BUDGET ADVISORY COMMITTEE MEETING

OCTOBER 14, 2011

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The Whitman College Strategic Plan
2011

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Mission (Goal) **Whitman College is committed to providing an excellent, well-rounded liberal arts and sciences undergraduate education. It is an independent, nonsectarian, and residential college. Whitman offers an ideal setting for rigorous learning and scholarship and encourages creativity, character, and responsibility. Through the study of humanities, arts, and social and natural sciences, Whitman's students develop capacities to analyze, interpret, criticize, communicate, and engage. Concentration on basic disciplines, in combination with a supportive residential life program that encourages personal and social development, is intended to foster intellectual**

Assumptions: All strategies and tactics support the mission of the college and will be implemented in a cost effective and sustainable manner.

Objective 1 **Provide exceptional opportunities for student learning by offering an excellent liberal arts and sciences curriculum**

Lead Staff

Strategy 1.1 **Strengthen key components of academic program such as Encounters, cross-disciplinary teaching initiatives, and global studies**

Tactic 1.1.1	Increase tenure track participation in teaching *Encounters*	Kaufman-Osborn, Apostolidis
Tactic 1.1.2	Complete articulation of learning goals for distribution requirements	Kaufman-Osborn, General Studies Committee, Perfetti
Tactic 1.1.3	Assess existing major programs in light of strategic planning of curriculum	Kaufman-Osborn, Committee of Division Chairs
Tactic 1.1.4	Integrate Written and Oral Communications Initiative into selected major programs	Kaufman-Osborn, Burgess
Tactic 1.1.5	Explore and expand opportunities for faculty appointments that support cross-disciplinary curricular initiatives	Kaufman-Osborn, Committee of Division Chairs
Tactic 1.1.6	Fund replacement courses and stipend for Global Studies Director	Kaufman-Osborn
Tactic 1.1.7	Fund global studies symposium, publication of symposium proceedings, faculty development seminars and summer workshops (consider using new unrestricted endowment income to bridge funding until new endowment gifts are secured)	Kaufman-Osborn, Magnusson

		Lead Staff
Tactic 1.1.8	Examine and, where appropriate, implement recommendations of Working Group on Global Education	Kaufman-Osborn, Brick, Magnusson
Tactic 1.1.9	Strengthen interdisciplinary programs (e.g., by providing adequate staffing and formal institutionalization in processes of faculty governance)	Kaufman-Osborn
Tactic 1.1.10	Sustain and expand Cross-Disciplinary Learning and Teaching Initiative	Kaufman-Osborn
Tactic 1.1.11	Work with Northwest 5 Consortium (Reed, Willamette, Lewis and Clark, University of Puget Sound and Whitman) to share resources and increase collaboration to strengthen the teacher-scholar model	Kaufman-Osborn
Tactic 1.1.12	Review criteria used in making appointments to endowed chairs and professorships	Kaufman-Osborn

Strategy 1.2 **Provide ongoing support for excellent teacher/scholars by ensuring competitive salaries; strengthening mentoring program for new faculty; supporting innovation; and increasing financial support for start up budgets, scholarship and faculty/student research.**

Tactic 1.2.1	Hire qualified faculty to fill tenure-track positions in Art History and Visual Culture Studies (Mellon position); Studio Art (Mellon position); Studio Art; Economics; English; Music; Politics (Mellon position); Psychology (Mellon position); Theatre (two positions). Chemistry and Biology	Kaufman-Osborn
Tactic 1.2.2	Informed by "Building on Excellence, 2010," add at least one new tenure track position in key area of academic program. Proposed endowment funded positions (subject to trustee approval): Chemistry 12/13, Biology 12/13, Rhetoric 13/14	Kaufman-Osborn
Tactic 1.2.3	Provide competitive faculty salaries at all ranks compared to the Panel of 14 and reward merit performance	Kaufman-Osborn
Tactic 1.2.4	Examine flexible tenure track appointments (part-time, shared positions, etc.)	Kaufman-Osborn

