularly on the highest need students.

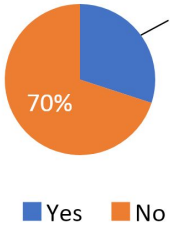
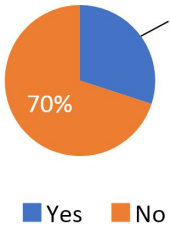
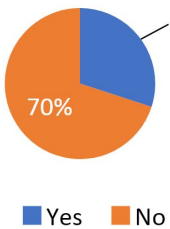
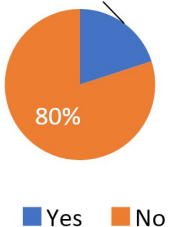
	<p>to fully execute projects, hire freelancers to assist communications staff on in-house efforts, and fund professional development so existing staff can increase their skills and effectiveness. Projects could include website redesign (full or partial), more extensive search engine optimization (SEO), additional outsourced video production, and other freelance content creation to supplement staff efforts. Costs could be wildly variable, with impact commensurate.</p>				
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Opportunities suggested and voted on, but not suggested for further study

These opportunities were among the 30+ opportunities that were initially ranked with high potential positive impact but various degrees of potential negative impact vis a vis the 8 criteria agreed on by the entire committee: Reduces Operating Costs, Improves Staff Satisfaction, Increases Development Revenue, Aligned with our Strategic Priorities, Increases Net Tuition Revenue, Increases Student and Parent Satisfaction, Increases Enrollment and is Consistent with a Liberal Arts Mission. When we voted in favor of them moving forward, they did not receive a majority of votes (as shown in the pie charts). We include them to honor the fact that they were brought to the table.

Committee Vote in Favor of Further Consideration	Opportunity Description and Rationale
 <p>50% 50%</p> <p>■ Yes ■ No</p>	<p>Improve Rankings Pursue strategy to improve our rankings in publications such as <i>US News & World Report</i>.</p>

 <p>40% 60%</p> <p>■ Yes ■ No</p>	<p>Flexible Contracts</p> <p>Offer flexible contract lengths for professional staff (example: 10-month contract with prorated 12-month salary schedule), subject to supervisor and cabinet officer approval. The magnitude of savings would be contingent on the number of people who take up such flexibility and the number of positions where that flexibility is available.</p>
 <p>40% 60%</p> <p>■ Yes ■ No</p>	<p>Tuition Assistance Program</p> <p>Reduce the tuition assistance program for dependent children by reducing the amount of benefit for current employees from 50% to 40%. The savings would of course vary by year, both due to the total number of participants in the cash grant program and the relative mix of expensive versus inexpensive institutions those dependents are attending.</p>
 <p>70%</p> <p>■ Yes ■ No</p>	<p>Tuition Assistance Program</p> <p>Reduce tuition assistance program for dependent children, grandfathering it in for current employees and discontinuing for new employees. Because of these eligibility requirements, the college would not realize any savings grandfathering these programs for between 2 and 5 years. Following those eligibility periods, it is difficult to determine what the savings would be and costs would likely still fluctuate for years to come.</p>
 <p>70%</p> <p>■ Yes ■ No</p>	<p>Staff Salaries</p> <p>Reset our targets for staff salaries from 100% to 90% of the median for peer institutions, and/or reconsider the appropriate comparison class for those salaries.</p>

 <p>70%</p> <p>■ Yes ■ No</p>	<p>Part-time Positions</p> <p>Consider more part-time positions to allow flexibility and reduce burnout for full time employees.</p>
 <p>70%</p> <p>■ Yes ■ No</p>	<p>Centralized Purchasing</p> <p>Purchase all office and building supplies in bulk and establish a supply repository used to distribute the supplies.</p>
 <p>70%</p> <p>■ Yes ■ No</p>	<p>Retirement Contribution Match</p> <p>Reduce retirement contributions match from 10% to 9%. Any reduction in the benefit level should consider the overall compensation provided, so that Whitman’s overall compensation is competitive with peer institutions and permits the college to compete for and retain the most-qualified candidates.</p>
 <p>80%</p> <p>■ Yes ■ No</p>	<p>Outsource Functions</p> <p>We addressed a few opportunities to outsource functions within our purview. After review the committee decided the negatives outweighed the financial benefit for those considered.</p>

Appendix—The opportunities below are a summary of additional suggestions made by committee members or collected in the staff survey we conducted in December. The primary reason they are not addressed above is that they were estimated to have a relatively lower financial impact. In addition, some are very broad and some are incorporated into ideas addressed above. We are passing these ideas along to the President and Cabinet.

Opportunity
On-site renewable energy, reducing emissions.
Accelerate the transition to digital communication and documentation.
Reduce the number of on-campus Alumni Board meetings.
Turn off lights earlier in all or most buildings and classrooms and reduce the number of fixtures.
Reducing computers in classrooms. Perhaps provide divisional laptops that faculty can request.
Reduce landscaping efforts and resource use.
Pursue development opportunities for eco-friendly retrofits of facilities. Consider deferring those improvements so that they can be part of future fundraising.
Provide more paths for career and title advancement at Whitman.
Limit facility hours and staffing.
Leverage existing revolving funds to fund projects that lower energy, water, etc. use.
Move the magazine on line for young alumni (less than 10 or 20 years out?) to reduce printing and mailing costs but still have paper versions for folks who value the paper the most.
Increase Development collaboration with faculty to support fundraising efforts.
Communicate utility-cost-saving recommendations (e.g. closing blinds in the summer, etc.).
Drastically reduce heat or AC during breaks for certain buildings.
Reduce the number of computers in classrooms.
Reduce air conditioning and heating usage.
To increase the College's effectiveness in attracting and retaining students, we should make significant progress on Whitman's Climate Action Plan and our goal of reaching carbon neutrality.

Reduce the number of printers across campus. People are doing more things digitally nowadays.
Ask all administrative departments how they would reduce budgets (in general, or just discretionary spending) by 10% to assess the effects of such reductions.
Limit food reimbursement for travel.
The Alumni Board could meet on campus once instead of twice per year: Savings: \$11,000
Eliminate tech licenses we no longer need.
Enhance student-staff cooperation. For example, create Communications Fellows, students who can work with communication to develop student-centered communication.
Continue to rely on virtual programming for alumni.
Continue using email and video more extensively in alumni relations after pandemic to reduce printing, event, and travel costs.
Eliminate the FALC program (Future Alumni Leadership Council). Savings: \$10,000
Reduce course fee assistance.
Reduce paper and stationery usage, recycle and reuse when possible.
Conferences and Events has a discretionary budget of \$550K and overall budget of \$987K. Are there opportunities here for efficiencies?
Eliminate the cell phone stipend.
Purchase technology and lab equipment in overstock, scratch-and-dent, and refurbished condition.
Reduce annual landscaping irrigation (example: 5% reduction) and flower budget.
Outsource payroll.
Identify current spending and standardize professional development spending for staff. Communicate clearly to staff how to access this spending.
Reconsider which administrative positions require national searches and which can be filled locally (with cost savings).
The President's Office has a discretionary budget of \$539K. Are there opportunities for efficiencies here?

Implement a surplus program to methodically sell items that the college no longer needs. According to the person who runs the surplus program at Carleton College, as of a couple of years ago, it was generating tens of thousands of dollars of revenue annually.
Leverage Whitman Investment Company (WIC) endowment fund to educate students and attract donors.
Annually recruit alumni volunteers to reach out to prospective students.
Charge for non-student access to some facilities.
Reduce turnover across positions on campus (staff and faculty) to reduce recruitment costs.
Reconsider overnight position at Library Circulation desk.
Bid out a new life insurance policy.
Move away from 100% recycled paper for <i>The Whitman Magazine</i> .
Evaluate Whitman contributions to employee health insurance plans.
Providing more work study jobs. Increase collaboration between communications and other departments, including athletics and academics. Work with the SEC and OP to target prospective students at schools with experiential learning programs.
Better manage athletics camps for college revenue.
Develop an annual Alumni Referral program in partnership with Admissions. (Admissions and AO are working on this program now.)
Video conferencing tools, such as Zoom, should be utilized to create a national platform for presenting Whitman speakers who have previously traveled across the country to speak with small audiences.
Charging for memberships to recreational facilities, such as Bratton, BFFC for community and non-Whitman use.
Health center and counseling center should bill student's insurance for services.
The alumni trips program can generate revenue. Each of the excursions to Cuba earned a \$5,000 commission for a total of \$15,000.
Provide strong incentives for faculty to compete for external grants (and/or at least remove strong disincentives). (E.g. revise Faculty Handbook Chapter VIE, and perhaps chapter VIB.)
Move to a satisficing model of admissions to minimize need for staff labor on reviewing applications.
Monetize academic content, including virtual distribution of classes or publications in academic journals.

