

## **Request for 2015-2016 Budget**

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**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Provost & Dean of the Faculty**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>97,796</b>	<b>169,114</b>			
	<b>REALLOCATIONS</b>							
1	Maintenance costs to be transferred to SEM	Division III-Biology	1-55-19-20075		(11,400)	130,836	Mark Beck	A
2	Maintenance costs transferred from Biology	Division III-SEM	1-55-19-20079		11,400	85,996	Mark Beck	A
3	Costs of NMR cryogens to be transferred to SEM	Division III-Chemistry	1-55-19-20076		(9,000)	92,815	Mark Beck	A
4	NMR cryogens costs transferred from Chemistry	Division III-SEM	1-55-19-20079		9,000	85,996	Mark Beck	A
5	Mathematica license now being covered by WCTS	Division III-Physics	1-55-19-20081		(1,000)	31,586	Mark Beck	A
6	Mathematica license (was paid by Math department)	Academic Technology Consulting	1-00-24-60004		1,000	317,565	David Sprunger	A
	<b>STAFF POSITIONS and/or WAGES</b>							
7	Division I Increase in hours for Division Asst	Division I-Office	1-53-19-20092	7,300			Bruce Magnusson	A
8	Division II NEW position: Administrative Assistant (part time)	Division II-Office	1-54-19-20093	8,736			Nicole Simek	A
9	Division III Increase in Hours for Admin Asst	Division III-Office	1-55-19-20094	1,050			Mark Beck	A
10	Health Professions Advisor	Division III-Office	1-55-19-20094	50,000			Pat Spencer	A

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11	Sheehan Assistant	Sheehan Gallery	1-54-29-20006	8,000			Pat Spencer	A
12	SSRA-Admin Assistant to Athletic Program Assistant	Athletics-General	1-58-41-20108	3,745			Pat Spencer	A
13	SSRA-Administrative Assistant (academic year)	Athletics-General	1-58-41-20108	17,640			Pat Spencer	A
14	Increase current administrative assistant to full time (with ARC)	Writing Center	1-56-19-20091	1,325			Pat Spencer	A
	<b>ATHLETICS</b>							
15	Increase costs to maintain a competitive learning experience.	Men's Golf	1-58-41-20113		10,000	11,580	Pat Spencer	A
16	Increase costs to maintain a competitive learning experience.	Women's Golf	1-58-41-20591		10,000	11,580	Pat Spencer	A
	<b>PROVOST OFFICE and DIRECT REPORTS</b>							
17	Services, materials and databases	Penrose Library	1-60-21-20002		54,027	806,495	Pat Spencer	A
18	Professional development for staff	Registrar's Office	1-61-42-20107		4,800	28,625	Pat Spencer	A
19	Travel expenses	Debate	1-56-25-20012		2,000	87,490	Pat Spencer	A
20	Travel expenses	Visiting Writers	1-54-29-20009		1,000	14,000	Pat Spencer	A
21	Travel expenses	Pre-Med	1-50-29-20019		1,000	2,500	Pat Spencer	A

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**Provost & Dean of the Faculty**

Memo or justification

11

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\$1,150 student wages; \$22,500 services; \$10,000 materials; Databases \$3,700 ACM, Cambridge \$3,300, World Cinema \$2,175, Latin Amer Newstand (current) \$1,452; and Portico & dSpace \$10,000.

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**Provost & Dean of the Faculty**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
22	Student (minimum) wage and new mellon tenure track position.	Writing Center	1-56-19-20091		3,569	22,331	Pat Spencer	A
23	Addition of the new part-time faculty mentoring program.	Center for Teaching & Learning	1-52-29-20041		2,500	21,000	Pat Spencer	A
24	Travel and costs associated with addition of two new positions	Institutional Research	1-61-59-20130		4,700	17,300	Pat Spencer	A
25	Increase stipends paid for summer research.	Student Faculty Summer Research	1-52-29-20503		24,500	115,000	Pat Spencer	A
	ACADEMIC DEPARTMENTS							
26	Costs associated with addition of .5 position.	Anthropology	1-53-19-20084		300	6,300	Bruce Magnusson	A
27	Student wages, services & supplies - new Mellon tenure-track position.	Art History and Visual Cultural Studies	1-54-19-20432		1,000	6,817	Nicole Simek	A
28	Supply costs - new Mellon position; placement exams.	Division II - Spanish	1-54-19-20662		2,750	5,683	Nicole Simek	A
29	Maintenance, supplies, ensemble music, communications	Division II - Music	1-57-19-20071		7,900	70,186	Nicole Simek	A
30	Increase in minimum wage/student wages.	Theatre Production	1-59-26-20003		933	148,848	Nicole Simek	A
31	Additional costs associated with new faculty member.	Division II - Theatre and Dance	1-59-19-20067		250	12,233	Nicole Simek	A
32	New section 336; Lab costs 349; DEA License; Student wages	Division III-BBMB	1-55-19-20468		3,460	13,683	Mark Beck	A
33	Costs associated with addition of .5 Mellon tenure-track position.	Gender Studies	1-50-19-20101		1,750	4,900	Pat Spencer	A

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**Provost & Dean of the Faculty**

Memo or justification

22

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29 Piano maintenance; ethnomusicology instrument maintenance; music library; ensemble music library; and communications

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**Provost & Dean of the Faculty**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
34	Addition of .5 Mellon tenure-track position & vehicle rental increase	Race & Ethnic Studies	1-50-19-20527		1,041	3,500	Pat Spencer	A
35	lab supplies, shipping fees, site licenses and student wages	Division III-Chemistry	1-55-19-20076		3,100	92,815	Mark Beck	A
36	Costs associated with the increase in van pool charges.	Division III-Geology	1-55-19-20078		2,834	19,931	Mark Beck	A
37	Cryogenic fluids, maintenance contract, electron microscope parts.	Division III-SEM	1-55-19-20079		9,900	85,996	Mark Beck	A
38	Increase in minimum wage for student workers.	Division III-Physics	1-55-19-20081		123	31,586	Mark Beck	A
39	Increase in minimum wage and van rental charges.	Division III-Astronomy	1-55-19-20083		150	7,455	Mark Beck	A
40	Licenses, new labs, student research, minimum wage, van costs	Division III-Biology	1-55-19-20075		12,027	130,836	Mark Beck	A
41	Increase in motor pool/vehicle costs.	Division III- Environmental Studies	1-55-19-20077		3,500	7,350	Mark Beck	A



