

TO: Budget Advisory Committee

FROM: Peter Harvey, Chief Financial Officer

DATE: December 7, 2022

Dear Budget Advisory Committee and Cabinet Members,

Our next meeting is Wednesday, December 7 at 5:15 pm in Memorial 324. The first half hour of the meeting will be for President Bolton to summarize the Cabinet's priorities in our recommendations to the committee and for ASWC President Gabby Rose to share ASWC priorities followed by any questions the committee has for Cabinet and Gabby.

At that point the Cabinet and Gabby will leave the meeting, and the committee will serve ourselves dinner and begin our deliberations.

Attached are three documents for our discussions.

1. The revised planning assumptions summary was approved by the Trustees in November. The assumptions are the same as we recommended to the Trustees with the exception of increasing the potential tuition increase range.
2. An excel spreadsheet of the budget requests submitted from departments ranked as A, B and C priorities. Also on the spreadsheet are the items the Cabinet has ranked as A priorities and Cabinet's recommended funding levels. In the memo justification column in the far right column, I have added in blue font the Cabinet's thinking on changes to requested increases.
3. The third document includes additional supporting documentation connecting to these departmental budget requests.

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

This is a very important meeting that helps the cabinet finalize a proposed budget which will then be presented to the Trustees in February. Thank you for your service on this committee and I look forward to our discussions next Wednesday.

Best,

Peter

2023 - 2024 PROPOSED PLANNING ASSUMPTIONS - As AMENDED

	<u>Budget 2022-2023</u>	<u>Proposed 2023-2024</u>
Budgeted Enrollment (Forecast: 1,464) (10 students = \$254,000)	1488	1385 - 1420
Target first year & transfer students (Actual Fall 2022 - 356)	430 FTE	415 - 435 FTE
Enrollment Contingency (target 2.5% of NTR)	\$1,062,000	\$950,000 - \$1,500,000
Tuition Increase (1% = \$385,000)	4.75%	3.0% - 5.0% 4.0% - 6.0%
Tuition Discount (Excluding Federal Support) (Forecast: 49.3%) (.50% = \$375,000)	50.96%	52.0% - 53.0%
Target first year & transfer discount rate Actual Fall 2022 (50.8%)	51.0%	52.0% - 55.0%
Endowment Payout	5.0% \$30,799,000	5.0% \$35,065,000
Annual Fund Gifts	\$2,800,000	\$2,800,000-\$3,000,000
Life Cycle Contributions	(.49%) \$2,327,000	(.49%) \$2,419,000
Merit/Promotion Salary Pool for Faculty (1% = \$238,000)	3.0%	2.0% - 3.0%
Equity Salary Pool for Faculty	3.5%	1.0% - 2.0%
Merit/Promotion Salary Pool for Staff (1% = \$260,000)	3.0%	2% - 3.0%
Equity Salary Pool for Staff	3.5%	1.0% - 2.0%
Fringe Benefit Rate (.50% =\$188,000)	35.5%	35.5% - 36.0%
Room Increase (1% = \$46,000)	3.0%	2.0% - 4.0%
Board Increase (1% = \$52,000)	3.0%	3.0% - 5.0%
Potential reallocations and growth of non-tuition revenues	\$868,0000	\$300,000 - \$400,000

2024FY Budget Request -								2024FY Budget Request - Combined
Description of budget request (note here if one-time expense)	Department or budget name	Department Datalatel number	Personnel Costs without OPE	Non-person nel costs	Department Priority	Cabinet Officer Priority	Cabinet recommended funding level	Memo or justification
Total for all pages			804,565	1,856,337			1,006,752	
1 Art discretionary	Division II - Art Department	1-54-19-20059		3,000	A	A	3,000	1 Requesting an increase in support of the essential NY trip due to rising inflation and overall costs of travel. Students will still be financially responsible for some costs but this will help make it more accessible.
2 Chemistry discretionary	Division III - Chemistry	1-55-19-20076		4,000	A	A	4,000	2 Increase in student/minimum wages, increases in costs of lab supplies and in hazardous shippin fees for lab courses.
3 Computer Science discretionary	Division III - Computer Science	1-54-19-20810		2,770	A	A	2,770	3 Increase in student/minimum wages that support two established programs: class mentors and lab aides as well as an ncrease in the number of people in the department.
4 Geology discretionary	Division III - Geology	1-55-19-20078		411	A	A	411	4 Increase in student/minimum wage.
5 Library discretionary	Library	1-60-21-20002		41,663	A	A	37,663	5 Increase in student/minimum wage, continuing hyper inflationary rises in the price of library materials, fund long postponed programming. Cabinet: Reduced because some proposed expenses can be covered by endowment.
6 General Studies discretionary	General Studies	1-50-19-20095		8,000	A	A	8,000	6 First Year Seminary (FYS) field trips and other costs of community engagement.
7 NEW Discretionary budget for	Human Centered Design	1-50-19-2xxxx		60,000	A	A	60,000	7 See detailed budget request attached - 2 PDOF HCD Budget proposal
8 Discretionary Budget	OCS Programs	1-62-00-20751		607,278	A	A	162,000	8 See detailed budget request attached - 2 PDOF OCS request. Cabinet: reduced because CFO worked with OCS team to revise estimate.
9 General Discretionary Budget	Athletics - General	1-58-41-20108		21,000	A	B	0	9 Annual expense for the ARMS software platform. Cabinet: The proposed software has not been reviewed by technology services to ensure it meets our security standards and that technology services can properly support it.
10 CCEC discretionary	Career for Community Engagement	1-88-42-20868		7,418	A	A	7,418	10 Increase in student/minimum wage.
11 CCS discretionary	Center for Community Services	1-88-43-20871		5,713	A	A	5,713	11 Increase in student/minimum wage.
12 Sheehan Discretionary	Sheehan Gallery	1-54-29-20006		2,632	A	A	2,632	12 In looking at the last two years of gallery operations, this budget line can only offer enough to cover our student wage costs. We offer great student support and work hours, as well as professional training for competitive jobs after graduation. Given that we hope to continue to prioritize these gallery jobs for Whitman students, and considering the increase in minimum wage.
13 staff wages/hours	Division II - Art Department	1-54-19-20059	5,460		A	A	5,460	13 increase in hours for our Studio and Safety Technician position salary to reflect an increase from 9-months to our current 10-month appointment.
14 staff wages/hours	ARC	1-87-29-20930	43,345		A	A	43,345	14 1.0 FTE Testing and Tutoring Coordinator position
15 staff wages/hours	Sports Information	1-58-41-20758	5,000		A	A	5,000	15 video/live stream producer position
16 Operations does not currently have a discretionary budget.	Athletics - BFFC / Sherwood Operations	1-58-41-20732		6,000	B	B	0	16 To meet the needs of equipment that needs repaired or has failed.
17 SI-does not currently have a discretionary budget.	Athletics - Sports Information	1-58-41-20758		10,000	B	A	10,000	17 Increase in operations due to increase in fees / software platform, web site licenses and stats package. Cabinet: added because it is needed to continue streaming athletic events to parents and alumni, which is the standard for Whitman's athletic convence.
18 staff wages/hours	Off Campus Studies	1-62-29-20032	34,640		B	B	0	18 1.0 FTE staff position / Administrative Assistant
19 staff wages/hours	SSRA - Assistant Coach	1-58-41-20590	36,000		B	B	0	19 .93 FTE increase for volleyball and men's soccer assistant coaches
20 Discretionary Budget	Division III - Environmental Studies	1-55-19-20077		7,500	C	C	0	20 To support field trip excursions

