



PRESIDENT'S BUDGET ADVISORY COMMITTEE

December 6, 2024
Jeff Hamrick, Ph.D., CFA, FRM
Vice President for Finance and Administration

I'm looking forward to our meeting this Friday. The primary agenda for this longer-than-typical is to obtain PBAC's feedback about budget initiative proposals (BIPs) for fiscal year 2026. The President's Cabinet has already done a preliminary review but will not finalize any decisions until early January 2025. (Budget documents get sent along to the trustees towards the end of January 2025.)

The President's Cabinet will be joining us for the first part of this meeting, both to offer insights but also to hear your feedback directly.

The back-up documentation sent along by the various vice presidents in connection with their budget initiative proposals (BIPs) is stored in a shared folder.

There is a four-tab spreadsheet summarizing all BIPs. Those four tabs are organized as follows:

- Requests for non-compensation base budget.
- Requests for fractional or full-time staff positions.
- Requests for new student salary/OPE budget dollars.
- Requests for one-time funds (mostly for capital projects).

There are some notes below the signature line with suggestions as to how to read or to interpret the spreadsheets. If Cabinet's initial thinking is translated into "Fund," "Partially Fund," or "Defer" decisions, the current draft fiscal year 2026 budget cap is as follows:

- Initial fiscal year 2026 budget-balancing challenge: approximately \$1.4 million.
- Staff position BIPs that seem likely to be funded: +\$69,000.
- Student salary/OPE BIPs that seem likely to be funded: +\$140,000.
- Non-compensation BIPs that seem likely to be funded: +\$575,000.
- Resulting total fiscal year 2025 budget-balancing challenge: approximately \$2.18 million.

Given the 30% / 70% split between the First and Second Working Groups, respectively, those groups would have budget balancing targets of approximately \$655,000 and approximately \$1,529,000. Both groups have been working steadily over the fall semester to start drafting lists of possible budget cuts to roll out with the start of fiscal year 2026. Please don't hesitate to let me know if you have any questions or concerns.

BIP #	BIP Type	Initiative Name	Withdrawn (W) or as Withdrawn as Funded (WF)	Decision: Defer, Partial-Fund or Fund	Total Personnel \$ Amount Funded (not including Summer OPE)	Justification	Department or Budget Name	Department/Budget General Ledger Number:	Current (FY25) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Email
1	Non-Personnel	Expansion of Strategic Digital Advertising		Partially Fund	\$15,000	Add several strategies to existing (display retargeting and pay-per-click ads), including platform-specific social media campaigns on YouTube and Instagram, focus on transfer students and TV streaming service ads. Meet potential students with a high ability to pay where they're online. 101 Applications for 2024 were in response to Digital Advertising, and 19 enrollments	Communications – PR & Social Media	1-95-59-80010-5294	\$50,000	\$0	\$30,000	Heidi Pitts	ohnstagg@whitman.edu
2	Non-Personnel	Insurance Increase: Property/Terrorism/Artwork		Fund	\$47,487	Cover increases in property insurance premiums which covers Property/All Risk, Art (and supplement for outdoor art), and Terrorism. BIP calculation is based on FY25 Actual of \$598,546, plus an anticipated 4% premium increase	Property Insurance: Discretionary Budget	1-00-60-40096-5090	\$575,000	\$0	\$47,487	VPFA Jeff Hamrick	harveya@whitman.edu
3	Non-Personnel	Insurance Increase: ELL/GL/AL/Crime		Fund	\$124,000	True up Liability Insurance premium which covers Liability/Base with multiple excess policies, Cyber Risk and Crime. BIP calculation is based on FY25 Actual of \$794,454 plus an anticipated 4% premium increase. Offset by revenue budget BIP, for net budget increase of 11,000.	Liability Insurance: Discretionary Budget	1-00-59-40018-5090	\$702,284	\$0	\$124,000	VPFA Jeff Hamrick	harveya@whitman.edu
4	Non-Personnel	Insurance Dividend Budgeting - ELL/GL/AL		Fund	-\$113,000	Add revenue budget for anticipated annual dividend income from CLIC. Has been a 10% Dividend Payout for the last 5 years. Basis for BIP amount is the FY25 amount of \$113,000. Offsets Insurance increase BIP, for net budget increase of \$11,000.	Liability Insurance: Budgeted Revenue	1-00-59-40018-4010	New Budget	\$0	-\$113,000	VPFA Jeff Hamrick	harveya@whitman.edu
5	Non-Personnel	FlyWire Student Finance		Defer		(1 of 2) Combined with One-Time request BIP #99. Monthly subscription cost to add features to existing Flywire service (currently used to process international wire transfers). Colleague integration and self service for student accounts allows for real time balance updates and autopay for payment plans.	Accounting & Business Services - Services	10,059,400,025,200	\$72,657	\$0	\$23,940	Student Accts	stonecd@whitman.edu
6	Non-Personnel	Athletics - Teamworks/ARMS - Compliance, Facility Scheduling, Recruiting, & Camp Software		Defer		Consolidated with duplicate Athletics BIP. New software solution to streamline Athletics NCAA compliance, athletics recruiting, branding and marketing, camps and clinics, event registration and management, and facilities scheduling.	Institutional Software	1-00-54-60040-5242	New Budget	\$0	\$24,000	Mike Osterman/Kim Chandler	terrio@whitman.edu
7	Non-Personnel	Restoration of full Card Reader Equipment Replacement budget		Fund	\$30,000	Increase lifecycle budget to fund replacement of aging door hardware, card readers and door controllers for 150-400 doors across campus before software compatibility issues arise.	Card Reader Equipment Replacement	1-00-54-60039-5090	\$35,000	\$0	\$30,000	Kevin Kelly, Director of Technology Infrastructure	terrio@whitman.edu
8	Non-Personnel	Google Backup		Defer		Implement backup storage solution for Google Workspaces Plus suite as an additional layer of protection from data loss beyond Google's built in protections	Technology Infrastructure	1-00-54-60002-5090	\$370,771	\$0	\$110,000	Kevin Kelly, Director of Technology Infrastructure	terrio@whitman.edu
9	Non-Personnel	Annual Software Licenses/Maintenance Contract Increases		Fund	\$114,300	\$5,300 Expected increases to software licenses Canvas, Endnote, WebHelpDesk etc. \$16,000 Expected increase to the Cisco SmartNet Maintenance Contract and student printing. \$20,000 Known increases to Ellucian Colleague and associated licenses, and non-Ellucian software licenses: DocLocator, Localist. \$30,000 Increases to information security licenses protecting information assets and technology infrastructure, continue Cyber Liability Insurance. Licenses for intrusion detection/prevention firewall, multifactor authentication, information security awareness training, internal vulnerability identification, Windows server audit logging, privileged access management, managed software deployment, secure document sharing, and endpoint detection and response. \$15,000 Right-sizing the license count for Zoom One Enterprise post implementation of Zoom Phone. \$28,000 New GL to centralize institutional software licenses: BambooHR, VIA TRM and TerraDotta, and Google Workspaces Plus for Education.	Technology Services	1-00-24-60004 and 1-00-54-60002 and 1-00-54-60003 and 1-00-54-60034 and 1-00-59-60025 and 1-00-54-60040	\$2,399,285	\$0	\$114,300	Dan Terrio, Chief Information Officer	terrio@whitman.edu
10	Non-Personnel	Computer Lifecycle Increases		Fund	\$10,000	Increase in inventory as well as computer replacement costs increasing for certain devices that are above our standard configurations. Adjusted 12-13-24 to reduce request per Dan Terrio. \$0 Requested for Administrative and \$10,000 requested for Instructional, instead of \$5,000 and \$15,000 as was originally requested.	Technology Services	1-00-24-60020 and 1-00-54-60021	\$435,800	\$0	\$10,000	Dan Terrio/Robert Fricke	terrio@whitman.edu
11	Non-Personnel	College Board Search Subscription Price Increase		Fund	\$5,250	This is the primary tool to acquire contact information for recruiting prospective students	Admission	1-00-42-50001-5361	\$240,000	\$0	\$5,250	Senior Associate Director of Admission	millera@whitman.edu
12	Non-Personnel	MARKETView Annual Price Increase		Fund	\$5,475	MARKETView is a critical tool in data analytics and financial aid leveraging work	Admission	1-00-42-50001-5200	\$260,000	\$0	\$5,475	VP for Admission & Financial Aid	millera@whitman.edu

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13	Non-Personnel	OCS Instruction Expenses FY26		Fund	\$587,898	Annual budgeted increase in OCS tuition expenses, based on projections for 43% of next year's juniors to study abroad, with a 5% increase in average program tuition.	Off-Campus Studies	1-62-17-20751-5090	\$2,914,272	\$0	\$587,898	Susan Holme	holmesl@whitman.edu
14	Non-Personnel	Centralizing Assessment efforts - Coursedog Assessment Module		Fund	\$39,000	Add features to existing Coursedog service (used by Registrar for scheduling, curricular management). Additional assessment module would allow for centralization of assessment data and streamlined data access for stakeholders.	New WCTS Coursedog budget	1-00-54-600XX	\$0	\$0	\$39,000	Split between Academic Affairs and WCTS	kimh2@whitman.edu
15	Non-Personnel	Audit & Tax Services	WF-40581	Defer		Additional Tax services expense due to expected additional single audit of FY25 (FEMA and SFA)	Audit & Tax Services	1-00-59-40016-5090	\$185,000	\$0	\$5,000	Darlene Wilson, AVP for Finance & Controller	wilsond@whitman.edu
16	Non-Personnel	Magazine Paper Cost Increases		Fund	\$25,000	Whitman Magazine is impacted by increase in paper prices due to demand higher than supply, raw material shortages, and increased energy costs. Costs for paper increased more than \$30,000 between FY23 and FY24.	Content Development	1-95-59-80004-5630	\$166,507	\$0	\$25,000	Ryan Barnes	ohnstagz@whitman.edu
17	Non-Personnel	Involve Platform		Fund	\$10,585	Previously covered by ARC budget, now in DOS. Annual expense of involve software: currently used for managing student activities, fostering connections & tracking engagement	Student Activities	1-97-42-30018-5241	\$22,753	\$0	\$10,585	Juli Dunn	jacobsbk@whitman.edu
18	Non-Personnel	Special Activities Participation Fund (Course Fees)		Defer		Special Activities Scholarships doubled in Fall '24 compared to Fall '23. The DOS requests funding to support this increased level of scholarships which allow students with need to enroll in a course (i.e. SSRAs, Music, Art).	Dean of Students	1-90-43-30269-5090	\$25,000	\$0	\$20,000	Bridget Jacobson	jacobsbk@whitman.edu
19	Non-Personnel	College Creek Village Supplies		Fund	\$2,150	Discretionary spending for new CCV Res Life staff & student positions, for supplies & decorations. Based on CCV Pro Forma amount.	Residence Life and Housing	3-96-81-30127-5090	\$543,007	\$0	\$2,150	Andrew Johnson	jacobsbk@whitman.edu
20	Non-Personnel	Equity & Inclusion in Outdoor Recreation: Adaptive Equipment Acquisition and Sustainability Plan		Fund	\$5,500	(1 of 2) Combined with One-Time request BIP #100. Maintain new adaptive outdoor recreation equipment for climbing, water sports and trails. Base budget increase of \$5,500 for maintenance, replacement and promotion	Student Activities	1-97-43-30023-5090	\$0	\$0	\$5,500	Juli Dunn	jacobsbk@whitman.edu
21	Non-Personnel	Travel Funds: Men's Tennis	WF-10050	Withdrawn as Funded		Increased hotel, food and laundry expenses for Spring Break due to no VRBO, Airbnb or Family home policy (historically used a private home for free).	SSRA - Men's Tennis	1-58-41-20118	\$35,625	\$0	\$11,970	Kim Chandler/Jeff Northam	chandlkc@whitman.edu
22	Non-Personnel	Travel Funds: Women's Tennis	WF-10050	Withdrawn as Funded		Increased hotel, food and laundry expenses for Spring Break due to no VRBO, Airbnb or Family home policy (historically used a private home for free).	SSRA - Women's Tennis	1-58-41-20119	\$35,625	\$0	\$10,000	Kim Chandler/John Hein	chandlkc@whitman.edu
23	Non-Personnel	Travel Funds: Men's & Women's Golf	WF-10050	Withdrawn as Funded		Increased hotel, food and laundry expenses due to no VRBO or Airbnb policy.	SSRA - Men's and Women's Golf	1-58-41-20113	\$69,160	\$0	\$11,000	Kim Chandler/Skip Molitor	chandlkc@whitman.edu
24	Non-Personnel	Travel Funds: Women's Lacrosse		Defer		Additional travel expenses for lacrosse, must travel to compete. Includes funds to travel to southern CA to meet NCAA expected 17 games.	SSRA - Women's Lacrosse	1-58-41-20499	\$52,000	\$0	\$17,500	Kim Chandler/Chris Duncan	chandlkc@whitman.edu
25	Non-Personnel	Travel Funds: M/W Cross Country/Distance Track		Defer		Additional travel expenses for cross country, haven't been able to attend NCAA annual minimum of 6 meets due to travel expenses. Also includes funding for Bi-annual flights to California for regional meet.	SSRA - Cross Country/Distance Track	1-58-41-20112	\$58,900	\$0	\$19,500	Kim Chandler/Scott Shields	chandlkc@whitman.edu
26	Non-Personnel	Travel Funds: M/W Swimming		Defer		Additional travel expenses for swimming, largest roster size in athletics with room to grow if travel costs are provided.	SSRA: Swimming	1-58-41-20117	\$98,150	\$0	\$38,894	Kim Chandler/Jenn Blomme	chandlkc@whitman.edu
27	Non-Personnel	Travel Funds: Baseball		Defer		10% increase in travel expenses for baseball, due to larger roster size and 40 game requirement per NCAA	SSRA - Baseball	1-58-41-20109	\$82,650	\$0	\$13,500	Kim Chandler/Brian Kitamura	chandlkc@whitman.edu