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	<b>Total for all pages</b>			<b>148,000</b>	<b>107,770</b>			
	<b>B Priorities</b>							
1	lab supplies	Division III-Chemistry	1-55-19-20076		2,000	92,815	Mark Beck	<b>B</b>
2	Increase stipends paid for summer research.	Student Faculty Summer Research	1-52-29-20503		24,500	115,000	Pat Spencer	<b>B</b>
3	Increase in motor pool/vehicle costs.	Division III-Environmental Studies	1-55-19-20077		3,215	7,350	Mark Beck	<b>B</b>
	<b>C Priorities</b>							
4	Services, materials and databases	Penrose Library	1-60-21-20002		24,355	806,495	Pat Spencer	<b>C</b>
5	Library-Digital Assets & Metadata Librarian	Penrose Library	1-60-21-20002	46,000			Pat Spencer	<b>C</b>
6	Steinway Certified Piano Technician and discretionary budget	Division II - Music	1-57-19-20071	17,000	5,000	70,186	Nicole Simek	<b>C</b>
7	Increase costs to allow teams to travel independent of each other.	Men's Soccer	1-58-41-20115		10,000	37,575	Pat Spencer	<b>C</b>
8	Increase costs to allow teams to travel independent of each other.	Women's Soccer	1-58-41-20116		10,000	37,575	Pat Spencer	<b>C</b>
9	SSRA-Senior Women's Admin and discretionary budget	Athletics-General	1-58-41-20108	60,000	10,000	64,755	Pat Spencer	<b>C</b>
10	Assistant Baseball Coach	SSRA Assistant Coaches	1-58-41-20590	25,000			Pat Spencer	<b>C</b>

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11	Travel expenses	Visiting Writers	1-54-29-20009		2,000	14,000	Pat Spencer	C
12	Lab costs; new hire costs, services	Division III-BBMB	1-55-19-20468		2,400	13,683	Mark Beck	C
13	Physiology labs, computers and minimum wage increase.	Division III-Biology	1-55-19-20075		14,300	130,836	Mark Beck	C



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**Chief Information Officer**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>113,000</b>	<b>133,575</b>			
1	Student Employee Minimum Wage Increase	Academic Technology Consulting	1-00-24-60004		1,700	317,565	David Sprunger	A
2	Increases to Annual Software Licenses	Academic Technology Consulting	1-00-24-60004		8,400	317,565	David Sprunger	A
3	MDI Jade (XRD software)	Academic Technology Consulting	1-00-24-60004		1,525	317,565	David Sprunger	A
4	Moe (software for Chemistry)	Academic Technology Consulting	1-00-24-60004		2,700	317,565	David Sprunger	A
5	Professional Development	Academic Technology Consulting	1-00-24-60004		3,000	317,565	David Sprunger	A
6	Adobe Acrobat Pro Licensing for Faculty	Academic Technology Consulting	1-00-24-60004		10,000	317,565	David Sprunger	B
7	WCTS Speaker Series	Academic Technology Consulting	1-00-24-60004		5,000	317,565	David Sprunger	B
8	Supplies	Client Support	1-00-24-60007		3,000	23,314	Joelle Chavre	A
9	Lifecycle Increase for 38 new CS Lab Computers	Instructional Technology Repl	1-00-24-60020		20,104	359,000	Joelle Chavre	A
10	Increase to Network Replacement	Network Replacement	1-00-24-60022		7,375	106,940	Kevin Kelly	A
11	Increase to Server Replacement	Server Replacement	1-00-24-60023		2,230	77,500	Kevin Kelly	A
12	Increase to maintenance contracts	Technology Infrastructure	1-00-54-60002		2,325	300,771	Kevin Kelly	A

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**Chief Information Officer**

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Memo or justification

1	WA state minimum wage increase
2	Expected increase to annual software licenses (i.e. Microsoft campus agreement, SPSS, etc.)
3	Software for Geology, Physics, Chemistry, BBMB and Biology that runs shared instrumentation
4	Software for Chemistry that does computational modeling of biomolecules used in both research and course work. Funding for the software had been through a grant that is now ending and this is to seek regular/ongoing funding for the software
5	This request is for an increase in professional development budget to accommodate the two additional ILT staff positions that were filled in April 2013 from existing but reallocated positions (not new positions)
6	Ability to license Acrobat Pro for faculty (although not the entire faculty, would start with those that have demonstrated need to do pdf manipulation)
7	Instructional and Learning Technology is looking to start a speaker series in partnership with other entities across the campus. Our intent is to pilot one speaker with existing funds this coming year and assess its success before elevating the priority.
8	Client services has not had a budget for supplies and is requesting a nominal budget to cover supplies for the staff
9	Increase is to cover the addition of nearly 40 new computers for the Computer Science Labs
10	Covers the increased cost of new 802.11n wireless access points that were installed in the final phase of the wireless upgrade
11	Covers the increase in maintenance for the replacement of the current Virtual Tape Library storage/backup with new Dell duplication disk backup appliance
12	Request to cover increase in maintenance agreements



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## Chief Information Officer

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
13	Systems Administrator to provide CS/Math Technical Support	Technology Infrastructure	1-00-54-60002	53,000			Kevin Kelly	A
14	Professional Development	Technology Infrastructure	1-00-54-60002		10,000	300,771	Kevin Kelly	B
15	Annual Maintenance - ClassClimate	Enterprise Technology	1-00-54-60003		3,398	290,576	Mike Osterman	A
16	Increase to Ellucian Colleague licensing	Enterprise Technology	1-00-54-60003		9,968	290,576	Mike Osterman	A
17	Annual Localist (web event calendar) service	Enterprise Technology	1-00-54-60003		12,950	290,576	Mike Osterman	A
18	Discretionary Consulting	Enterprise Technology	1-00-54-60003		10,000	290,576	Mike Osterman	A
19	New Position - Project Manager	Enterprise Technology	1-00-54-60003	60,000			Mike Osterman	B
20	DuoSecurity 2-factor Authentication	IT Security	1-00-54-60034		4,900	92,233	ISO	A
21	Increase to Cisco VoIP maintenance	New General Telephone Acct	1-00-59-60025		15,000	119,861	Dan Terrio	A

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## Chief Information Officer

Memo or justification

13	In collaboration with the Math Dept and the CS Steering Cmte, it has been determined that a position to provide technical support to the math and computer sciences programs will be required, particularly as the CS program grows. This position would be in WCTS with primary support to CS
14	Professional development and training costs for staff in technology infrastructure is some of our most costly professional development as it is not conferences, but often vendor/hardware/software specific training which are usually week long training sessions.
15	The annual license for the online course evaluation system (Class Climate) has been paid with grant funding for the past year (or two) and we need to now operationalize the annual license cost
16	Expected increase to the Ellucian Colleague licensing (ESSA Agreement)
17	Annual license cost for the College's (web) events calendar
18	Consulting would be used to "kick start" startegic initiatives, such as institutional analytics, PCI compliance, Identity Management, Financial Aid Awarding, etc. or could be used for functional area reviews of processes and procedures towards operating efficiencies
19	While project management can come from various WCTS staff, having a position that is focused on project mgmt and has an extensive portfolio of projects would help to shepard IT related projects effectively and efficiently
20	Solution to provide two-factor authentication for all faculty, staff and students, a security "best practice" as single factor authentication is rapidly becoming less secure
21	Cisco Systems, Inc. has changed the requirements for maintenance and licensing for the Voice over IP phone system, nearly doubling the annual maintenance we have been paying.