21	Music Discretionary	Division II - Music	1-57-19-20071		19,865	C	C	0	21	To subsidize the increased hours needed to support student endeavors as well as contribute to a competitive rate. As a result of the FSR, our Lecturer in Voice position in the music department was eliminated. The department chose to renew a vocal position and remove our faculty collaborative piano contribution. It is our understanding that this choice created a greater financial contribution (\$12,000) to the FSR than was asked of our department. We hope that this will also soften the budgetary constraints of this request.
22	Chemistry Discretionary	Division III - Chemistry	1-55-19-20076		5,340	C	C	0	22	Increase in student/minimum wages, increases in costs of lab supplies and in hazardous shipping fees for lab courses.
23	Discretionary Budget	Division III - Physics	1-55-19-20081		7,876	C	C	0	23	Increase in student wages, services supplies and communication costs as well as travel and meal.
24	staff wages/hours	Off Campus Studies	1-62-29-20032		20,000	C	C	0	24	change the funding source for current OCS staff member from an endowment
25	staff wages/hours	Hunter Office			32,000	C	C	0	25	.875 FTE position for Admin Assistant in Hunter Conservatory
26	staff salary	SSRA Personnel Salaries	1-58-41-20445		54,000	C	C	0	26	addition of 1.0 FTE for Mental Health Services - Premier Sports Psychology
27	Administrative Assistant needs to go from 10 month/year to 12 month/year position.	Counseling	1-89-42-30008	7,400		A	A	7,400	27	The administrative assistant's duties regarding support of the Associate Dean of Students: Health and Wellness and the Director of the Counseling Center continue throughout the summer months. In addition, the administrative assistant will be supporting new positions including the Sexual Violence Prevention Coordinator and the Assistant Director of the Counseling Center. They would be able to provide support for the Health Center Director by answering phones for the Health Center during the summer months. The administrative assistant position is part of the JED team and is instrumental in supporting the establishment of the Wellness Program, the Alcohol/Substances Education Program, the Sexual Violence Prevention Program, and the Suicide Prevention Program. Additional duties in the summer months include year-end budget reconciliation, Titanium student satisfaction surveys, updating intake forms, reviewing and running reports for the Associate Dean to review in reference to appointments, clients, caseload, and demographic groups such as groups by ethnicity, first generation status, international students served, etc.
28	Assistant Director of Community Health & Sexual Violence Prevention Specialist, 10/month/year	Counseling	1-89-42-30008	65,000		A	A	65,000	28	The Sexual Violence Prevention Program's mission is to improve societal response to sexual violence and promote primary prevention strategies that reduce the incidence of victimization from sexual assault, sexual harassment, dating violence, domestic violence, and stalking. This program approaches sexual violence from a public health perspective, including efforts to change social norms, behaviors, and practices, to cultivate a community climate free from violence. The Sexual Violence Prevention Program outreach has been provided by students who currently do not have a permanent staff leader. The students need a leader who coordinates their training and the regular programs offered to Whitman students, faculty, and staff. Under the Wellness umbrella, the Coordinator will provide this training and outreach in other areas of wellness. As Whitman College pursues becoming a JED school, a strong leader in the Sexual Violence Prevention/Wellness Outreach Coordinator position will help us to meet this honorable and much needed goal.
29	Wellness Peer wages for four positions each nine month school year	Counseling	1-89-42-30008	32,640		B	B	0	29	The Wellness Peers are at the heart of the new Wellness Program on Campus. They will provide wellness training to the Whitman Community. They will offer regular, preventative, biweekly events and workshops teaching students about all the areas of wellness including: emotional, intellectual, spiritual, physical, social, environmental, occupational, and financial wellness. The wellness peers will be trained in suicide prevention so that they can offer workshops and events through the Suicide Prevention Program on campus to teach and empower all students, staff, and faculty to know how to help when someone discloses they are thinking about suicide. They will also be trained in Alcohol/Substance education and will teach workshops and host events on responsible alcohol and substance use. The year will culminate in a Wellness Fair where students can engage in assessment of their wellness and learn how to incorporate and maintain all eight areas of wellness in their lives. The Wellness Peers are vital to Whitman College's meeting JED and NASPA guidelines.
30	UWill teletherapy service permanent funding	Counseling	1-89-42-30008		36,000	A	A	36,000	30	Permanent funding request for teletherapy services for students. Previous funding was \$18K by the President's Office, \$10K by the Dean of Students Office and \$8K from the Counseling Center. This service is provided as the Counseling Center often has a waitlist, due to increased mental health issues, and this service provides students the ability to see a therapist when necessary with no waiting period.
31	Administrative Assistant	Dean of Students	1-90-42-30001	40,000		A	A	40,000	31	Restoring the Office of the Dean of Students to the previous level of staffing to adequately serve students and the Whitman Community. Last year, we hired student employees to support the reception area when members of the community come to the Dean of Students Office. Given the confidential/sensitive information
32	Transportation Fees	Dean of Students	1-90-42-30001		7,000	A	B	0	32	Adding the cost of transportation services for students' needs in transporting them to/from the ER as to not cause a liability issue for the College. Estimating around 100 roundtrip transports per academic year. Cabinet: other existing funds can continue to support this service.
33	Travel Expenditures	Debate & Forensics	1-71-25-30423-5700		13,500	A	A	13,500	33	The total cost of tournament travel for the debate and forensics program has increased approximately 38.6% since 2019-2020 (last year of in-person travel). This increase in cost is due to additional traveling team-members, meeting the accessibility needs of students, expansion of the program into forensics, fuel costs, airline tickets, and lodging.

34	Student Wages	Outdoor Programs, Rental Shop, Climbing Center, OP Trip Leaders	1-97-43-30217-5195/5190 1-97-43-30023-5195/5190 2-85-44-30089-5195/5190		66,898	A		40,000	34	The Climbing Center has not received an increase in their discretionary budget since 2015. For context, we have had to cut hours by 33% to stay on budget with the current level of funding. In that time, minimum wage has increased 66%. In order to maintain a level of staffing for the most accessible activity offered by the OP without transferring costs to the end user, we are seeking an additional \$66,898 to cover the increase costs of minimum wage for the 108 student employees (50 OP trip leaders, 42 climbing center employees, 12 shop staff 4 bike/ski student staff). Cabinet: Phase in increase.
35	Expand the security staff by four patrol officers.	Security	1-00-59-30032	158,080		A	A	79,040	35	Request to add four additional officers at this data point. (\$19.00/hr x 40 = 760.00 x 52 weeks = \$39,520). Cabinet: start with two officers and attempt to add more the following year.
36	Operating Expense	Sorority & Fraternity Life	8-97-42-30453		15,000	A	A	15,000	36	This budget was gift funded for the 2022-23 academic year; continued programming in future years requires a dedicated operating budget. This would cover supplies and services to run the Sorority & Fraternity Life Office including professional association, conference attendance, resources and support, student leadership training, etc.
37	Student Wages	Student Activities / Reid Campus Center	1-97-42-30211 1-97-43-30013		5,000	B	B	0	37	The minimum wage in the state of Washington will have increased 31.4% over the last 5 years (\$12 in 2019 to an expected \$15.74 in 2023). In order to continue to provide supervision of the building and programming, we need to meet the minimum wage increase. We are seeking an additional \$5000 to cover this increased cost for 23 employees (info desk, building managers, and Gallery intern)
38	Visit Scholarship Program	Admission	1-00-43-50210-		40,000	A	A	40,000	38	As part of Whitman's efforts to enroll a diverse student body, we provide all-expenses paid trips to Whitman to 40-50 students each spring. In the past, these students have traveled to Whitman alone and been hosted by current Whitman students, staying overnight in residence halls. However, in recent years Admission staff have recommended moving to a model where Whitman pays for travel expenses for both the student and a trusted adult, including flights and lodging. Last year, due to COVID, we were unable to host students overnight on campus, so we requested and received \$30,000 in one-time funding to pilot this model of flying in students along with a trusted adult. The program was successful in terms of both yield and anecdotal feedback. The total cost ended up being approximately \$32,000. This request accounts both for inflationary pressures on travel costs and the desire to increase the number of students able to visit Whitman through this program.
39	Recruitment travel budget increase	Admission: Recruiting Travel	1-00-42-50001		20,000	A	A	20,000	39	Whitman Admission staff travel extensively to recruit prospective students. Periodically, we have request budget increases to reflect increased travel costs. In recent years we have been able to get by without increases to the budget by using discretionary funds freed up from efficiencies in other areas, and COVID also led to a reduction in travel. This fall, however, we have seen large increases in travel costs due to inflation. This request is about half of what we project we will need to cover the full impact of increased travel costs -- we will work to reduce costs in other areas to help cover the rest.
40	Equipment Coordinator	Conference Events and Scheduling -	1-82-42-41001-5010		42,000	A	A	42,000	40	Due to the ever increase of events and conferences being requested and held on campus to pre-pandemic levels and more. This position is critical in safely supporting not only student, faculty and staff events, but also our town and gown community relationships. The Equipment Coordinator will work with event planning information and take the lead in assuring event set-ups are ready to go and event take-downs are wrapped up. The position involves coordinating and scheduling teams of student employees, driving a truck, loading, unloading, and setting up tables/chairs and other equipment.
41	Event Coordinator	Conference Events and Scheduling -	1-82-42-41001-5010		44,000	A	B	0	41	Due to the ever increase of events and conferences being requested and held on campus to pre-pandemic levels and more. Additionally, this position is essential in supporting the President's on campus and Sherwood house events. All this is critical in support the five College strategic indicatives, as well as student recruitment and retention and local/area community relationships. The Events Coordinator will plan, develop, and implement a wide range of events that engage both internal and external constituents. This person will work with a variety of departments across campus including the President's Office for high-profile events. Cabinet: make the duties of the new Admin Asst in Dean of Students half time support for Dean and half time support for scheduling.
42	One Time - Spider Lift	Maintenance and Grounds	1-94-60-40089		170,000	A	B	0	42	The "spider" lift, refers to the design of the equipment, which looks similar to a spider. The unit is basically a mini-track hoe with legs on all sides. This unit will be able to get us into much tighter locations closer to the buildings, inside buildings where the design prohibits regular maintenance (e.g. light replacement), and work on the taller trees. In conjunction with the lift, this one time request would include a trailer for safely moving the spider lift around campus and to JWC as needed. Cabinet: one time requests not built into operating budget but will attempt to fund with surpluses.
43	One Time - Vehicle Replacement	Grounds	1-94-60-40094		30,000	A	B	0	43	Replace a 1992 truck with over 100,000 miles with an electric cart or used 1/4 ton truck (or a new hybrid truck with cost TBD) for grounds use assigned to a Landscape Technician. Cabinet: one time requests not built into operating budget but will attempt to fund with surpluses.
44	PP Operations- Natural Gas	Utilities	1-94-60-40095-5521		41,645	A	A	15,000	44	This increase is due to the potential increase of natural gas prices and longer periods of gas usage due to climate/temp. impacts. Cabinet: because final price increases in utilities are not known yet, phase this increase in over multiple years.
45	PP Operations- Electricity	Utilities	1-94-60-40095-5522		61,428	A	A	20,000	45	This request is due to the possible increase of costs for electricity. Cabinet: because final price increases in utilities are not known yet, phase this increase in over multiple years.