		Lead Staff
Tactic 1.2.5	Refine and expand faculty mentoring program	Perfetti
Tactic 1.2.6	Assess implementation of move to a five course teaching load	Kaufman-Osborn, Dobson
Tactic 1.2.7	Conduct external reviews of the Departments of Anthropology, History, Math, and Race and Ethnic Studies as well as Sheehan Gallery and the Maxey Museum	Kaufman-Osborn, Janning
Tactic 1.2.8	Provide support for participation in national meetings on pedagogy and academic administration (e.g., workshops for department chairs)	Kaufman-Osborn, Perfetti
Tactic 1.2.9	Reorganize governance structure of Center for Teaching and Learning	Kaufman-Osborn, Perfetti
Tactic 1.2.10	Integrate CwTI (Communicate with Technology Initiatives) faculty workshop into CTL program	Kaufman-Osborn, Terrio
Tactic 1.2.11	Conduct assessment of internal innovation grants and issue call for proposals for 2012-13	Kaufman-Osborn
Tactic 1.2.12	Identify ways to evaluate non-classroom modes of teaching within faculty review process	Janning
Tactic 1.2.13	Increase budget for start-up funds for new tenure track positions	Kaufman-Osborn
Tactic 1.2.14	Increase support for faculty/student research (e.g., summer research grants)	Kaufman-Osborn
Tactic 1.2.15	Reduce current reliance on non tenure track faculty by filling first four of eight Mellon Foundation-funded conversion positions	Kaufman-Osborn
Tactic 1.2.16	Implement new informal review process for untenured tenure-track faculty at mid-point of initial three-year contracts	Perfetti

Strategy 1.3 **Strengthen key non-curricular elements of academic program to enhance student learning out of the classroom by improving student advising; strengthening the Off-Campus Studies office; enhancing the number and quality of applications for post-baccalaureate grants and fellowships; and providing effective library resources**

		Lead Staff
Tactic 1.3.1	Evaluate and, where appropriate, modify pre-major advising program	Perfetti, Cleveland
Tactic 1.3.2	Continue to build Penrose archives and collections	Kaufman-Osborn, Corkrum
Tactic 1.3.3	Increase student applications for and receipt of post-baccalaureate grants and fellowships	Perfetti, Raether
Tactic 1.3.4	Build into budget Science Outreach Coordinator (previously funded by HHMI grant)	Kaufman-Osborn
Tactic 1.3.5	Provide additional staff position for Off-Campus Studies office in order to support program growth, new partner programs, new initiatives	Kaufman-Osborn

Strategy 1.4   **Assess and modify administration of academic program to better meet the needs of the students and assist our faculty in developing a multi-year curriculum and staffing plans for academic departments and interdisciplinary programs; implementing improved assessment mechanisms; and enhancing the work of department chairs and interdisciplinary program directors**

Tactic 1.4.1	Develop two-year curriculum and staffing plans for academic departments and interdisciplinary programs, and refine web-based Curriculum Planning Tool (which generates enrollment projections on the basis of these plans)	Kaufman-Osborn, Committee of Division Chairs
Tactic 1.4.2	Review, revise, and update new department chairs handbook at end of 2011-12 academic year	Kaufman-Osborn, Perfetti
Tactic 1.4.3	Align NWCCU Accreditation requirements with existing assessment activities	Kaufman-Osborn, Perfetti, Janning
Tactic 1.4.4	In accordance with practice adopted in 2009-10, conduct a 360 review of one PDF direct report per year	Kaufman-Osborn
Tactic 1.4.5	Clarify procedures and role of Curriculum Committee in reviewing, modifying, and approving curriculum plans of all academic departments in accordance with comprehensive needs of the academic program	Kaufman-Osborn

Lead Staff

Tactic 1.4.6	Complete and consolidate reorganization of the Office of the Provost and Dean of the Faculty	Kaufman-Osborn
Tactic 1.4.7	Assess current system of administering student evaluations	Kaufman-Osborn

Objective 2 — **Deliver a strong co-curricular program that focuses on student learning and leads to success in**