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28	Non-Personnel	Recruitment Funds: Women's Soccer		Defer		Fund new recruiting in Bay Area and Southern CA.	SSRA- Women's Soccer	1-58-41-20116	\$57,075	\$0	\$3,000	Kim Chandler/Michelle Voiland	chandlkc@whitman.edu
29	Non-Personnel	Recruiting Funds - Men's Soccer		Defer		Fund new recruiting in Phoenix, California and Las Vegas	SSRA - Men's Soccer	1-58-41-20115	\$57,075	\$0	\$4,000	Kim Chandler/Jose Cedeno	chandlkc@whitman.edu
30	Non-Personnel	Digital Endowment Donor Impact Reports (DEDIR)	W	Withdrawn		Benefits of switching to digital endowment/impact reports with the Odder software include saving staff time – online platforms help with merging and creation of reports, and eliminate printing, folding, stuffing, and mailing. It will also provide an enhanced donor experience with more engaging content, such as a gratitude video message from a student.	Development - Stewardship Communications	1-91-55-70005-5090	\$5,400	\$0	\$6,050	Amy Lenahan	setchesj@whitman.edu
31	Non-Personnel	Reunion Equipment and Rentals (RER)	W	Withdrawn		The reunion equipment and rental request will help us offset increased costs, including those for successful all-alumni events downtown like the one introduced this year in part to avoid student demonstrations. We also intend to raise reunion registration fees to help cover part of these costs.	Alumni Relations - Reunion	1-86-56-70014-	\$55,575	\$0	\$5,000	Jennifer Northam	setchesj@whitman.edu
32	Non-Personnel	Sustainability Recycling Program Non Personnel		Fund	\$3,582	(1 of 2) Combined with Student Personnel Request BIP #63. Supplies to address recycling inefficiencies, enhance recycling efforts across campus, and support the Sustainability Department in promoting waste minimization. Facilitate the implementation of a comprehensive recycling education and outreach program.	Sustainability	1-00-60-40780		\$0	\$3,582	Sustainability Manager	ichsan@whitman.edu
33	Non-Personnel	Sustainability EcoReps Program Non Personnel		Fund	\$7,859	(1 of 2) Combined with Student Personnel Request BIP #64. Materials to support and expand EcoReps program for peer-to-peer sustainability learning and engagement across the student body	Sustainability	1-00-60-40780		\$0	\$7,859	Sustainability Manager	ichsan@whitman.edu
34 a	Non-Personnel	Electricity Rate Increases		Fund	\$54,000	Anticipated rate increase for campus electricity	Utilities	1-94-60-40095		\$0	\$54,000	Tony Ichsan	ichsan@whitman.edu
34 b	Non-Personnel	Electricity Rate Increases		Fund	\$83,110	Increased costs for electricity due to new square footage/additional bldgs on electrical meters	Utilities	1-94-60-40095		\$0	\$83,110	Tony Ichsan	ichsan@whitman.edu
34 c	Non-Personnel	Electricity Rate Increases		Fund	\$13,333	Electric utility price increases for on-campus housing. Total for all utilities of \$40,000 set in conversation with the CFO.(Broken down into approximately \$13,333 for each of electric, gas, and water/sewer/garbage.)	Utilities	3-96-81-30342-5090	All RH Utilities budget of \$670,000	\$0	\$13,333	Andrew Johnson	johnsoam@whitman.edu
35 a	Non-Personnel	Natural Gas Rate Increases		Fund	\$46,000	Potential increase of campus natural gas prices and longer periods of gas usage due to climate/temp. impacts.	Utilities	1-94-60-40096		\$0	\$46,000	Tony Ichsan	ichsan@whitman.edu
35 b	Non-Personnel	Natural Gas Rate Increases		Fund	\$32,525	Anticipated increase in natural gas usage due to new square footage/additional bldgs in service	Utilities	1-94-60-40096		\$0	\$32,525	Tony Ichsan	ichsan@whitman.edu
35 c	Non-Personnel	Natural Gas Rate Increases		Fund	\$13,333	Natural Gas utility price increases for on-campus housing. Total for all utilities of \$40,000 set in conversation with the CFO.(Broken down into approximately \$13,333 for each of electric, gas, and water/sewer/garbage.)	Utilities	3-96-81-30342-5090	All RH Utilities budget of \$670,000	\$0	\$13,333	Andrew Johnson	johnsoam@whitman.edu
36 a	Non-Personnel	Water Rate Increases		Fund	\$31,000	Anticipated rate increase for campus water	Utilities	1-94-60-40097		\$0	\$31,000	Tony Ichsan	ichsan@whitman.edu
36 b	Non-Personnel	Water Rate Increases		Fund	\$50,399	Increased costs for water and sewage due to new square footage/ additional bldgs on water meters	Utilities	1-94-60-40097		\$0	\$50,399	Tony Ichsan	ichsan@whitman.edu
36 c	Non-Personnel	Water Rate Increases		Fund	\$13,333	Water/Sewer utility price increases for on-campus housing. Total for all utilities of \$40,000 set in conversation with the CFO.(Broken down into approximately \$13,333 for each of electric, gas, and water/sewer/garbage.)	Utilities	3-96-81-30342-5090	All RH Utilities budget of \$670,000	\$0	\$13,333	Andrew Johnson	johnsoam@whitman.edu
37	Non-Personnel	DIV II office discretionary		Defer		(1 of 2) Combined with Student Personnel Request BIP #66. True up Division II office budget for supplies etc due to inflation.	DIV II- Office	1-54-19-20093-5090	\$16,376	\$0	\$544	DIV II Chair	jiaq@whitman.edu
38	Non-Personnel	Whitman @ WSP program Discretionary		Partially Fund	\$19,600	New budget for formalized Washington State Penitentiary program contract staffing, books and materials.	Whitman@WSP	1-50-29-2XXXX-XXX X	\$0	\$0	\$39,200	The faculty coordinator and the Provost	jiaq@whitman.edu

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39	Non-Personnel	Northwest Museum	WF - 40581 and 10051	Withdrawn as Funded		NAGPRA compliance for repatriation of 500 objects in Whitman collections requiring consultation with Tribes. Funding for two consultation visits per year, going forward for at least 5 years.	Northwest Museum	1-53-29-20005-5090	\$5,915	\$0	\$3,500	Libby Miller	jiaq@whitman.edu
40	Non-Personnel	ARC equipment for Accessibility	WF - ARC 20930	Withdrawn as Funded		Increase discretionary budget for technology supplies for accessibility-related reasons for student (e.g., braille books, printer, text-to-speech, etc.)	Academic Resource Center	1-87-29-20930-5090	\$0	\$0	\$85,500	Richard Middleton-Kaplan	jiaq@whitman.edu
41	Non-Personnel	PDOF Faculty Moving		Defer		True up faculty moving budget. Median moving costs approximately \$10,000 for tenure-track faculty members and \$6,500 for VAPs. Anticipate 6-8 tenure-track hires and 13-15 visiting hires in FY26. Looking forward, 40 faculty will be eligible to take sabbatical during the 26-27 academic year.	PDOF	1-50-29-20014-5090	\$60,000	\$0	\$117,500	Elisabeth Mermann-Jozwiak/ Atarah Pinder	jiaq@whitman.edu
42	Non-Personnel	PDOF Faculty Recruiting		Partially Fund	\$45,000	True up faculty recruiting budget. Median recruiting costs in FY24 were \$9,600 for Tenure Track and \$2,900 for VAPs. Plus advertising, conferences and background checks. Anticipate 6-8 tenure-track hires and 13-15 visiting hires in FY26. Looking forward, 40 faculty will be eligible to take sabbatical during the 26-27 academic year.	PDOF	1-50-29-20015-5090	\$90,000	\$0	\$94,000	Elisabeth Mermann-Jozwiak/ Atarah Pinder	jiaq@whitman.edu
44	Personnel - Staff	Assistant Director of Financial Aid		Defer		Additional position of an Assistant Financial Aid Director, 1.0 FTE in order to fully staff the financial aid office. In order to be fully compliant with this regulation for Administrative Capability, the financial aid office is required to have the ability to maintain processing and procedures, have the ability to complete tasks that allow financial aid staff to function as an engaged member of the Whitman Community	Financial Aid	1-00-42-50002-5010	\$280,684	\$60,000	\$0	Director of Financial Aid	millera@whitman.edu
45	Personnel - Staff	Care Coordinator Permanent Funding		Fund	\$40,713	Care Coordinator salary was previously charged to Tabbutt Endowment, but the payout is insufficient for full funding. DOS was able to reallocate \$15,892 from Debate budgets to partially fund the position internally. The BIP is for the balance of the salary that wasn't able to be covered through re-allocation.	VP Student Affairs Office	1-90-42-30001-5010	\$504,766	\$30,158	\$0	Care Coordinator	jacobsbk@whitman.edu
46	Personnel - Staff	Associate Director of Housing Operations		Fund	\$88,425	Salary for Professional salary in Res Life to support CCV, per CCV Pro Forma.	Residence Life and Housing	3-96-81-30127-5010 (GL to be determined)	\$271,488	\$65,500	\$0	Andrew Johnson	jacobsbk@whitman.edu
47	Personnel - Staff	Custodian		Fund	\$52,650	Additional 1.0 FTE permanent Custodian to provide coverage for new square footage (e.g. Baseball Clubhouse, Third Space, Panhellenic Interest House) coming online and the Jr Sr Village.	Custodial	1-94-60-40090		\$39,000	\$0	Cory Kiesz	ichsan@whitman.edu
48	Personnel - Staff	General Maintenance Technician		Fund	\$64,800	Additional 1 FTE maintenance position to support Academic, Administrative and Residence Housing. Increase capacity for work orders for new facilities such as a Panhellenic Interest House, Third Space House, Fraternity Houses, and the Baseball Clubhouse.	Maintenance	1-94-60-40089		\$48,000	\$0	Mike Willard	ichsan@whitman.edu
49	Personnel - Staff	Landscape Specialist		Fund	\$55,350	Grounds department 1.0 FTE Landscape Specialist position for Jr/Sr Village, over 1500 grass plants annually as well as maintaining shrub beds, snow and ice removal in the winter. All seven of the new interest houses will require mowing and shrub bed maintenance.	Grounds	1-94-60-40094		\$41,000	\$0	Jeff Jensen	ichsan@whitman.edu
50	Personnel - Staff	Sustainability Coordinator (50-50 with WWPS)		Defer		0.5 FTE of split position in partnership with WWPS for Sustainability Coordinator. Connect CCEG students with public schools, support Sustainability Manager in implementation of the Campus Sustainability Plan and the Energy Renewal/Decarbonization Plan.	Sustainability	1-00-60-40780		\$27,000	\$0	Sustainability Manager	ichsan@whitman.edu
51	Personnel - Staff	Science Equipment Technician		Defer		New 1 FTE position for instrument maintenance to relieve Faculty hours spent on repairs	DIV III Office	1-55-19-20094-5030	\$436,232	\$75,000	\$0	DIV III Chair	jiaq@whitman.edu
52	Personnel - Staff	Outreach Coordinator		Defer		New 1 FTE position to fill gap left by expired Mellon Foundation Grant for Community Engaged Learning and Research (CELR). Position will build and support community STEM opportunities.	PDOF/DIV III	1-55-19-20094-5030	\$436,232	\$61,360	\$0	Elisabeth Mermann-Jozwiak and DIV III Chair	jiaq@whitman.edu

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54	Personnel - Staff	Hunter Admin		Defer		Establish budget for Hunter Administrative Assistant, currently Rika Groff in position funded by Provost, working 195 hours each year.	DIV II Office	1-54-19-20093-5150	\$21,859	\$4,220	\$0	DIVII Chair	jiaq@whitman.edu
56	Personnel - Staff	ARC Testing and Tutoring Coordinator position		Defer		Increase Testing and Tutoring Coordinator position from .83 to 1 and adjust salary for increased duties.	Academic Resource Center	1-87-29-20930-5030	\$295,858	\$16,000	\$0	Richard Middleton-Kaplan	jiaq@whitman.edu
57	Personnel - Staff	PDOF: Pre-Major Advising stipends		Defer		True up advising budget. Summer Registration Assistance (SRA) rate is \$500 to work with 7 students over the summer, \$72/student additional. During academic year, Pre-major advisors (non-faculty) receive \$100/student/year. In FY 2024, actual stipends paid were \$54,488 on advising stipends.	PDOF	1-51-11-20952-5110	\$33,995	\$21,000	\$0	Helen Kim/Atarah Pinder	jiaq@whitman.edu
58	Personnel - Students	Student Wage Minimum Wage Increase Pool		Fund	\$49,311	New budget for centralized management of Student Worker minimum wages increases. BIP calculation based on 2.35% minimum wage increase on planned \$2,098,366 SSCOB amount.	Minimum Wage Increase Pool: Student Wage Budget	1-00-59-41371-5005	New Budget	\$49,311	\$0	VPFA Jeff Hamrick	harveya@whitman.edu
59	Personnel - Students	Student Wage Summer OPE Increase		Fund	\$1,427	Based on FY24 Actual Summer Student Wages of \$60,723. OPE paid at 9% Reduced rate, plus 2.35% increase to account for minimum wage increase.	Minimum Wage Increase Pool: OPE Budget	1-00-59-41371-5030	New Budget	\$1,427	\$0	VPFA Jeff Hamrick	harveya@whitman.edu
60	Personnel - Students	3 Student Community Managers for CCV		Fund	\$17,850	Residence Life at CCV. Three student Community managers, paid hourly in lieu of full discount on housing. Based on CCV Pro Forma amount.	Residence Life and Housing	3-96-81-30127-5010	\$271,488	\$17,850	\$0	Andrew Johnson	jacobsbk@whitman.edu
61	Personnel - Students	Student Employment Funding - Athletics		Partially Fund	\$20,000	4,600 Hours of student workers for combined Sherwood center supervision and gender equitable laundry services	SSRA - Athletics General	1-58-41-20108/1-58-41-20346	\$234,000	\$76,130	\$0	Kim Chandler/Stephen Gall	chandlk@whitman.edu
62	Personnel - Students	Summer Conference Coordinator (student wages)		Fund	\$4,000	Due to the loss of the 0.5 FTE Coordinator position, replace with student at an RD or RA level to provide leadership to Summer Conference student workers.	Conference Events Scheduling	1-00-60-41006	New Budget	\$4,000	\$0	Jennifer Casper	ichsan@whitman.edu
63	Personnel - Students	Sustainability Recycling Program Student Personnel		Fund	\$13,500	(2 of 2) Combined with Non-Personnel request BIP #32. Student workers to help address recycling inefficiencies, enhance recycling efforts across campus, and support the Sustainability Department in promoting waste minimization. Facilitate the implementation of a comprehensive recycling education and outreach program.	Sustainability	1-00-60-40780	\$13,500	\$13,500	\$0	Sustainability Manager	ichsan@whitman.edu
64	Personnel - Students	Sustainability EcoReps Program Student Personnel		Fund	\$9,500	(2 of 2) Combined with Non-Personnel Request BIP #33. Student workers to support and expand EcoReps program for peer-to-peer sustainability learning and engagement across the student body. Currently only 2 reps.	Sustainability	1-00-60-40780	\$9,500	\$9,500	\$0	Sustainability Manager	ichsan@whitman.edu
65	Personnel - Students	Classics Dept. new Student Wage budget		Fund	\$1,625	100 student hours in Classics. Position is an accommodation for Daniel Smith, to assist with scanning print books to assist with Daniel's screenreader, along with other document management tasks	Classics - DIV II	1-54-19-20070-5XXX	New Budget	\$1,625	\$0	Kate Shea/Elisabeth Mermann-Jozwiak	jiaq@whitman.edu
66	Personnel - Students	DIV II student labor		Defer		(2 of 2) Combined with Non-Personnel Request BIP #37. True up Division II office budget for student wages due to inflation.	DIV II-Office	1-54-19-20093-5XXX	\$16,376	\$2,320	\$0	DIV II Chair	jiaq@whitman.edu
67	Personnel - Students	Social Justice Concentration		Fund	\$2,500	Build up new program by adding a student worker to the Social Justice Fellows program for social media, event attendance, assistance to SJ110.	Social Justice Concentration	1-54-19-21041-5XXX	\$2,500	\$3,000	\$0	Program director and the Provost	jiaq@whitman.edu
68	Personnel - Students	ARC Student wage budget		Partially Fund	\$20,000	Additional student labor to meet increasing demand for peer tutoring and notetakers (tutoring requests have doubled from last fall). See justification for reason they decided against purchasing the GLEAN notetaking program	Academic Resource Center	1-87-29-20930-5XXX	\$89,498	\$79,691	\$0	Richard Middleton-Kaplan	jiaq@whitman.edu