Reevaluate mileage reimbursement.
Selling the blue seats for home basketball/volleyball games.
Merchandising and selling athletics gear on campus.
Pursue sponsorships for athletics programs.
Strategically outsource administrative and creative talent. Set up a outsource resources finder in HR. COVID has changed workforce sourcing.
Use academic programming to expand our donor base, both in terms of strategic topical areas (Black and Indigenous Studies, perhaps?) and geographically (consider her how a Whitman in Seattle or domestic Crossroads course could not only interest new individual donors.
Charge a nominal fee (\$5-\$10pp) for in-person events; this will help defray the cost of venues and BEO minimums that are high. Exempt young alumni from this fee. Adding a fee has the potential to reduce the number of no-shows.
Facility rentals plays a significant role in revenue for many college athletic departments, but at this point, SSRA/athletics really does not do anything or have a plan to rent out our facilities in order for use, or even charging for facility use, even to groups across campus, to help maintain/pay for upkeep of our facilities.
Offer tuition discounts for local Walla Walla college/university students who don't plan on returning to their college campuses.
Allow individual departments to solicit donations from alumni and community members whom we interact with. (Perhaps provide specific guidelines for such solicitations? More generally, perhaps use faculty and staff in roles akin to gift officers for specific donors who have relationships with those faculty or staff?)
Perhaps a few particular collection pieces could be deaccessioned and sold with the proceeds coming in used to fund other things.
In recruiting/communications/marketing, emphasize distinguishing features of Whitman's program such as efforts to decolonize syllabi, a focus on diversifying the voices represented in collections, a new practice of land acknowledgement, and efforts to have the Marcus Whitman statue removed.
Host athletics tournaments on campus.
You would get more work for your money if some custodians were allowed to work 12am to 9am.
Replace the Science Outreach Coordinator, a staff position that plays an important role in publicizing science, which is a requirement or desideratum in many of the most prestigious science grants.

Implement need-blind admissions. What would be the cost/benefit from a recruiting standpoint to going need blind? Use parent-plus loans to fill in gaps.
Evaluate ROI of the College's membership in Independent Colleges of Washington.
Update Penrose House.
Partner with CS to create "web development fellows", also create fellows for other forms of communications ("admissions communications fellow").
Promote faculty sabbaticals, which can be partly funded by external grants and which also provide springboards for future grant applications. (Consider building some form of grant application due diligence into sabbatical applications.)
Use existing reserve budgets to bridge gaps caused by lower enrollment this year and probably the next.
Work with faculty and/or other constituencies to develop a broad range of programming (including some that would be appealing for political conservatives) for donor/alumni events. (A different policy of "The college engages too much in politics and that has alienated quite a few of our conservative donors, including current parents.")
Formalize criteria for admissions and merit aid decisions so that these can be reviewed for effectiveness in terms of yield and retention (and perhaps even academic performance).
Develop strategies to lower our admit rate. (This might be particularly important for recruiting among some populations. Anecdotally, I've found that students from China and Korea tend to write off schools with high admit rates.)
There should be a reallocation of staff positions to create an internal development communications position to tell donor stories more effectively and broadly. Avoid prominent public political actions as a College.

Financial Sustainability Review: Academic Subcommittee Draft Recommendations

Barry Balof (co-chair), Brad McMurchie (co-chair), Sharon Alker, Shampa Biswas, Sneha Chachra, Kurt Hoffman, Michelle Janning, Josh Jensen, Jonathan Sposato, Alzada Tipton, Lisa Uddin

Recommendations of the Committee for Savings in the Academic Program

1. The committee endorsed a plan that will create savings over the next 4 academic years of \$2.1M as a result of staffing changes. These savings will result from faculty retirements in Classics, Environmental Humanities, History, Japanese, Mathematics and Statistics, and Philosophy. Whitman has several faculty members currently receiving payments under the College's Salary Continuation Plan. Additional savings will accrue as faculty's eligibility for these payments expires or as other faculty go on the SCP plan who are not replaced. Finally, savings will result from the elimination or reduction of NTT faculty lines in Studio Art, Art History and Visual Culture Studies, Biology, Chinese, French, Japanese, Music, Politics, and Theater and Dance. The committee did not reach consensus on additional reductions in NTT faculty (including, among others, lines in Religion and Chemistry). NTT staffing of the first-year studies program was also discussed as a potential area for savings, but the committee was not able to reach consensus on how to proceed in this area. Based on community feedback the committee will make a final recommendation to the board on NTT positions. The committee gave strong consideration to, but ultimately rejected, proposals to eliminate multiple academic departments and tenured positions. The committee also notes that NTT faculty currently under contract with the college will not have those positions reduced or eliminated before the expiration of their contract.
2. The committee unanimously supported revising Whitman's policy for compensating tenured and tenure-track faculty who teach more than 5 courses in a year. The revisions will create a more uniform, equitable system and will save the college roughly \$40,000 per year.
3. The committee endorsed reducing the number of regular course releases granted annually by 10. All faculty on the Faculty Personnel Committee currently receive a course release; we propose granting releases only to those in their first year as well as the chair of the committee (reduction of 3). The First-Year program currently has three total course releases between the director and the writing coordinator; we propose reducing that to 2 (reduction of 1). We also propose eliminating 6 other standing course releases for department chairs and program directors. While these reductions will not necessarily create direct savings, they will help to overcome a portion of the loss of breadth that will likely result from other changes.
4. The committee unanimously endorsed elimination of Whitman's Language Assistant program which will create savings of \$159,000 annually.

5. The committee was unanimous in recommending a reduction in the annual budget for PDA/ASID to \$300,000 starting with the 21-22 academic year. The details are up to implementation by the Provost and the CDC, but the model is based on an annual funding level of \$2000 for tenured and tenure-track faculty, and \$1500 for Senior Non-Tenure Track Faculty. This change will produce savings between \$40,000 and \$120,000 on an annual basis. The committee also recommended that funding for SSRA(Coaches) PDA's be transferred to the Athletics budget. This funding has averaged \$22,000 over the last 4 years. Whitman has historically provided travel funding for Visiting Assistant Professors. This funding has averaged \$32,000 per year over the last 4 years. Given that such funding is relatively unusual for colleges like Whitman, the committee suggests either eliminating this expense or capping it at \$20,000 per year.
6. The committee was unanimous in recommending reallocation of roughly \$400,000 in reserves held in the faculty Professional Development Account (PDA/ASID) to the general operating funds of the college for the '21-22 academic year.
7. The committee evaluated several scenarios that would reduce the cost of the college's sabbatical leave policy while maintaining a strength and competitiveness necessary for the teacher-scholar model. Policies from peer institutions were evaluated based on information available to the committee. The committee was unanimous in endorsing some form of change to the current policy. Three models were reviewed by the committee with different frequencies and levels of compensation and replacement positions in each model. Based on the variable number of faculty taking a year-long versus semester sabbatical, as well as the replacement rates for faculty on leave, the models are projected to realize between \$150,000 and \$550,000 in annual savings over our current plan. The committee was unable to come to a consensus on recommending only one model to the President and ultimately to the Board of Trustees. The committee will review this matter further after the community has provided feedback.
 - After 4 years of teaching, Faculty may apply for a one-year sabbatical at 60% pay or a one-semester sabbatical at 92% pay
 - After 5 years of teaching, Faculty may apply for a one-year sabbatical at 70% pay or a one-semester sabbatical at 94% pay
 - After 6 years of teaching, Faculty may apply for a one-year sabbatical at 50% pay or a one-semester sabbatical at 100% pay

Notes on Process

The committee met weekly and deliberated all decisions as a whole group. We began with discussions of the sabbatical program. We constructed and evaluated various models both against the historic costs of our own program, and also those of peer and aspirational schools. We did not reach consensus on one new model, so will be presenting three models to the board in our final report. We continued with discussions of PDA and ASID funding, and reached consensus on the cap and average savings. We

then looked at three models for reductions in the academic program, one of which involved some department and program (and tenure-line) eliminations, and two that reduced department staffing through retirements and contributions from NTT Faculty. The committee reached consensus that the program and department elimination models would not go forward. There were many points of consensus among the two other models, though there are still areas for exploration based on community feedback. We also reached consensus on capturing potential savings through elimination of the Language Assistants program, standing course releases for faculty, and compensation for faculty overloads.

Strategic Investments for Consideration by the Academic Sub-Committee of the FSR

The committee discussed the following as areas that could help generate student demand. In all cases there was an understanding that investment decisions by the college will be based on study and deliberation, including the use of data generated internally and by Hanover Research.

1. Re-Envision Academic Programs

Investigate the possibility of re-envisioning/re-framing existing academic offerings to bolster student recruitment, retention, and preparedness for Life After Whitman, to maximize existing tenured and tenure-track faculty expertise (no additional FTE in proposed offerings), and to strategically add new hires/additional FTE in investment areas (e.g., Computer Science) that are strategically linked with other programs. As part of this, investigate renaming existing programs to align more with prospective student understandings of academic areas, combining existing programs, or creating tracks or hyphenated courses of study within existing programs. Opportunities for re-envisioning/re-framing (given in greater detail in Appendix A) are in the following areas:

Black and Indigenous Studies

Classical Studies

Creative Arts

Digital Studies/Experience Design/UX

Global Literature and Culture

International Trade and Finance

Neuroscience

Public Health

Social Justice and Human Rights

2. Enhance Connections between the Academic Program and Career Development, Off-Campus Locales, and Walla Walla Valley Community Engagement

Investigate and, if warranted, invest and enhance infrastructure and faculty development across all three divisions to better align the curricular and co-curricular offerings of the College. This would include support for courses or programs associated with Whitman-managed locales away from campus (e.g., Seattle, “West” programs), Walla Walla community-engaged learning and research, student research opportunities, and curricular opportunities that prepare students for Life After Whitman.