Strategy 2.1 — **Ensure a campus environment that integrates the co-curricular with the academic mission of the college**

Tactic 2.1.1	Increase the opportunities for students to engage in high impact activities, and provide resources for faculty who want to add more experiential learning opportunities to their curriculum	Cleveland, Carson
Tactic 2.1.2	Continue and fully develop the Whitman College and Walla Walla Community internship program	Carson, Leavitt
Tactic 2.1.3	Seek increased support for internships and high impact curricular and co-curricular programs	Cleveland, Carson
Tactic 2.1.4	Fully fund Assistant Dean for Student Engagement	Cleveland
Tactic 2.1.5	Hire Assistant Director for Student Engagement Center	Cleveland

Strategy 2.2 — **Affirm a campus environment that acknowledges the importance of differences among individuals and groups**

Tactic 2.2.1	Increase Stuart Religious Counselor to full-time with program support	Cleveland, Jacks
Tactic 2.2.2	Continue to incorporate the core value of diversity in all stages of faculty and staff searches	Kaufman-Osborn HR Director
Tactic 2.2.3	Increase Intercultural Center Program Advisor to Assistant Director in order to take on greater responsibilities such as planning, fall orientation for international students, creation of new programs, mentor and advise students	Mweu, Cleveland

Lead Staff

Strategy 2.3   **Develop programs that enhance the personal development, health and safety of students**

Tactic 2.3.1	Develop and implement comprehensive student learning outcomes and assessment procedures in all Student Services departments.	Tavelli, Maxwell, Carson, Mweu, Jacks
Tactic 2.3.2	Assess possibilities of creating a leadership development program	Maxwell, Leavitt, Adams
Tactic 2.3.3	Sustain the Green Dot sexual assault prevention program	Maxwell
Tactic 2.3.4	Assess and develop plans to enhance the sophomore experience	Tavelli, Carson, Dunn, Mweu

Strategy 2.4   **Deliver strong varsity athletics, club sports and intramural programs that offer teamwork and leadership experiences for students**

Tactic 2.4.1	Develop ongoing education programs for coaches, captains, athletic student leaders and team members over critical issues impacting teams and programs	Cleveland, Kaufman-Osborn
Tactic 2.4.2	Examine ways of improving athletic recruitment efforts	Kaufman-Osborn, Snider
Tactic 2.4.3	Monitor and ensure compliance with Title IX, especially in terms of varsity athletics and club sports. Explore the possibility of adding women's lacrosse.	Kaufman-Osborn, Snider
Tactic 2.4.4	Continue funding for three full-time assistant athletic coaches when W Club funding expires effective 2011-12 and 2012-13	Kaufman-Osborn, Snider
Tactic 2.4.5	Provide support and strategic direction for W Club	Snider

Strategy 2.5   **Assess and modify the administration of Student Services to better meet the needs of the campus**

Tactic 2.5.1	Add administrative help in the Dean of Students office to provide better service to students and program support for Academic Resource Center	Cleveland

Objective 3   **Ensure the enrollment, retention, and graduation of an academically talented and diverse group of students that meets net tuition revenue goals and ensures a balanced budget**

Strategy 3.1   Meet enrollment targets of 400 first-years and 1450 year FTE

Tactic 3.1.1	Upgrade Visit Program Coordinator	Cabasco
Tactic 3.1.2	Implement relationship management software tool for recruitment	Cabasco
Tactic 3.1.3	Continue enhancements of document imaging software	Cabasco
Tactic 3.1.4	Complete update of admission website (in conjunction with overall web redesign)	Cabasco
Tactic 3.1.5	Update website virtual tours	Cabasco
Tactic 3.1.6	Expand and increase support for Admission Intern Program	Cabasco, Dyerly
Tactic 3.1.7	Fund part-time application readers	Cabasco, Dyerly

Strategy 3.2   Continue work with financial aid consultant to reduce Whitman's discount rate

Tactic 3.2.1	Continue need-sensitive financial aid policy for new students	Cabasco, Ponti
Tactic 3.2.2	Balance discount rate goals with academic profile and diversity goals	Cabasco, Ponti
Tactic 3.2.3	Update Financial Aid website and publications	Cabasco, Ponti