46	Manager of Budgets	Business Office	1-00-59-40002	75,000	A	B	0	46	Due to capacity constraints with the budget preparation process and the annual audit work occurring simultaneously, the Business Office has been struggling to provide budget information timely in order to meet important deadlines for the President's Budget Advisory Committee and the Board of Trustees' Resource Committee meetings. The bulk of the year-end budget review and close process, budget model preparation work, and preparation of the budget reports and materials are currently being done by the CFO and Associate Controller, who both have extensive institutional knowledge and who are both retiring soon. The Controller oversees all other budget-related duties through-out the year which is currently being piece-mealed across the department to be worked on as time allows. To plan for transition in these two key positions, the Business Office is requesting that a Manager of Budgets position be created to: (1) take charge of the year-end budget review and close process, (2) perform the budget model preparation work, (3) prepare budget reports and materials for the committee meetings, (4) review and maintain budgets all through-out the year to help keep Whitman College's departments financially on track, and (5) help answer questions and provide budget training to various departments across campus. Cabinet: consider again next year. In meantime attempt to reorganize duties in department to better spread out work load.
47	Supervisor training	Human Resources	1-98-59-40017	6,500	A	A	6,500	47	This request is to invest in additional supervisor training and invest in a tool such as the DISC assessment to help supervisors learn more about their work style, build stronger relationships and consequently strengthen their team. See HR support
48	Staff training	Human Resources	1-98-59-40017	3,000	A	A	3,000	48	This request is to expand access to the Clifton Strengths Assessment, which helps reveal an individual's top talents and through a series of guided conversations helps them focus on how they can practice these talents in their everyday work. See HR support
49	One Time - Vehicle Replacement	Maintenance	1-94-60-40089	25,000	B	B	0	49	Replace a 2007 van requiring engine work with a used 1/2 ton truck w/lift gate (or a new hybrid truck with cost TBD) to safely move appliances, small equipment etc. for the Small Appliance Maint. Tech
50	One Time - Vehicle Replacement	Grounds	1-94-60-40094	25,000	B	B	0	50	Replace a 1994 truck with over 130,000 miles with a used 1/4 ton truck (or a new hybrid truck with cost TBD) for grounds use assigned to a Landscape Specialist
51	Wēpa Student Printing	Technology Infrastructure	1-00-54-60002	70,000	A	A	70,000	51	See associated supporting documentation - CIO request 1A Wēpa Student Printing kiosks - \$70,000
52	Endpoint Detection and Response tool and managed Security Ops Center	IT Security	1-00-54-60034	60,000	A	A	60,000	52	See associated supporting documentation - CIO request A2 2022 Budget Request Endpoint Detection and Response (EDR)
53	Increase to Software licensing	Enterprise Technology	1-00-54-60003	16,900	A	A	16,900	53	Increase to cover expected/know software license increase to Colleague and associated applications. Also include over \$5,000 for increase of Scantron (class climate - course evaluation solution) as we have to move to their cloud solution.
54	New position - Classroom & Events Tech Consultant	Multimedia Development & Serv	1-00-24-60006	50,000	A	A	50,000	54	See associated supporting documentation CIO request Classroom and Events Technology Consultant Position Budget Request FINAL (and note that with the increased demand on the two staff, we are already having to pay overtime and with the WA state new definition of exempt vs. overtime eligible, we will most likely pay more overtime in the near future.)
55	Increase to Network Replacement budget	Network Replacement	1-00-24-60022	5,200	B	B	0	55	For the 5 new network and AV switches that were purchased as part of the Wilke Computational Lab
56	Increase to Server Replacement budget	Server Replacement	1-00-24-60023	2,000	B	B	0	56	For the one Dell Network Attached Storage appliance (nas7) with 20 TB of storage that was purchased for the Wilke Computational Lab
57	Increase to Lifecycle for Acad Comp replc - Addition of Comp. Chem. Lab	Instructional Technology Repl	1-00-24-60020	12,000	B	B	0	57	See associated supporting documentation - CIO request 1B Computer lifecycle funds adjustment - \$12,000
58	New Client Services Consultant position	Client Support	1-00-24-60007	50,000	B	B	0	58	See associated supporting documentation - CIO request 2B New Client Consultant Position
59	Upgrade to MS A5 Licensing from A3 to better manage windows devices	Academic Technology Consulting	1-00-24-60004	40,000	B	B	0	59	See associated supporting documentation - CIO request 3B Upgrade to Microsoft A5 licensing - \$40,000 annually
60	Jamf Connect license (password mgmt on Mac desktop and laptop comps)	Client Support	1-00-24-60007	3,000	B	B	0	60	See associated supporting documentation - CIO request 4B Jamf Connect license purchase - \$3,000 annually
61	Identity and Access Management (IAM) solution	IT Security	1-00-54-60034	45,800	B	B	0	61	May be less depending on vendor selection.
62	Implementation services for IAM solution (one time expense)	IT Security	1-00-54-60034	165,000	B	B	0	62	May be less depending on vendor selection.
63	Digital Advertising Funds	PR & Social Media	1-95-59-80010	50,000	A	B	0	63	See supporting document - 8 Memo Communications Budget Request FY24
64	Web Content Specialist	Communications Salary	1-95-59-80001	10,000	A	A	10,000	64	See supporting document - 8 Memo Communications Budget Request FY24

	Note: all wages exclude OPE	One time (optimal) added expense 2023-24	One time (optimal) added expense 2024-25	Eventual (optimal) Annual Operating Budget	Start date for Annual Operating Budget (FY=fiscal year, begins July 1 the previous year)	Is the Expense Essential or Could It Be Scaled Down?	Justification/Description
TOTAL		\$146,000	\$281,000	\$501,250			
Personnel (note: all amounts EXCLUDE OPE)							
	Existing faculty			\$0		n/a	4 departments have agreed to have courses offered to HCD in rotation, and absorb the lost courses. Existing faculty teaching courses in HCD as part of regular teaching load (2 sections in year 1; 3 sections in year 2 and beyond)
	Advising			\$0		n/a	This advising will count in faculty members' existing advising load calculations
	Designer-in-Residence Consultant	\$25,000		\$0		Could be scaled down	This is an external designer to help us design the HCD 2xx and 4xx syllabi, with faculty, and to participate in some way in HCD 1xx during 2023-24. This could be one person or split between people. This could be a series of visits, or an extended stay. We are in touch with Design for America to inquire about their national consultants who assist with curricular design. We are also in touch with alumni who work in HCD, many of whom have already assisted with program development during 2021-22 and 2022-23. If Alumni consult with no fee (or reduced fees) we could also use this funding to give them travel and food and accommodation.
	Designer-in-Residence			\$95,750	FY 25	Essential	(\$85,000 salary plus \$18,000 [\$1500 monthly rent x 12] + \$2000 travel + \$2000 PDA + \$8500 for equipment). The Annual Designer in Residence will serve as an instructor for HCD 2xx and co-instructor for HCD 4xx; they will also give public lectures, advise cohorts of students, and consult with various campus constituencies. The detailed position description is in a separate document. We are not sure if search expenses for this person should be included in this budget
	Visiting Designer Micro-Residencies			\$30,000	FY 26	Could be scaled down	These would be short-term visits (beginning in 2023-24) from designers over the course of a year, akin to existing visiting Educator program, but could last from a couple of days to a week or two. The budget would allow for several short visits or fewer longer visits, to be determined annually. This is also meant to bring in designers who represent diverse voices in the design world, contributing to Whitman's DEIA efforts. The Community or Public Learning Director can leverage Micro Residencies to pair with community arts/design events to generate publicity for Whitman HCD. This community engagement grows the pool of local HCD collaborative practical experiences (required by the concentration). Academic departments could be invited to contribute to the selection of Micro Residencies. Micro Residents can put on events that will fill out the calendar of HCD co-curricular cohort building activities. The budget includes travel and accommodations.
	Faculty Co-Director Stipends			\$5,000	FY 24	Essential	(2 @ \$2500). HCD will have co-directors, to embody the collaborative and interdisciplinary model of the program; this is in place of course releases
	Administrative Staff			\$30,000	FY 24	Could be scaled down	There will be ample administrative work that would help start and maintain the program. This labor could be combined with an existing administrative assistant position, it could be a "rotator" position shared between divisions, and/or it could be part-time staffing in an existing office.
	Safety and Satellite Makerspace Staffing			\$100,000	FY 25	Could be scaled down	We would like to make better use of existing spaces. This is for Fouts, Harper Joy, and any additional "satellite" makerspaces that will have increased use and require increased monitoring and student space/equipment training. Many spaces on campus are well-suited for the kinds of projects HCD will be doing, but they are used by other students and faculty currently and are short-staffed if we add time or use burden beyond existing courses. So, we want to fund additional personnel expenses for the use and safety monitoring of these spaces (beyond occasional student worker staffing).
	Student Assistants (2023-24 only)	\$6,000		\$0		Could be scaled down	During the first year of the program students would be hired to assist with planning elements, which could include assistance with spaces, courses, communications, and collaboration with faculty and a Designer in Residence Consultant. The faculty co-directors would supervise the students.
	Resident Student Designer(s)			\$6,000	FY 25	Could be scaled down	(~6 hrs/week x 2 students). After the first year of the program, HCD would employ a Student Designer (who'd have taken HCD courses) who can work with faculty involved in the program, and who can serve as a mentor for students in HCD 1xx.
	Student Design Assistant(s)			\$6,000	FY 25	Could be scaled down	(~6 hrs/week x 2 students). Because the "makerspaces" for HCD would be located in several satellite locations in addition to WCTS room 14, student staffing for safety and mentoring in these spaces will be required.
	Student Program Administrative and Communications Assistant			\$6,000	FY 25	Could be scaled down	(~6 hrs/week x 2 students). Communications and administrative work with HCD would be helped with student staff positions, which is similar to how many academic departments and programs operate.
	Student Internships			\$20,000	FY 25	Could be scaled down	(4000 each x 5/year starting 24-25). These would be part of existing competitive internship funding infrastructure to start, with a goal of adding to this fund beginning in the second year.
	Community or Public Learning Position			\$70,000	FY 25	Could be Scaled Down	Faculty-facing community or public learning director or specialist for curricular work, with emphasis on social justice as portion of position (salary + PDA). This amount is based on the previous Community Learning Specialist position. The Social Justice concentration will require community placements, so this position would support both programs along with existing CELRI work. This could be configured in creative ways, but it would be a faculty-facing position to help with increasing efforts for community-engaged learning and research. Ideally it will be someone with an advanced degree in community engaged learning, and who has published scholarship in this academic area. They will cultivate a network of connections with local designers, arts/design-related organizations, businesses, exhibit or performance venues, and public events. They will be involved in identifying potential community engagement or internship placements and possibly Micro Residencies that have potential to grow the network of contacts to increase visibility of Whitman in the community. Increasing Whitman's visibility in support of local arts/design/social justice efforts benefits attracting prospective students and future donors who patronize these community events.
	Sub-total	\$31,000	\$0	\$368,750			
Summer Design Lab (note: HCD can function without a Summer Design Lab but we have budgeted for it) (note: summer expenses span 2 fiscal years)							
	Existing Space on Campus			\$0	FY 24	n/a	The Design Lab could be easily held in existing spaces, including WCTS room 14. Summer Design Lab would generate publicity for the College have potential to attract new students to the College. It may be that we would include local K-12 students in this summer experience, for which funding could be pursued using grants or other resources.
	Faculty Coordinator Stipends June			\$2,333	FY 24	Essential	June (2 faculty @ 3500 each for summer, split between 2 FYs). Similar to summer research funding for faculty (e.g., Perry Grants), this would serve to compensate 2 faculty members to run the summer design lab each year.
	Faculty Coordinator Stipends July and August			\$4,667	FY 25	Essential	
	Student Stipends June			\$10,000	FY 24	Could be Scaled Down	(10 students @ 3000 each). Students will get a stipend to participate in the Lab, as will any student assistants.