3. Consider Revisions to the Academic Calendar to Allow Short-Term Learning Opportunities

Investigate a revised academic calendar that includes a January and/or June term that would work with current faculty teaching loads, and that would allow short-term learning opportunities linked with career development, learning in Whitman-managed locales away from campus, Whitman-Walla Walla connections (especially community-engaged learning and research), and Life After Whitman.

Investigate the potential revenue generation from short-term opportunities that would result from a revised academic calendar that includes a January and/or June term. This could also include Alumni College, options for local community members to take courses, or festival/camp opportunities if a modest tuition is implemented.

4. Consider Bolstering External Grant Support for Faculty Professional Activity

Evaluate investments in the Grants and Foundation Relations Office that may enhance the reputation of Whitman College, to support any new initiatives or investments in the academic program, to accommodate revisions to the sabbatical policy, to increase divisional equity of opportunity for external funding among faculty, and to better align Development and Provost offices’ efforts.

Appendix A Elaboration of Re-Envisioned Academic Programs

Submitted by Sharon Alker, Barry Balof, Shampa Biswas, Kurt Hoffman, Michelle Janning, and
Lisa Uddin

Academic Sub-Committee of the Whitman College Financial Sustainability Review

February 2021

We propose several new and reconfigured programs of study that emerge from and build on the existing expertise of our current faculty that can enhance our current offerings and we expect will be attractive to current and prospective students. Although the specifics of these programs will come from the larger faculty, most of these are ideas that have been in discussion among different groups of faculty and we expect will have wide buy-in. Many of these programs exist at our peer institutions. These ideas are starting points for conversations about ways to reimagine the academic program, and we anticipate refinements and additions as the faculty continue to exchange ideas.

Please note that the new programs we suggest below can be either Majors, Minors, or Concentrations (configurations that already exist at Whitman). We have also indicated co-curricular and Student Engagement Center connections for each of the programs, and have ideas for communicating the strengths and possibilities of each program in ways that would be attractive to prospective and current students.

In preparing this document, we have been guided by the “**criteria for review**” that President Murray delineated in her charge to the Financial Sustainability Review committees:

- Centrality to Whitman’s liberal arts mission
 - Does it support the teacher-scholar model?
- Does it drive enrollment?
- Does it drive revenue?
- Does it connect to our strategic priorities?

The **strategic priorities** of the College are:

- Increasing access and affordability
- Enhancing diversity, equity and inclusion
- Innovating the curriculum
- Connecting to life after Whitman
- Celebrating the College's location in southeastern Washington

NEW AND RECONFIGURED PROGRAMS (majors, minors, or concentrations)

Black and Indigenous Studies
Classical Studies
Creative Arts
Digital Studies/Experience Design/UX
Global Literature and Culture
International Trade and Finance
Neuroscience

1. Black and Indigenous Studies (replacing Race & Ethnic Studies)

- Black and Indigenous Studies examines the locations and experiences of Black and Indigenous people in the modern world at local, national and global scales. Students study the intellectual, cultural and political aspects of blackness and indigeneity both historically and in the present. They develop tools for analysis and communication that are applicable to career fields such as law, medicine, education, arts, and business.
- Departments with interested faculty: Anthropology, Art History, English, Film and Media Studies, French, History, Politics, Religion, RWPD, Theater and Dance
- Following through on the recent Inclusion Task Force action items (<https://www.whitman.edu/campus-life/diversity/inclusion-task-force-final-report/inclusion-action-items>) and 2017 Memorandum of Understanding (<https://www.whitman.edu/documents/Offices/Provost/CTUIR%20MOA%202017.pdf>)
- Actualizing strategic planning plank of “celebrating our location” with “its dynamic history, diverse population and inspiring physical landscape” which “is a source of strength and pride for the college.”
- Co-curricular elements: Confluence Project, site visits, speaker series (funded by Lewis endowment, endowments for Northwest History and Politics), OCS, extensive use of Maxey Museum and Penrose archives, and Sheehan art collection.
 - Examples of potential (and existing) Student Engagement Center connections: Whitman Teaches the Movement; internships such as curatorial and oral history projects at Tamástslíkt Cultural Institute or micro-lending development with (located locally but a national LLC) Seven Sisters Community Development Group, community fellow positions with CTUIR First Foods Program or Crow’s Shadow Institute of the Arts, Alumni networking events surrounding race in the business world
- For examples at other institutions, see: <https://www.oxy.edu/academics/areas-study/black-studies>
<http://www.middlebury.edu/academics/black-studies>
<https://admissions.uiowa.edu/academics/native-american-and-indigenous-studies>
<https://www.ualberta.ca/native-studies/index.html>

2. Classical Studies (replacing the current Classics department)

- Classical Studies focuses on the interdisciplinary and global study of antiquity. Areas include: studying the literary, rhetorical, philosophical, critical, and artistic texts of antiquity; religious beliefs in Greece, Rome, and other ancient cultures; classical Mediterranean and Middle Eastern, as well as East and South Asian cultures; the way the natural world is constructed historically; language study; the global impact of ancient texts (including classical reception studies); the material culture of antiquity.
- Students develop understanding and tools that will equip them well in a broad range of career fields. Students with expertise in classics pursue careers in law, medicine, politics, arts and communication, and business.

- Departments with interested faculty: Classics, English, Environmental Humanities, History, Languages, Philosophy, Politics, Religion, RWPD, and possibly others. Possible collaborations with colleagues at Walla Walla University.
- Language study (Latin and/or Greek) recommended.
- Co-curricular offerings could include: curatorial and gallery work, archival research, library and information-science work, community-engaged learning with students in local schools and educational organizations, internships abroad, partnerships with Walla Walla University.
 - Examples of potential (and existing) Student Engagement Center connections: internships and community fellow positions with local schools for curricular design and afterschool programming in global literacy and languages, internships with galleries and archives in off-campus study programs and summer opportunities.

3. Creative Arts

- Creative Arts focuses on the aesthetic, cultural, ethical and political dimensions of the contemporary arts across a range of related creative disciplines. It examines how the arts of the present relate to past movements, and explores the capacities of creative expression to reflect and change the world. Students learn to think and make between and across artistic fields, preparing themselves for multidisciplinary professions in art practice, education, and administration.
- Departments with interested faculty: Art, Art History, Creative Writing, Film and Media Studies (Production), Music, Theater and Dance
- Study Abroad and/or Language study recommended
- Humanities courses in creative arts criticism required (e.g. AHVCS, FMS, French, Hispanic Studies)
- Co-curricular offerings: artist-in-residence program, Sheehan Gallery exhibits, studio visits, speaker series (funded by O'Donnell endowment), an Arts West program.
 - Examples of potential (and existing) Student Engagement Center connections: community-engaged learning projects bridging Walla Walla Music Organization and Walla Walla Public Schools, internships or community fellow positions (with Seattle Art Museum, San Francisco Arts Commission, Walla Walla Symphony, ArtWalla, and the Carnegie Picture Lab, internships in film-related fields with existing alumni-connected firms in California and Vancouver, BC

4. Digital Studies/Experience Design/UX

- Digital Studies operates at the intersection of technology and the humanities/social sciences. It is highly complementary to Computer Science and could involve many collaborative projects between a wide range of disciplines and CS. It is comprised of a broad array of practices, methods, and approaches that are aimed at providing students with such knowledge/skills as: multimodal literacy, digital storytelling, the creation and representation of humanities, fine arts, cultural, and historical data, data mining, visualization techniques, information preservation, archive management, exhibit design, the management of cultural data, the ethical use of technology, the use of specialized

tools to capture and interpret cultural and human subjects data. Digital Studies infuses technology with forms of creativity and analysis more associated with the humanities, fine arts, and social sciences.

- Departments with interested faculty: Anthropology, Art, Art History, Classics, Computer Science, English, French, German, History, Penrose Library, Religion, Rhetoric, Film & Media Studies, Music, Psychology, Sociology.
- Co-curricular offerings: site visits, speaker series, digital fluency certificate
 - Examples of potential (and existing) Student Engagement Center connections: internships with Seattle, Portland, and San Francisco tech firms, community fellow positions with local historical organizations such as Kirkman House Museum or Fort Walla Walla to enhance rural access to digital preservation of documents, alumni networking events with firms dedicated to design thinking, experience design internships with tech and design firms, and intersections of built-environment design or urban design with environmental sustainability
- This handbook gives more in-depth information about the sort of work digital studies students might do. Much of this is information that can be presented to future employers as part of student portfolios, <https://handbook.pubpub.org/>
- For examples at other institutions, see:
<https://www.davidson.edu/academic-departments/digital-studies>
<https://wheatoncollege.edu/academics/majors-minors/digital-humanities/>
<https://shc.stanford.edu/digital-humanities>
<https://www.hamilton.edu/academics/centers/digital-humanities-initiative>
<https://www.hamilton.edu/news/story/why-user-experience-design-is-a-great-career-for-liberal-arts-students>

5. Global Literature and Culture

- Global Literature and Culture studies cultural expressions as media through which to think across cultural boundaries, develop an ethic of hospitality toward other worlds and people, and cultivate an ethos of global citizenship.
- Departments with interested faculty: Art History, Chinese, Classics, English, French, German, Hispanic Studies, Japanese, Religion
- Language requirement and Study Abroad Experience
- Co-curricular offerings: Visiting writers and artists (funded by Mabel Goreclose endowment, O'Donnell endowment), Sheehan Gallery exhibits
 - Examples of potential (and existing) Student Engagement Center connections: internships and community fellow positions with local schools for curricular design and afterschool programming in global literacy and languages, internships with international NGOs, alumni networking with company leaders in global trade
- For an example from another institution, see: <https://www.oxy.edu/academics/areas-study/comparative-studies-literature-culture>