Strategy 3.3   Improve retention rate to 95% and graduation rate to 90%

Tactic 3.3.1	Continue enrollment management committee to monitor and coordinate retention efforts	Cabasco
Tactic 3.3.2	Review and analyze retention and graduation rate data to determine potential areas where Whitman can improve	Cabasco, Christopherson

Strategy 3.4   Enhance recruitment and outreach programs for qualified applicants and enrollees who are students of color and/or students from a broad range of socioeconomic backgrounds

		Lead Staff
Tactic 3.4.1	Develop and implement outreach to WISE program alumni	Cabasco, Dyerly
Tactic 3.4.2	Continue to cultivate and develop relationships with community based organizations	Cabasco, Dyerly
Tactic 3.4.3	Continue to enhance Visit Scholarship Program	Cabasco, Dyerly

Objective 4   **Enhance fund raising to realize the vision for Whitman's future. Tell the Whitman story broadly to enhance the national reputation of the college**

Strategy 4.1   **Advance Whitman's campaign**

Tactic 4.1.1	Expand cultivation and solicitation of high capacity prospective donors whose connections to Whitman are less developed than those giving during campaign's quiet phase	Bogley
Tactic 4.1.2	Utilize publicly announced campaign as a vehicle for inspiring larger gifts from alumni, parents, and friends, as well as to encourage an increased number of multi-year commitments	Bogley
Tactic 4.1.3	Develop project specific campaign tear sheets and brochures to enhance messaging regarding the import and impact of campaign initiatives	Tinhof
Tactic 4.1.4	Create planned giving coordinator position for campaign support by reallocating existing position	Bogley
Tactic 4.1.5	Conduct survey regarding annual giving	Bogley
Tactic 4.1.6	Create stewardship coordinator position for campaign support by reallocating existing position plus equity upgrade	Bogley
Tactic 4.1.7	Support leaders of campaign through regional campaign committees	Bogley
Tactic 4.1.8	Expand programming of special events such as the Whitman Faculty Series, Young Leaders events, and alumni events featuring faculty and students	Bogley
Tactic 4.1.9	Launch campaign newsletter	Bogley

Lead Staff

Tactic 4.1.10	Launch effort to utilize video to support campaign's impact through promotional videos distributed via e-mail with web links	Bogley
Tactic 4.1.11	Complete planning and budgeting for implementation of revamped reunion weekend program beginning fall of 2013	Bogley, Schmitz
Tactic 4.1.12	Assess alumni travel program including staffing, programming, and budget	Bogley, Schmitz

Strategy 4.2   Raise funds for campaign priorities and other special initiatives

Tactic 4.2.1	Build Whitman's Academic Strength through gifts and grants to deepen and broaden the curriculum, strengthen the faculty, expand opportunities for student-faculty research, improve student learning, an expanded internship program, and necessary equipment and technology to support the initiatives	Bogley
Tactic 4.2.2	Endow Whitman's commitment to access and affordability through expanded need and merit-based scholarships	Bogley
Tactic 4.2.3	Build Whitman's financial strength through increased funding of unrestricted endowments and increased unrestricted giving to support the annual operating budget through the Annual Giving program	Bogley

Strategy 4.3   Expand communication efforts to project a unified message about Whitman's achievements and vision for the future

Tactic 4.3.1	Maximize use of Whitman magazine to support campaign; fund increasing distribution costs	Wardwell
Tactic 4.3.2	Expand efforts to place OpEds in regional and national media	Wardwell
Tactic 4.3.3	Complete college website evolution and upgrade	Wardwell
Tactic 4.3.4	Implement new content management system for web	Wardwell

		Lead Staff
Tactic 4.3.5	Add online content specialist	Wardwell
Tactic 4.3.6	Retain PR firm to execute national media relations program	Wardwell
Tactic 4.3.7	Add one publication designer position	Wardwell

Objective 5   **Provide the resources necessary to support excellent staff and facilities**