BIP #	BIP Type	Initiative Name	Withdrawn (W) or as Withdrawn as Funded (WF)	Decision: Defer, Partial-Fund or Fund	Total Personnel \$ Amount Funded (not including Summer OPE)	Justification	Department or Budget Name	Department/Budget General Ledger Number:	Current (FY25) Budget Amount	Incremental Personnel Budget without OPE	Incremental Non-Personnel Budget	Responsible Staff Person or Position	Email
110	Non-Personnel	CUPA compensation benchmarking data		Fund	\$3,500	There is not currently a line item for purchasing of our compensation data, which means that some years we do not obtain all relevant data. The increase will cover Benchmarking for the following: 1) Administrators in Higher Education 2)Benefits, Employee Experience, and Structure 3) Faculty salary 4) Professionals in Higher Education 5) Staff in Higher Education. The amount requested is reflective of the work that HR completed for this year's surveys, and the significantly reduced pricing afforded to Whitman for being participants in multiple surveys. Accurately benchmarking positions against relevant competitors allows us to hire well, increases likelihood of stronger retention outcomes within the first 3-5 years, and therefore reduces turnover expenditures.	Human Resources: Services	1-98-59-40003-5090	\$32,930	\$0	\$3,500	Erika Cerda	cerdae@whitman.edu

ARC 2025-2026 Budget Request

Submitted by Richard Middleton-Kaplan, Director of Academic Support Services

October 25, 2024

Account Number 1 87 29 20930 5341

Current Budget: \$532,858, of which **\$133,450** is discretionary

Requested increase: \$181,191 (78,009 + \$16,000 + \$1,682 + \$85,500)

\$133,450 discretionary - \$89,498 student wages = \$43,952

REQUEST 1 OF 4: Increase in budget for student peer tutors and notetakers

Current Budget: \$89,498 (carved out of discretionary budget)

Requested increase: \$78,009, for a new total of \$167,507

Rationale: Demand for peer tutoring and notetakers is increasing. For example, six weeks into the Fall 2024 semester, tutoring requests had roughly doubled from the year before. The increase might be attributed to several factors, including increasingly high needs students, increased collaboration between the ARC and other areas (such as supplying STEM Hub Evening Drop-In Tutoring for multiple subjects and multi-discipline planned evening tutoring sessions in residence halls), and more aggressive promotion of tutoring services on our part. We continue to make every effort to meet student needs where and when students can benefit from our service.

The ARC employs more than 150 student workers, and trends suggest the demand for service will only increase.

The requested increase is based on use in the first four (4) week of FA2024. See Appendix A below for a breakdown.

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities I: Academic Excellence and Distinction; II DIEAA; III. A Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships, and IV: Strong Launches After Whitman for All Students.

As Whitman's incoming classes reflect the challenges endured by pandemic-era students, and an increasing percentage of neurodivergent students and students with physical and cognitive disabilities, we have an obligation to make academic support services available to all students who need those services. "Access without support does not equal opportunity," as learning researcher Vincent Tinto has said, and peer tutoring offers essential support for all students. Notetaking for students who have a disability-based accommodation to receive notes represents a legal as well as a moral and ethical obligations to make course notes accessible for our most vulnerable and needy students—and, as with many modifications originating out of rights of access, improved opportunity for all students. These services ensure equitable access and provide

an opportunity to succeed. Regarding Strategic Priority IV, ample evidence exists that working as a peer tutor improves learning not just for the tutee but that also for the tutor themselves in terms of retention, progression, and completion; it would be logical to conclude that it also contributes positively to a strong launch.

Does the request directly support health and safety? No.

Does the request reduce future costs? No. It allows us to keep pace with anticipated future expenses.

Can the request be scaled down?: Last year, we spent \$118,260 for all student workers. It is unlikely that we would be able to do with less as student need is steadily increasing. Notetakers formed the largest part of this, accounting for \$62,826, and therefore presents the richest area for potential reduction. We had hoped to reduced the need for peer notetakers this year with the acquisition of the GLEAN notetaking program, but ultimately, we chose not to make that purchase for several reasons, including:

- The program works well for a small number of students but is forbiddingly multi-faceted and complex for students with ADHD or anxiety disorders, and those students form a significant percentage of students who have an accommodation for receiving notes;
- We did not have staff capacity to train students to become proficient in GLEAN;
- We considered creating a new student worker position for someone who would become the lead in training students with accommodations to use GLEAN. However, that required a staff member to train a student notetaker to become the GLEAN ambassador and leader. We could not find that staff time as fall term approached. Perhaps with more time leading into next fall, we would be able to search, hire, train, and supervise that position. If we could train more students to use GLEAN and become self-sufficient notetakers, we could reduce the cost of paying peer notetakers. A GLEAN license would cost approximately \$15,000 per year; it might be a while before we could obtain an offsetting savings in peer notetakers, but it is possible in the long term.
- We attended an AHEAD Webinar about various notetaking programs and platforms. We learned that none are ideal for all students and that each have drawbacks. We explored as many as we could before the start of the academic year, but we did not have time to explore all. We are hopeful that might find something that will work, but this investigation will require more staff time.

(Request #2 was submitted separately)

REQUEST 2 OF 4: Increase in Testing and Tutoring Coordinator Position from 0.83 to 1.0, and adjustment in salary for increased duties.

Current Budget: \$37,576 (at \$21.35 per hour x 1760 hours) current salary.

Requested increase: \$16,000 (estimate) + OPE

Increasing from 0.83 FTE (1760 hours) to 1.0 FTE (2,080 hours) at same rate of \$21.35 per hour would raise salary to \$44,408 + OPE.

REQUEST 3 OF 4: Increase budget for supplies in ARC testing center.

Current Budget: \$5,608

Requested increase: Increase of \$1,682, or 30%, resulting in a new total of \$7,290.

Rationale: With increasing numbers of students with disabilities using ARC testing facilities, we will be printing more exams, thereby using more printer cartridges and paper, and we will need more testing supplies such as pencils, scratch paper, calculators, and so on.

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities I: Academic Excellence and Distinction; II DIEAA; III. A Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships. Having supplies on hand ensures that students have a properly equipped testing center which can provide an equitable and welcoming testing environment.

Does the request directly support health and safety? No, but it does help to keep students inside the safe and controlled environment of the testing center. Having supplies on hand also reduces the need for students to leave the room to retrieve supplies, or having the proctor leave, either of which could compromise the integrity of the testing.

Does the request reduce future costs? No.

Can the request be scaled down? The cost will depend on student need. We do need to print exams, provide paper and pencils, and so on, in accord with the number of tests.

REQUEST 4 OF 4: Increase baseline to account for textbooks and supplies for at least one blind student—and possibly more.

Current Budget: \$0.

Requested increase: \$85,500.

Rationale: This year has been a learning experience for the ARC in meeting the technology needs of a fully blind student. Textbook conversion to Braille, a Braille embosser, a Braille printer, text-to-speech technology such as JAWS, and other purchases are beyond what our current budget supports. Presently, the ARC purchases these materials with the plan that they will be back-filled at the end of each semester or academic year from the Life Cycle fund managed by Jeff Hamrick. Jeff has advised me that we should begin building in baseline requests for these expenses now, with the expectation that it may take several cycles before the expenditure can be moved to baseline. Since serving blind students falls within the ARC's mission, it does seem reasonable to have the economic resources to serve students.

The costs associated with a single blind student for the first eight (8) weeks of FA2024 have been \$21,387.

$\$21,387 \times 2 \text{ semesters} = \$42,774.$

$\$42,774 \times 2 \text{ in anticipation that the College may admit at least one more blind student} = \$85,548.$

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities I: Academic Excellence and Distinction; II DIEAA; III. A Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships. Ensuring an equitable educational opportunity for a blind student meets a legal as well as moral and pedagogical imperatives and diversifies the College's student body.

Does the request directly support health and safety? Yes. A blind student must have the technology to support safe and supportive learning environments inside and between classes.

Does the request reduce future costs? Potentially, yes, although it is difficult to say. Purchase of equipment like a Braille embosser and Braille printer may not need to be repeated and could be used for several students. We have also discovered that individual students use different technologies and software that they have become accustomed to, so depending on individual needs and preferences, there may be additional expenditures. Conversion of textbooks to Braille is expensive, but the total cost of a conversion depends on the subject; for example, graphs and charts are particularly expensive to convert, as is sheet music, so materials will be more expensive for a student in a STEM or Music pathway.

Can the request be scaled down? Insofar as we have legal obligations to provide accessible materials and technology, no. We can certainly work with students to arrive at economical solutions. The request can be deferred as long as the Life Cycle Fund remains a viable source, but at some point this expense should be rolled into the ARC's baseline as it constitutes a fundamental service of the ARC.

APPENDIX A: BREAKDOWN FOR REQUEST 1: INCREASE IN BUDGET FOR STUDENT PEER TUTORS AND NOTETAKERS

Peer Tutors:

586 hours for Weeks 1-4 of FA2024.

586 hours x 3.5 to get total hours for 15 weeks of fall term: 2,051 hours

2,051 hours for fall x 2 to get a total for fall and spring together: 4,102 hours

4,102 hours for the academic year x \$16.66 per hour = **\$68,339**

Peer Notetakers

560 hours for Weeks 1-4 of FA2024.

560 hours x 3.5 to get total hours for 15 weeks of fall term: 1,960 hours

1,960 hours for fall x 2 to get a total for fall and spring together: 3,920 hours

In reality, approximately 44% of peer notetaking is for 50-minute classes at \$16.66 per; another 44% is for 90-120 minutes classes which pay \$24.99 per class (or per note); and 12% goes to classes that run two-to-three (2-3) hours, which would pay \$33.32 for two hours or \$49.98 for three hours. Using the lower figure for the last twp, we have:

- 1,725 hours (or 44% of 3,920 total hours) for the academic year x \$16.66 per hour = \$28,738
- 1,725 hours (or 44% of 3,920 total hours) for the academic year x \$24.99 for classes of 90-120 minutes = \$43,108
- 470 hours (or 12% of 3,920 total hours) for the academic year x \$33.32 per note = \$15,660

Total for peer notetakers: \$87,506

ARC Office Student Desk Workers:

25 hours per week x 28 weeks to get a total for fall and spring together: 700 hours

700 hours for the academic year x \$16.66 per hour = **\$11,662**

Total for all ARC Student Workers: \$167,507

REQUEST 2 OF 4: Increase in Testing and Tutoring Coordinator Position from 0.83 to 1.0, and adjustment in salary for increased duties.

Current Budget: \$37,576 (at \$21.35 per hour x 1760 hours) current salary.

Requested increase: \$16,000 (estimate) + OPE

Increasing from 0.83 FTE (1760 hours) to 1.0 FTE (2,080 hours) at same rate of \$21.35 per hour would raise salary to \$44,408 + OPE.

Rationale: The case for a full-time position is amply supported by the skills that Noémie Studer has brought to this job and the necessity we have discovered for summer projects beyond what we envisioned when we designed the position including debriefing in June and hiring and training of notetakers and conducting assessments. That alone would account for the increase from 0.83 to 1.0.

As noted in a draft of a revised job description that I have given to HR, Noémie has not only out-performed her job description with her many efficiency improvements of processes, but since October 2023 she has added many tasks, including duties in the job description of the Assistant Director: Disability Support Services, for which she has been uncompensated. While some of these duties might return to the new Assistant Director when we hire that person, it would make sense for some of these to stay with Noémie both because she developed and/or perfected them and because they do logically fall within her scope.

The provost, HR, and I will need to work on finalizing a revised position description and then to set the salary level. Because that has not yet been done, the amount I have requested here is only a best estimate.

Alignment with Strategic Priorities: Strongly aligned with Strategic Priorities I: Academic Excellence and Distinction; II DIEAA; III. A Vibrant Campus Community That Supports Learning, Thriving and Lifelong Relationships. The Testing and Tutoring Coordinator is not only the major contact for students with accommodations for testing, but is often the first point of contact for all students who come to inquire about ARC services. Ensuring that the ARC testing center is a warm, welcoming place that preserves academic integrity is essential for the college to provide equitable opportunities to students with physical and learning disabilities.