6. International Trade and Finance

- International Trade and Finance investigates how and why goods, services, information, money and power are exchanged across the world. Students ask questions and think

critically about the risks and complex factors that shape the structures and practices of global trade, businesses, and organizations. And they create solutions to address the challenges, problems, and opportunities that businesses and organizations face in today's global economy. (Denison)

- Departments with interested faculty: Anthropology, Art History, Economics, English, History, Politics, Sociology
- Language requirement
- Strategic use of "Whitman Summer Studies in China" program
- Co-curricular offerings: Executives-in-residence program, site visits, speaker series (funded by Henry Jackson endowment, O'Donnell endowment, Perry Endowment, Asian Studies endowment)
 - Examples of potential (and existing) Student Engagement Center connections: internships in finance and international trade in urban centers on the West Coast and inland Western U.S. (including local organizations such as Baker Boyer Bank and the Downtown Walla Walla Foundation), community-engaged collaboration between the Whitman Investment Club and WWPS Future Business Leaders of America, international internships in development and sustainability in targeted geographic areas with alumni connections and potential for international student recruitment
- For an example at another institution, see: <https://denison.edu/academics/global-commerce>

7. Neuroscience

- Neuroscience is an interdisciplinary field that focuses on the nervous system and the relationship between biology and human and animal behavior. By taking courses across sciences, social sciences, and the humanities, students investigate implications for mental and physical health, child development, education, medical ethics, and aging, among other areas. This area of study pairs well with in-depth study of chemistry, biology, psychology, and computer science. Students who study neuroscience as undergraduates pursue graduate work and careers in medicine, cognitive science, psychology, physiology, and patent or intellectual property law (Hamilton, Denison, Wellesley, Kenyon).
- Departments with interested faculty: BBMB, Biology, Computer Science, Philosophy, Psychology, Music
- ideal for students planning graduate or professional study in neuroscience, biology, chemistry, psychology, medicine and other related fields.
- Co-curricular offerings: speaker series (funded by Brattain and Brode endowments).
 - Examples of potential (and existing) Student Engagement Center connections: Internships with medical research hospitals (including via alumni networks), community fellow positions that connect neuroscience to local organizational missions relating to addiction (e.g., Trilogy) and disability (e.g., Walla Walla Valley Disability Network)
- For examples from other institutions, see: <https://www.oxy.edu/academics/areas-study/neuroscience>;
<https://www.carleton.edu/neuroscience/>
<https://www.dickinson.edu/homepage/41/neuroscience>

8. Public Health

- Public Health educates students in public health from the perspective of the liberal arts, with particular attention to the analysis of public health problems from multiple perspectives and with tools from multiple disciplines and with emphasis on theory and history; linked to the formulation and implementation of public policy, thus connecting science and government at its core (Franklin and Marshall). It provides students with an array of analytical frameworks for understanding the complexities of population health and offers opportunities to integrate and apply these frameworks within the context of coursework, civic engagement, and independent research. (Macalester) It is essential for students with career interests in aid organizations, business and government, as well as in medicine, mental health and public health; opportunities to pursue and expand students' health interests and obtain hands-on experience both in the laboratory and in the community. (Dickinson)
- Second language and/or study abroad encouraged, especially for global public health focus or public service-based careers
- Departments with interested faculty: Anthropology, BBMB, Biology, Economics, Hispanic Studies, History, Philosophy, Politics, Psychology, Sociology
- Co-curricular offerings: site visits, speaker series (funded by Brattain endowment, Brode endowment, Lewis endowment)
 - Examples of potential (and existing) Student Engagement Center connections: community-based research and internships (with Walla Walla Community Health Department, The Health Center (WWPS), and Providence St. Mary's, e.g.), alumni networking and speaking events with frontline COVID-19 health professionals (recently feature in the *Whitman Magazine*), internships with governmental health-related organizations at the state and national level
- For examples from other institutions, see:
<https://www.fandm.edu/public-health>
<https://www.macalester.edu/cgh/>
https://www.dickinson.edu/homepage/36/health_studies

9. Social Justice and Human Rights (Replacing Gender Studies)

- With possible tracks in gender studies, queer studies, immigration justice, environmental justice, criminology, and the law
- “Drawing from a wide range of interdisciplinary topics and approaches from the humanities and social sciences, the Human Rights and Social Justice program provides an overview of historical and contemporary human rights issues and their impact on human lives in different cultural contexts. The program offers students an opportunity to examine and critically assess the various strategies and mechanisms that have been used nationally and internationally to address these issues, including social movements, domestic legislation, international statutes, and human rights declarations and conventions.” (Carleton University)
- Departments with interested faculty: Gender Studies, Hispanic Studies, Philosophy, Politics, RWPB, Sociology

- Co-curricular elements: Community-based learning projects, penitentiary project, site visits, internships, speakers series (funded by Henry Jackson endowment, Penology endowment, Skotheim endowment, William O'Douglas endowment)
 - Examples of potential Student Engagement Center connections: community fellow positions (with local immigration law firms, the Juvenile Justice Center, Washington State Penitentiary, and the women's shelter at the YWCA), national and international internships with human rights NGOs, networking and speaker events dedicated to gender rights advocacy in business and government
- For examples at other institutions, see:
https://www.dickinson.edu/homepage/104/policy_studies
<https://www.oxy.edu/academics/areas-study/diplomacy-world-affairs>
<https://admissions.carleton.ca/programs/human-rights-ba/>

FSR - Student Support
Kazi Joshua and Charley Rosenberry, Co-Chairs

Final Document
February 1, 2021

Subcommittees:

Amy Molitor, Kim Chandler, Steve Setchell
(Outdoor Program and Athletics)

Monica Chapman, Kazi Joshua (Bridget Jacobson)
(SEC/IC/DOS/DEI and Professional Development)

Nate Boland, Dalia Corkrum, Alzada Tipton
(Library and Off-Campus Studies)

David Sprunger, Adam Miller, Peter Harvey
(Residence Life and Bookstore)

Lia Beatty, Rae Chresfield and Julie Taylor
(Health Center, Counseling Center)

FSR - Student Support Group

Process and Summary

The FSR Working group on Student Support worked within the initial criteria that had been provided by President Murray at the beginning of the convening of the 3 FSR Groups:

1. Centrality to Whitman's Liberal arts mission
2. Does it drive revenue?
3. Does it drive enrollment?
4. Does it connect to our Strategic priorities?

The committee further created a longer set of questions as they gathered information and wanted to assess what might make sense in terms of the goals that President Murray had articulated for the working groups over all. The Key questions that were developed as a supplement to the criteria provided by President Murray were:

Key Questions for Areas of Study

- Why does Whitman offer this program?
- What are the alternatives to fulfill the need? (e.g., rely on community resources?)
- Do our peer institutions use the same type of program or a different approach? What about non-peers (e.g., Universities, community colleges)
- Does this program encourage recruitment of students?
- Does this program encourage retention of students?
- Is the need growing or diminishing over time?
- What type of students typically use this program – first gen? Minorities? Economically-advantaged or disadvantaged students? Athletes? STEM or Humanities? International?
- Do prospective students (and parents) ask specifically for information about this program?
- Do we/will we lose prospective students due to a reduction or elimination of this program? If we increased/decreased/eliminated this program, how would our admissions or discount rate be affected?
- Does this program make Whitman distinctive from its peer institutions? From the alternatives for most prospective students (consider that many students are deciding considering public universities as well as liberal arts colleges)?
- How does this program reflect our institutional values?
- How does this program fit into our Whitman-specific definition of/identity as a small, residential liberal arts college?
- How does this program help support/build upon our strategic plan?
 - Increasing access and affordability
 - Enhancing diversity, equity and inclusion
 - Innovating the curriculum
 - Connecting to life after Whitman
 - Celebrating our location

The committee used the above in their focused smaller working groups. A strategy that was adopted to organize the committee in 5 smaller working groups that delved into a specific area e.g. Athletics and the Outdoor Program or Bookstore and Residence Life etc. These smaller working groups shared all of their work through a shared google drive and provided longer reports of their findings. The smaller groups also had the opportunity to share in virtual meetings with the entire working group their findings and recommendations and took questions and feedback. Some of these were submitted in writing. You will note that the group members of each smaller working group are listed under the appropriate report. The entire committee was given an opportunity to review and comment on the entirety of the report before it was submitted to President Murray on February 1.

The Cabinet in separate deliberations from the committee also recommended a reduction of 3.8 FTE in staff positions in student support areas. Where possible reductions will be made through attrition. The Cabinet will also be considering implementing tuition charges for students taking more than 18 credits. The college can also better utilize certain restricted endowments by reducing operating budgets with similar purposes if the restricted endowment is not being fully utilized. The estimated savings is \$117,000 in addition to \$100,000 in the library which was recommended by the library review group.

We have provided a quick summary of the total savings at the end of the report for your quick reference. We spent most of our time identifying areas where savings could be found. In a few areas, there are some possibilities of investment, but we have not advanced this part of our work.