	<i>Note: all wages exclude OPE</i>	One time (optimal) added expense 2023-24	One time (optimal) added expense 2024-25	Eventual (optimal) Annual Operating Budget	Start date for Annual Operating Budget (FY=fiscal year, begins July 1 the previous year)	Is the Expense Essential or Could It Be Scaled Down?	Justification/Description
	<i>Student Stipends July and August</i>			\$20,000	FY 25	Could be Scaled Down	
	<i>Materials, potential guest speaker stipends, and field trips June</i>			\$3,333	FY 24	Could be Scaled Down	The supplies and pedagogical elements of the Lab would require funding.
	<i>Materials, potential guest speaker stipends, and field trips July and August</i>			\$6,667	FY 25	Could be Scaled Down	
	<i>Weekly "Design Cafe" (Food) June</i>			\$1,000	FY 24	Could be Scaled Down	Similar to the Beckman Scholars in sciences, the Design Lab would include gatherings where students and faculty participants can eat, collaborate, and share ideas.
	<i>Weekly "Design Cafe" (Food) July and August</i>			\$2,000	FY 25	Could be Scaled Down	
	<i>Sub-total</i>	\$0	\$0	\$50,000			
Professional Development							
	<i>d.School Attendance FY 24 only</i>	\$30,000		\$0		Could be Scaled Down	(4 faculty x 7500 per person [5000 + travel and lodging and food]). We consider the d.school course to be the ideal general-purpose introduction to HCD pedagogy. Faculty who are new to teaching HCD will take this course as an orientation. Sending more faculty to this program will help grow interest in the program and prepare more faculty to either teach HCD classes or incorporate elements of HCD into their existing courses.
	<i>Faculty and Staff Development FY 24 only</i>	\$10,000		\$0		Could be Scaled Down	(conferences, memberships, workshops, site visits); this does not include funding for Designer in Residence. Faculty who are already familiar with HCD pedagogy concepts or who have taught HCD-related courses can enhance their approaches to teaching and research. Professional development is essential to sustain a high quality of HCD teaching and research. In years when possible, additional faculty could use this to attend the d.school (likely one or two per year). For the first year, it will be good to have a small amount of funding for HCD faculty to hone their pedagogical skills for eventual teaching in the program. This funding would continue each year, and would be flexible to be used by faculty interested, but not yet participating, in HCD.
	<i>Faculty and Staff Development</i>			\$22,500	FY 25	Could be Scaled Down	(conferences, memberships, workshops, site visits, additional d.school attendance)
	<i>Sub-total</i>	\$40,000	\$0	\$22,500			
Annual Design Event (note: HCD can function without an Annual Design Event but we have budgeted for it)							
	<i>Design Event Planning</i>		\$10,000	\$0		Could be Scaled Down	Stipends and/or site visits. During 2024-25 HCD faculty will plan what the annual event will be, when it should take place, and what its elements can be (including, perhaps a design competition, local opportunities, etc.); this funding would be for stipends and possible site visits or other resources needed for planning. This would be an eventual annual event. In spring 2023, we are visiting Elon University's DesignForge event to share ideas. Resources such as Design for America will also be consulted. This event would generate publicity for the College and could attract new students and donors. It can be a public-facing event that can include Walla Wallans as well as students and faculty and staff.
	<i>Faculty Stipends for annual Design Event Preparation</i>			\$2,000	FY 26	Could be Scaled Down	The planning team is 3 people each year: the coordinator (line below) and 2 others who are involved in HCD (or who want to get involved)
	<i>Faculty Design Event Coordinator Stipend</i>			\$3,000	FY 26	Could be Scaled Down	The annual event coordinator is a faculty member who could be the HCD co-director but doesn't have to be (if it is the director, this stipend is in addition to director stipend)
	<i>Event advertising, venue, food, staffing, and materials</i>			\$25,000	FY 26	Could be Scaled Down	Allocation of these funds would be figured out more definitively during FY 25; we will look into grants and/or work on partnering with Designing for America and/or Future of Design in Higher Education for ideas, especially ideas related to using the event for community outreach.
	<i>Plenary Speakers</i>			\$10,000	FY 26	Could be Scaled Down	This can be one or several speakers, to cover travel and food costs if they are unable to provide this, along with a small stipend
	<i>Sub-total</i>	\$0	\$10,000	\$40,000			
Materials and Program Budget							
	<i>Materials used in existing courses across numerous departments</i>			\$0	FY 24	n/a	Many classes (and accompanying materials) already exist and are thus covered under other programs' budgets but would not add cost
	<i>Books, Subscriptions, Memberships</i>			\$5,000	FY 24	Could be Scaled Down	Some professional associations and publications require subscriptions or purchase; books for research and teaching can also be covered with this amount.
	<i>Non-Digital Small Supplies Startup</i>	\$10,000		\$0		Could be Scaled Down	This is paper, markers, low-tech supplies, portfolios, post-its, etc.; this excludes furniture, whiteboards, and extra materials needed for summer design lab.

	Note: all wages exclude OPE	One time (optimal) added expense 2023-24	One time (optimal) added expense 2024-25	Eventual (optimal) Annual Operating Budget	Start date for Annual Operating Budget (FY=fiscal year, begins July 1 the previous year)	Is the Expense Essential or Could It Be Scaled Down?	Justification/Description
	<i>Non-Digital Small Stupplies Ongoing</i>			\$5,000	FY 25	Essential	*
	<i>Technology Startup</i>	\$26,000	\$109,000			Essential (though still being researched)	The technology (hardware and software and other digital tools) needed for a program in HCD, in many ways, is already here, especially in CS and Art. However, there are specific tools needed to create a program that would align with other colleges' programs. Faculty involved in HCD planning have offered a list of needed technological equipment, which is represented by the cost here. How it is allocated, if scaled down, can be figured out if a budget is approved.
	<i>Technology ongoing</i>			\$5,000		Essential	Much of this is hard to predict, given that 2023-24 will be a year to assess how piloted programs may work. But maintenance for some hardware may be needed.
	<i>Program Budget</i>			\$5,000	FY 24	Essential	This amount aligns with many dept budgets; it is for social events, cohort-building, communications, postal charges, etc.
	<i>Furniture and Classroom Supply Prototyping (23-24 only)</i>	\$39,000		\$0		Could be Scaled Down.	We need to scale out furniture and classroom supplies over multiple years, and to make smart decisions as we go. We may not be able to rely on paths and vendors that we have been using in the past, given the ways that design matters for a design program and we have to have design and aesthetics inform the (especially public-facing) elements of the program. We have gotten figures from various vendors for the kinds of furniture and supplies we believe we will need to create a successful HCD program for our students. In 2023-24 we will use existing furnishings and supplies for the HCD 1xx classes, and we will work with vendors to try demo units, which doesn't cost anything; we will also use advice we got from the Hive to purchase temporary inexpensive items to try out. To effectively figure out how space is used before a remodel, we need to get multiple units for student and faculty use. This can also include things like temporary lighting, some furniture, and teaching tools such as whiteboards and carts. This is a one-time purchase for trying things out – a type of seed money. This process is consistent with design thinking, in that we would be "prototyping" the space for trial use. Then the larger expense for permanent furniture (line below) will be made with better information from those who will eventually engage with the permanent design. Students in HCD 1xx will participate in the redesign ideas for the space.
	<i>Furniture and Classroom Supply Permanent</i>		\$105,000	\$0		Could be Scaled Down	(tables, chairs, storage, movable whiteboards, movable partitions, carts, etc., this is for HCD space AND to put whiteboards in multiple satellite locations on campus). The permanent refurbishing of the HCD classroom and any satellite makerspaces will require a larger expense than the prototyping that will occur in 2023-24. This amount reflects this expense, based on hours of research and conversations with faculty, other sites, and vendors. We have been grateful for the efforts of David Sprunger in WCTS for this figure, and we note that this figure will become increasingly accurate as decisions are made about the space.
	<i>Sub-total</i>	\$75,000	\$214,000	\$20,000			
Space							
	<i>Classroom</i>			\$0		n/a	The basement classroom 14 in the WCTS building, also known as the Wincubator, has been designated as available for HCD use starting in the first year of the program. During 2023-24 students and faculty involved in HCD will iterate and create prototypes for what the remodel will look like to best meet the needs of ongoing HCD students. Because no new space is needed to be built, there is no cost associated with starting a program in a "hub" location. The space, in addition, is not attached to any existing academic department, thus adding to the interdisciplinary values of HCD.
	<i>Remodel existing space(s)</i>		\$57,000	\$0		Could be Scaled Down	(lighting, paint, hallway signage, outside door signage, wall mounted items stabilizing, etc.) The remodel of the designated HCD classroom space would not begin until FY 25. HCD 1xx students in 23-24 would actually work on projects that are meant to figure out (and prototype) how the space should be redesigned. Cost estimates for a remodel have still been figured using current and accurate information and advice from involved faculty and vendors, but the specifics of how that amount would be distributed among the estimated detailed costs would be solidified for a remodel to start FY 25. (Construction summer 2024)
	<i>Sub-total</i>	\$0	\$57,000	\$0			
TOTAL		\$146,000	\$281,000	\$501,250			

FY2024 Budget Request
Off-Campus Studies
10/28/2022

OCS Discretionary Budget:

Due to extremely low study abroad participation rates during the pandemic, we have had large surpluses in the OCS discretionary budget the past two years. We expect that in 2023-34 OCS participation rates will return to pre-pandemic levels (around 40% of the junior class studying away for at least one semester) and therefore to serve those students we will need our discretionary budget to remain at \$101,160 which is similar to the prepandemic discretionary budget for OCS.