Does the request directly support health and safety? Yes. The Testing and Tutoring Coordinator plays an essential role in assuring that the ARC testing area supports the health and safety of students with physical and learning disabilities who use the testing space. With this statement, I am not using “health and safety” metaphorically; I am referring literally to an issue beyond making the ARC a warm, welcoming environment. For example, we have had multiple instances of students having medical emergencies while testing, and there is always the potential for students’ conditions to be triggered by anything from noise to lighting to other factors of the testing environment. Some students may escalate or become dysregulated due to stress and the nature of their disability, and other students have become confrontational when observed to have violated the ARC’s testing procedures; all these instances require a person skilled in conflict

resolution and able to stay firm and set boundaries that preserve academic integrity while upholding a friendly, warm environment. The vulnerability, anxiety, and conditions with which students come into the testing center makes health and safety issues a daily reality, not a hypothetical chance. She has trained other ARC staff members and student desk coverage workers in responding to emergency and stressful situations likely to arise. Given her exceptional ability to manage and respond to these situations, the more that Noémie can be present, the more the ARC testing center can support the health and safety of all students.

Does the request reduce future costs? Yes. There is a very real retention issue here. Noémie is underpaid for the work she does to the extent that staying in this position at this rate is unsustainable for her and her family. Retaining Noémie at a salary reflective of the work she does would avoid future costs of a replacement search, training, and likely reduction in productivity of a successor.

Can the request be scaled down? I believe that the increase to 1.0 FTE is necessary. As for an upgrade in rank and salary, that will be determined in conversation with HR and the provost as we refine the revised job description.

	A	B	C	D	E	F
1		ARC				
2		Discretionary Budget 2025	133,450.00			
3		Carved out student labor for 2026		89,498.00		
4		Discretionary budget 2026 after carved out student labor	43,952.00			
5	1	Request increase student labor for stu. tutors and notetakers	78,009.00			
6		Total student labor requested for 2026:			167,507.00	(89498+78009)
7	2	Tasting Tutoring position hours increase Salary		16,000.00		
8	3	Supplies for ARC testing center	1,682.00			
9	4	Equips , textbooks and supplies to support one blind student	85,500.00			
10		Total budget increase requested including staff salary:	181,191.00	(1+2+3+4)		(78009+16000+1682+85500)
11		Total operating budget increase requested:	165,191.00	(1+3+4)		(78009+1682+85000)
12		Total operating budget only requested for 2026	209,143.00	(C4+C11)		(43952+165191)
13		Total ARC budget requested for 2026	314,641.00	(133,450+78,009+16,000+1,682+85,500)		

BIP Rationale for Increase in OCS Tuition Expenses FY26

Estimated total expense for OCS Tuition 2025-26: **\$3,502,170***

Increase in FY26 compared to FY25 for OCS Tuition expense: **\$587,898***

How we calculated this figure:

- The size of the junior class (Class of 2026) in 2024-25 is 295 students.
- The size of the current sophomore class (Class of 2027) is much larger than the junior class numbering 403 students currently.
- In 2024-25 about 43% of the junior class will study off campus for one semester.
- If 43% of the 403 students in the sophomore class studies abroad for a semester, that would be 173 students. Assuming some attrition between sophomore and junior year, we used the figure of 170 students for the number we anticipate will participate in OCS in 2025-26.
- While increases in OCS tuition rates have been quite variable since COVID, we used the figure of a 5% increase in average program tuition compared to 2024-25.
- In addition, we have a high level of interest in Oxford University for Spring 2026 and anticipate that 4 students may be admitted to this selective university next year. Since Oxford's tuition typically costs significantly more per semester than Whitman, we added an extra \$30,000 to the total anticipated tuition expenses for FY26 to account for that expense.

For a detailed picture of OCS enrollments, OCS tuition expenses and Whitman tuition revenue, please see the ***OCS Revenue Projection Snapshot 11/6/2024*** also posted in this shared drive.

* These figures only cover semester-long Whitman OCS Partner Programs and do not include anticipated expenses for Semester in the West, which is a Whitman-run program.

Off-Campus Studies
11/18/2024

OCS Revenue Projection Snapshot

	WHITMAN TUITION	PROGRAM TUITION	REVENUE		Avg Program Tuition	% Chg
2015FA	\$1,441,755	\$1,010,273	\$431,482	63 # of Students		
2016SP	\$2,174,075	\$1,583,740	\$590,335	95 # of Students		
TOTAL 2015-16	\$3,615,830	\$2,594,013	\$1,021,817	\$ 16,418	Avg Program Tuition	5.92%
2016FA	\$1,282,230	\$893,305	\$388,925	54 # of Students		
2017sp	\$2,089,560	\$1,421,425	\$668,135	88 # of Students		
TOTAL 2016-17	\$3,371,790	\$2,314,730	\$1,057,060	\$ 16,301	Avg Program Tuition	-0.71%
2017FA	\$1,481,700	\$978,053	\$503,647	60 # of Students		
2018SP	\$2,222,550	\$1,475,504	\$747,046	97 # of Students		
TOTAL 2017-18	\$3,704,250	\$2,453,557	\$1,250,693	\$ 15,628	Avg Program Tuition	-4.13%
2018FA	\$2,311,650	\$1,485,937	\$825,713	90 # of Students		
2019SP	\$2,414,390	\$1,584,716	\$829,674	94 # of Students		
TOTAL 2018-19	\$4,726,040	\$3,070,653	\$1,655,387	\$ 16,688	Avg Program Tuition	6.79%
2019FA	\$1,335,500	\$871,416	\$464,084	50 # of Students		
2020SP	\$2,136,800	\$1,385,570	\$751,230	80 # of Students		
TOTAL 2019-20	\$3,472,300	\$2,256,986	\$1,215,314	\$ 17,361	Avg Program Tuition	4.03%
2021FA	\$379,660	\$238,170	\$141,490	14 # of Students		
2022SP	\$1,639,020	\$1,063,298	\$575,722	59 # of Students		
TOTAL 2021-22	\$2,018,680	\$1,301,468	\$717,212	\$ 17,828	Avg OCS Program Tuition	2.69%
2022FA	\$494,700	\$346,052	\$148,648	17 # of Students		
2023SP	\$2,415,300	\$1,538,644	\$876,656	83 # of Students		
TOTAL 2022-23*	\$2,910,000	\$1,884,696	\$1,025,304	\$ 18,847	Avg OCS Program Tuition	5.71%
2023FA	\$1,160,330	\$721,436	\$438,894	38 # of Students		
2024SP	\$3,847,410	\$2,514,204	\$1,333,206	126 # of Students		
TOTAL 2023-24	\$5,007,740	\$3,235,640	\$1,772,100	\$ 19,730	Avg Program Tuition	4.68%
2024FA	\$1,143,180	\$683,613	\$459,567	36 # of Students		
2025SP	\$3,111,990	\$1,922,607	\$1,189,383	98 # of Students		
TOTAL 2024-25	\$4,255,170	\$2,606,220	\$1,648,950	\$ 19,449	Avg OCS Program Tuition	-1.42%
2025FA	\$1,816,386	\$1,133,055	\$683,331	55 # of Students		
2026SP	\$3,797,898	\$2,369,115	\$1,428,783	115 # of Students		
TOTAL 2025-26	\$5,614,284	\$3,502,170	\$2,112,114	\$ 20,601	Avg OCS Program Tuition	5.00%

*Numbers in red are forecast.

NOTES ON FORECAST:

- The forecasted Whitman tuition is based on a 4% increase
- The forecasted OCS program tuition is based on a 5% increase over the previous year's "Avg Program Tuition" plus estimated Oxford tuition costs for 4 students.
- The number of students in the class of 2027 reported in Sep 2024 is 403.
- The number of students in the class of 2026 reported in Sep 2024 is 295.

The Clise Planetarium is a valuable resource for Whitman students and for the surrounding community and has been for many decades. The projector in the planetarium needs to be replaced soon.

We use the projector in all of our introductory courses — Astronomy 110, 177, 178, 179 — as well as for presentations for both Whitman and community groups.

We serve close to 2,000 people each year, including:

- We use it in all of our introductory courses to demonstrate astronomical coordinates; how the sky changes over the night / month / seasons / year; how the sky varies depending on where on Earth you are. This reaches 80 - 100 students each year. This is a hugely valuable piece of equipment for helping our students visualize the sky, especially in Astr 177 where understanding how to read a star map and how objects are located in the sky is a substantial piece of the course content. In the non-majors' ASTR110 course, visits to the planetarium give the students a chance to interact with the material in a novel manner and help to cement important concepts about our place in the solar system. Without the planetarium, it is difficult to connect the three-dimensional sky to the star charts and images the students see in class.
- We serve other members of the campus community: e.g., we do shows for dorm section study breaks and intend to return to the full day of student-led shows we were in the habit of offering for family weekend pre-Covid. (Deaths in the family prevented AKD from organizing that in both Fall 2023 and 2024.) That is another 400-500 members of the Whitman community each year.
- We do shows for some groups for Admission visitors, e.g., when they have a high school class visiting.
- We occasionally do shows for groups of Alumni.
- Each year some of our students learn to run the equipment: Several of our Astronomy alumni have gotten jobs at science museums because they have learned here how to do planetarium shows.
- We see almost all of the local school children (Walla Walla, College Place, Milton-Freewater, and nearby communities) at some point in their education. Our planetarium presentations

are live, not canned, and address the learning objectives for the various age groups. We also do shows for a range of community groups. We often host people from quite a distance (e.g., Elgin, Boardman) including hosting groups from the CTUIR a few times.

The planetarium projector is 21 years old. Spitz, the company that manufactured it, stopped producing parts or maintaining our model a couple of years ago.

Last spring Mars stopped moving. This fall the Daily Motion began to fail. Being able to show how the sky changes over the night is the most important function, so if it stops moving, we've lost an essential function. We are stopped, too.

We are just now starting to look at possible replacement projectors. We have not yet gotten any quotes, but we expect that the cost will be around \$350,000 - \$400,000. And we are looking back into how we funded the current projector in 2003.

We would like to make sure that College leaders are aware that this important academic and outreach instrument is failing and in need of replacement. We expect that by early January we should be able to provide a more detailed estimate of the replacement cost.

Andrea K Dobson

Chair, Dept. of Astronomy

Note from Qi: Ruth, as a local school board member, mentioned that the department will also explore possibilities for receiving local grants. There may be a reserved fund called Braden under the Treasure's office could be used for this request. (11.20.2024)

Rationale re: BIP for Coursedog Assessment Module

In its July 2024 letter regarding our Year 7 Re-accreditation visit, the Northwest Commission on Colleges and Universities delivered the following two recommendations:

Recommendation 1: Spring 2024 Evaluation of Institutional Effectiveness - Continue improving its system of assessment to be effective in evaluating the quality of learning in its programs. (2020 Standard(s) 1.C.5)

Recommendation 2: Spring 2024 Evaluation of Institutional Effectiveness - Demonstrate systematic evaluation and planning processes to inform and refine its effectiveness and assign resources in support of student learning and achievement. (2020 Standard(s) 1.B.1)

Currently our assessment processes and the assessment data we collect regarding both of these standards are highly decentralized and siloed. While the assessment data are housed within our Office of Institutional Research, we do not have a centralized platform that brings processes and information together that multiple individuals and units can access to improve upon programmatic and institutional outcomes and to assign resources in support of student learning and achievement.

The college has invested in Coursedog and will be launching this platform for scheduling, curricular management and other academic operations beginning next semester and the following academic year. Coursedog provides an assessment module for purchase that can centralize our assessment processes and data via a common platform while also allowing individuals and units to have immediate access to this data. Having a centralized and common platform to bring processes and information together that is readily accessible will also reduce the amount of time that the staff in the Office of Institutional Research currently devote to responding to numerous individual demands for data from multiple individuals and units across campus.



Coursedog

Pricing Proposal

Prepared for: Whitman College



About

Expires on: Dec 22, 2024

Coursedog

Coursedog Pricing Proposal | Whitman College | Expires on: Dec 22, 2024

90%

reduction in

Investment Summary

Pricing includes unmetered access to:

- Unlimited forms and approval workflows
- Unlimited reports
- Unlimited custom fields
- Unlimited data exports
- Unlimited users and catalogs
- Unlimited business roles and RBAC

Assessment Management

Product	Year 1	Year 2	Year 3	Total
Assessment	\$29,355	\$30,823	\$32,364	\$92,542
Implementation Service Fee	\$23,484	-	-	\$23,484
Upfront Payment Discount	(\$13,881.30)	-	-	(\$13,881.30)
	\$38,957.7	\$30,823	\$32,364	\$102,144.7

- Included 15% upfront concession if you'd like to pay upfront
- Prices include all future updates at NO COST
- Prices will increase after the new year due to AI features + other enhancements already in system and incentivizing customers to choose now for free features



Coursedog

Thank you!

Contact:

Danny Bloom

AM

dbloom@coursedog.com

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- [Assessment Management](#)
- [Course Demand Projections](#)
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Integration and Technical Resources

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- [Ellucian Colleague Details](#)
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Budget Request for the “Whitman @ WSP Program”

Mitch Clearfield, Oct. 2024

I am submitting this proposal to request an ongoing budget for the “Whitman @ WSP Program,” which encompasses Whitman’s academic relationship with the Washington State Penitentiary (WSP). This would stabilize the work that others began and that I have already been doing there since 2019, and provide the resources to continue expanding that collaboration.

Background and Current Work

- Whitman’s relationship with WSP goes back at least to the 1970s, with a lot of variation over the years.
- Classes that combined “outside students” (from Whitman’s campus) and “inside students” (incarcerated at WSP) began (I think) in Spring 2016, with one offered 8 of the next 9 semesters until the pandemic interrupted. After several false-starts, I was finally able to resume such classes in Fall 2022.
- In Fall 2023, my class was offered in a different part of the prison, that had not previously had a Whitman class. Whitman’s presence in that part of the prison has continued, along with our presence in the part of the prison where previous classes had been offered.
- In 2024, we were able for the first time to offer two classes in the same semester. Kazi Joshua offered a Race and Ethnic Studies class in the spring, and Sharon Alker is currently offering an English literature class.
- For each of my classes and for Sharon’s class, there are two outside students who serve as course assistants. They help facilitate groups’ discussions during class, provide peer support for outside students, and join the instructor for weekend “study hall” meetings to provide support for inside students. In addition to benefiting the class, it is a fantastic opportunity for them to deepen their engagement with the material and with the environment of the Penitentiary.
- In summer 2023, I was also approved for the first time to lead a reading group at WSP, with outside students and faculty along with inside folks who took my class the previous spring. The reading group has continued each semester since then, with some old and some new participants (both inside and outside). The reading group does not have a specific topic that it focuses on, but includes a variety of materials that are intellectually rich and will repay discussion from a wide variety of perspectives. Examples include the novels *Beloved* and *Frankenstein*, a graphic novel entitled *Daytripper*, bell hooks’ *All About Love*, and a philosophy book on forgiveness.
- By DOC policy, each class and reading group requires at least one WSP staff partner, to handle all of the administrative procedures at WSP and to escort the group for each class.
- There is great interest among the incarcerated populations in those two parts of the prison for a greater number and variety of classes, as well as other forms of intellectual engagement such as reading groups and lecture series.