**FINANCIAL SUSTAINABILITY REVIEW
ATHLETICS AND OUTDOOR PROGRAM REPORT**

Working group membership: Kim Chandler; Amy Molitor; Steve Setchell

Recommendations for budget reductions

Athletics:

Highest Priority Tactics		Projected Savings (*annual savings, **shift in funds)
<ul style="list-style-type: none"> o Impose a minimum of a 3-year moratorium on international travel 		\$23,600*
<ul style="list-style-type: none"> ● Rationale: Not all teams have access to international travel; puts some financial burden on student athletes; cost / benefit needs to be reviewed 		
Pros	Cons	
- Saves \$\$	- Could impact recruiting	
- Removes financial burden to student athletes	- Reduces competition during a season	
<ul style="list-style-type: none"> o Limit Travel Party Size for Teams 		Min. \$300.00 per away trip
<ul style="list-style-type: none"> ● Rationale: Reduces travel costs – lodging costs (fewer hotel rooms) and food costs 		
Pros	Cons	
- Saves \$\$\$	- Reduces Team Cohesiveness- Baseball, M/W Soccer, XC/Distance Track, Swimming	
- Fewer Hotel Rooms Needed	- Athlete retention decreases due to frustration associated with not competing	
- Reduction in food costs	- Limited Travel Squad reduces strategic options while competing	
<ul style="list-style-type: none"> o BSN Athletics Agreement: \$18,000 Annually 		\$18,000*
<ul style="list-style-type: none"> ● Rationale: Working with BSN to purchase team paraphernalia, uniforms and equipment could result in significant cost savings. 		
Pros	Cons	
- Reduces Costs and provides purchasing	- Limits or removes existing relationships	

power for the department.	between coaches and vendors	
- Provides a one stop shopping for most equipment and uniform needs	- BSN meets significant needs, but not all needs for bats, swimming tech suits, etc.	
o Game Guarantees to reduce the number of away trips		\$26,000*
<ul style="list-style-type: none"> ● Rationale: Rather than travel to pre-season away games, we would provide game guarantees for teams to travel to Walla Walla. This would result in significant savings on travel for Whitman’s teams. Rather than spending \$15,000 to \$25,000 for such a trip, teams would be paying other schools to travel to Walla Walla for approx. \$3,500. 		
Pros	Cons	
- Reduces Travel Costs	- It’s difficult to attract competition to Walla Walla for a single game. Would need collaboration with other WA schools to also play these visiting teams.	
- Reduced conflicts with students missing class, particularly early in the semester when non-conference games are played	- Pre-season travel often facilitates team bonding. This will be lost.	
o Room Policy – one person/bed - Use rollaways for 3/room		\$80,000*
<ul style="list-style-type: none"> ● Rationale: This usually results in 2 athletes per room. Coaches should contact hotels early enough to secure rollaway beds for a third person per room. This should reduce travel costs as fewer hotel rooms will be needed. 		
Pros	Cons	
- Reduces Costs	- Roll away beds tend to be less comfortable	
- Continues to meet the one head, one bed policy of Whitman College and NCAA	- Title IX implications if the policy is not definitively adhered to by the dept.	
TOTAL SAVINGS – High Priority		\$147,600

Mid-Level Priority Tactics		Projected Savings (*annual savings)
o Eliminate SSRA Activity Classes taught by non-coaches		\$35,500
<ul style="list-style-type: none"> ● Rationale: SSRA activity classes are taught by adjunct instructors which require additional college funds. SSRA classes will still be offered in other courses and are taught by athletic coaches as an expectation of their contract 		
Pros	Cons	
- Saves \$\$	- These courses include yoga, conditioning, and Pilates classes which facilitate student physical and mental health	
- There are a number of online resources in which students could access this form of activity	- Requires the dismissal of adjunct faculty	
-	- These courses tend to be in high demand	
Low Level Priority Tactics		Projected Savings (*annual savings)
o Revise the Club Sports Funding Model		\$70,000
<ul style="list-style-type: none"> ● Rationale: Club Sports requires significant time and resources from the athletic staff and budget. We suggest making this an entirely student-funded activity with funds from ASWC or participant fees. ASWC currently invests \$30,000 in program fees and Athletics contributes \$70,000 for a total investment of \$100,100.00. This is a large amount of money for a small number of students that participate in these programs. 		
Pros	Cons	
- The change in the funding model would allow students to directly support their experience. It would provide parity for funding since the total amount is \$101,000. These funds are committed to a small group of students. If this new model were enacted, the funds could be reallocated in a way to	- Significant loss to the college experience for students who are not in the varsity athletic program. - The college would also lose oversight of the club sport programs, which are a huge liability to the college since the programs do not have coaches or advisors. The teams travel and	

serve more students or to support higher priorities.	compete without supervision, while representing the college.	
<ul style="list-style-type: none"> - Will also offer savings to both the Dean of Students Office and ASWC - Would allow for a distribution of duties for staff in athletics. 	<ul style="list-style-type: none"> - Club sports is used in the recruiting of prospective students. This could result in lost revenue in tuition 	
-	-	
TOTAL SAVINGS – MID and LOW LEVEL PRIORITY		\$105,500
TOTAL SAVINGS – ALL ATHLETICS		\$253,100

Outdoor Program:

High Priority Tactics		Projected Savings (*annual savings)
<ul style="list-style-type: none"> o Review and revise the current staffing model and job duties for financial efficiency. 		unknown
<ul style="list-style-type: none"> ● Rationale: Currently, the Outdoor Program and staff are overseen by numerous offices including Athletics, Dean of Faculty and Dean of Students 		
Pros	Cons	
<ul style="list-style-type: none"> - Potential for greater financial efficiency 	<ul style="list-style-type: none"> - Since the OP does offer activity and leadership classes a connection to the Dean of Faculty's office makes sense 	
<ul style="list-style-type: none"> - Review could provide insight in the new OPE hourly requirements 	<ul style="list-style-type: none"> - OP funds for students are housed in the Dean of Students' office 	
<ul style="list-style-type: none"> - Provides a consolidated approach to the classes taught as well as the overall operations of the climbing center which supports those activities. 	<ul style="list-style-type: none"> - Trips, climbing center and rental shop are overseen by the Dean of Students Office 	
<ul style="list-style-type: none"> o Place the Outdoor Programs under one supervisor/office 		unknown
<ul style="list-style-type: none"> ● Rationale: As noted above, financial efficiency may occur if the staffing and job duties were housed under one supervisory office. 		
Pros	Cons	

- OP staff will connect with one office for all needs – budgetary and administrative	- Distances activity and leadership classes from the Dean of Faculty’s office oversight	
-	-	
o Review vehicle insurance costs and consolidate the needs with the college		unknown
<ul style="list-style-type: none"> ● Rationale: OP vehicles have insurance costs which come directly from the OP budget. These vehicle insurance costs should be consolidated with the larger motor pool insurance costs 		
Pros	Cons	
- Reduces costs directly to the OP for vehicle insurance	- Transfers those costs to the Physical Plant budget	
	-	
TOTAL SAVINGS – ALL OUTDOOR PROGRAM		unknown

Recommendations for investments to drive enrollment and/or revenue:

Athletics:

Highest Priority Tactics	Projected Cost
o Athletics Online Store: \$3,000	unknown
<ul style="list-style-type: none"> ● Rationale: As families of athletes, friends, alumni, faculty and staff purchase Whitman Athletics apparel via the online store, Whitman Athletics will receive credit for such purchases 	
o Camp/Clinic Expansion	unknown
<ul style="list-style-type: none"> ● Rationale: Most athletic teams offer some form of camp for youth and / or prospective students. Working with Residence Life and Bon Appetit to facilitate overnight camps, the Athletics department could increase the current revenue earned. 	
o Weekend & Summer Tournaments – Junior High/HS	unknown
<ul style="list-style-type: none"> ● Rationale: With facilities unused during breaks, Whitman Athletics might work with various sports organizations (AAU, youth leagues, etc.) in the northwest to encourage hosting tournaments. 	
o Enhance Golf Tournament Fundraiser	unknown
<ul style="list-style-type: none"> ● Rationale: The current W Club Golf fundraiser has the potential to bring in additional earnings. Exploring various alternatives to the current model such as hosting the tournament on the west side of the state or areas with alumni and friends might increase revenue. 	