Strategy 5.1   **Provide ongoing support for excellent staff by ensuring competitive salaries and benefits; promoting a culture of recognition and appreciation; and addressing needs of family members**

Tactic 5.1.1	Provide competitive staff salaries compared to peer institutions and reward merit performance	Harvey, HR Director
Tactic 5.1.2	Promote a culture of recognition and appreciation of staff	HR Director and Budget Officers
Tactic 5.1.3	Continue to support access to adequate child care services through Kids Place and by facilitating the sharing of information on other community resources	Harvey, HR Director
Tactic 5.1.4	Continue to support trailing spouses finding employment at Whitman and through the community employers network	Harvey, HR Director

Strategy 5.2   **Encourage a culture of innovation and professional growth for staff**

Tactic 5.2.1	Fully fund program of regular external reviews of administrative departments	HR Director
Tactic 5.2.2	Enhance leadership and training programs for staff	HR Director
Tactic 5.2.3	Add a director of Environmental Health and Safety to serve as Chemical Hygiene Officer and lead all safety and Risk Management programs.	Harvey

Strategy 5.3   **Ensure that Whitman facilities support the evolving needs of the college**

Tactic 5.3.1	Ensure appropriate funding to replace facilities components in accordance with life cycle plan by reviewing life cycle funding model annually	Harvey

		Lead Staff
Tactic 5.3.2	Establish reserve fund to assist in small renovations to facilities to meet new program needs for spaces	Harvey
Tactic 5.3.3	Fund debt service for Sherwood, Olin, Maxey and HJT renovations	Harvey
Tactic 5.3.4	Develop plans to address space needs for Off-Campus Studies and Academic Resource Center, and Financial Aid/Admissions	Harvey, Kaufman-Osborn, Cleveland, Cabasco
Tactic 5.3.5	Assess long range science facilities needs	Kaufman-Osborn, Harvey, Golden
Tactic 5.3.6	Continue to incorporate sustainable design elements into renovations and new construction projects where practicable	Park
Tactic 5.3.7	Continue to incorporate barrier free design elements into renovations and new construction where practicable	Park

Strategy 5.4   Promote long term financial stability through effective planning

Tactic 5.4.1	Consider phasing out specific academic programs	Kaufman-Osborn
Tactic 5.4.2	Review strategic plan annually to ensure priorities are linked with budget modeling	Budget Officers
Tactic 5.4.3	Promote technology to reduce non essential travel expenditures and reduce printing and postage expenses	Budget Officers
Tactic 5.4.4	Regularly review programs to ensure they are still central to the mission	Budget Officers
Tactic 5.4.5	Explore opportunities to reallocate existing resources to fund new initiatives and priorities	Budget Officers
Tactic 5.4.6	Promote sustainability practices to more efficiently utilize resources and facilities	Budget Officers
Tactic 5.4.7	Refine the zero-based contingent faculty staffing model, adopted in 2010-11, in order to cost-effectively allocate contingent faculty positions	Kaufman-Osborn

Lead Staff

Objective 6   **Use information technology to enhance the educational process and improve the effectiveness of**

Strategy 6.1   **Integrate technology into teaching and learning**

Tactic 6.1.1	Continue to assist faculty in exploring creative, innovative and appropriate uses of technology in teaching and learning	Sprunger, Chavre, Lubbers
Tactic 6.1.2	Continue educating faculty on topics helpful and compelling to faculty research and student instruction	Sprunger
Tactic 6.1.3	WCTS reorganization that includes revising vacant Senior Analyst and Co-consultant for Division III position to be a Director of Learning Technology with associated salary adjustments.	Terrio
Tactic 6.1.4	Assess usability and feature gaps for students and faculty in CLEo (learning management system); prioritize gaps and implement improvements	Osterman
Tactic 6.1.5	Continue to partner with academic departments in the development and maintenance of specialized computer facilities. Renovate the math computer lab	Schueller, Chavre, Harvey
Tactic 6.1.6	Continue to assess and improve technology enhanced learning spaces on campus, including the completion of the renovation of Olin computer lab	Sprunger
Tactic 6.1.7	Continue experimenting with the development and use of "Virtual Labs" and "Virtual Desktops" for improved access to academic software and other specialized online academic resources	Osterman, Quiner, Chavre
Tactic 6.1.8	Enhance portal advising tools to increase support for the college's academic advising program	Quiner, Osterman
Tactic 6.1.9	Resume converting non-technology enhanced classrooms into technology enhanced classrooms	Sprunger