- There is more than enough interest among Whitman students to support a greater number and variety of combined classes. For the current semester, both Sharon and I received far more applications than there were spaces in our classes.
- I'll also note that the academic collaboration with WSP has garnered attention beyond those two institutions. In 2019, there was a featured *Whitman Magazine* article about my Applied Ethics class at the Penitentiary, and I am currently in conversation with a reporter for Northwest Public Broadcasting who is interested in doing a story about my Restorative Justice class. That story would not only be broadcast on area NPR radio stations, but would also appear in the *Union-Bulletin*.
- In Spring 2024, Provost Tipton approved my becoming the inaugural Director of the Whitman @ WSP Program, with responsibilities that include coordinating all of the different academic engagements with WSP, as well as providing logistical and pedagogical support for other faculty to develop and offer classes there.
- Over the summer, with the support of a Pedagogical Inquiry Grant, I ran a series of workshops for three other faculty who have begun or will begin to teach at WSP. I am aware of at least two additional faculty who are interested in teaching there in the future.

Upcoming Plans for the “Whitman @ WSP Program”

- In AY 2025-26, if funding permits there will be 2 combined classes per semester, drawn from a multiple departments: my Philosophy class about forgiveness, a new class taught by Rebecca Hanrahan on the meaning of life, an Art class taught by Maria Lux on comix drawing, and a Sociology class taught by Chris Wakefield on theories of criminology. Those classes will be offered in the two different parts of the Penitentiary where we have established a presence.
- There will be at least 1 ongoing combined reading group, that can also serve as a body to work with faculty who are developing new classes to offer at WSP.
- I am hopeful of organizing other academic opportunities for incarcerated folks, such as lecture series and art or writing workshops.
- I anticipate continued support of WSP cultural events by the campus community, perhaps with particular connections between relevant campus affinity groups and the planners of those cultural events

NOTE: I have met with Superintendent Rob Jackson and Associate Superintendent Sandi Jacobson, and they are fully supportive of these expansions of the partnership with Whitman. There are also four different WSP staff members who have served as escorts for our classes and reading groups, and who are interested in continuing in that role.

Proposed Budget

per course: \$8300

\$4000 for WSP staff partner

\$1500 for books and materials for incarcerated students

\$300 for food for the final meeting

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

reading group each semester and summer: \$2000

\$1500 for WSP staff partner

\$500 for books for incarcerated participants

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

no additional costs anticipated

TOTAL for 4 courses per year and 3 reading groups = \$39,200 annually

Alignment with Opportunities Identified by Art & Science

(drawn from their PowerPoint slides)

- **Preparing to make a difference –**

All of the academic opportunities provided by the Whitman @ WSP Program strongly align with this emphasis. For “outside” students, being able to collaborate closely with incarcerated individuals is already a way “to make a difference,” and it is an invaluable way to gain a greater understanding of the kinds of broader efforts that can lead to individual and systemic change. As well, many of the classes and reading group books focus on pressing social problems in our society and the world as a whole, helping students gain a richer understanding of the impacts of and potential responses to those problems.

- **Experiential Learning –**

It can hardly be overstated how robustly experiential all of the Whitman @ WSP classes and reading groups are. The immersion in that physical environment, the first-hand view of its rules and practices, the close interactions with staff, and of course the perspectives of the residents of that institution all make powerful impacts on “outside” students.

- **Academic [...] experiences focus on the ethical dimension of being an active citizen of the world –**

Every academic opportunity at the Penitentiary inherently involves attention to the ethical complexities of that institution, as well as the ethical complexities of our presence there. As well, the courses offered there and the books included in the reading groups will typically include some significant focus on the ethical aspects of the topic.

- **engaging in global issues through projects based in the community –**

The U.S. approach to criminal justice has been among our most successful cultural exports. While there are some important variations in the approach taken by other countries, the

experiences that “outside” students have in the Penitentiary here are relevant to nearly every other society in the world.

- **help members of the campus community understand complex systems of oppression and lead lives of purpose –**

Nothing can provide a more robust understanding of our current prison system than an immersive experience within it, including close collaboration with its residents. I have especially noticed over the years that many “outside” students begin with very simplified expectations about the system’s evils, and end up with much more nuanced views about both the problems that exist and also the potential solutions to those problems.

- **Students embrace a collective responsibility to work for justice and inclusion on and off-campus –**

All of the classes and reading groups at the Penitentiary are thoroughly collaborative, with “outside” students and residents working together as equal partners. As part of that work, each must recognize both the genuine contributions that they can make, as well as recognize their own limitations and respect the contributions that others can make.

- **Students enjoy a deep sense of belonging, the opportunity to learn from one another, and the freedom to be themselves**

It may be surprising to learn, but “outside” students have repeatedly emphasized that the community formed in the classes and reading groups at WSP is unparalleled. The connections that are formed are deep and authentic, with everyone bringing their whole self to the work. As well, the greater diversity of backgrounds and perspectives that are present in the room have enabled many “outside” students to be more open and honest than they feel they can be on campus, where expectations of orthodoxy can be dominant.

Alignment with Strategic Priorities

(drawn from the website descriptions)

#1 – Academic Excellence and Distinction: Strongly Aligned

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

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

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

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

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

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

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

#3 – Vibrant Campus Community: Somewhat Aligned

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

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

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

The website’s explanation of this strategic priority emphasizes connections to businesses, nonprofits, graduate programs, and individuals who might be able to assist students in their career goals. A robust Whitman @ WSP Program doesn’t directly do those things for most students, although there occasionally students who are interested in careers in the Department of Corrections.

Beyond that, the Whitman @ WSP Program helps contribute to students’ preparedness for life after Whitman in important ways. Most directly, it provides experiences that are not otherwise available on campus, for students who are interested in careers in law, public policy, social work, mental health, and other related fields.

More broadly, the elements of the Whitman @ WSP Program are squarely in line with the goal of “provid[ing] new ways for students to learn and prepare for a rapidly evolving professional landscape.” Combined classes and reading groups foster communication, understanding, and

close collaboration across differences of background and perspective – all of which are essential skills and mindsets in contemporary workplaces.

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

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

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

BUDGET REQUEST FROM

DUE to Qi Jia in PDOF by **October 2025, 2024**

Department Name	Expense/Revenue Account Name	Account Number					2023/2024	2024/2025	2024/2025	2025/2026	2025/2026
		FD	LO	FN	DP	OB	Actual	Expense Budget	Revenue Budget	Student Wages to be Carved out of Discretionary Budget	Requested Budget
Semester in the West - 20524	Contributions - TR	1	53	19	20387	4420	-\$7,988				
Semester in the West - 20524	Other revenue	1	53	19	20387	4990	-\$5,700				
Semester in the West - 20524	Discretionary Budget	1	53	19	20387	5090	\$0	\$49,486			\$98,972
Semester in the West - 20524	Staff salaries	1	53	19	20387	5130	\$121				
Semester in the West - 20524	Other payroll expense	1	53	19	20387	5160	\$43				
Semester in the West - 20524	Services	1	53	19	20387	5200	\$8,122				
Semester in the West - 20524	Supplies	1	53	19	20387	5300	\$1,865				
Semester in the West - 20524	Vehicle costs	1	53	19	20387	5399	\$1,454				
Semester in the West - 20524	Equipment under \$10,000	1	53	19	20387	5513	\$909				
Semester in the West - 20524	Computer Maint/Repair	1	53	19	20387	5518	\$46				
Semester in the West - 20524	Communications	1	53	19	20387	5600	\$657				
Semester in the West - 20524	Travel and meals	1	53	19	20387	5700	\$150				
Semester in the West - 20524	Vehicle Fuel Purchases	1	53	19	20387	5702	\$160				
Semester in the West - 20524	Local Meals	1	53	19	20387	5703	\$249				
Semester in the West - 20524	Events	1	53	19	20387	5742	\$708				
Semester in the West - 20524	Budget officer transfer - in	1	53	19	20387	6313	-\$164				
Semester in the West - 20524	Budget officer transfer - out	1	53	19	20387	6323	\$48,855				

SITW Budget Request for 2025-2026

We request to increase the SITW budget to \$98,972 for 2025-2026 to run the program in the fall of 2025. SITW typically requires ~100k in discretionary budget each time we run the program. Historically, the SITW is budgeted annually at ~50K. That way there is a 100K budgeted to run the course every other year. As we transition to every year for 2024 and 2025, we need to increase the budget to cover the 2025 program. For the years of 2023-2024 and 2024-2025 SITW was budgeted ~50k and those two years are being used to run the course in fall of '24. Thus, for the budget of 2025-2026 the program requires ~100k to run in fall of 2025 as the previous two yearly budgets have been and are currently in use for the fall '24 program.

Here is the text of an email from Jeff Hamrick (11/15/2023) confirming this plan of action:

1. Do not submit a request for incremental base budget for SITW for FY25 (i.e., academic year 2024-2025).
2. For the FY26 budget formation process, which will run in FY25, please plan on submitting a request to up the SITW budget by ~\$50K, in the base sense.

As SITW moves back to an annual model, we will terminate whatever arrangements (pushing into a reserve from, having a budget closing unto itself, etc.) were being used previously to get SITW its needed budgets every other year by using an "averaged out" amount each year."

Semester in the West is a unique program that aligns with the College's strategic priorities. The program is known nationally and internationally for its robust and intensive experiential learning that connects Whitman students to communities and cultures across western North America. The program creates lifelong bonds among program members and across program years as evidenced by numerous well-attended reunions that connect and reconnect SITW participants. The program connects Whitman students with community partners in various careers and has served to help students get jobs after graduation. The new SITW model that runs every year allows us to broaden access to the program and include more Whitman faculty bringing unique perspectives that enhances SITW's commitment to diversity, equity, and inclusion. The program is committed to raising awareness and exploring in detail environmental issues including topics of justice, sustainability, and climate adaptation and mitigation.

Please let me know if you have any questions.

Sincerely,

Lyman Persico

Submitted by: Lyman Persico

Date: 10/22/24

Outreach Coordinator

Position Proposal

The last HHMI proposal that we were successful in winning (2008) included the forward-looking component of community engagement: work that is now a formal plank in our strategic plan. Staffing that position brought significant experiential learning opportunities for students in STEM fields, and helped prepare them to make a difference in their communities. That program also enabled faculty to fulfill the critical “broader impacts” required to obtain external research grants. While highly successful by all measures, that position focused exclusively on work associated with STEM.

In 2021, the Mellon Foundation grant funding that supported the Community Engaged Learning and Research Initiative's staff position to facilitate Arts/Humanities and Social Science faculty Community Engaged Learning and Research (CELR) expired, leaving the logistical and administrative work associated with curricular-focused CELR left unsupported.

Here, we seek to build on the successful STEM model and fill the gap left by the discontinued administrative support for CELR in the Humanities, Fine Arts, and Social Sciences by bringing an expanded vision that will facilitate work across the college. It will create opportunities for students to: explore and contribute to the needs of their communities; translate what they learn in theory; apply their learning practically and reciprocally to real community challenges; and build the skills they need to connect to their local community, wherever it may be, now, and in their future. It will also support and add educational opportunities for community organizations and stakeholders whose work is enhanced via connection with Whitman faculty and students.

Position Description

This full time staff position will serve our students and faculty by building and supporting community connections and outreach opportunities in areas designed to fulfill student interest and curricular needs. In our STEM programs, we already have a platform of success with 8 established programs, ranging from “Science Nights” in the schools to field trips and summer institutes. They will facilitate and assist in that work, and so expertise in, and comfort with, general science is essential. Beyond STEM, this position will contribute to community-college partnerships and projects

across any and all academic disciplines, helping faculty execute their projects by assisting in the recruitment and training of students, as well as overseeing resource and logistics management across the college to serve the mission of connecting students with community. This will be particularly useful for CEL work done by faculty in the social sciences, arts, and humanities, currently via the CELRI Committee's internal granting structure. In addition, it will be necessary to support the growing number of academic concentrations that require an experiential component in their curricula. In the future, as the College commits to a more robust faculty-facing community engaged learning and research structure (including a new Faculty Fellow), this staff position will be crucial to support logistical and administrative tasks associated with curriculum-based CELR across all departments and programs.

Responsibilities

65% STEM and Education work, 35% CEL Administrative and Logistical Oversight

- Community Science Outreach Program Development, Oversight, and Shared Contribution in Activities
- Supervision of Student Interns in STEM, Coordination of Student interns in other areas (immediate supervision would fall under the faculty conducting those programs)
- CTUIR MOA Support, and close work with a new Faculty Fellow in Community Engaged Learning and Research
- Alumni Relations Program Support
- Participation in comprehensive advising of students
- Development and Fundraising Support
- Liaison to key campus entities (including Admissions, CCEC, ARC, CELRI, Campus Sustainability)
- NSF Grant Broader Impacts Support
- Whitman Undergraduate Conference 2.0 (Specific Contribution: work with students to present community engagement projects in the context of their academic work)
- Coordinate with communications and admissions to help showcase outreach work with community focus
- Budget Management for related programs

Qualifications

This position combines expertise in education, comfort/general knowledge with basic sciences, and administrative skills. The ideal candidate will have:

- Bachelor's degree in Science, Education, Communications, or a related field (Master's preferred).

- Demonstrated experience in science communication, education, or outreach, willingness to learn and participate in science outreach projects
- Understanding of inclusive pedagogy and ability to work with diverse populations
- Effective collaborative skills and ability to work with teams of students, faculty and community members
- Demonstrated strong organizational skills

Compensation

Salary: \$61,360 based on \$29/hr OPE: \$21,782.80 Total: \$83,142.80

Pre-Major advising: 1-50-11-20952-5110

We use the FY 2025 as the basis for FY26, we are asking \$21,000 salary increase, bringing the budget from 33,950 to 55,000 for FY2026

Helen Kim:

Summer Registration Assistance (SRA) work currently is paid according to the following rate: A SRA gets \$500 to work with 7 students over the summer. If they work with more than 7 students, they receive \$72/student. Pre-major advisors who do work during the regular year, who are not regular faculty receive \$100/student to work with them for the entire academic year. It makes sense to adjust the budget every year, and we can work with some figures for this program over the last 2 years for sure to do some projections (some of this is based on anticipated size of incoming class).