Reinstate Position/Staff Salary Requests:

1. **\$34,640 - Staff Salary Request to reinstate Administrative Assistant position** in Off-Campus Studies as a 10-month, 40 hour per week position. **See *Background and Rationale below.***
2. **\$20,000 - Staff Salary for Laura Cummings, OCS Coordinator, changing source of salary funding.**

Rationale: This portion of Laura's salary has been paid by the David Deal China Exchange Endowment since 2001. In 2013 when OCS switched to the home tuition model which resulted in substantial savings for the college, we were supposed to begin to use the college's regular staff wages budget to cover this portion of Laura's salary but that has been delayed year after year. We recommend that this be remedied so that the Deal Endowment funds can be used for China studies programming and other programmatic purposes. Note that the college's salary budget currently covers only 2.5 FTE for Off-Campus Studies staff because nearly half of Laura's salary comes from endowment funds.

OCS Administrative Assistant - Reinstate Position Request

Background:

In 2013 when Whitman changed to the home-school tuition model for Off-Campus Studies, we needed and were approved for a fourth position in OCS because of the administrative burden of this fee model. Resources for this position were available because the fee model generates roughly \$1,000,000 per year in tuition savings (since Whitman's tuition is on average much higher than the actual OCS programs' tuition fees). But the home tuition

model requires much more work to implement properly. Additional duties that OCS staff have performed since 2013 include:

- OCS maintains detailed Partner Program budget information for all 80 programs on our website that must be updated each semester.
- OCS staff inputs OCS program budget details on a spreadsheet for Whitman's Financial Aid Services for aid to be awarded to each participating student and then builds a budget for each OCS student that reflects Whitman and program aid.
- OCS staff supports Student Accounts staff by transferring data from OCS program invoices to a spreadsheet and coding the various budget items so students can be accurately billed.
- Because of our goal for OCS programs to be a more integral part of the Whitman curriculum and the increased responsibility and liability associated with charging Whitman tuition for third-party study abroad programs, since 2013 we have sent more faculty overseas each year for OCS site visits (some years we have sent as many as 8 faculty) which requires administrative support.

In April 2020 our OCS Fellow/Administrative Assistant Liz Reynolds resigned during the pandemic to live with her family in Utah. The college opted not to replace her due to financial belt tightening during the pandemic and low OCS enrollments during the COVID crisis. We were able to manage during the pandemic without an Administrative Assistant because OCS enrollments were extremely low. But now that OCS enrollments are returning to pre-pandemic levels that is no longer tenable.

Rationale:

Fortunately, OCS/study abroad enrollments have already bounced back to 35% of the junior class in 2022-23. We predict enrollments will be back to pre-pandemic levels as early as 2023-24. About 180 students (40% of juniors) are likely to study abroad or on US-based study programs in 2023-24.

Of greatest concern is the current burden on Laura Cummings, OCS Coordinator, who has been largely doing the work of two positions for 2.5 years now. The situation is no longer sustainable. Some important projects have been set aside and we are having difficulty meeting deadlines because of insufficient staff. This year we have delegated as many responsibilities as possible to our OCS Student Interns (such as events publicity, social media and researching airfare prices for program budgets) but many other tasks are not suitable to delegate to part-time student workers.

There are other factors that are contributing to increased need for staff in OCS. Our increasingly diverse student population needs additional support if we are going to

maintain equity, inclusion and access for all students. Trends we are seeing include the following:

- Significant increase in advising appointments for low-income students who have a myriad of questions about study abroad expenses and aid both prior to OCS and once they are away (increasingly while abroad students are asking us to cover medical expenses, reimburse for stolen laptops, etc and answering these numerous requests is time consuming)
- More students with substantial financial aid who need assistance booking and paying for flights to San Francisco and Los Angeles in order to visit consulates to fulfill biometrics requirements for their student visas
- More students with documented disabilities wish to study abroad and need multiple special planning meetings with OCS provider staff and ARC staff to ensure resources in the destination are adequate and conditions suitable
- Increasingly complex student visa processes are hard for all students to navigate especially those whose parents have not traveled outside the U.S. previously. This often requires multiple appointments with OCS staff to notarize documents and review visa steps.

Other factors contributing to the need for an Administrative Assistant during the Academic Year:

- Due to changes in WA State labor laws, our Assistant Director position is no longer exempt and subject to overtime compensation when he works more than 40 hours per week. This has put an additional burden on other OCS staff.
- Even though Crossroads faculty-led courses are currently suspended, faculty-led off-campus studies are still being offered by Whitman on a small scale—1) *Whitman Summer Chinese Studies in Taiwan* in 2023 with Deal Endowment funding, 2) *Land Water Justice* with Mellon funding in 2022 and 2023, and 3) *Semester in the West* 2021 and 2022. If the administrative assistant position is reinstated, OCS will be able to provide centralized administrative support to faculty leading such courses including application processes through our Terra Dotta/myOCS software, predeparture waivers/forms, budget oversight, JPM reconciliation, etc. Having these functions centralized in one office for faculty-led courses is much more efficient, reduces the risk of important safety/liability issues being overlooked, and relieves the burden on faculty trip leaders and on other staff on campus who do not have off-campus studies expertise. Note that for the Fall 2022 cohort of Semester in the West students, OCS already provided the support for the application process through our Terra Dotta software. With an Administrative Assistant, OCS could

easily provide the JPM reconciliation support for programs like Semester in the West and Land Water Justice to relieve the burden on the Administrative Assistant in Maxey.

Key responsibilities for the Administrative Assistant should include:

- Maintenance of OCS website
- Reconciling JPMorgan/accounts payable, including for faculty-led off campus courses (eg *Whitman Summer Chinese Studies in Taiwan*, *Land Water Justice*, *Semester in the West*, etc)
- Overseeing payroll for OCS interns and OCS bloggers
- OCS events (orientation meetings, information meetings, OCS rep visits to campus, OCS Fair) planning and publicity
- Tracking the application status of OCS students and producing enrollment reports for various parties including the Treasurer's Office and Institutional Research
- Scheduling OCS Committee meetings and student appointments
- Back-up support for the OCS Coordinator for Terra Dotta software updates to keep OCS digital program brochures current, create and edit on-line application forms and required pre-departure forms etc.

Funding Source for Administrative Assistant Position:

\$9000 - Effective January 2023 OCS' Terra Dotta software contract will be approximately \$9000 less than it was due to our successful negotiations for a lower rate. We propose using these savings toward the wages for reinstating the Administrative Assistant position.

Thank you very much for your consideration of this important request for our academic offerings. I would be happy to answer any questions you may have.

Susan Holme
Director of Off-Campus Studies

Please contact me if you have any questions or would like to discuss this further.

Telara

Budget request for 2023-2024

We have consistently received feedback from both employees and supervisors that further developing our supervisors and contributing to their professional growth is a strong need and desire. As HR is increasing our bandwidth, we want to devote time beginning this Spring to creating and executing training opportunities for supervisors. Costs for Spring training will be covered through the current fiscal year's budget, but additional funding is requested for 2023-2024 to sustain and expand these efforts. Attached is the schedule for the Spring semester 2023. Approximately \$2,500 will be spent for supplies/refreshments/IMS costs for the 12 sessions and \$2,000-\$2,500 on CliftonStrengths assessments (\$49.99/assessment). Cara Setchell has been trained to administer training and coaching from previous employment and believes she can create workshops and provide coaching without additional training at this point in time.

In looking at 2023-2023, we are requesting a total of \$6,500 for supervisor training. \$2,500 is needed for supplies/refreshments/IMS costs for approximately 12 sessions. Additionally, we would like to be able to invest in a tool such as the DISC assessment as a way to help supervisors learn more about their work style, build stronger work relationships and consequently strengthen their teams. At present time, individual assessments cost \$81. We currently have 100 supervisors, and think it's realistic that half of those will want to participate in the assessment in year one, so we can project an additional cost of \$4,000. Eventually, we would envision using DISC with entire department teams. There will be an initial investment of \$3,500 to certify a facilitator and purchase a facilitator kit that we plan to cover from the fiscal year 2023.

CliftonStrengths for employees

Once we focus on the Clifton Strengths Assessment with supervisors this Spring, we would like to make this available to more staff. CliftonStrengths helps reveal an individual's top talents that they are born with and through a series of guided conversations helps them focus on how they can practice these talents in their work every day so that their talents turn into strengths. Gallup offers multiple levels of assessments, and while we intend to use the mid level (priced at \$49.99/assessment) for managers, we think the basic level (priced at \$19.99) will provide plenty of information to staff. We can use strategies on how to gradually introduce this over multiple fiscal years and/or use a model of departments contributing a portion of the cost, but we could fund 150 employees at \$3,000.