November 5, 2014

To: Peter Harvey, CFO  
Budget Advisory Committee  
From: Dan Terrio, CIO  
RE: WCTS 2015-2016 Budget Request

In the CIO budget priorities worksheet, you will find a short justification/explanation for each of the requests regardless of priority. I wanted to highlight a couple of things that may not be apparent just looking at the worksheet.

The total "A" priority requests from WCTS is \$161,575. While that number seems large, allow me to provide some context to the numbers within the request.

\$93,677 of the "A" priority requests are what I might categorize as "external" requests, where WCTS is making the request on behalf of another department for various reasons. For example, line number 2 on the worksheet is a request for \$3,398 for the annual license to Scantron's Class Climate, the college's online course evaluation system. WCTS's philosophy has been to (where appropriate) manage and administer software licenses centrally. However, if we did not request the funding, the request would not disappear, but would be reflected in another area's request, and in this case, most likely the Provost's. The requests that fall into this category are also requests that are collaborations between WCTS and other departments. This is the case for the two requests associated with the development of a computer science program.

\$37,393 of the "A" priority requests are what I might categorize as internal (to WCTS) fixed-cost requests. These requests are reflective of anticipated and know increases to maintenance contracts for hardware and licensing for software.

\$9,605 of the "A" priority requests are what I might categorize as internal lifecycle replacement adjustments. In the case of these requests, they are associated with new (approximately 80) wireless access points that replaced older models through the upgrade of our wireless network infrastructure where the replacement costs are higher than the access points that were replaced as well as the replacement of our old data backup equipment with newer backup equipment that also has a slightly higher replacement cost.

Finally, \$20,900 of the "A" priority request are what I might categorize as internal (to WCTS) new initiatives and requests for increases to operations such as professional development.

In conclusion, the bottom-line request from WCTS might seem large, however the majority of the total, if not reflected in our request, would be reflected in other budget officer requests which would not affect the overall total budget request for the college.



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**Dean of Students**

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1	Intercultural Center - Asst Director	Intercultural Center	1-81-42-30009	50,000			Cleveland & Joshua	A
2	Operating funds and Programming for Chief Diversity Officer	Intercultural Center	1-81-42-30009		25,000	28,205	Cleveland & Joshua	A
3	Power & Privelege Symposium	Power & Privelege Symposium	1-97-42-30371		15,000	5,000	Barbara Maxwell	A
4	1st Generation/working Class Support & Club funding	New budget			7,500		Chuck Cleveland	A
5	Increase in FTE for International Student Adviser	International Student	1-81-43-30010	18,000			Chuck Cleveland	A
6	Diversity Affinity group funding	New budget			1,500		Chuck Cleveland	A
7	Increase hours for Program Coordinator	Academic Resource Center	1-87-29-30004	2,200			Juli Dunn	A
8	Security Officer training - existing officers	Security	1-00-59-30032		5,000	41,812	Nancy Tavelli	A
9	Climbing Wall Safety	Climbing Wall	1-97-43-30217		6,000	34,300	Barbara Maxwell	A
10	Additional uniform allowance for Security	Security	1-00-59-30032		1,500	41,812	Nancy Tavelli	A
11	Student Scholarships for Koru	Student Engagement Center	1-88-42-30007		7,500	42,863	Noah Leavitt	A
12	New Student Orientation	Opening Week	1-97-43-30015		16,000	51,557	Barbara Maxwell	A
13	Alcohol and Drug Counselor	Counseling Center/Health Center	1-89-42-30008	25,000			Thacher Carter	B

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**Dean of Students**

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14	Continuing education for Counselors	Counseling Center	1-89-42-30008		5,000	62,936	Thacher Carter	B
15	Pre-major advising	Academic Resource Center	1-87-29-30004		1,000	38,584	Juli Dunn	B
16	Hub expenses	Student Engagement Center	1-88-42-30007		3,000	42,863	Noah Leavitt	B
17	WWU & WWCC Partnerships	Center for Community Service	1-88-43-30027		2,500	17,800	Noah Leavitt	B
18	Professional development	Student Engagement Center	1-88-42-30007		7,000	42,863	Noah Leavitt	B
19	Looking@Leadership	Student Activities	1-97-42-30018		4,250	22,753	Barbara Maxwell	B
20	Climbing Wall Manager	Climbing Wall	1-97-43-30217	30,000			Barbara Maxwell	B
21	Sophomore Programming	Student Activities	1-97-42-30018		2,000	22,753	Nancy Tavelli	B
22	Vehicle maintance and repair	Security	1-00-59-30032		2,700	41,812	Nancy Tavelli	B
23	Writing Support Specialist	Academic Resource Center	1-87-29-30004	8,700			Juli Dunn	C
24	Full time Security Officer	Security	1-00-59-30032	32,000	1,000	41,812	Nancy Tavelli	C



## Budget Requests 2015-2016 for Chuck Cleveland, Dean of Students

**Line 1. Intercultural Center – Assistant Director.** This new position would work under the direction of the new Associate Dean of Intercultural Affairs/Chief Diversity Officer. This person will work directly with students to help design and promote intercultural programs and services. They will promote retention through internal support systems and student organizations as well as provide and support programming to enhance cultural and ethnic education. This will include the development of goals and procedures for the Glover Alston Center and overseeing the maintenance of departmental web pages and media accounts. This position will strengthen the Intercultural Center and allow the Chief Diversity Officer to focus on institutional strategic priorities. [Requested \$50,000]

**Line 2. Operating Funds for new Associate Dean of Intercultural Affairs/Chief Diversity Officer.** The person in this new position will need funds for travel and lodging for conferences, professional development and other events when called upon to represent the College. Additionally, this person will need programming funds to raise the level and priority of multicultural issues and diversity on campus for the entire community including faculty, staff and students. [Requested - \$25,000]

**Line 3. Power & Privilege Symposium.** Last year the Power and Privilege Symposium was granted a budget of \$5,000 toward their expenses. The actual amount spent was \$23,450, including the keynote speaker and an all campus meal. In addition, this fall three students in leadership positions will be attending a Facing Race Conference in order to better prepare them to organize the Symposium on campus. (This is being funded by ASWC, the President's office and the Dean of Students in the amount of about \$3,200.) This Symposium is an important tool to educate and involve the campus community in creating a more welcoming environment for all. [Requested \$15,000]

**Line 4. First Generation/Working Class Support (FGWC).** FGWC supports and fosters success in students from an underrepresented background. Their website says, "FGWC aims to facilitate the opening of opportunities through successful networking and the strengthening of a supportive structure, both academic and personal." Currently, they are funded by the Dean of Students. In order to have a secure funding source for support and programming we are requesting a regular budget amount. These requested funds will also provide ongoing special programming to expose FGWC to key campus people and resources and to provide team building and group and individual development. [Requested - \$7,500]