Atarah:

In FY 2024, We spent a total of \$54,488 on advising stipends, \$34,888 (63 advisors) in the Fall and \$19,600 (30 advisors) in the Spring. In FY 2025, we spent \$30,312 (54 advisors) in fall and approximate 30 advisors in the spring of 2025.

Faculty Moving: 1-50-29-20014-

Request a budget increase between 84,500-117,500 in FY2026

The faculty moving budget has been \$60K, at least, since FY20. While the budget remained underspent during the COVID years due to reduced faculty relocations, records show consistent overspending beginning in FY23.

With the new policy in place, the median moving costs have been approximately **\$10,000** for tenure-track faculty members and **\$6,500** for visiting faculty members. It is difficult to estimate the number of new faculty members in FY26, but we anticipate that we could have, at least, 6-8 tenure-track hires and 13-15 visiting hires.

There are about 40 faculty who will be eligible to take sabbatical during the 26-27 academic year.

With these estimates, we anticipate that we would need a moving budget of between \$144,500-\$177,500.

Faculty Recruiting: 1-50-29-20015-

Request a budget increase between \$69,000-\$94,000 in FY2026

The faculty recruiting budget (90K) has also remained consistent since FY2020, with the exception of FY21, when it was temporarily halved due to COVID. The budget has been consistently overspent. Last year, the median recruiting costs for tenure track faculty members were about \$9.6K and for visitors it was \$2.9K. Based on the same numbers as above and to also account for advertising costs (54K last year), recruiting conferences (8.2K last year) and background checks (2.7K last year), we estimate we would need a budget of between \$159K-184K.

Total budget increase requested: 174,500-232,500

Faculty Moving					
	Budget	Expenses	Balance		
2019-2020	60,000.00	-43,379.00	16,621.00		
2020-2021	60,000.00	-54,811.00	5,189.00	Covid	
2021-2022	60,000.00	-38,356.00	21,644.00	Covid	
2022-2023	60,000.00	-76,527.53	-16,527.53		
2023-2024	60,000.00	-167,441.61	-107,441.61		
2024-2025	60,000.00	-78,604.75	-18,604.75	Only up to Oct, 2024	
Faculty Recruiting					
2019-2020	90,000.00	-149,874.67	-59,874.67		
2020-2021	43,000.00	-28,047.00	14,953.00	Covid	
2021-2022	90,000.00	-95,014.33	-5,014.33	Covid	
2022-2023	90,000.00	-186,023.42	-96,023.42		
2023-2024	90,000.00	-237,646.31	-147,646.31		
2024-2025					

BUDGET REQUEST FROM
 DUE to Qi Jia in PDOF by **October 2025, 2024**

Department Name	Expense/Revenue Account Name	Account Number					2023/2024	2024/2025	2024/2025	2025/2026	2025/2026
		FD	LO	FN	DP	OB	Actual	Expense Budget	Revenue Budget	Student Wages to be Carved out of Discretionary Budget	Requested Budget
Northwest Museum	Contributions - TR	1	53	29	20005	4420	-\$25				
Northwest Museum	Staff salary & wage budget	1	53	29	20005	5010	\$0	\$30,715			
Northwest Museum	OPE budget	1	53	29	20005	5030	\$0	\$10,750			
Northwest Museum	Discretionary Budget	1	53	29	20005	5090	\$0	\$8,765	\$5,915.00	\$6,350	
Northwest Museum	Staff salaries	1	53	29	20005	5130	\$29,942				
Northwest Museum	Other payroll expense	1	53	29	20005	5160	\$10,710				
Northwest Museum	WC-Student wages	1	53	29	20005	5190	\$5,915				
Northwest Museum	FWS - Student wages	1	53	29	20005	5195	\$142				
Northwest Museum	Services	1	53	29	20005	5200	\$4,020				
Northwest Museum	Supplies	1	53	29	20005	5300	\$306				
Northwest Museum	Communications	1	53	29	20005	5600	\$227				
Northwest Museum	Travel and meals	1	53	29	20005	5700	\$938				
Northwest Museum	Vehicle Fuel Purchases	1	53	29	20005	5702	\$38				
Northwest Museum	Local Meals	1	53	29	20005	5703	\$689				
Northwest Museum	Domestic Airfare	1	53	29	20005	5705	\$1,397				

RATIONALE ATTACHED

Submitted by: 

Date: 10/24/2024

Budget request
Northwest Museum

\$6,350

I am requesting an additional \$3,500 in my budget to cover costs related to compliance with the Native American Graves Protection and Repatriation Act (NAGPRA). Whitman has more than 500 objects that are potentially subject to repatriation under NAGPRA. While NAGPRA has always been unambiguous regarding the repatriation of Native Human Remains and Associated Funerary Objects, a Final Rule published in January 2024 clarifies the responsibilities of institutions that receive federal funding to consult with Tribes about *all objects* that potentially fall under the categories covered by NAGPRA, namely Sacred Objects and Objects of Cultural Patrimony. The Final Rule heightens the risk for institutions like Whitman of being out of compliance.

The primary expense is funding visits from Tribal representatives to consult on and retrieve objects that belong to them. I anticipate approximately two visits per year, one from Tribal representatives from the west side of the state and one from Columbia Plateau Tribes, with an estimated cost of \$2,000 for the first and \$1,500 for the second, for at least the next five years, at which time this number might appropriately be revised.

In addition to being a matter of legal compliance, a proactive approach to NAGPRA also allows Whitman to accomplish one of the areas of focused action under the strategic priority “Connecting Whitman, Walla Walla, and the World”: to “engage substantially with the College’s history in ways that are honest and reparative with those harmed, and fully realize the commitments in the Memorandum of Agreement with the Confederated Tribes of the Umatilla Indian Reservation.”

Budget Increase Proposal: Music Technology Lab

Submitted by Michael Simon as chair on behalf of Music Department

Summary:

The Music Department requests **\$28,545.85** to help with costs associated with converting the Music Listening Library into an expanded Music Technology Lab in response to increasing student demand and disciplinary need.

Background and Plan:

Since the mid-2000s, the Music Department has had a small Music Technology Lab (7 seats) in our basement. For years, this is where Music Tech courses were taught, however the demand for the courses has made that space far too small to teach these classes (his semester's Intro to Music Tech class has 24 students, and there was a waitlist). Since the lab's initial creation, Music Technology has rapidly expanded in student interest and in relevance to the Music Major. For AY 2022-23 we added a Music Technology and Production track to the Music Major. Since that time, we have graduated three majors and have four more graduating in the next twelve months. This is an area of great interest for our students, and is increasingly a vital component of life after Whitman for Music students. Beyond the students directly taking Music Tech and Production courses, the Music Tech Lab is used by students across campus for creating music, Music Composition courses use the space for composition, and this spring a Theater and Dance Hip Hop Culture practicum will be taught in the space. Consequently, we are planning to move the Music Tech Lab to a larger space, with greater visibility and accessibility for a range of students.

The Music Department and Penrose Library are working on a project to integrate the Music Department's holdings into Penrose Library formally, and move those holdings to Penrose. This has the result of making our holdings more searchable to scholars and more accessible to all members of the Whitman community. Moving the materials also frees up the space that was previously our Music Listening Library (room 101 on the main floor of the Music Building), and the Department has decided to put the Music Tech Lab in that space, in time to use for the coming fall semester (Fall 2025). The plan will create a lab with 10 workstations, and tie this room technologically to the Recording Room next door, allowing forward looking experiential learning in the classroom. This will allow approximately 20 students to be in the classroom, alongside access to the computers, recording equipment, synthesizers, and other resources needed to best teach this course and engage in the subject matter. The integration of this room with the Recording Room (Room 102) will also allow for much more expansive Senior Projects and collaborations between different groups within the Music Department and across campus. Additionally, the Lab would also serve as an "outpost" for Human Centered Design. This

investment looks toward the future, creating a resource that shows our commitment to Academic Excellence and Distinction as well as connecting to Life After Whitman.

Reusing the Music Listening Library Space for any other purpose requires removing shelving and installing outlets. This cost was estimated by Tony Icsahn at \$25,000. Similarly, classroom furniture for such a space would be approximately \$16,000, regardless of use in the space. We request that the College pay for the costs of returning the room to a usable space with classroom furniture.

Speciality equipment for the lab will be about \$12,500 (we have already secured all 11 computers through some creative work with WCTS, and also could reduce this by \$3700 by postponing the speakers for one year). Furniture would likely be about \$14,000-20,000 (I am waiting on more detailed quotes here and used pricing online for these items).

The Music Department has approximately \$30,000 of funding that we can devote to this from our endowments, however we would appreciate as much help as possible with the physical space and classroom furniture, as that's required for any use of this space. If we can use as much of our department money on especially equipment, that will be extremely beneficial for students. For example, there are potential future additions of equipment that we could work toward sooner, like a recording console (\$60,000-160,000) or immersive audio speakers (\$10,000-20,000) This redesign of the space would add a significant improvement in the facilities and usability for students in music technology classes, but also serves the broader student population as well.

Costs:

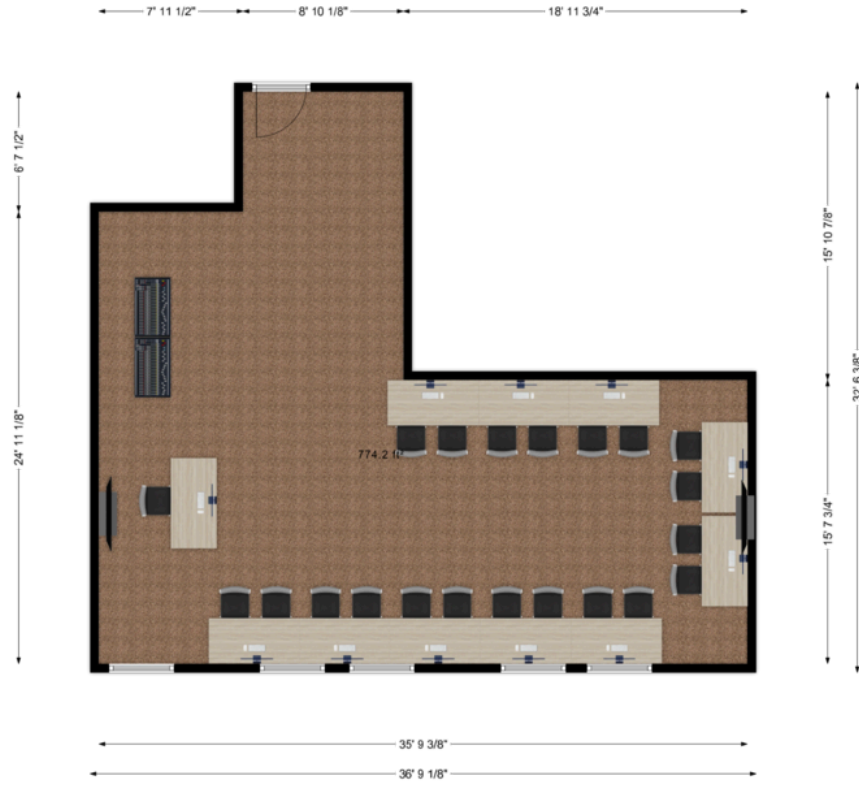
Total cost station equipment: \$12,466.02
Total furniture & classroom tech cost: \$15,708.83
Construction and Electrical cost: \$25,000.00
Contingency 10%: \$5371

Total cost: \$58,545.85

Contribution from Music: \$30,000

Request: \$28,545.85

Design:



Lisa Uddin

BUDGET REQUEST FROM
DUE to Qi Jia in PDOF by October 2025, 2024

<u>Department Name</u>	<u>Expense/Revenue Account Name</u>	<u>Account Number</u>					<u>2023/2024</u>	<u>2024/2025</u>	<u>2024/2025</u>	<u>2025/2026</u>	<u>2025/2026</u>
		<u>FD</u>	<u>LO</u>	<u>FN</u>	<u>DP</u>	<u>OB</u>	<u>Actual</u>	<u>Expense Budget</u>	<u>Revenue Budget</u>	<u>Student Wages to be Carved out of Discretionary Budget</u>	<u>Requested Budget</u>
Social Justice Concentration	Discretionary Budget	1	54	29	21041	5090	\$0	\$2,500		5,500	5800

Submitted by: _____

Date: _____

October 28, 2024

Dear Dean Mermann-Jozwiak,

The Concentration in Social Justice is requesting a 2025-2026 budget of \$5800 in order to build this new program in line with the College's Strategic Priorities (I, II, IV, V). The program has a full enrollment in the new foundations course, has been profiled in the *Whitman Wire* and *Whitman Today* as a highlight of the College's investment in teaching students how to make social change, and has established promising connections to all Divisions and the CCEC. Next year will be pivotal to growing this early success.