<ul style="list-style-type: none"> o Advertising, Signage & Team Sponsorships 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: Advertising with signage and programs can be increased significantly. Season media guides might offer higher interest among advertisers. Signage in Sherwood, BFFC and Borleske might increase as well. 	
<ul style="list-style-type: none"> o Add a Master's Swimming Program 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: Walla Walla has a solid swim culture. With limited swimming opportunities in the valley, residents may be interested in developing a Master's swimming program housed at Whitman's pool. 	
<ul style="list-style-type: none"> o Tennis/Wine Camp enhancement – Adult age camps 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: The Tennis/Wine camps offered each summer have been a resounding success. Other adult camp models might be considered such as a Golf/Wine camp or an adult swim camp and meet. 	
<ul style="list-style-type: none"> o Add Team II's to increase roster sizes for select teams 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: Increase roster sizes would allow the College to have a first and second team. Increased roster sizes require additional enrollment and recruiting leading to greater revenue. Clearly, there will be costs associated with funding the Team II's in the areas of operations, competition, and staffing where we will need to move PT assistant coaches to FT positions. 	
<ul style="list-style-type: none"> o Expand Distance Track Model – Outdoor Season 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: The recent addition and excitement of winter indoor distance track suggests interest in track. Expanding distance track offerings to the spring track season may result in increased prospective student interest, thus increasing revenue. 	
<ul style="list-style-type: none"> o Club Sport Recruitment and Expansion i.e. Men's Lacrosse 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: Club athletes tend to recruit their rosters. If Athletics partnered with such recruitment efforts, club sport success could increase to the point of establishing additional varsity teams (i.e., Men's Lacrosse) 	
<ul style="list-style-type: none"> o Coaching & Leadership certifications 	unknown
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ● Rationale: Coaching and Leadership Certifications or programs would provide a niche to the department and the college. The involvement and training in these programs would provide the opportunity for a student to enrich their potential in leadership or coaching and it would be an invaluable asset for them to place on their resume and to be prepared at a different level than other peers for life after Whitman. 	
Mid-level Priority Tactics	Projected Cost

o Sell Whitman Athletics branded wine	unknown
<ul style="list-style-type: none"> ● Rationale: Institutions across the nation are branding wine for athletic teams. Given our location, Whitman might consider partnering with a local winery to develop various labels for the entire athletic program or individual sports. 	
o Addition of sport(s): Indoor Track, Softball, and Rowing – NWC Sponsored Sports	unknown
<ul style="list-style-type: none"> ● Rationale: Adding additional teams will come with costs, however, we anticipate revenue will exceed costs, results. 	
o Addition of Esports	unknown
<ul style="list-style-type: none"> ● Rationale: Institutions across the nation are adding competitive Esports teams. Again, though costs will require the development of such a program, we anticipate the type of student attracted to an institution with an Esports program will result in significant revenue. 	
o Create Interdisciplinary Academic Programs- Sport Management, Sport Psychology & Sport Analytics	unknown
<ul style="list-style-type: none"> ● Rationale: Both student athletes and non-athletes have expressed interest in sport-oriented majors. SSRA could collaborate with numerous academic departments on campus to develop an interdisciplinary program focusing on sports. Sport Analytics and analytics in general is a fast growing field. In addition, there are not enough Sport Psychologists to meet the needs throughout the country. We could serve a very important and exciting role in preparing students for this work and knowing that there is a need in the job market that we could anticipate will exist for at least 10 years. 	

Outdoor Program:

Highest Priority Tactics	Projected Cost
o Offer summer camps/trips to current students and/or youth and high school students for revenue opportunities	unknown
<ul style="list-style-type: none"> ● Rationale: We believe that a demand exists for summer outdoor trips for youth, high school, and college students during the summer months. Offering summer trips in the summer should provide job opportunities for Whitman students and introduce youth and high schoolers to Whitman College. Such programs should pay for themselves as well as bring in additional revenue. 	
o Offer summer trips for Whitman Alums – revenue opportunity and campus connections	unknown

<ul style="list-style-type: none"> ● Rationale: Similarly, outdoor trips directed at alumni, friends of the college and others could offer job opportunities for students and revenue for the OP and College. Alumni interest in alumni travel trips indicates that interest may exist for OP led summer trips. 	
<ul style="list-style-type: none"> ○ Offer community-based programming for revenue opportunities 	unknown
<ul style="list-style-type: none"> ● Rationale: Local interest in the outdoors and recreational opportunities suggests that community residents may be interested in OP led trips. The Blue Mountain Land Trust has led outdoor day trips in the region for over 5 years and often has a wait list. 	
<ul style="list-style-type: none"> ○ Assemble recruiting goals and initiatives with the Admissions Office and Outdoor Programs staff 	unknown
<ul style="list-style-type: none"> ● Rationale: We encourage the OP staff to work directly with the Admissions office to develop recruiting goals. We are aware of the challenges associated with diversity in the OP. This collaboration may facilitate greater diversity as well as reach students who are interested in an institution with a solid outdoor program. 	
<ul style="list-style-type: none"> ○ Promote the Climbing Team and increase the number of students involved in the team 	unknown
<ul style="list-style-type: none"> ● Rationale: The Whitman College Climbing Team has been extremely successful over the last 10-15 years. Given this success, the College should increase its promotion of the Climbing Team and the experiences it offers. Promotions might also be directed toward diverse populations as the College seeks to enhance diversity within the OP. 	

Tactics considered but not included:

<ul style="list-style-type: none"> ○ Cut an athletic team/sport 	\$100,000
<ul style="list-style-type: none"> ● Rationale: We did explore cost savings associated with cutting an athletic team. Average savings would be approximately \$100,000 depending upon which team was cut. We cannot recommend this as a cost savings measure as we believe it will result in lost revenue for the institution. Athletics works closely with the Admissions Office in terms of recruiting students to Whitman College. The short-term cost savings could result in significantly greater losses in revenue. 	
<ul style="list-style-type: none"> ○ Decrease course offerings in the Outdoor Program 	\$42,974
<ul style="list-style-type: none"> ● Rationale: Similar to the elimination of an athletic team, OP courses draw prospective students to Whitman 	

College. Reducing OP courses could influence student enrollment ultimately affecting revenue.	
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Brief process overview

We reviewed the budgets for the past 2-3 years to obtain an understanding of what the current Athletics and Outdoor Programs operating costs are. After examining these costs, we explored how each aspect of these programs are funded. We analyzed the annual operating budget funding, endowment payouts, and fundraising. For cost reductions, we scrutinized each aspect of the operations for athletics and the outdoor program, resulting in a list of areas in which definable cost cutting could occur. We prioritized these cuts based upon identifiable pros and cons particularly focusing on indirect effects.

For revenue generation and recruitment, we met with Adam Miller to identify tuition revenue levels from student athletes across various programs as well as the possibility for increasing revenue within existing programs and the development of new athletic teams.

**FINANCIAL SUSTAINABILITY REVIEW
Counseling/Health Center REPORT**

Working group membership: Rae Chresfield, Lia Beatty, Julie Taylor

Recommendations for budget reductions:

The Welty Center for Health currently provides some level of physical health care for students 9 hours a day, with a Nurse Practitioner or Medical Doctor being available 6 hours a week to provide medical diagnoses and to write prescriptions. The Health Center has already reduced services from 24/7 to 8:00 AM - 5:00 PM weekday only (savings of \$150k/yr). The Counseling Center provides counseling (individual/group) and crisis intervention for students. There is a lack of community providers for counseling in the Walla Walla area. Note that some staff wages come from various endowments to the Counseling Center.

Highest Priority Tactics:	Projected Savings
<ul style="list-style-type: none"> Identify, establish, and improve partnerships with community providers. This will provide expanded student services without additional cost to the College. 	\$0
Mid-Level Priority Tactics:	
<ul style="list-style-type: none"> Restructure organization and reporting structure to more closely integrate the health center with the counseling center. This will allow us to better address the whole health of the student. 	\$0
<ul style="list-style-type: none"> Revisit need to require health insurance for all students. Costs are borne by the student, but would allow students who otherwise would be unable to access local community care due to health insurance issues. 	\$0
<ul style="list-style-type: none"> Consider using a telehealth provider (e.g., TimelyMD) to supplement (but not replace) the services provided on-campus. In conjunction with requiring all students to have health insurance coverage, this program could alleviate case loads on our providers. Cost is \$65k/year for physical health, and TimelyMD would work with local providers for testing and prescription fulfillment. There is an option to include mental health counseling as well, believed to be approximately \$50k/yr. (exact costs TBD) This option could possibly replace one or two counselors, but not the entire Center. The subcommittee does not recommend replacing counselors with telehealth at this time. 	varies, depending on staffing levels. Approximate net 0 if a single RN is replaced; greater savings if additional staff are replaced. There are too many unknowns at this point (demand, services provided, etc)
Lower Priority Tactics:	
<ul style="list-style-type: none"> 	

Recommendations for investments to drive enrollment and/or revenue:

The providing of physical and mental health care of Whitman students is not a revenue-generating activity. At best, it helps keep students in-class and on-campus. When medical and mental health needs of students cannot be met, students may need to withdraw from school. But the care available on campus does not necessarily drive students to choose Whitman over another college. We are aware that students do withdraw from Whitman due to mental or physical-health issues that, if they could be properly managed on-campus, could keep those students enrolled.

Highest Priority Tactics:	Projected Revenue
•	
Mid-Level Priority Tactics:	
• Clarify all prospective student/admissions/website materials to better clarify what the Counseling and Health Centers can and cannot do; hours available, services available (e.g., Health Center no longer providing 24/7 service)	\$0
Lower Priority Tactics:	
•	

Tactics considered but not included:

- Reduction in number of counselors (currently 6).
 - o Demand for counseling services is increasing within the student population, not decreasing. This is expected to continue for several years and is presently exacerbated by the pandemic. Current caseloads per counselor range from 30-40 students. Heavier caseloads result in longer wait times – 3-6 weeks may be typical. By comparison, wait time to be seen by a community practitioner (when available) can be 2 months or longer. Approximately 15 students withdrew from classes due to mental health issues last year. With a telehealth provider such as TimelyMD, total counselors employed by the College might be able to be reduced, but cost for the service is similar to cost of a counselor. Telehealth options would not replace outreach services, or psycho-education for faculty, staff, students, and families. Might be appropriate if case loads continue to increase, to minimize need to hire additional staff.
- Removal of Case Manager
 - o Person just hired; starts in February. Position allows counselors to focus on the treatment and diagnosis of students while the case manager handles scheduling, insurance, etc. We could also ask the Case Manager to add the responsibility for community outreach and partnerships (currently a proposed part-time position).
- Consolidation of administrative positions
 - o A single administrator may likely cause issues with patient confidentiality and not be effective in scheduling students for both physical and mental health needs, especially as the entrances to the two facilities are separate.