**Line 5. Increase in FTE for International Student Adviser.** This position is currently at .61 FTE and we would like to increase it to full time. With the increasing international student class sizes, more staff support will be required to accomplish the goals of the college and to meet the regulations of the various U.S. governmental agencies. There are reports to be submitted to, and stringent regulations mandated by, the following United States agencies: Customs and Border Protection (CBP), Immigration and Customs Enforcement (ICE) and the US Department of State (DOS). This position originally supported about 34 students which have increased to this year's total of 72 students, native speakers

and language assistants. Current projections indicate as many as 92 in this group by Fall of 2017. This position currently supports: 60 Friendship Family pairings with community members, assistance with detailed Optional Practical Training paperwork that allows students to work one year in the US after they graduate, tax treaty applications, Homeland Security meetings, assistance for students filling out tax forms for US taxes, individual attention and support year round. **[Requested - \$18,000]**

**Line 6. Diversity Affinity Group funding** – These funds would be used to support meetings and programming for a group of students and faculty of diverse backgrounds who meet monthly to seek support. This should/could be a shared fund with the Provost office. **[Requested - \$1,500]**

**Line 7. Increase hours of Program Coordinator in Academic Resource Center.** The Academic Resource Center has experienced tremendous growth in the areas of tutoring and test proctoring needs. Next year with a full-time Director of Academic Resources on board, roles and responsibilities will be shuffled again. At current, this position has been temporarily increased from 37.5 hours/week to 40 hours/week to account for an increase in work duties. We expect that those work duties will remain on an upward trend and as such permanent funding for this position at 40 hours/week is needed. **[Requested - \$2,200]**

**Line 8. Security Officer training for existing officers.** This request is to secure a budget amount for ongoing professional training for current security officers. Local law enforcement agencies can provide some training, but there is a need to have additional training that is available away from campus. The statistical information for the Clery Act is kept by Security and also requires ongoing training. **[Requested- \$5,000]**

**Line 9. Climbing Wall Safety.** The climbing wall provides 15 to 16 SSRA climbing classes per semester as well as recreational opportunities for the campus. Last year the request was made for \$12,000 to use for equipment replacement and inspections. The amount granted was \$6,000. We would like to request the remaining amount needed this year. Many safety improvements have been or are in the process of being implemented as a result of last year's budget increase which was greatly needed and is being well used but audits, structural inspections, and other safety personnel and equipment costs were not fully covered. **[Requested - \$6,000]**

**Line 10. Additional uniform allowance for Security.** In order for Security officers to be readily identified by the campus community, we need to upgrade their required uniform. Required uniforms need to be paid for by the College. **[Requested \$1,500]**

**Line 11. Student Scholarships for Koru.** Koru is a new Seattle-based start-up company founded by two innovators from the world of higher education. Koru's purpose is to assist graduates of elite liberal arts colleges around the country to access high-level positions in rapidly growing, mission-driven organizations, primarily in the private sector.

The format of the Koru program is to place a cohort of students into a four-week challenge with rapid-growth, mission-driven businesses. The cohort, divided into teams of four or five participants, is provided a challenge by the business that is a current issue for the organization. The teams then have four weeks to work together in finding a solution to the challenge. Throughout the program, participants are given high-level training, resources and access to a network of coaches and mentors to



expand their skills and apply them to the issue at hand. At the end of the session, the teams present their solutions back to high level managers.

Participant cost for the program is \$2750. Given the success Whitman participants have experienced over the past year, we want to ensure that this opportunity is available to all interested Whitman students and graduates for whom Koru makes sense, regardless of their financial status.

This budget request is *to fund scholarships for selected applicants with financial need to attend Koru*. The funding will guarantee three scholarships for Whitman applicants and open-up a fourth Whitman scholarship from Koru's scholarship fund. **[Requested - \$7500]**

**Line 12. New Student Orientation during Opening Week.** We are requesting additional funds to bring in a high level speaker such as Dr. Kathy Obear to help educate the campus on diversity issues during Opening Week. [A speaker of this caliber has a total cost of around \$6,000 at this time.] We are also requesting funds for student labor to help with this week. These students would go through a training period in the spring and then be ready to put on the program for around 400 students and their parents and families. This would fund 12 students for 80 hours each. **[Requested - \$16,000]**

**Line 13. Alcohol and Drug Counselor.** This would be a new part time, 10 month drug and alcohol counselor position. Disruptive behavior and poor impulse control are found in many of the incidences on campus that result in damage to property, self and others. Alcohol is involved in approximately 50% of sexual assaults on campuses nationwide. Having this position on campus would facilitate consistent outreach and prevention. This person would conduct individual counseling and group treatment, in addition to outreach and consultation to the campus community. **[Requested - \$25,000]**

**Line 14. Continuing Education for Counselors.** It is important that we support continuing education for staff. It enables practitioners to maintain their licenses in addition to sharpening clinical skills. Because of our rural location it tends to cost a little more in order to get appropriated CEs. **[Requested - \$5,000]**

**Line 15. Pre-major advising expenses.** In 2009, the Academic Resource Center took over the work from the Provost's office related to pre-major advising including assigning incoming students to their pre-major advisers, providing trainings and resources to pre-major advisers, and working with Admissions to secure the necessary student files. At the time, no funding was transferred with this responsibility and as a result the pre-major advising expenses have been drawn out of the Academic Resource Center budget. A dedicated budget line would cover the costs of the supplies for hard copy advising folders, advisers' handbooks, and hard copies of catalog for new-to-advising advisers, and snacks/lunch for advisers' trainings. **[Requested - \$1,000]**

**Line 16. HUB Expenses.** The Whitman Professional Hub program is aimed at connecting Whitman students and alumni with internships, employers, and networking events. This summer, for the first time, we organized and host a series of seven successful Hub events around the country, with nearly 200 people attending one of the seven, including more than 30 current students. The overall cost was over budget by approximately \$3,500, and we would like to request additional funds with the assumption



that we will be running these in a similar manner and with a similar scope in upcoming years.

[Requested - \$3,000]

**Line 17. WWU and WWCC Partnerships.** The three area colleges have had a very positive ongoing relationship through the annual Spring Service Day, which typically has about 400 students participate. Two years ago, we increased our interaction with those schools by collaborating on an exciting community event during Global Entrepreneurship Week (GEW), which we hosted at Whitman. Building on that success, this year we are expanding the GEW collaboration (again to take place at Whitman) and the three schools are also working together to create an etiquette dinner to take place in February (to take place at Walla Walla University). This request for new support is to specifically support programming that unites the three schools. [Requested - \$2500]

**Line 18. Professional Development-SEC.** As the Center's programs take on greater stature and demonstrate Whitman's significant focus on this aspect of our College, we want to offer team members opportunities to attend professional conferences and networking events to share what they are doing. The goal is to offer each member of the office the ability to attend one significant regional or national conference to share an aspect of their work. [Requested - \$7,000]

**Line 19. Looking@Leadership.** As part of a student leadership development program, we plan to initiate a program designed to engage Whitman College students in conversations and reflection on the practice of leadership. The Looking@Leadership series brings local leaders from a variety of industries to campus for an intimate lunch and dialogue with 10 – 12 students. Our goal is to give students the opportunity to hear stories of leadership in practice, a 'case study' model for learning about the ways leadership is developed, practiced and executed. The first year will focus on the theme of women in nontraditional leadership roles. We are excited to provide examples for our students (both men and women) of leadership beyond the traditional gender constraints they may have experienced previously. In future years, we plan to choose other themes from which to recruit speakers, for example nonprofit organizations, business leaders, tribal or other cultural based leaders, etc. [Requested - \$4,250]

**Line 20. Climbing Wall Manager/OP Trips Coordinator.** The Climbing Center is open 7 days a week and is heavily used by Whitman students for both SSRA climbing classes and general recreation. The OP Director has been stretched thin over the past few years to manage this facility. A rotating student climbing center manager has been employed to help deal with the need over that past five years but a non-student professional is needed to focus on staffing, deposits, scheduling and programming. The OP director would still oversee and handle policies, procedures, training and risk management. There are roughly 35 different climbing center staff and roughly 30 OP trip leaders needing to be supervised and this "fellow" position would oversee those student staff. This fall there are 16 climbing classes with 12 students per class (192 students.)