Telara McCullough | Director of Human Resources | Whitman College | 509-527-5941 | mcculltl@whitman.edu

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Peter Harvey
Chief Financial Officer
Whitman College



Supervisor training curriculum October 2022.docx

61K



Laura Nix <nixll@whitman.edu>

Fwd: 2023-2024 budget proposal

1 message

Peter Harvey <harvey@whitman.edu>
To: "Nix, Laura" <nixll@whitman.edu>

Fri, Nov 11, 2022 at 9:57 AM

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

From: **Telara McCullough** <mcculltl@whitman.edu>
Date: Fri, Nov 11, 2022 at 9:56 AM
Subject: Fwd: 2023-2024 budget proposal
To: Peter Harvey <harvey@whitman.edu>
CC: Cara Setchell <setchecl@whitman.edu>

Peter - Here are the details related to our budget request to increase expenditures for supervisor training on an ongoing basis. The total increase requested is \$9,500, which is the incremental cost of offering an ongoing series of supervisory training sessions, extending CliftonStrengths developmental assessments to staff over the next several years, and introducing an assessment tool like DISC as a way to explore supervisor, employee and team work and communication styles and build stronger relationships and teams. There is \$20,000 currently budgeted in the staff development account and it will continue to fund the staff appreciation breakfast and other appreciation activities, the new staff onboarding series with cabinet officers twice annually, and other staff inclusion events such as the recent new staff mixer. I think it's important to build this ongoing investment in staff development into the annual budget process and recognize our intent to sustain the investment, and not view it as one-time expenses.

A few one-time expenses anticipated next year that we have already discussed, and are not included, are NCORE travel for one HR staff member, and a shared expense for investigator training for at least two HR staff members. The volatility of staff hiring continues to exceed both the relocation and recruiting expense budgets, although more controls have been developed in the past year for recruiting expenses. My understanding of our strategy is that these expenses may be offset in other parts of the budget such as salaries while the position is vacant.

I'm excited to be able to extend more supervisor skill training this Spring. In particular, based on my frequent work with supervisors and employees needing help to build stronger relationships, I believe a tool like DISC will be helpful in creating a vehicle for shared conversations, understanding about individual differences, and how to better work together. (I've worked extensively with a similar tool but DISC will be new to me as well). I'm sharing below the proposal Cara Setchell developed for the additional training we have in mind and an attachment from her describing the preliminary curriculum for supervisor training that she envisions:



WHITMAN COLLEGE

SUPERVISOR DEVELOPMENT OPPORTUNITIES

Spring 2023

JANUARY

Onboarding New Staff Employees

Careful thought and preparation must be put into successfully transitioning staff employees into their new roles and into the Whitman community. This session will cover basic topics that supervisors should share with new employees in the onboarding process and explore ways to help employees develop a sense of purpose in their roles early on and create a sense of belonging.

This session will be offered on January 10 from 10 a.m. - Noon in Olin, Room 138 and will be repeated on January 12 from 3- 5 p.m. in Olin, Room 138.

Inclusive & Equitable Hiring, Part One & Part Two *

In this two-part session, we will explore how bias manifests in searches and learn strategies to mitigate bias. We will walk through the entire search process, identifying ways to be inclusive and equitable throughout the entire process.

Once hiring managers attend both of these training sessions, they will be able to lead a search independently from an equity advocate. This session is in two parts, and we ask that supervisors commit to attending both sessions.

Part one of this session will be offered on January 25 from 1 – 3 p.m. in Olin, Room 138 and part two of this session will be offered on February 2, from 1 – 3 p.m. in Olin, Room 138.

FEBRUARY

It's about Time: Understanding timesheets, Whitman paid time off, the Family and Medical Leave Act (FMLA), and Washington Paid Family & Medical Leave

If a staff member you supervise needed to take an extended leave, would you know how to advise them? Learn about federally-mandated job protected leave as well as potential options available to employees for receiving some compensation when out on medical or family leave. Additionally, we will take a deep dive into BambooHR timesheets.

This session will be offered on February from 4-5 p.m. in Olin, Room 138 and will be repeated on February 13 from 1-2:30 p.m. in Olin, Room 138 and will be repeated on February 22 from 2-3:30 p.m. in Olin, Room 138.



WHITMAN COLLEGE

MARCH

Developing and Managing a Departmental Budget

How is the College's budget developed? How and when can you make requests for the next year's budget? How do you develop your own departmental budget? Join us to learn about strong budget practices and how to be a good steward of the college's fiscal resources.

This session will be offered on March 15 from 8:30-10:30 in Olin, Room 138.

Performance Management*

Learn about the value of effective performance management, the model that Whitman uses, and how to write and deliver a high-quality performance review. This session will be offered on March 2 from 8:30 – 10 a.m. in Olin, Room 138

APRIL

Developing Your Talents into Strengths

In this two-part session, we will use the CliftonStrengths Assessment to help you discover your natural talents and learn how to develop your greatest talents into strengths. Prior to this session, participants will be provided instructions on how to complete the CliftonStrengths Assessment. Participation will be capped at 25 people per session, and an RSVP will be required.

This session will be offered on April 17 from 1-3 p.m. in Olin, Room 138 and will be repeated on April 25 from 9 – 11 a.m. in Olin, Room 138.

MAY

Leading With Your Strengths

Use your CliftonStrengths personalized results and reports to maximize your potential as a supervisor. While not required, participants will get the most out of this session if you attend the prior *Developing Your Talents into Strengths* session.

This session will be offered on May 25 from 2-4 p.m. in Olin, Room 138 and will be repeated on May 31 from 10 a.m. – Noon in Olin, Room 138.

** Inclusive & Equitable Hiring and Performance Management will be offered once/semester.*

FUTURE TOPICS

Fall 2023

Supervising with a DEIA Lens
Improving Job Performance
Using Canopy to Support Our Staff

Spring 2024

Effectively Engaging Employees
Managing Conflict
Insights Discovery: Adapting Your Style to
Meet the Needs of those you Lead

Each session above will be offered twice.

** Inclusive & Equitable Hiring and Performance Management will be offered once/semester.*

Wēpa Student Printing kiosks - \$70,000 annually

In July 2022, Whitman entered into a three-year contract with Wēpa, a print services vendor, to manage our student printing services on campus. One time funds were used to pay for the installation of the kiosks and existing funds that have been traditionally used to pay for student printing will be used to assist with the payment for this service (approximately \$22,000/year from our existing budget). We will, however, have an estimated shortfall of \$70k annually to pay for the printing service. For the 2021-22 school year, students printed approximately 900k pages. As of Oct 31, 2022, this total appears to be trending in the same direction as last year.

Pre-COVID student printing costs:

Pre-COVID Printing Annual Costs		
	October 2015 - Sept 2016	October 2016 - Sept 2017
GoPrint Licensing	\$1550	\$1550
Printer Replacement s	\$15606	\$4045
Toner	\$12665	\$15586
Paper	\$6950	\$4379
Printer Parts	\$3570	\$1463
Printer Maint Calls (3rd party)	\$523	\$1133
Totals	\$40864	\$28156
Yearly average	\$34510	

Expected Wēpa costs based on a 900,000 page annual page count:

Pages (Annual)	900,000
Mono Simplex Cost	\$47,693
Mono Duplex Cost	\$1,822
Color Simplex Cost	\$24,444
Color Duplex Cost	\$734
Revenue and Costs	

Installation/shipping for stations	\$0
Annual lease charges	\$22,104.00
Other costs	\$0
Total Costs	\$22,104.00
Print Cost	\$74,693
Net	\$96,796.80

a.

Endpoint Detection and Response ~ \$60K, annual

The attack surface is growing. Our approach and tools need to adjust to this reality.

EDR reduces Whitman College's risk exposure

EDR proactively improves the security posture of the Whitman College computing environment by providing critical insight into all college-managed server, workstation, and network devices. This real-time insight is crucial to enable informed decisions on how to best protect our environment and data.

EDR is preventative

Recent breaches resulting from compromised workstations and credentials include countless government and commercial agencies. Unfortunately, it is known that many bad actors are actively targeting higher education institutions (eg. Whitworth University), where cleanup efforts cost millions of dollars. These actors know that higher education institutions have comparatively open network access policies and promiscuous configurations for end-user devices. EDR provides the information and tools to prevent a bad actor to "pivot" from one normal system in our environment to gain access other high-value systems within our environment

EDR is required

As the cyber insurance business model matures, EDR has become a specific requirement for reducing premiums – and even the ability to acquire coverage in many cases. EDR fulfills many requirements of various regulations such as GLBA, Safeguards Rule, etc. by providing asset inventory, vulnerability status, real-time/continuous monitoring and associated reporting.

EDR will allow for the consolidation of infrastructure

WCTS maintains multiple systems from multiple vendors to drive various security controls and satisfy many requirements. EDR will replace at least two-to-three of these disconnected tools and may allow consolidation of others. EDR will allow WCTS to further explore the consolidation of many products and services -- freeing up both the financial and human resources that are currently consumed maintaining these disconnected systems.

EDR is desirable and becoming 'expected'

EDR is an added layer of security that is becoming expected and standard among many organizations and institutions. Industry Best Practice recommends organizations leverage endpoint detection and response a key component of their overall security posture – much like anti-virus was expected 10-15 years ago.

EDR is really MDR.

We are requesting a managed endpoint detection and response (MDR) solution. EDR/MDR includes the licensing and tools to achieve functionality PLUS the capacity to process

anomalous behavior across all Whitman-managed devices. This is a standard/best-practice approach for organizations similar in size and capacity as Whitman College – as it requires considerably less local staffing to manage and support – while offering true 24x7 monitoring, response, and remediation by active security analysts not directly employed by the College.