Lead Staff

Strategy 6.2   Integrate technology into college operations

Tactic 6.2.1	Assess and address developing training needs for current and future college operations and incorporate new training methods (i.e. screencasting, etc.)	Hinz
Tactic 6.2.2	Work with IR to analyze dashboard requirements; select and pilot a solution	Quiner, Osterman, Christopherson
Tactic 6.2.3	Complete conversion from QUACK to personalized portals	Osterman, Quiner
Tactic 6.2.4	Pilot Kuali for web-based workflow	Quiner, Osterman
Tactic 6.2.5	Select and implement e-commerce bill payment solution for student accounts	Froese, Osterman
Tactic 6.2.6	Implement new bookstore point-of-sales and inventory system	Smith, Osterman
Tactic 6.2.7	Assess the needs of the campus for events calendar and scheduling system	O'Connell, Quiner
Tactic 6.2.8	Evaluate digital document management needs of the campus	Quiner
Tactic 6.2.9	Evaluate e-transcript providers, and select and implement if feasible	Urban, Quiner
Tactic 6.2.10	Evaluate and assess new ticketing and asset management solution	Chavre

Strategy 6.3   Provide reliable infrastructure that allows for ready access to technology resources

Tactic 6.3.1	Continue to implement a redundant and flexible network and server architecture	Kelly
Tactic 6.3.2	Upgrade or replace Blackboard Transaction System (campus card swipe)	Kelly, Osterman

		Lead Staff
Tactic 6.3.3	Conduct a pilot project for a campus wireless system that utilizes 802.11n thin access points. Replace the entire campus wireless network with 802.11n thin access points (explanation of budgetary impact: with utilization of Network Lifecycle funds and an additional $60,000 for three years, the wireless network upgrade would be complete. By using life cycle funds only, the replacement would take place over nearly 7 years)	Kelly
Tactic 6.3.4	Continue to keep IT Disaster Recovery/Business Continuity Plan updated	Osterman, Kelly, Quiner
Tactic 6.3.5	Establish "maintenance" budget for auditorium AV	Terrio
Tactic 6.3.6	Establish life cycle maintenance budget for Film Studies Lab	Terrio, Kaufman-Osborn
Tactic 6.3.7	Establish life cycle maintenance budget for Brattain Auditorium	Terrio, Kaufman-Osborn
Tactic 6.3.8	Establish life cycle maintenance budget for new Olin wing technology	Terrio, Kaufman-Osborn
Tactic 6.3.9	Establish life cycle maintenance budget for Science Mobile Laptop Cart	Terrio, Kaufman-Osborn
Tactic 6.3.10	Increase life cycle maintenance budget for telephone equipment	Kelly

Strategy 6.4   Strengthen information technology security and compliance practices including user awareness and education.

Tactic 6.4.1	Continue to monitor and enhance security of all college services	Osterman
Tactic 6.4.2	Prioritize and implement recommendations from Moss-Adams and ID Experts assessments to improve the college compliance posture	Osterman
Tactic 6.4.3	Get feedback on and approval of IT security plan; implement procedural changes to comply with the plan	Osterman
Tactic 6.4.4	Continue working with the Institutional Review Board and Office of Grants and Fellowships to support security and privacy needs of scholarship	Osterman

		Lead Staff
Tactic 6.4.5	Work with functional offices that handle Personally Identifying Information (PII) to develop and deploy standardized secure desktop configurations	Osterman, Kelly
Tactic 6.4.6	Establish a formal IT security education and awareness program with the initial focus for new staff	Osterman