The climbing center manager position/OP Trips coordinator would be half time managing climbing center student staff and half time managing OP trips student staff. This position is designed to be filled with a recent Whitman graduate who would gain valuable work experience. This position would enable

the climbing center and the OP to function more smoothly and better address risk management, staff management and budget/deposit issues. [Request- \$30,000]

**Line 21. Sophomore Programming.** Over the past year, a group of Student Affairs staff has been assessing the sophomore experience in order to identify ways the college might provide more intentional programs or services to support this group. The questions guiding this study include: 1. How does the college currently support this group? 2. How can we increase our retention? 3. What can we do to support this class? Sophomore year seems to be a time for students to narrow their focus in academics, co-curricular involvement, social settings, and internship/career planning. As a result of this study, they have decided to focus in a couple of ways: 1. The sophomore springboard e-mails during the summer to stay connected and give them some guidance about future planning. 2. Have a coordinated series of programs throughout the year that include annual events such as the Sophomore Picnic, Academic Majors Fair, and the IHC Block Party. They will also use section reunions, a class specific social gathering and recognition and celebration of major declarations to address some of the issues and concerns brought up by past students. [Requested - \$2,000]

**Line 22. Vehicle maintenance and repair.** The security vehicle has become a great tool to use to travel between the furthest points on campus more rapidly. It allows them a safe and secure way to patrol the north part of campus more regularly. This budget amount will pay for annual maintenance and gasoline. [Requested - \$2700]

**Line 23. Writing Support Specialist.** We are about half way through our gift funding for the Writing Support Specialist program. This position has worked with students with disabilities in time-intensive ways as they work on their reading and writing strategies. Currently, a person who works an additional 20 hours/week during the academic year in the Center for Writing and Speaking fills the position. We have found that combining the two positions has benefited each side by alerting students to the additional resources available in the Academic Resource Center as well as transitioning students with disabilities to the offerings and services available in the Center for Writing and Speaking. By partnering with the Center for Writing and Speaking in a formalized manner, we believe that we will be able to staff the position in a more permanent manner, which will allow us to hire a more qualified and long-term employee. See the proposal from Lydia McDermott, Director of the Center for Writing & Speaking, for the assistant director position in the Writing Center (Provost's request.) [Requested - \$8,700]

**Line 24. Full time Security Officer.** The Security office currently consists of 5 security officers and 1 director. Having an additional officer will help alleviate the overtime pay when someone is on vacation or sick leave or when called on by the college for additional coverage at events. It will also provide additional coverage in the night and early morning hours. As additional staff is hired, we need funds for to support ongoing training and uniforms. [Requested - \$33,000]



**Whitman College**  
Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Dean of Students**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>0</b>	<b>120,000</b>		
1	Title IX - Publications	NEW - Title IX			1,500	Chuck Cleveland	<b>A</b>
2	Title IX - Investigator/Administrator ongoing training	NEW - Title IX			20,000	Chuck Cleveland	<b>A</b>
3	Title IX - Outside Investigators	NEW - Title IX			60,000	Chuck Cleveland	<b>A</b>
4	Think About It- Alcohol/Sexual Assault Prevention program	NEW - Title IX			3,500	Chuck Cleveland	<b>A</b>
5	Title IX - Legal Counsel	NEW - Title IX			35,000	Chuck Cleveland	<b>A</b>

# Budget Requests 2014-2015

## *Title IX Requests from the Dean of Students*

Title IX is designed to keep the faculty, staff and students on our campus safe from gender based discrimination. It is also mandated by the federal government and continues to rapidly evolve. In order to be diligent in keeping our campus safe and also keeping our college as free as possible from potential lawsuits, there are requirements that we must meet and some of them are quite expensive. This is not a Student Affairs or Dean of Students mandate it is for the college in general. The workload has fallen on the Dean of Students office with no additional help and no funding.

Over the past several years, the Dean of Students has been spending surplus funds to meet these needs. Those surplus funds are now at a level that can no longer support the continued funding of these mandates.

Breakdown of requests:

**Line 1. Title IX Publications**—We are required, by either legislated mandate or highly recommended guidelines, to provide annual publications related to Title IX. This includes awareness posters, written documentation of resources and support to complainant and hard copies of written policies/procedures. [Requested - \$1,500]

**Line 2. Investigator/Administrator ongoing training**—The budget amount requested will cover ongoing training seminars for certification as administrators/deputy administrator and investigators. It is vital that we maintain the knowledge base and skill set of current and future college investigators and administrators. This covers the costs for two people for conferences and four people for initial or ongoing training. It will cover travel, hotel, food and training fees. The current fee for training is \$2500 per person (not including travel, hotel, and food.) [Requested - \$20,000]

**Line 3. Outside Investigators**—As the volume of cases increases, the need to be able to bring in an independent, external investigator to assist with some of the more complex student v. student cases, employee v. employee or employee v. student cases. We have identified several individuals who would be willing and available to assist with these cases as needed. The amount listed should cover one to two cases a year. [Requested - \$60,000]

**Line 4. Think About it – Alcohol/Sexual Assault Prevention program.** This program is designed to be used during the summer with our incoming first-year students to ensure that they arrive on campus with a common foundation of knowledge related to alcohol and drug use and sexual behaviors and activity. It is designed to supplement our current Opening Week educational trainings. This will help students who choose to engage in these activities to do so safely. The reporting tools available through Think About It will also help us refine our campus programming so that we are responding with great agility to

the needs related to knowledge, skills and attitudes of the incoming class relative to these behaviors. The President's office is funding this for the first year of a four year contract. **[Requested - \$3,500]**

**Line 5. Title IX – Legal Counsel**—Title IX and its trailing mandates require specialized legal advice on a regular basis that is not always available locally. The yearly retainer fee for this kind of legal advice is currently, \$35,000 per year which includes several days of onsite visits. Having the onsite visits allows us to have training for larger groups than we could afford to send offsite and allows consultations with administrative and faculty leadership. This is in addition to local legal advice. **[Requested - \$35,000]**