Recommended Investments to Improve Student Health:

Highest Priority Tactics:	Projected Cost
<ul style="list-style-type: none"> • New efforts on total-health of students. Wellness model approach includes programming focused on identification of health issues; treatment options on-campus; education of students and staff on what the Health and Counseling Centers can do. Student-led sessions, training provided by health professionals at the Health and Counseling Centers. 10 students/year, 10 hours/week. Costs covered by student-employment program, which would like additional student-employment options as there are more students requesting employment than positions available. 	<p>\$30,000/yr (cost borne by student-employment budget)</p>
<ul style="list-style-type: none"> • Improve data gathering and analysis to better understand Health Center and Counseling Center usage. This is a huge gap now and improvements to services can be done only if a clear understanding of demand met and unmet can be obtained. 	<p>\$0 (can utilize system already in place)</p>
<ul style="list-style-type: none"> • Recruit MD/ARNP for full-time Medical Director position. This will allow for medical diagnoses and medical prescriptions to be written during regular office hours, rather than only 6 hours per week as currently is the case. Student experience improved; student health may improve, allowing students to focus on their studies rather than missing classes. Consider possibilities of legal liability if non-qualified personnel offer diagnoses and treatment. 	<p>\$0 to \$50,000 depending on hours and qualifications.</p>
<p>Mid-Level Priority Tactics:</p>	
<ul style="list-style-type: none"> • 	
<p>Lower Priority Tactics:</p>	
<ul style="list-style-type: none"> • 	

Brief process overview:

Reviewed data of usage and satisfaction of students when encountering the Counseling Center and Health Center. Data is limited regarding Student Health and improved tracking of use (# of students, type of encounter, time of encounter, acute/chronic/recurring) needs to occur in order to adequately understand need and fulfillment of those needs. Peer institution review to better understand how other colleges handle mental and physical health needs of students. Identification of gaps and areas of improvement. Continuing discussions with local providers and peer institutions to examine areas of improvement.

**FINANCIAL SUSTAINABILITY REVIEW
DOS/DEI/PROFESSIONAL DEVELOPMENT/SEC REPORT**

Working group membership: Kazi Joshua, Monica Chapman (Bridget Jacobson)

Recommendations for budget reductions

We recommend the following tactics for the areas outlined below:

Dean of Students:

Items Recommended	Projected Savings
Evaluating the current international student health insurance program for students should be reconsidered to ensure better coverage. This would reduce depending on emergency funds to help cover medical expenses. High need students would still need regular financial aid.	\$20,000
Coordinate an assessment of how support services might be shared between similarly situated offices: IC, ARC, Res Life, and DOS to maximize efficacy of staff and support for students.	

Intercultural Center/Diversity Equity & Inclusion:

Items Recommended	Projected Savings
We recommend no additional staff. This assumes the positions: Director of Equity & Inclusion and VP of DEI positions will be filled. Currently these two positions are vacant and there are 4 staff in the IC team (2/3 of the team)	
Coordinate resource supports for programming in Greek Life, LGBTQIA+ and international students with the DOS office.	
Endowments - Using accumulated payout savings to cover part of DEI operating budget for one year.	\$160,000 in savings for <u>ONE YEAR</u> or spread over 4 years

Student Engagement Center:

Items Recommended	Projected Savings
We are recommending there should not be any additional staff. We believe this matter will merit further study and a different recommendation regarding an investment in staffing for career preparation may be advanced.	
Explore if the communications function in the SEC could be connected with the Communications Dept. as a shared responsibility depending on consultation with the “Administrative Units” working group that has the Communications area in its purview.	

Tactics considered but not included:

Items Recommended	Projected Savings
The Colleen Willoughby Fund (Women Leadership Fund) should be re-examined of its location and its current uses within the limits of the endowment agreement.	\$85,000 (reallocation) A payout of \$8,917/year
Staff Professional Development: This item was elevated for a cabinet discussion to take into account other units that were not being studied by this committee.	

Brief process overview:

We gathered the information from all of the units provided by the staff. We also met with the teams in all areas to follow up with specific questions we had regarding the materials we had received, and in one case, had access to a recent external review.

In the course of our inquiry, we were attentive to the recent Inclusion Task Force report recommendations.

**FINANCIAL SUSTAINABILITY REVIEW
OCS/LIBRARY SUBCOMMITTEE REPORT**

Working group membership: Nate Boland, Dalia Corkrum, Alzada Tipton

Recommendations for budget reductions

Office of Off Campus Study:

- We recommend the following tactics:

Measure	Projected Savings
1. Reduce the amount of money budgeted for OCS tuition costs	\$300,000
2. Suspend Crossroads Program until it can be made self-sustaining	\$81,000
3. Eliminate Whitman purchasing International Medical Insurance for students	\$16,550
4. Limit the number of times a student can participate in OCS	\$51,300

- 1. Reduce the amount of money budgeted for OCS tuition costs:** Each year tuition dollars are set aside to be passed through to pay other institutions. The OCS tuition budget amount was adjusted upwards a couple of years ago when there was a uniquely large number of students studying abroad, and has stayed at that higher level ever since despite the average number of students studying abroad returning to historical norms.

Savings estimate: \$300,000/yr

Pros	Cons
<ul style="list-style-type: none"> • There is no direct impact on the budget or availability of OCS to students in a normal year. 	<ul style="list-style-type: none"> • If we have another abnormally large number of OCS applications, there will have to be a decision to either restrict the number of OCS applications granted or request a one-time reallocation of budget funds to cover the costs.

- 2. Suspend Crossroads Program until it can be made self-sustaining:** Crossroads is a short-term study abroad program led by Whitman faculty. The costs of the program (compensation and travel for faculty and a second chaperone, and student travel costs) are paid through student fees with financial aid for students who have demonstrated need. Financial Aid has \$81,000 of college money set aside for Crossroads financial aid. High-need students receive financial aid that covers the full cost of the trip/course. Other students receive financial aid from the college to help with travel costs – on average about \$2000.
Note: trips to China are funded from endowments supporting engagement with China, which offer funds in perpetuity.

There are at least three major sustainability issues with the current administration of the Crossroads Program.

1) Funding from surplus OCS funds will run out in 2023. We have been paying these faculty costs through a finite surplus left over from the pre-home-tuition-model days; it is estimated that this surplus will run out in 2023.

2) Students are not charged tuition for the course, which allows them to earn typically 4 extra academic credits at no cost. This can exacerbate a problem we have with students going to “pay by credit” for their last semester (e.g., not paying a full semester of Whitman tuition.)

3) Faculty are compensated twice: a 0.5 course credit (they can apply towards a course release in the academic year once they had led a course twice) and stipend (\$1000/week for 2 to 6 weeks) plus travel costs.

Each of these issues are solvable, but we recommend that the Crossroads Program be suspended and a taskforce be created to evaluate new funding/credit/compensation models.

Savings estimate: \$81,000/yr (the yearly Financial Aid budget for Crossroads)

Pros	Cons
<ul style="list-style-type: none"> ● The OCS office reports that due to the labor intensive nature of making arrangements to create multiple individual short-term off-campus programs and the 18-month lead time needed to set up and recruit students for these courses, Whitman OCS will not be able to offer these courses until the fourth staff position (the Administrative Assistant/OCS Fellow position) is restored. ● Crossroads provides students with “free” credits that could increase the likelihood of pay-by-credit in students’ final semesters. There needs to be a way to incorporate the credits for this off-semester experience into the academic calendar and a way to charge students for exceeding a max credit limit (overload?). ● There are reasonable opportunities to reinstitute Crossroads with a sustainable budget from Endowed sources: Crossroads is included in the current capital campaign and the O’Donnell Endowment has reached maturity and could be used (China-based Crossroads courses are already funded through other endowments). 	<ul style="list-style-type: none"> ■ Crossroads courses are in demand and often have waitlists. ■ The Crossroads Program is part of the new Global Studies Concentration ■ The short-term OCS opportunities are attractive to STEM majors who prefer to complete core coursework on campus and student athletes who do not want to miss all or part of a season traditional semester OCS programs.

Eliminate Whitman purchasing International Medical Insurance for students: Discontinue the current practice of Whitman OCS purchasing iNext international medical insurance for all OCS

students. To make sure that all OCS students have international medical insurance, OCS would charge students for iNext international medical insurance in addition to the Whitman tuition, if their program itself did not already charge them for required international medical insurance.

Savings estimate: \$16,550/yr (\$140/student/semester x 130 students/year on non-CIEE programs - \$1650 for supplemental mental health app)

Pros	Cons
<ul style="list-style-type: none"> • About 90% of all OCS programs now provide international medical insurance as part of the students' required fees for their program and the Whitman purchased CIEE iNext insurance has become redundant for those programs. 	<ul style="list-style-type: none"> ■ Whitman OCS students will no longer have uniform international medical insurance so OCS staff will need to monitor program coverage more closely to make sure all students have at least basic coverage. ■ Some programs offer mental health coverage and others do not, which will result in some OCS students having to pay for mental health support out-of-pocket or forgoing these medical services all together. (Whitman could purchase the mySSP mental health study abroad app service for approximately \$11 per semester per student for an approx total cost of \$1650 per year.)