With these funds, we are aiming to build more campus-wide programming via visiting activist-scholars, launch our faculty advisor program in line with the Project for Action and Social Change, grow a community of social justice students through receptions, and – from the discretionary budget – implement a small social justice fellows program (beginning with two student hires). Our budgeting reads as follows:

\$600 SJ 100 visiting educators (local or through zoom)
\$4000 2 events (with additional sponsorship for each from appropriate departments and programs)
\$600 4 faculty advisors, working with students on the Project for Action and Social Change
\$150 Opening-year reception
\$450 End-of-year-reception

\$5,800 Total

Student Wages to be Carved Out of Discretionary Budget

Social Justice Fellows Program

2 students for academic year @ \$17 an hour with the following divided tasks:

- 1 student assisting SJ 110 in Fall 2024 ~4 hours a week (~\$2000)
- 1 student doing social media and other communications (e.g., flyers, posters, outreach with campus groups): 1-3 hours a week depending on the week (~\$1500)
- 2 students doing event attendance (e.g., fall visitor day, admitted students day, alumni reunion, etc.): this probably ends up being 12-15 hours a semester (~\$1000 a year)

\$3000 Student a

\$2,500 Student b

\$5,500 Total

Thank you for your consideration and support of this program

Lisa Uddin

Director, Social Justice Concentration (2024-25)

Science Equipment Technician

Proposal for 2025-26 Fiscal Year

Proposal

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

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

Skills

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

Cost

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

Rationale

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

BUDGET REQUEST FROM
 DUE to Qi Jia in PDOF by October 2025, 2024

Debi/Lydia

Department Name	Expense/Revenue Account Name	Account Number					2023/2024	2024/2025	2024/2025	2025/2026	2025/2026
		FD	LO	FN	DP	OB	Actual	Expense Budget	Revenue Budget	Student Wages to be Carved out of Discretionary Budget	Requested Budget
Division II - Office	Contributions - TR	1	54	19	20093	4420	-\$50				
Division II - Office	Staff salary & wage budget	1	54	19	20093	5010	\$0	\$215,306			
Division II - Office	OPE budget	1	54	19	20093	5030	\$0	\$75,357			
Division II - Office	Discretionary Budget	1	54	19	20093	5090	\$0	\$16,376			
Division II - Office	Staff salaries	1	54	19	20093	5130	\$131,964				
Division II - Office	Overtime	1	54	19	20093	5140	\$464				
Division II - Office	Staff wages	1	54	19	20093	5150	\$77,251				
Division II - Office	Other payroll expense	1	54	19	20093	5160	\$74,455				
Division II - Office	WC-Student wages	1	54	19	20093	5190	\$1,940			\$2,320.00	\$19,240.00
Division II - Office	Services	1	54	19	20093	5200	\$462				
Division II - Office	Supplies	1	54	19	20093	5300	\$7,077				
Division II - Office	Info/Tech Equip under \$10,000	1	54	19	20093	5343	\$566				
Division II - Office	Equipment under \$10,000	1	54	19	20093	5513	\$123				
Division II - Office	Furniture and fixtures	1	54	19	20093	5515	\$3,081				
Division II - Office	Communications	1	54	19	20093	5600	\$479				
Division II - Office	Local Meals	1	54	19	20093	5703	\$44				
Division II - Office	Events	1	54	19	20093	5742	\$5,184				
Division II - Office	Budget officer transfer - in	1	54	19	20093	6313	-\$3,028				

Submitted by: 

Date: 10/24/24

According to the data from the US inflation rate, (which is a measure of how much the price of a basket of goods changes over time) for each year from 2018 to 2024, the percentage increase is approximately:

2018: 2.44%

2019: 1.81%

2020: 1.23%

2021: 4.7%

2022: 8.0%

2023: 4.1%

2024: estimate of 3.2%

In 2017-2018 fiscal year, the Division II office allocation was at \$15,000, with an increase the following year of \$1,376.00 and is the last increase we have received for that budget. The above figures total an overall inflation increase of \$4,239.00 since 2018.

We have taken that allocation in 2018 and calculated that cost of the same goods over that 6-year period, which would allow us to continue providing the same goods and services for our faculty, offices, overall building needs and faculty lounge goods as we have previously. The student wages have also increased each January by quite a bit over time. When also considering all of the supplies (faculty, offices/teaching, Div II main office, lounge and building), printer cartridges for now 5 printers and braille paper for 1 other printer, student wages, info and tech equipment, furniture and fixtures and the 2-3 Division wide (we are the largest by far) celebration events we host each year, this makes the overall \$3,000 (increase from current allocation) seem pretty minimal.

We are asking for an increase from current allocation of \$16,376 (which includes student wages of \$2320.00) to that of \$19,240.00.

Deborah Morehead
Div II Assistant

Lydia McDermott
Lydia McDermott
Chair Div II

Kate Shea

Department Name	Expense/Revenue Account Name	Account Number					2023/2024	2024/2025	2024/2025	2025/2026	2025/2026
		FD	LO	FN	DP	OB	Actual	Expense Budget	Revenue Budget	Student Wages to be Carved out of Discretionary Budget	Requested Budget
Division II - Classics	Contributions - TR	1	54	19	20070	4420	-\$25				
Division II - Classics	Discretionary Budget	1	54	19	20070	5090	\$0	\$1,892	1625	1892	
Division II - Classics	Services	1	54	19	20070	5200	-\$100				
Division II - Classics	Supplies	1	54	19	20070	5300	\$692				
Division II - Classics	Computer under \$10,000	1	54	19	20070	5511	\$103				
Division II - Classics	Communications	1	54	19	20070	5600	\$710				
Division II - Classics	Local Meals	1	54	19	20070	5703	\$486				

Request to increase Classics Department Discretionary Budget

We are asking to increase our budget by \$1625 to cover 100 student hours per year for a student. This student worker position is an official accommodation for Daniel Smith. We will be hiring a student worker to assist with scanning print books for use with Daniel Smith's screenreader. This student worker will also help with organizing paper documents from Daniel's Elementary Greek class and completing other related tasks.

The new Budget total that we are requesting for 2025/2026 is \$3517. This total includes an Expense Budget of \$1892 and a Student Wages Carve out of \$1625.

1625 student labor + 1892 = 3517

Submitted by: _____



Date: _____

10/22/24

WHITMAN DEPARTMENT OF ATHLETICS BUDGET REQUESTS FOR 2025-2026 10.25.2024

Athletics	\$ 24,000.00	<p>Teamworks/ARMS Software Platform - Compliance, Recruitment, Facility Scheduling, and Camps: In January of 2023, the NCAA Division III membership passed a significant piece of legislation that has elevated Division III Athletics and compliance oversight. The Teamworks/ARMS platform is a high-level priority and essential and needed in our athletics department at Whitman. I have attached additional documents that discuss how this software platform is vital to the work that we do. We need to get away from using paper for our compliance signatures and attestations. At this time, Pacific, Willamette, PLU have contracts with ARMS. George Fox and Lewis and Clark are in the process of completing their contract as well. See Attached Documents</p>
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Athletics	\$ 15,000.00	<p>ONE-TIME PURCHASE: James Hayner Field - Windscreen - East Fenceline in its entirety - 392 ft x 8 ft. The windscreen for the east side fence was omitted from the original project budget. Consequently, we have been using the old construction site windscreen on the east side. The windscreen was significantly torn and recently had to be removed. The windscreen on the east side plays a significant role in protecting the turf field and screens out the dirt, leaves, and tree limbs that come off the hillside. The windscreen is essential to continue to protect the investment that was made for the turf surface. The Communications Office has assisted us with the design and in gaining accurate quotes for the project.</p>
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Athletics	\$ 13,500.00	<p>ONE-TIME PURCHASE: James Hayner Field - Windscreen - North/South Fences - behind goal boxes - 60ft x 20 ft. The windscreen for the north and south fences was omitted from the original project budget. A windscreen on the north/south fenceline would provide a backdrop for the goal box area - just as a windscreen is placed in center field for baseball, to provide the appropriate backdrop for the athletes when shooting on goal. The Communications Office has assisted us with the design and in gaining accurate quotes for the project.</p>
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Athletics	\$ 15,000.00	<p>ONE-TIME PURCHASE: Branding Initiative for Sherwood Center - Championship Banners: We have run out of room for our championship banners to be hung in the Varsity Gym. As a result, we are in need of exploring alternative options and a complete re-design in an effort to be more efficient with the use of available space. The Communications Office is working with us on potential strategies and design elements.</p>
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WHITMAN DEPARTMENT OF ATHLETICS BUDGET REQUESTS FOR 2025-2026 10.25.2024

<p>Baseball</p>	<p>\$ 13,500.00</p>	<p>Travel Funds: The Baseball program is requesting a 10% increase in budget for anticipated travel expenses for next year. The program plays 24 NWC games and then has the need to schedule in an additional 16 games for non-conference play to satisfy a 40-game schedule per the NCAA. The team plays a combination of local NAIA schools and NCAA Division III schools that are primarily located in Southern CA - SCIAC. The team also holds the largest male roster within our department and the second largest roster next to swimming. The head coach has worked closely with Admissions to take additional student-athletes during the year to assist with the incoming first-year class which has increased his overall roster numbers.</p>
<p>Men's & Women's Cross Country & Distance Track</p>	<p>\$ 19,500.00</p>	<p>Travel Funds: Cross Country and Distance Track (the newest sport offering at Whitman, est. 2020) have continued needs for funding to meet the travel costs to support the competitive needs of the program. The Distance Track program has failed to meet NCAA Sport Sponsorship levels for the past 2 years. The sponsorship requirement is for the team to compete in 6 spring meets, with a min. of 10 men and 10 women. Given the financial limitations to travel, we have not been able to meet the 6 meet requirement. The program is also using Turtle Tops at times to transport the team and having coaches behind the wheel following a full day of coaching is unsafe. In addition, the increase in funding will allow us to withstand the NCAA Regional Cross Country meet which is awarded each year to teams in Region X (includes TX, OR, CA, and WA). We anticipate the site selection process to remain intact and as a result, we will need to fly our regional competitors (8 SA's/team for M/W and 3 coaches = 19) every other year to CA. The costs for the regional meet are significant and they have a deep impact to the program's budget when we are unable to drive to the regional meet and we need to fly.</p>
<p>Men's & Women's Golf</p>	<p>\$ 11,000.00</p>	<p>Travel Funds: Hotel Costs for spring break and NWC competitions has increased as a result new travel policies which no longer permit VRBO and Airbnb houses to be used for team travel. The spring break trip for both the men and the women's golf team will face an escalation in costs as a result of this change in policy. There will also be an increase in food costs since the houses provided teams with the opportunity to cook meals and to also do laundry for practice and game uniforms.</p>
<p>Men's Soccer</p>	<p>\$ 4,000.00</p>	<p>Recruiting Funds: The request is to have funding to recruit in Phoenix (Nov.), California (Dec.), and Las Vegas (Jan.). The funds would assist the coaching staff in being able to work in these areas which we have not been able to do given the overall funding for the program.</p>

WHITMAN DEPARTMENT OF ATHLETICS BUDGET REQUESTS FOR 2025-2026 10.25.2024

<p>Women's Soccer</p>	<p>\$ 3,000.00</p>	<p>Recruiting Funds: The coaching staff requesting is to have funding to be able to recruit in CA where there are a number of high-level events in the Bay Area and Southern CA. This would assist the coaching staff in traveling to these events which we have not been able to afford/attend since the current budget for the program is committed to travel and operations for the season.</p>
<p>Men's & Women's Swimming</p>	<p>\$ 38,894.00</p>	<p>Travel Funds: The swimming roster is the largest roster within Athletics. On average, we have a total roster fo 40 student-athletes, and 3 coaches. The largest expenditure is travel and the program is limited in what they can do to solve for it. We are currently running with a bare-bones roster (19 men and 17 women) If recruiting goes well this year, our roster will be much larger in 25-26. We have continued to work hard to get the best prices on travel and hotels and we only swimming our NWC conference competitors and one mid-season invitational - which is an industry standard in our sport. Nonetheless, even in 2024-2025 I project overall costs at approximately \$192,000 and am funded at \$163,106.00. I am building towards a roster of 40 student-athletes next year and if all of our other costs remain consistent, then our total costs for 2025-2026 would be \$202,000 creating a \$38,894 deficit.</p>
<p>Men's Tennis</p>	<p>\$ 11,970.00</p>	<p>Travel Funds: Hotel costs for spring break have increased as a result of new travel policies which no longer permit VRBO, Airbnb's or Family homes to be used for team travel. The Men's Tennis program has been staying at a "family" or alumni home for the past 10 years to reduce costs. The spring break trip for the men's team will face an escalation in cots as a result of this change in policy. We move from zero dollars being spent on housing to \$12,000 dollars or more in new expenses. There will also be a recognized increase in food since the houses provided teams with the opportunity to cook meals and to also do laundry for practice and game uniforms. The request for the men's team is larger than the women's team due to having a larger roster.</p>
<p>Women's Tennis</p>	<p>\$ 10,000.00</p>	<p>Travel Funds: Hotel costs for spring break have increased as a result of new travel policies which no longer permit VRBO, Airbnb's or Family homes to be used for team travel. The Women's Tennis program has been staying at a "family" or alumni home for the past 10 years to reduce costs. The spring break trip for the women's team will face an escalation in cots as a result of this change in policy. We move from zero dollars being spent on housing to \$10,00 dollars or more in new expenses. There will also be a recognized increase in food since the houses provided teams wth the opportunity to cook meals and to also do laundry for practice and game uniforms. The women's team has a smaller roster than the men's team and this substantiates the lower request for the team.</p>

WHITMAN DEPARTMENT OF ATHLETICS BUDGET REQUESTS FOR 2025-2026 10.25.2024

Volleyball	\$ 9,120.00	ONE-TIME PURCHASE: The request is for the purchase of carbon volleyball poles, crank, and padding. The current poles weight 60 lbs per piece and setting up the gym every day for practices and camps has become a safety concern. The new poles would be 20 lbs. per piece and would be safer for everyone involved when setting up the court.
Student Wages	4,600 hours	Student Employment Funding: Funding for 2024-2025 resulted in the elimination of \$4,600 hours throughout our athletic facilities. The most significant impact occurred in the Sherwood Center where we have removed supervision in the facility. This has caused concern for the oversight of the building in the evening when our staff is not on site. The opportunity to receive funding for 4,600 hours would give us the opportunity to provide jobs to a significant number of Whitman students. It would also give us the opportunity to resolve one of the issues raised in the Gender Equity report which was equitable practices for laundry with all 17 of our programs. Placing an individual at the Sherwood desk would also provide the opportunity for these individuals to simultaneously do laundry in the evening hours and to also provide the appropriate oversight for the facility and the best response model should an emergent situation occur.
Women's Lacrosse	\$ 17,500.00	Travel Funds: The team travels 20 student-athletes and 2 coaches. Women's LAX is our youngest varsity team, est. in 2015, and the sport is isolated in the PNW. There is only one remaining NAIA institution that is sponsoring WLAX. As a result of this, the team is forced to travel to compete. The NWC schedule provides 11 games which leaves the program in need of scheduling 6 non-conference games to get to the NCAA expected 17-game schedule. The additional funds requested would permit the program to meet these additional travel demands since these games are often played in Southern CA. The fundraising efforts of the program are also impacted by it's youth and a small alumni database that is not able to effectively support the program needs at this time.