**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Vice-President for Development & College Relations**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>0</b>	<b>62,400</b>			
1	Reunion Tent Rental Fees	Reunions	1-86-56-70014		5,000	94,375	Nancy Mitchell	A
2	Fantasy Reunion Printed Brochure	Reunions	1-86-56-70014		1,200	94,375	Nancy Mitchell	A
3	Alumni Parade Enhancements	Reunions	1-86-56-70014		10,000	94,375	Nancy Mitchell	B
4	Subsidize 5th Renunions	Reunions	1-86-56-70014		5,000	94,375	Nancy Mitchell	C
5	President's Gift Societies Events	Development- Stewardship	1-91-55-70005		20,000	5,400	Tamara Tinhof	A
6	Broadening the Base of Support	Annual Giving	1-93-56-70011		20,000	124,000	Brian Dohe	A
7	Software Purchase	Development Services	1-92-55-70004		1,200	47,000	Becky Kennedy	A

Vice-President for Development & College Relations

Memo or justification

- |   |   |
|---|---|
|   |   |
| 1 | Additional dollars are needed to cover the expense of tent rentals for Reunion Weekends on a permanent basis.   |
| 2 | A printed "Fantasy Reunion" brochure will announce this new program designed to increase reunion attendance (registrations), reunion giving and attendance at Reunion Convocation.  |
| 3 | Alumni Parade Enhancements: In order to create a festive event and draw alumni to participate, class identity items distributed before the start of the parade will increase participation.   |
| 4 | Subsidize 5th Reunion: The cost of attending the reunion for alumni who graduated five years ago is prohibitive; this request is to subsidize the reunion fees for the 5th Reunion cluster beginning in 2017.   |
| 5 | The President's Gift Societies events launched with these funds will feature the President and/or a faculty member speaking to these leadership donors over a meal or heavy hors d'oeuvres indicating how their gifts are making a difference at the College. |
| 6 | In this labor-intensive program, featuring student phone calling, lots of electronic and mail outreach, our budget is inadequate to help us address the challenge of retaining and growing our base of consistent annual donors.                              |
| 7 | The purchase of Initium, a service that enables our staff to increase processing efficiency of address updates among our 20,000 alumni, parents and other friends of the college.   |

# Fiscal 2016 Budget Requests

Offices of Development and Alumni Relations

John W. Bogley, Vice President for Development and College Relations

November 7, 2014

## Reunions 1-86-56-70014

### #1: Tent Rental Fees: \$5,000 - A Priority

The Office of Alumni Relations has been charged with reinvigorating the reunion program to increase alumni engagement and participation levels. Several reunion weekends have been combined into one weekend which takes place in the fall. Multi-generational programming highlights the lifelong relationship alumni have with the College as well as better communicate the importance of supporting the College through giving. In order to efficiently manage numerous large groups at one time, tents are a necessity. After the 2014 reunion it was clear that hosting events in tents is a far better option than using the Sherwood gymnasium (the gym will be used in the event of extreme weather).

The Alumni Office used \$1,900 surplus from the 2013-2014 reunion budget to help cover a portion of this year's expense for tent rentals. The total cost of tents annually is \$10,000. An additional \$5000 is needed to cover tent rental fees for reunions on an annual basis.

### #2: Fantasy Reunion Printed Brochure: \$1,200 - A Priority

The Alumni Office is seeking funds to produce a printed mailer designed to introduce the Fantasy Reunion program which will encourage reunion registrations, gifts to annual giving, Reunion Convocation attendance and build enthusiasm for the reunion. Similar to fantasy football, alumni build teams and earn points based on their team's reunion attendance, reunion registration, giving and other details such as the distance traveled from their home to campus. The winner of the contest will receive a prize (iPad has been suggested) which will be announced at Reunion Convocation (winner must be present to win).

Johns Hopkins reported that the Fantasy Reunion program resulted in a 6% increase in first-time donors, a 15% increase from donors who had not given in 5+ years, and in addition, they collected nearly 1,000 pieces of data to update records and their reunion registration numbers increased by 1000%.

Each group of reunion co-chairs will write a letter which will be inserted into the brochure. The brochure will introduce the Fantasy Reunion program, list the schedule of events, direct alumni to register online and provide accommodation information. This four-color two-page brochure will be mailed to all 2,500 reunion households when online registration goes live. Since the reunion letters are already budgeted items the dollar amount requested is to cover the printing of the brochure and the additional postage it requires.



**#3: Alumni Parade Enhancements: \$10,000 – B Priority**

Creating a memorable experience requires enhancements for the parade. In order to create a festive event and draw alumni to participate in the parade with the intent in drawing them to Reunion Convocation, class identity items will add to the value of the experience. These items may include lanyards, hats, boas, sunglasses which will be distributed at the start of the parade; a different item for alumni in each of the 12 reunion classes.

**#4: Subsidize 5th Reunion Classes: \$5,000 – C Priority**

The number of registered alumni for the 5<sup>th</sup> reunion cluster took a dip in 2014 (8%-24%) due to the \$12 registration fee and increased cost of meals. In 2005 the 5<sup>th</sup> reunion cluster attendance rates ranged from 25%-32%. To facilitate attendance for 5<sup>th</sup> year reunion attendees, the Alumni Office seeks \$5,000 to subsidize class functions. The next fifth year cluster reunion is scheduled for 2017.

**Development**

**#1: Stewardship – President’s Gift Societies Events \$20,000 – A Priority**

The campaign has provided a forum for celebrating donors individually and collectively. The campaign has engaged more donors and created a larger number of those who give at least \$1,000 annually to the College. As we enter the post-campaign period, we must keep these donors engaged and thank them for their gifts while working to secure continued, and increased support, in future years. We will utilize these funds to support a series of events/receptions/ meals in our largest markets and on campus at which we will thank these donors for their generous leadership support.

**#2: Annual Giving – Broadening the Base of Support \$20,000 – A Priority**

Each year, our count of alumni grows by more than 300 with the addition of new graduates net of those alumni who pass away each year. The future of our fundraising success is built in the Annual Giving Program. This program makes the case to all generations of alumni that Whitman is a cause worth supporting given the inherent good of a liberal arts education and Whitman’s particular adeptness in preparing students to make a difference in the world after graduation. The program aims to instill a sense of paying it forward from graduates to today’s students. Our budget has been overspent by more than \$10,000 each of the last three years and we have used surplus to fill the gap. Now that we are fully staff, we will be much less likely to generate surpluses that can fill this gap. So, beyond closing the budget hole, we anticipate spending roughly \$10,000 to upgrade and expand our outreach by the annual giving program to our alumni.

**3: Development Services-- Software Purchase – A Priority-- \$1,200**

When alumni, parents or other supporters of Whitman move and do not tell us of their new locations, mail sent to them gets returned. With over 20,000 people receiving mail from us 1-5 times a years, the number of pieces of returned mail creates a significant work burden for staff to try to update and correct these addresses. Inition, the product that we will purchase annually with these dollars, will provide us properly formatted addresses including proper spelling, capitalization, full street names, and zip plus four information. This means that we will eventually have fewer return mail pieces, saving us both outgoing and incoming postage as well as ensuring that our messages reach our constituents in a timely manner.