3. Limit the number of times a student can participate in OCS: Limit all students to one OCS semester plus one Whitman faculty-led short-term Crossroads program. Because study abroad is so critical for language acquisition, an exception would be made to allow students enrolling in programs in which all courses are taught in a language other than English to participate in OCS for two semesters either in one location or in two locations.

Savings estimate: \$51,300/yr (Avg of 3 students/year attend two different semester programs in one year x avg program tuition fees of \$17,100 = \$51,300)

Pros	Cons
<ul style="list-style-type: none"> • Students who want to study abroad for two semesters in two different locations are often adamant about their desire to do so, but their academic rationale is not always compelling. • Some liberal arts colleges already limit the number of study abroad/OCS terms that a student can engage in because of the cost to the college and concerns about academic continuity. 	<ul style="list-style-type: none"> ■ Whitman's study abroad programming distinguishes itself from some other liberal arts colleges because we currently do not limit how many times a student can study off-campus during their Whitman career (aside from transfer credit limitations and not permitting semester OCS until the student has junior standing). Our current flexibility appeals to prospective students who often ask about it at Admission Visitors Days and restricting OCS in this way could impact some students' decision to enroll at Whitman. ■ Students who wish to study away for both semesters of their junior year in two different locations sometimes do not have compelling academic

	<p>reasons but want to leave campus because they are not content at Whitman or in Walla Walla. Eliminating this option will likely negatively impact retention of a few students each year who may transfer out if they cannot study away their entire junior year.</p> <p>📺 Because we have already advised dozens of sophomores about their OCS plans in 2021-22, it would be difficult to make this policy change until 2022-23.</p>
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Penrose Library:

We recommend the following tactics:

Measure	Projected Savings
1. Optimize use of existing Library endowments	Up to \$100,000
2. Decrease personal subscriptions that duplicate institutional subscriptions	At least \$2,400

- **Optimize use of existing Library endowments:** Digital access costs (both subscriptions and e-book/e-journal purchasing) and operating costs continue to rise. The Library is fortunate to have generous endowments that can be used to secure many (but not all) materials. Many of the materials endowments (for books) were established in an earlier time that did not imagine the move to digital and do not explicitly allow for procuring access to digital materials. It is increasingly difficult to use these endowments given the declining demand for book purchases. Most of the library endowments also do not provide means for supporting library operations outside of building collections.

In consultation with the Comptroller and legal counsel, three endowments were recently identified that may be used more broadly to support digital subscriptions.

Savings estimate: up to \$100,000/year by loosening restrictions on specific endowment funds

Pros	Cons
<ul style="list-style-type: none"> ● The endowments were established to support the library. It would be good to use them to do so. 	<p>📺 While some endowments maybe readily be re-interpreted, others may require difficult and lengthy legal review / conversations with donors.</p>

- **Decrease personal subscriptions that duplicate institutional subscriptions:** It is noted that administrators, faculty, and staff purchase subscriptions to journals, periodicals, etc. that may a) already be available, or b) be cheaper as a collective subscription through the library. As an example, while available data is incomplete, we know that at least \$2,407.82 was

spent last year on individual subscriptions to The Chronicle of Higher Education, when the Library already pays \$1,550.00 for a campus-wide license.

Savings estimate: *Uncertain, but at least \$2,408.* We should reach out to faculty and staff to obtain a list of current periodical subscriptions and whether they are purchasing them using PDA, departmental, or other college funds.

Pros	Cons
<ul style="list-style-type: none"> The Library and our consortia have greater bargaining power with journal vendors than individuals. There may be cost savings in consolidating individual subscriptions to campus-wide licenses. 	<ul style="list-style-type: none"> Some faculty may still want to obtain subscribed materials independently due to connected discounts, ease of access, or desire for physical copies. Savings would be realized from non-Library budgets and may require slight increases to the Library budget.

Recommendations for investments to drive enrollment and/or revenue:

OCS:

Explore creating a Seattle Semester option: A Whitman-run Seattle Semester Program might help recruit and retain students and faculty who are concerned with the college’s location in a small rural town, while keeping tuition and costs under college control.

Pros	Cons
<ul style="list-style-type: none"> A Seattle Semester Program may be a useful recruiting tool for students and faculty, particularly people of color. As a Whitman-controlled program, Whitman would have control over the curriculum and costs of such a program and retain the full tuition paid by students. 	<ul style="list-style-type: none"> The program would require significant, upfront investment by the college. The cost and sustainability of such a program has not yet been determined.

Penrose Library:

Create more open educational resources: The Library has established an open digital repository and created digital archives that could be leveraged to raise our national profile. Goodwill and recognition will improve Whitman’s reputation, rankings in our peer group, aid in recruitment of students, faculty and staff, provide no-cost access to scholarly materials, and improve our odds of receiving grants from national funding agencies.*

*National federal granting agencies justify grant expenditure as contributions to the public good. To the extent that activities at Whitman result in tangible contributions like open educational resources, articles, databases, etc., review panels will give greater regard to

applications emanating from our institution. Note that in addition to directly funding scholarly activities, many grants provide indirect cost (IDC) remittance to the college that can be used in lieu of regular budget funds to enhance and support scholarship at the College. Over the past 11 years, IDC recover has totaled nearly \$570,000.

This program would enhance our reputation and potentially student recruitment and retention

Pros	Cons
<ul style="list-style-type: none"> ● Amplify the scholarship being produced by Whitman faculty and students ● Significant adoption of OER would replace expensive textbooks, providing for greater equity and access for students ● Increase opportunities for grant funding ● Increase opportunities for meaningful student employment in the development of digital resources 	<ul style="list-style-type: none"> ■ Development of OER can be very time consuming ■ Library and WCTS do not necessarily have the expertise across OER software, platforms, and resources ■ Additional staffing may be required

Tactics considered but not included:

OCS:

- Charge Whitman students higher tuition for OCS programs that have higher tuition than Whitman
- Reduce the number of OCS Partner Programs
- Eliminate reimbursement of consulate flights to obtain student visa
- Eliminating airfare estimate from the OCS financial aid budget

Library:

- Raise price of public membership
- **Sell the Stuart Napoleona collection:** Prior to their stock donation which formed the Stuart Library Acquisitions Endowment, Elbridge and Evelyn Stuart donated books, artifacts, and memorabilia whose provenances have some relationship to Napoleon Bonaparte. A special room, with its own HVAC system, was constructed to house these materials. While some of the books have relevance to our French and history curricula, the remainder of the collections are curiosities that are never studied. The room is opened infrequently and by appointment only. The question is being asked if we are, indeed, the best stewards of these materials.

Savings estimate: uncertain. The collections have never been appraised. Anecdotally, values of \$1-2 million have been suggested.

Pros	Cons

<ul style="list-style-type: none">● Sale of the collection would generate much needed income● Objects and artifacts would find a more suitable home, with appropriate curation, preservation, and appreciation opportunities● The endowment agreement makes no prohibition for the sale of the collection● The collection will require significant conservation and preservation of the draperies, carpeting, and upholstery in the not-too-distant future which will be quite expensive	<ul style="list-style-type: none">● Sale of this collection would generate only one-time savings● Negative publicity surrounding the sale might generate a loss of goodwill and potentially work against future donations of funds and/or collections● Future curricular developments would be unable to use the materials for pedagogical purposes
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**FINANCIAL SUSTAINABILITY REVIEW
RESIDENCE LIFE AND BOOKSTORE REPORT**

Working group membership: Peter Harvey, David Sprunger and Adam Miller

Recommendations for budget reductions

Residence Life:

Items Recommended	Projected Savings
The college should explore reducing the number of RAs in the residence life program from a typical 39 to 34 with a goal of having a more equitably distributed number of students each RA supports.	\$69,000

Bookstore:

Items Recommended	Projected Savings
The college should continue to explore engaging a private partner to operate the bookstore. Such a partnership has the potential to lower costs to students by increasing course materials available digitally, and through used books and rental books. A partner could deploy technology to make it easier for faculty to reserve course materials and for students to place their orders. Students could have the option of paying a flat per credit fee for all books, which can be less expensive depending on the classes students are taking. A partner could also potentially expand the offerings in the online bookstore and increase sales to alumni and parents. More work needs to be done to evaluate the potential of such a partnership and whether it truly will benefit students and what the financial impact would be to the College.	

Brief process overview:

The team met with staff in the areas studied.

Total Savings Projections for FSR Student Support Group		
Items Recommended by Area Noted	Projected Year Savings	Comments
Athletics (all levels)	\$253,100.00	
College's restricted endowments	\$117,000.00	
Dean of Students	\$20,000.00	
Intercultural Center	\$40,000.00	spread over 4 years equals a total of \$160,000 savings
Off-Campus Studies	\$448,850.00	
Penrose Library	\$102,400.00	
Residence Life	\$69,000.00	
Staffing (Cabinet's recommendation)	\$194,000.00	Estimated savings in salaries and benefits
Total Savings	\$1,244,350.00	