Additional considerations:

WCTS estimates that \$12-17K in existing licensing and tools could be eliminated by the second year of a fully-deployed EDR solution. These funds are currently being used to license tools that the EDR solution would eventually replace.

Cybersecurity has emerged as one of the most critical functions impacting every facet of the organization. Tools such as this are integral to providing the proactive protections necessary in today's risk environment.

The EDR/MDR approach is considerably more efficient and affordable than acquiring or requiring local resources to monitor and react to events (minor through major). This approach is effectively gaining the an additional position for less than half the cost of a similarly-qualified individual and covers 24x7 vs. 8-5 Monday through Friday.

EDR/MDR solutions encompass more than investigations and remediation – they often include 'warranty' coverage that could be leveraged before a cyber insurance claim would need to be made as well as advisory input to improving existing configurations, processes, and policies. These professional services are part of the need to continually assess our ongoing security posture. This implementation could lower our fiscal liability for endpoints managed by the EDR/MDR solution, as well as provide a very valuable resource in having an objective third party referenced for internal conversations involving the need to change some existing, legacy cultures on campus.

Classroom and Events Technology Consultant Support Technician Position Budget Request

Summary

WCTS requests one new full time staff position to aid in supporting learning space and event technology. We have not asked for additional staffing in this area since 2006. Since then, the number of technologically enhanced learning spaces have increased 50% while event technology support continues to increase, most recently by about 250% on a yearly basis. Our two existing Instructional Media Services staff are at a breaking point with their workload, regularly working well past 40 hours per week, and unable to complete the entirety of their work. This new full time staff member – a Classroom and Events Technology Consultant – will enable us to manage the “new normal” workload, and to provide the level of support that those who use classrooms and host events (especially those who do so frequently) need and deserve. In essence, the entire campus will benefit.

Rationale

In 2007, WCTS’ Instructional Media Services (IMS) employed two staff members to support approximately 80 technologically enhanced learning spaces on Whitman’s campus. In addition to supporting these learning spaces, these two staff members also supported the technology needs of most* Whitman College events, estimated to have been approximately 150 events during the 2007-2008 academic year.

During the fall of 2016, IMS supported 110 events. In the years since 2016, with the exception of the campus in-person shutdown during the Covid pandemic, the number of events requiring our support has increased dramatically in number and complexity. From Opening Week 2022 to the end of October, our two IMS staff members have supported 147 events. At this pace, they are likely to support approximately 225 events by the end of the Fall 2022 semester alone. By comparison, in the last “normal/pre-Covid” academic year, 2018-19, these same two IMS staff members supported 126 events– that’s for the whole year. In the 2022 Fall semester alone we will eclipse the entire 2018-19 total, and approach the total or 264 events for the entirety of the 2021-22 academic year. By the end of the 2022-23 year, we anticipate that we will support 450 events, and based on the steady growth over the last 13 years, we expect only more growth in future years.

At the same time as the event technology support has increased, the number/complexity of technologically enhanced learning spaces also increased significantly. As mentioned above, in 2007, Whitman had approximately 80 such enhanced spaces. By the end of the 2018-19 fiscal year, Whitman had 121 technologically enhanced learning spaces, all created and maintained by the same two IMS staff members who support event technology.

But it’s not just the number of spaces that increased (and still increase). The technology needed/expected for these spaces became markedly more complex. In 2007, learning space technology consisted of a computer, a projector, audio speakers, and a VHS/DVD player. In 2019, typical learning space technology included touch panels to operate the projectors/adjust volume, as well as hardware to make switching between guest devices and room computers seamless.

Today's technology has allowed the infrastructure of teaching to flourish, in ways that enable students and faculty to teach and learn in different ways and modalities. However, this also means that supporting and maintaining this intricate "backbone" of classrooms takes our two IMS staff members much longer than it did in 2007!

As we all know, the Covid-19 has been a game changer in so many ways. At the onset and the height of the pandemic, Whitman recognized the herculean effort that WCTS underwent, including outfitting approximately 80 learning spaces with additional technology needed to allow hybrid and online teaching and learning. But it is what happened after Whitman returned to in-person learning that is not well known. Now, most learning spaces had measurably more

technology for the two IMS staff members to support, which significantly increased support time— in a leap up from 2019 levels. This technology included an additional screen to view online participants, two cameras, lapel microphones, as well as a hub that would allow the integration of network, cameras, and microphones over a single cable. In addition, the "new normal" people came to expect of having recorded and/or streamed events added a new heavy preparation, execution, and post-event support time requirement for our two staff members.

Though steps have been taken to streamline and make support work more efficient for the two IMS staff members, these efforts have hit their limit. Learning space technology and event technical support continue to expand staggeringly in amount and complexity. The two staff members now regularly work beyond 40 hours per week, one of them (non-exempt) incurring significant amounts of overtime. Many learning spaces that need regular maintenance and attention are being simply ignored because there simply is not enough labor and resources to be able to attend to them. We constantly worry what is falling through the cracks, and who at Whitman will go underserved or unintentionally ignored, and it's now "normal" for our two staff members to feel that they should never get sick and never go on vacation.

We have not asked for an additional staff member in approaching 20 years. It is time now for us to ask for a one new full time staff member in order to manage the staggering workload and also to ensure that we are able to meet the steadily growing demands of the college.

We thank you for your support and understanding.

Estimated Cost: \$50,000 + OPE

** Exclusions: Most events in Cordiner Hall, Harper Joy Theater productions, Chism Hall performances, and athletic events. The key word here is "most." In many cases, IMS staff have collaborated closely with faculty/staff in these areas to either run and/or partially/fully install and setup the technology infrastructure needed to run events in these areas.*

Draft Job Description

POSITION SUMMARY

This position supports the use of classroom and event technologies on campus. This position collaborates with other IT members to provide an information technology environment that is consistent with the goals of Whitman College and meets the needs of faculty, staff, and students.

PRINCIPLE POSITION RESPONSIBILITIES

- Support the use of classroom and event technology. This includes regular and unscheduled/urgent maintenance and event technology setup/breakdown and equipment operation.
- Assisting with:
 - Assisting and training faculty, staff and students with the use of equipment and facilities.
 - Installing and maintaining classroom and event venue equipment on campus. Equipment includes, but is not limited to data projectors, networked computers, speakers, video equipment and other audio-visual equipment, and security devices.
 - Keeping records of repair, replacement, and maintenance of equipment.
 - Documenting routine operations and processes, and maintaining records and inventories.
 - Coordinating with Physical Plant and outside contractors on classroom renovation and major equipment installation.
 - Training and working with student workers, checking work, and assigning duties to meet needs of varying workload.
- Perform service calls as assigned.
- Perform other essential duties and implementation of projects as assigned.

QUALIFICATIONS

Individuals must possess the following knowledge, skills, and abilities or be able to explain and demonstrate that they can perform the essential functions of the job, with or without reasonable accommodation, using some other combination of skills and abilities and to possess the necessary physical requirements with or without the aid of mechanical devices, to safely perform the essential functions of the job.

Minimum Qualifications

- Any combination of experience that provides the required knowledge, skills and abilities to perform the essential functions of the position.
- Value, respect, and welcome diverse perspectives and experiences.
- Strong communication skills, and the ability to retain composure in sometimes stressful situations.
- Devoted to exploring and supporting the intersections of technology with teaching and learning.
- Proficiency with Mac OS and/or Microsoft Windows.
- Curiosity to continually learn new things about technology.
- Eagerness to engage in problem solving.

- Ability to work independently and in teams.
- Ability and flexibility to work evenings or weekends as scheduled.
- Satisfactory completion of background check.

Desired Qualifications

The following attributes are not mandatory, but we hope for as many of these as possible in the ideal candidate:

Experience:

- Bachelor's or two year degree (emphasis/major in education, humanities, arts, technology, or other relevant field is a plus).

Technological Experience in supporting and/or using:

- Demonstrated knowledge and experience in as many of the following as possible:
 - Repairing and performing installation and maintenance of microcomputer and multimedia equipment
 - Operating sound, light, and electronics as they apply to multimedia operation
 - Trouble-shooting techniques with technology
 - Using a variety of power and hand tools, cleaners, and test equipment related to the maintenance and repair of computer and multimedia equipment
- Demonstrate ability and skills to:
 - Operate and configure computing equipment and multimedia devices
 - Review, understand, and apply concepts presented in equipment operation manuals and training programs
 - Use tact and judgment in dealing with the public
 - Perform manual labor, including lifting up to 50 lbs regularly

Professional

- Experience in instructional technology and/or user support in a managed computing environment, or a combination of relevant skills and experience.
- A proven ability to translate challenges into opportunities and work comfortably in a changing, multi-tasked, and sometimes ambiguous environment.
- Ability to manage projects and project portfolios.
- Attention to detail and accuracy.
- Analytical and creative approaches to problem solving.

Computer lifecycle funds adjustment - \$12,000 annually

The Computational Chemistry Computing lab added 25 high-powered and specialized desktop computers to the inventory in 2021. These computers will need to be added to our current desktop replacement model of 6 years. These computers were purchased in 2021 and are due to be replaced in 2027. Each computer was purchased for \$2391.06 and assuming that costs remain constant over the next 5 years (the amount of time before they are due for replacement), that will require an additional \$12,000 to be added to the Instructional Technology Replacement (1-00-24-60020) budget to compensate for this addition to the lifecycle.

New Client Services Consultant Position - \$50k annually

In 2020, a vacated Client Services Consultant position was put on hold and eventually eliminated as part of the Financial Sustainability Review. The loss of this position has created a hardship in the Client Services team of WCTS as the work that was spread amongst two consultants is now handled mostly by one. Most Administrative lifecycle replacements (~120/year), unresolved Help Desk tickets, and printer support have fallen on the shoulders of the one support consultant. This consultant also assists with hardware provisioning/retirement and is attempting to learn hardware repair for both Mac and PCs to be a backup to our lone hardware repair technician. They are currently supported by our PC Endpoint System Administrator whose position it is to maintain our Windows fleet of computers on campus. Our Endpoint System Administrator is dedicating about $\frac{1}{3}$ to $\frac{1}{2}$ of their time to support the C.S. Consultant. This has pulled them from essential duties of supporting the security of our PC fleet of computers in conjunction with the office of the ISO. This support is critical as more computers are being used off campus. Due to the lack of support consultants, ticket response time has also been extended resulting in clients having to wait longer to have incidents resolved.