**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Dean of Admission and Financial Aid**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>35,000</b>	<b>117,683</b>			
1	Addition of Regional Admission Officer in Northern California	Admission	1-00-42-50001	35,000			Tony Cabasco	A
2	Increase in Admission Travel Budget	Admission	1-00-42-50001		20,000	1,055,765	Tony Cabasco	A
3	Increase in International Travel Budget	Admission	1-00-42-50001		15,000	1,055,765	Tony Cabasco	B
4	Continuation of Zinch Subscription	Admission	1-00-42-50001		13,500	1,055,765	Tony Cabasco	A
5	PowerFAIDS software	Financial Aid	1-00-42-50002		68,183	29,050	Marilyn Ponti	A
6	Part-time Legislative Liaison student worker position	Financial Aid	1-00-42-50002		1,000	29,050	Marilyn Ponti	B

Dean of Admission and Financial Aid

Memo or justification

- |   |  |
|---|--|
|   |  |
| 1 | Included in the 2014-15 Strategic Plan as Tactic 3.2.2 for the strategy of increasing applications.      |
| 2 | See memo. Airfare costs have risen 5% and hotel costs have risen 8% since 2012.                          |
| 3 | Included in the 2014-15 Strategic Plan as Tactic 3.2.7 for the strategy of increasing applications.      |
| 4 | Included in the 2014-15 Strategic Plan as Tactic 3.2.8 for the strategy of increasing applications.      |
| 5 | Note: \$68,162 is one-time cost; in subsequent years the license fee is \$10,950. See Budget Memo        |
| 6 | Student wages and travel for Legislative liason for Whitman College/ICW (\$500 travel, \$500 work study) |



# MEMORANDUM

Whitman College  
Offices of Admission

TO: Budget Advisory Committee

FROM: Tony Cabasco, Dean of Admission & Financial Aid

DATE: November 6, 2014

SUBJECT: 2015-2016 Budget Requests

## Admission Budget Requests

### Addition of Admission Officer position

Amount Requested: \$35,000

California is a critical market for prospective students for Whitman. In recent years California has become Whitman's top source of applicants, and this trend is likely to continue given current demographic trends. The population of college-going students in California is also highly diverse, furthering the appeal of California as a recruitment focus for Whitman. The addition of a regional Admission Officer in Northern California is included in the 2014-15 Strategic Plan as Tactic 3.2.2 for the strategy of increasing applications; as noted in the Strategic Plan, the position was filled in July 2014 as an FTE-neutral transition with a staff member moving from Walla Walla to San Francisco. This budget request will replace the lost position on campus.

### Increase in Admission Travel Budget

Amount Requested: \$20,000

Since our previous request for additional travel funding in 2012-13, we have seen a 20% increase in travel expenses. Some of this increase is due to increased travel conducted by admission officers, especially in key regions of application growth for the College (California, Minnesota, Illinois, New England) and in strategic new markets (the South). Costs related to travel has also increased significantly. Airfares from Walla Walla Regional Airport increased 5.4% from Q1 2012 to Q1 2014<sup>1</sup>. Hotel rates in North America have risen 5% from 2013 to 2014<sup>2</sup> after a 3% increase from 2012 to 2013<sup>3</sup>. The overall increase during this time has been 8.2%.

### Increase in International Travel Budget

Amount Requested: \$15,000

International applicants increased by 43% in 2013-14 and represented 11% of Whitman's applicant pool. International students add diverse perspectives to the Whitman community and have been increasingly helpful in meeting Whitman's targeted discount rate. Prospects for growth in international recruitment are strong and this has been identified as Tactic 3.2.7 in the 2014-15

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<sup>1</sup> <http://www.transtats.bts.gov/AverageFare/default.aspx>

<sup>2</sup> <http://press.hotels.com/en-us/hpi/u-s-hotel-rates-have-increased-by-5-percent-in-2014/>

<sup>3</sup> <http://press.hotels.com/en-us/hpi/north-american-hotel-rates-rise-3-percent-according-to-hotels-com-hotel-price-index/>

Strategic Plan for the strategy of increasing applications. Current international recruitment efforts focused on Southeast Asia and China, but increased funding would allow for expanded recruitment efforts in strategic markets, potentially including India, Brazil, and Mexico. Other opportunities include joining an established tour of United World Colleges in an effort to increase Whitman's applicant pool and enrollment from these schools.

Continuation of Zinch subscription

Amount Requested: \$13,500

Whitman began working with Zinch, a social media platform for high school students, in the 2013-14 application cycle. Over 1,600 new prospective students came from engagement with Zinch; 346 applicants were identified through Zinch and 105 of those had their first contact with Whitman through Zinch. The engagement with Zinch has helped the admission staff expand the number of prospective students who are considering Whitman. As such, Zinch has been identified as Tactic 3.2.8 for the strategy of increasing applications in the 2014-15 Strategic Plan. During 2013-14 and 2014-15 budget years, the cost for Zinch has been funded through one-time funds dedicated to increasing applications for admission and those funds have been depleted. This request allows the admission office to continue work with this social media platform.

**Financial Aid Budget Requests**

Financial Aid Software (PowerFAIDS)

Amount Requested: \$68,183 (one-time); \$10,950

The Financial Aid office's primary request is for a software product that will allow the staff to automate many of the financial aid processes for prospective and current students. PowerFAIDS, a program owned and operated by College Board, will allow the financial aid staff to import data from financial aid forms such as the College Scholarship Service (CSS) Profile into Whitman databases and automatically calculate financial need. The software program will improve the current process, which involves a lot of manual entry and manipulation by the financial aid staff.

In 2013-14, the Financial Aid office saw a large increase in the number of financial aid applications because of the 40% growth in applications. The growth in applications translated to an increase of over 750 additional financial aid forms that needed to be entered and calculated. While the financial aid staff had considered software solutions previously as a means of improving efficiency, the large increase in workload created the need to look at other ways to process financial aid efficiently for incoming and returning students.

Currently, the financial aid staff imports the CSS Profile into the Datatel student information system, exports the raw data into an Excel spreadsheet, completes the calculation and then brings it back into Datatel to complete the process. The normal processing time for one student can be from 5 minutes to 30 minutes depending on the complexity of the family finances. Staff estimates that a new software system will cut the time by one-third.

With the change in the College's policy to a need-sensitive admission process in 2011, the staff must calculate financial need for all applicants who apply for-need-based aid (instead of just admitted students). The financial aid staff transitioned from processing financial aid applications for approximately 1,000 applicants to calculating approximately 2,500. The staff has been working



overtime an average of an additional 20 hours a week to complete these financial aid files for the last 3 years. Allocations from within departmental budgets have helped fund additional staff wages.

With the use of PowerFAIDS, the financial aid staff will be able download data from financial aid forms and process the data from within the software package. Once the data is imported, the financial staff will be able to calculate financial need and create financial awards, eliminating much of the manual process. This will be a much faster way of calculating need and improve the data transfer that needs to happen between our various databases and student information systems. Staff estimates this new process will save significant staff hours during the 7 months the financial aid staff calculates demonstrated need for returning and prospective students.

As part of the College’s strategic plan, the Admission office hopes to continue to increase the number of applications over time. It would be a significant challenge for the Financial Aid staff to complete financial aid awards in a timely manner for prospective students without additional efficiency in software of processes or additional staffing.

The Financial Aid staff completed research on what financial aid tools peer colleges are currently using. Below is a chart on what these peer colleges use to calculate financial need at their institutions:

<u>College</u>	<u>FA Software</u>	<u>Calculating Expected Family Contribution</u>
Carleton	Datatel	INAS/College Board
Colby	Jenzabar	Institutional Formula & Jenzabar
Colorado	PowerFAIDS	PowerFAIDS
Davidson	Banner	PowerFAIDS w/Banner
Dickinson	Banner	PowerFAIDS w/Banner
Franklin & Marshall	PowerFAIDS	PowerFAIDS
Kenyon	Banner	PowerFAIDS/Banner
Macalester	Banner	PowerFAIDS/Banner
Occidental	Banner	PowerFAIDS/Banner
Reed	Banner	PowerFAIDS/Banner
Rhodes	Banner	PowerFAIDS/Banner
Union	Datatel	INAS/College Board
Whitman	Datatel	Manual process

Nine of the comparison colleges use PowerFAIDS with seven of the colleges that use PowerFAIDS through Banner, an alternative student information system that has PowerFAIDS built into the software. Colby uses another student information system Jenzabar with a customized solution.

While Carleton and Union are also Datatel users, both colleges use the INAS service through the College Board. Unfortunately, the INAS service is not an option because the INAS service is not compatible with Whitman’s current financial aid approach to calculating financial need. The INAS service uses Institutional Methodology (IM) from the CSS Profile and does not allow changes to the data. Whitman uses a modified version of the IM to calculate financial aid. While using IM for our calculations would allow for automation with Datatel, it would require a significant change to our approach to calculating financial need especially in regard to the use of home equity, medical costs,



and other factors that are important to Whitman's process. Whitman is the only college in our comparison pool that still uses a manual process.

The table below highlights the estimated costs of the PowerFAIDS software as provided by the College Board. Note that much of this budget request is in one-time money for the initial software license fee. The annual subscription is a smaller amount.

<u>Cost, by category</u>	<u>2015-16</u>	<u>2016-17</u>
Implementation (one-time cost)	\$45,133	
Training (one-time cost)	\$10,000	
<u>Annual Software License</u>	<u>\$13,050</u>	<u>\$10,950</u>
Total	\$68,182	\$10,950

The financial aid staff recognizes that Power FAIDS is a significant request; however, the alternate option would be to add at least one full-time employee to the financial aid office. Any new staff member who has had limited or no experience in working with financial aid information will require significant training. The impact on the budget is significantly less in the long-term with the software package than a permanent position in financial aid.

Please note that adopting the software package does not impact the availability of or the amount of aid student will receive. It is merely a tool for importing and calculating financial need.

Student Wage Increase for Legislative Liaison position

Amount Requested: \$1,000

For the last 3 years, Financial Aid has been asked by Independent Colleges of Washington to find a Legislative Liaison for Washington State. This student would be responsible for keeping the Whitman College community up to date on issues with student aid, conducting conference calls with 10 other schools twice a month, and traveling to Olympia to speak with legislators. With student aid a priority, it would be nice to fund the opportunity for a Whitman College student to learn more about higher education, financial aid, and financing higher education. It would also provide the student an opportunity to engage with and educate legislators about Whitman College and financial aid issues for the state of Washington. The financial aid staff has enough student wage budget to employ 2 part-time students, who are much needed for clerical support. This budget request for \$500 for student wages and \$500 for travel would allow for an additional part-time position.

**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Chief Communications Officer**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>0</b>	<b>181,400</b>			
1	One-time request- Research	Comm- Services	1-95-59-80001		65,000	78,000	Michelle Ma	A
2	Ongoing increase- PR and Advertising	Comm- Advertising	1-95-59-80001		70,000	78,000	Michelle Ma	A
3	Ongoing increase- Magazine	Comm- Equipment	1-95-59-80001		15,000	78,000	Michelle Ma	B
4	One-time request- Photo Equipment	Mailing Services- Discretionary	1-95-59-80003		6,400	18,600	Michelle Ma	A
5	One-time request- Mailing Services	Whitman Magazine- Discretionary	1-95-59-80004		25,000	93,700	Michelle Ma	A

Chief Communications Officer

Memo or justification

1	Second half of funding request for research proposed as part of 2014-2015 Office of Communications strategic goals. Includes focus groups, survey, message development and testing, and orientation and training collegewide for the updated college messaging.
2	Budget to allow for efforts to increase Whitman's overall visibility - nationwide and through a variety of mediums to defined audiences - highlighting the College's people and programs.
3	Allows for overall improvements to be made to Whitman's flagship publication, including 16-pages of content to be added to November (fall) issue. Also aligns budget closer actual trending costs which rise each year due to growing readership (# of Alumni).
4	To upgrade the Office of Communications photo and video aquisition equipment to expand our capabilities and improve quality.
5	Actual costs for mailing services were \$21,300 last year and postage is expected to rise again next year. This addition will bring our budget within range.



**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

**Treasurer and Chief Financial Officer**

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Personnel costs without OPE	Non- personnel costs	2015 Budget	Responsible staff person or position	Priority
	<b>Total for all pages</b>			<b>0</b>	<b>98,589</b>			
1	Increase in moving expenses	Administrative Moving	1-98-59-40014		5,000	17,900	Dennis Hopwood	A
2	Increased premiums	Property Insurance	1-00-60-40096		14,000	159,000	Peter Harvey	A
3	Utility increases	Physical Plant Operations	1-94-60-40095		67,889	1,371,150	Dan Park	A
4	Replace recycling containers	Recycling	1-94-60-40102		2,000	10,850	Tristan Sewell	A
5	Organic fertilizer	Whitman Playing Fields	1-94-60-40085		1,700	24,750	Bob Biles	A
6	Increased maintenance costs	Johnston Wilderness Complex	1-00-59-40050		3,000	11,690	Dan Park	A
7	Rising operational costs for all three owners	Borleske Rental	1-00-29-40074		5,000	70,000	Peter Harvey	A

**Whitman College**

Request form for 2015/2016 budget

Prioritize;  
Highest - A  
Medium - B  
Lowest - C

Treasurer and Chief Financial Officer

Memo or justification

1	
2	
3	Utility rates are increasing.
4	Replace recycling containers on campus on a regular schedule.
5	Cost to convert to organic fertilizers.
6	Rising maintenance costs.
7	This is Whitman's share of the increased operating costs of the Borleske sports complex.