Currently, we have no redundancy in positions within the Client Services team which has resulted in a single point of failure if one of our team becomes ill, incapacitated, or is away from the office for an extended amount of time. Also, two of our staff are within a couple of years of retirement and neither person has a support backup. I am proposing that the aforementioned Client Services Consultant position be reinstated. This position would start at a salary of approximately \$50,000/year. Attached below is the most recent job description for this position.

This new position would assist in workload balance amongst the Client Services team, allow for cross training to give backups to each position, and reduce the overall response time to tickets and issues reported by our clients. Additionally, this would free up our Endpoint System Administrator to focus on their assigned role and to work on upcoming initiatives that affect the campus' PC fleet of computers. Finally, as the college continues to focus on the strategic priorities, more staff and additional software solutions are being introduced and require the attention of the front-end support team.

WHITMAN COLLEGE JOB DESCRIPTION

DATE: April 27, 2020

JOB TITLE: Client Services Consultant

FLSA DESIGNATION: Non-Exempt

OFFICE/DEPARTMENT: WCTS

SUPERVISOR: Director, Client Services

DEPARTMENT HEAD: Director, Client Services

BUDGET OFFICER: Chief Information Officer

Position purpose

A Client Services Consultant provides desktop hardware and computing support, network printer repair and installation, and assistance to all technology users on campus. This position collaborates with other IT members to provide an information technology environment that is consistent with the goals of Whitman College and meets the needs of faculty, staff, and students.

Principal position responsibilities/duties

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

Primary knowledge, skills, and abilities

Knowledge and experience in:

1. Advanced operation of Macintosh and Windows computers and other peripheral devices.
2. General computer and network printer hardware repair
3. The installation of standalone and networked computer applications.
4. The use of common application software, such as Microsoft Office applications, email, web browsers.

5. Problem solving techniques and ability to read and interpret service manuals.
6. Consulting with users on various software, hardware, and network problems.
7. Familiarity with enterprise level network printer functions, troubleshooting, and repair & maintenance.

Essential traits:

1. A commitment to customer service to provide timely, attentive, upbeat care and making sure needs are met in a manner that reflects positively on the college and Technology Services department.
2. Strong team orientation.
3. Good interpersonal and communication skills enabling the establishment of cooperative and collaborative working relationships with a variety of campus constituencies.
4. The ability to positively and actively contribute to Whitman College's core values of diversity, equity, and inclusion.
5. A clear ability to make technical issues understandable.
6. An ability to work occasional evenings or weekends.
7. An ability to perform manual labor, including heavy lifting (30 lbs.) regularly.

Minimum requirements

1. One or more years of experience in computer user support in a networked computing environment.
2. Ability to obtain Dell & Apple hardware repair certifications and/or CompTIA A+ certification within first 6 months of employment
3. Satisfactory clearance of background check required.

Preferred requirements

1. A two-year college and/or technical school degree with emphasis on Computer Information Systems. A bachelor's degree is a plus.
2. Experience working in user services in higher education
3. Experience working with Endpoint Management products (SCCM, Jamf Pro)
4. Experience with PC and/or Apple hardware repair

Upgrade to Microsoft A5 licensing - \$40,000/annually

Currently, Whitman is licensed on Microsoft's A3 licensing model. This license has served the campus well for many years. The COVID-19 pandemic has changed the way that Whitman does business and has seen an increased number of employees that work remotely. As of now, as soon as a PC leaves the on-campus network, WCTS is no longer able to manage that computer consistent with the policies and configurations that exist for traditional on-campus workstations.. This means that Windows updates, security patches, and other software updates may remain uninstalled which leaves the computers in an unsecured state. Also, if a PC user is off campus and changes their network password via myWhitman, the PC they are using off-campus will not update its local cached login information thus causing the client to continue to use their old password. Depending on the situation as to why that password was changed, may be another security issue.

With the A5 licensing, WCTS would gain access to the full suite of Microsoft offerings including InTune and Azure AD. These two components would give us the ability to manage our PC fleet while remote which in turn would enable us to ensure that our PC fleet is up to date with security patches, network password changes, and software updates. Also, additional features of the A5 license might be leveraged by other teams within WCTS i.e. Information Security Office and the Identity and Access Management team.

Currently, we pay \$35,455.84 for our A3 Microsoft license. I am proposing a \$40,000 increase to that as A5 licensing would be \$75,334.08.

Jamf Connect license purchase - \$3000 annually

Jamf Connect is an add-on service to our current Jamf Pro software suite that manages the campus' Apple fleet of computers. Jamf Connect will allow for additional security protections and flexibility for our computer users. Currently, Macs on campus require a local account to be created for each user to allow for access to that computer. This account addition must be done physically at the computer by an IT staff member. These local accounts' passwords are not able to be managed remotely by the IT team and if a user forgets their password or if an additional user wants to use the computer, the computer must be touched by an IT administrator to retrieve and/or change the password for the client or create another profile. Additionally, confusion is had when a client sets the local password to be the same as their Whitman services password and they then change the Whitman password and do not realize/remember that the Mac password is set separately (locally). With Jamf Connect, the Mac computer fleet is connected to the campus network for login credentials, meaning that the password they use for other Whitman services would also be used to log into their Apple computer. This allows the client to change their password in one location and not need to remember additional passwords. As the trend continues to remote work possibilities, Jamf Connect also allows for additional Mobile Device Management (MDM). The IT team can move toward a zero-touch deployment model. This means that Apple devices that are owned and managed by Whitman can be shipped directly to remote users without the need to have the device go through WCTS. Devices sent to the client will acquire all Whitman licensed and configured products on initial login by the client in their home or remote office location. This option will save both time and money for the college as it does not require hours of IT time to unbox, provision, create a user account, and transfer data from the old to the new computer. All of this is accomplished by the client on their first log in to the new device. Additional security options this affords us, includes the ability to require multi-factor authentication (MFA) on our Mac devices. As the college moves to implement MFA, we will have the option to include that requirement on the login screen of our mobile Mac devices, if we so choose in the future.

Digital Advertising

In an increasingly competitive higher ed landscape, it is critical that Whitman use all the tools available to reach and recruit prospective students and their families. Given the prevalence of digital media use for our target audience, digital advertising is a key resource that could help increase the number of our inquiries and applicants—and ultimately admitted students.

This fall, Communications executed a targeted digital advertising campaign using surplus funds. The two-month campaign aimed at Washington state high school students saw exciting results. Our Facebook reach increased by more than 200,000 and our Instagram reach saw a more than 80-thousand increase. During the eight weeks running ads, the number of people visiting our Facebook and Instagram accounts increased by 29% and we saw an 11% increase in followers. Below are some other highlights:

- Our ads were viewed more than one million times reaching more than 172,000 people
- The ads saw more than 17,000 likes, shares or clicks
- Nearly 4,000 people clicked the “Learn More” button and were redirected to our [WA state landing page](#) on whitman.edu
- Visitors to the landing page stayed an average of nearly seven minutes. Studies show that the average time that a site visitor spends on a webpage is 52 seconds.
- By location our ads were seen 81% by WA residents, 16% by OR residents, 2% by ID residents and the rest by others outside these states
- This was all accomplished in house with a small budget

When we look at what our panel of 19 peers are spending on recruitment marketing, Whitman falls in the middle with competitors like Reed and Macalester spending double what we currently spend on marketing the college to prospective students.

I have spoken with potential marketing partners who specialize in higher ed, including Carnegie Dartlet, Ruffalo Noel Levitz, Converge and OHO, to better understand the services they offer and the costs. Their partnership would amplify the college’s marketing to convert students and their parents to a specific action, which may be related to seeking more information, applying, enrolling, attending an event, meeting deadlines, etc. They offer strategic support and execute ads for specified time frames to communicate Whitman’s story to the market and to ensure prospective students are connecting with us in the critical moments of their college search. The range is between \$30,000 and \$150,000 and despite being at the lower end of this price range, I think the amount requested is a good start and will help increase overall awareness, brand affinity and enrollment for Whitman.

It is worth noting that the discretionary budget in this area currently does not include any recruitment marketing costs. The budget for other recruitment marketing sits in the Admission budget at this time. However, since the digital marketing work happens in Communications, Adam and I agree that the placement for this work makes the most sense in Communications at this time, but of course, we would be willing to revisit that in the future.

Web Content Specialist

During a college search, surveys show that an institution's website remains the number tool for prospective students and their families to find the information that directly affects decision making. Whitman sends tens of thousands of recruitment materials to prospective students and families each admission cycle, and each one of those direct students and families back to the Whitman website. For that reason, it is critical that the website is optimized to tell Whitman's story in a clear and compelling way. With more than 6,000 active web pages—many that need to be updated cyclically or often—it is a dynamic and ever-changing process that requires staff time and resources.

Currently, simple website updates are managed by technical staff and student workers, with new content primarily executed by freelance writers with communications staff managing the work. However, this recruitment writing and oversight would best be served by having a single staff member whose sole purpose is to make sure recruitment and academic information is up to date and relevant to today's students. Having website content created in-house will allow for better collaboration with stakeholders across campus, more ownership of the work and a lower likelihood of out-of-date web content.

Therefore, I propose that I move \$45,000 from my discretionary budget that is used for freelance writing and add \$10,000 as requested here to create the annual salary for a web content specialist to oversee this work.