WHITMAN COLLEGE ATHLETICS BUDGET REQUESTS FOR 2025-2026

Department Name	GL Number	Funding Requests	Explanation	Budget Type
SSRA Fee Courses	1-58-41-20087	No Requests		
Athletics General	1-58-41-20108	Multiple Requests	See Attachment	Incremental Non-Personnel Budget
Baseball	1-58-41-20109	\$ 13,500.00	Travel Funds	Incremental Non-Personnel Budget
Men's Basketball	1-58-41-20110	No Requests		
Women's Basketball	1-58-41-20111	No Requests		
Cross Country/Distance Track	1-58-41-20112	\$ 19,500.00	Travel Funds	Incremental Non-Personnel Budget
M/W Golf	1-58-41-20113	\$ 11,000.00	Travel Funds	Incremental Non-Personnel Budget
Men's Soccer	1-58-41-20115	\$ 4,000.00	Recruiting	Incremental Non-Personnel Budget
Women's Soccer	1-58-41-20116	\$ 3,000.00	Recruiting	Incremental Non-Personnel Budget
Swimming	1-58-41-20117	\$ 38,894.00	Travel Funds	Incremental Non-Personnel Budget
Men's Tennis	1-58-41-20118	\$ 11,970.00	Travel Funds	Incremental Non-Personnel Budget
Women's Tennis	1-58-41-20119	\$ 10,000.00	Travel Funds	Incremental Non-Personnel Budget
Volleyball	1-58-41-20121	\$ 9,120.00	Travel Funds	Incremental Non-Personnel Budget
Training Room	1-58-41-20122	No Requests		
Club Sports	1-58-41-20124	No Requests		
Intramurals	1-58-41-20125	No Requests		
Athletics National Travel	1-58-41-20129	No Requests		
SSRA Student Wages	1-58-41-20346	\$ 76,130.00	4600 Hours	Incremental Non-Personnel Budget
SSRA Outdoor Fee Courses	1-58-41-20426	No Requests		
SSRA Personnel Salaries	1-58-41-20445	No Requests		
Club Sports Cycling	1-58-41-20489	No Requests		
Club Sports Ultimate Men	1-58-41-20497	No Requests		
Women's Lacrosse	1-58-41-20499	\$ 17,500.00	Travel Funds	Incremental Non-Personnel Budget
Club Sports Travel	1-58-41-20501	No Requests		
SSRA Asst. Coaches	1-58-41-20590	No Requests		
Club Sports Alpine Skiing	1-58-41-20628	No Requests		
Club Sports Nordic Skiing	1-58-41-20629	No Requests		
Club Sports Women's Ultimate	1-58-41-20641	No Requests		
Club Sports Contingency	1-58-41-20642	No Requests		
Club Sports Volleyball	1-58-41-20645	No Requests		
Student Athlete Advisory Cnd	1-58-41-20680	No Requests		
Game Management	1-58-41-20731	No Requests		
Sports Information	1-58-41-20758	No Requests		
Club Sports Climbing	1-58-41-20769	No Requests		
Travel Accommodations	1-58-41-20851	No Requests		
Athletics PDA	1-58-41-20993	No Requests		
Bratton Tennis Center - Ops	1-58-41-20034	No Requests		
Div. I Physical Education	1-58-41-20055	No Requests		

WHITMAN COLLEGE ATHLETICS
ARMS/TEAMWORKS IMPACT STATEMENT
October 25, 2024

- ARMS provides us with several operating platforms for the same price and these are programmatic areas that are critical needs for the department.
- 100 Division III schools are contracted with ARMS – PLU, Willamette, Kenyon, Carleton, Elmhurst, Trinity, Macalester, Saint Mary’s, Baldwin Wallace, Colby, NYU, St. John’s, Adrian, Johns Hopkins, Amherst, Williams, MIT, etc.
- ❖ **Compliance**
 - ❖ ARMS accurately “counts” practices and dates of competition to align with the 2023 NCAA legislation.
 - ❖ E-forms for all NCAA Compliance Paperwork
 - ❖ Eligibility Records & Tracking
 - ❖ Sustainability with paperwork
 - ❖ Academic progress and progress toward a degree
 - ❖ Transfer Tracers
 - ❖ Roster Management
- ❖ **Recruiting:**
 - a. Bridges with Slate – Admissions recruiting platform – enhances interdepartmental communication
 - ❖ Provides a mobile platform
 - ❖ Central portal for ALL athletic teams.
 - ❖ Branding & Marketing:
- ❖ **Branding & Marketing:**
 - ❖ Customized email templates and a graphic library for multiple uses.
- ❖ **Camps and Clinics:**
 - ❖ Customized and branded portal for each team and each camp
 - ❖ Registration of Participants
 - ❖ Management of participants – waivers, schedules, etc.
 - ❖ Payment System – online credit card portal
- ❖ **Event Registration, Management, and Payment System: WClub Golf Outing**
 - ❖ Registration of Golfers
 - ❖ Management of Participants
 - ❖ Payment System – online credit card portal
- ❖ **Facility Scheduling**
 - ❖ Scheduling format for nine facilities
 - ❖ Communication process for any facility change or request.
 - ❖ Compliance enhancement for the “count” of practices and dates of competition
 - ❖ Facility requests for reservations
 - ❖ Facility overview for the programming that is occurring in all nine facilities

Compliance:

In January 2023, the NCAA Division III membership passed significant legislation that changed the way that college athletics had been counting athletic dates of practice and competition.

The legislation moved us from a format of 19 weeks and a specific 5-week non-traditional season to a calendar format of 114 days that would openly span both the fall and spring semesters.

In addition, the non-traditional season also expanded from 16 days of practice to 24 days of practice.

Compliance needs and concerns have risen sharply given this legislative change and our compliance director is now left with the task of managing and counting playing and practice seasons for all seventeen of our programs.

Our compliance director is now using 17 different Google calendars which is a daunting process given all of the moving pieces when there are practice cancellations, time changes, facility changes, and competitive changes that we might incur throughout the year.

- In the modern sense, the Google calendar option is an ineffective process and it lacks reliability and confidence in our ability to continue to track our programs daily.
- **If we have errors in our calculations then the NCAA would consider this a violation. A violation would result in a self-report to the NCAA in which the department and the institution are shown to violate NCAA policy. The self-report is not anything that any of us want to have happen and it would be a violation that would bring negative visibility to our programs, our department, and to the college.**
- Our current system with the use of Google Calendars has proven to be problematic and unreliable during the first semester, particularly when we have had a significant number of changes.
- **The ARMS platform provides an operating system that is dedicated to NCAA compliance needs and to the task of calculating practice and competition schedules to ensure that all programs at all times are compliant with the new legislation.** Our colleagues at PLU and Willamette are currently using ARMS and they are light years ahead of the rest of us in the NWC in their compliance processes.
- **ARMS provides all NCAA paperwork in an electronic format.**
- At the beginning of every academic year, we meet with all of our teams and athletes and during this time we review NCAA rules, HIPAA, FERPA paperwork, and the paperwork that the NCAA expects every student to sign off on.
- Currently, the paperwork packet is a total of 5 pages that are printed and signed in person. **With 300 athletes, that is approximately 1,500 copies that we use on an annual basis as a result of the compliance paperwork.**
- We are also expected to file and hold this paperwork for seven years to maintain our appropriate NCAA records. (This is a stipulation of the NCAA).
- **The ARMS platform would provide us with the opportunity to orchestrate this paperwork in an e-format and as a result, we would reduce the significant use of paper, and we would also be able to manage our file room and space since this would all be captured online.**

Roster Management & Eligibility Management:

- **ARMS provides us with a tool to keep effective and accurate roster records.**
- The NCAA and the Northwest Conference require us to maintain eligibility records for each student-athlete and to track them over their four-year intercollegiate career.
- **The ARMS system will provide us the opportunity to track student-athletes who leave the team, have a season-ending injury, have academic difficulty, or for any additional reason in which their participation as a student-athlete is interrupted.**
- **ARMS software provides a critical feature for the compliance director and the athletic department since our Registrar's office does not "tag" or track our current student-athlete population for their participation or use of a season of competition and therefore, accurate record keeping is the responsibility of the athletic department.**
- If a student-athlete requests to transfer from Whitman College, then we are required to respond to any college on the academic status and progress of a student-athlete at Whitman. We also complete transfer tracers to other institutions that officially report a student athlete's eligibility.

Recruiting:

Athletics works closely with the Admissions Office with our recruiting efforts. The Admissions Office uses the Slate Platform and our coaches have a very limited point of access to the numerous tools that Slate provides to our Admissions counselors. This is understandable since the limited access is often due to privacy and confidentiality items such as counselor recommendations and financial aid information.

- Work has been done to try to enhance the Slate Portal, but our head coaches and assistant coaches do not have a mobile platform which is critically important to the work that we do. Our coaches spend a significant amount of time at recruiting showcases, games, and events and the mobile portal is a real need for our programs.
- Currently, our coaches use ARI, Front Rush, and Excel via Google Docs to manage their recruiting databases, mailings, and prospect profiles. We truly need one main system for our recruiting efforts and there is a concern that these other platforms expose us to data breaches (Front Rush has already experienced a significant breach two years ago). In the past 5 years, we (Admissions, Athletics, & WCTS) have reviewed both of these platforms and we declined to do work with them for our entire department given the lack of financing.
- **Two years ago, we reviewed, both ARI and Front Rush, and each platform would have cost us \$18,000.00 annually.**
- **ARMS provides a robust recruiting operating system in addition to five additional areas of departmental needs for the same cost as one of the recruiting platforms (ARI or Front Rush). It's a significant and defining difference between ARMS and other items that we have reviewed.**
- **ARMS talk with Slate and our data and communications with the Admissions Office would be efficient and heightened as a result of the inner workings of these two platforms.**
- **ARMS also provides us with a mobile platform for our coaches to use while recruiting on the road.**

Branding and marketing- Email Templates:

- **ARMS provides a customized marketing portal in which our coaches and staff can pull from a library of images that feature the college, classrooms, facilities and so much more. The opportunity to create enhanced graphics for our daily communications is a huge bonus with this platform.**
- **Teams can create customized visual images specific to their programs. This will make a dramatic difference in our recruiting efforts, and our correspondence with alumni, parents, and friends of athletics.**

Camp and Clinics:

Recruitment and Fundraising are critical expectations of the Athletic Department.

We currently do not have a central portal for camp registration, registrant management, camp payment, or camp refunds.

Our coaches are currently outsourcing our camp registration and payment process using the Stack Sports and Ryzer online sites.

There have been concerns with using these two sites since they publicize that they retain the right to "use" the information that they acquire on registrants.

The payments to the college/department also often have to be addressed with our colleagues in the business office since they are not always properly identified or labeled specifically to the camp that they represent.

- **ARMS will provide us with a central portal for all Whitman Athletic camps. It also provides all of the items that are necessary to run effective and highly organized camps.**
- **ARMS will design a customized camp page for each team that is specifically branded to the college.**

- **ARMS also maintains a 6% service charge for all camp registrations. This figure would be lower than the current sites that we use.**

Event Registration, Management, and Payment System: WClub Golf Outing

- **ARMS would provide us with the opportunity to market the WClub Golf Outing**
- **ARMS would provide us with a portal platform in which golfers could register, sponsor, and pay for their participation in the event.**
- In 2023, we used Event Bright to register our participants. The service fee was 11%. We received a significant amount of negative feedback for this service fee being so high. We need to find an alternative option. **ARMS provides us with an affordable option and it also provides us with a portal that we can access on the day of the event to finalize registration, payments, or sponsorships.**

Facility Schedules:

The Director of Athletics and the Director of Facilities currently oversee nine facilities (Sherwood Center, BFFC -Fitness Center and Harvey Pool, Bratton Tennis Complex, Outdoor Tennis Courts, James Hayner Field, the practice fields, and Borleske Stadium Hitting Center.

These facilities hold academic classes, practices, competitions, and open recreational opportunities for athletics and the entire campus community.

The requests for facility space and reservations are a daily task given the significant requests for the use of these spaces.

- **ARMS features a facility scheduling platform that would significantly enhance our organization in this area.**
- **ARMS would also provide us with a full view of all facilities at all times. The opportunity to see what is happening in multiple facilities at a single date and time would provide our staff with resources to accommodate our facilities most efficiently.**
- **ARMS also features an operational system that could be prompted by a head coach to request a change, cancellation, or future reservation. The process is critical since it also has a sequence for approval for any changes to happen to the master calendar. The notification process that is featured in ARMS would help with the complete notification of our staff including the Athletic Trainers, Facility Director, Compliance, Sports Communication, and the Director of Athletics.**
- We currently do not have a software platform that helps us manage this and this is also one of the high-risk areas in which our compliance oversight for practices is really impacted.











ARMS RISK REPORT

This document serves as the outcome of the appraisal undertaken by the IT Team of the ARMS Athletic Management Online Software Application. The objective of this is aimed at ARMS operational effectiveness, adherence to and compliance with regulations, management of risk, technical controls, and the integration of the software with Whitman College systems.

OVERVIEW

ARMS is a cloud-based, Software as a Service solution that provides colleges and universities a framework for managing their entire athletic ecosystem namely (ARMS Recruiting, ARMS Compliance, ARMS Academics, ARMS Team Management, ARMS Department Management, ARMS Financial Aid, ARMS Advancement, ARMS Administration and ARMS Workflow, ARMS Total Camps Solution). ARMS Software provides all the tools to help support colleges and universities to streamline their communications, recruiting processes, reporting and monitoring all areas of athletics particularly mitigating the risk of compliance violations.

The following documents were considered, reviewed and follow up questions were asked during the assessments.

-  1_arms_software_HECVAT Full_01_06_23.xlsx
-  2_arms_software_workflow_process_security.pdf
-  3_ARMS Software LLC 9-30-22 SOC 2 Type II Report - Client.pdf
-  4_arms_software_AOC-SAQ_D_ServiceProvider-v3_2_1_aoc_09_01_22.pdf
-  5_arms_software_security_metrics_asv_scan_attestation_03_24_23.pdf
-  6_arms_software_penetration_test_results_2021.pdf
-  7_arms_software_data_types_by_module.pdf
-  8_arms_software_data_exchange_technical_support_timeframe_information.pdf
-  9_arms_software_gdpr_compliance_information.pdf
-  10_arms_software_international_edition_VPAT_2023.pdf
- [ARMS Software Privacy Statement](#)

CONTROL ASSESSMENT

With regards to Security, Compliance, and Integration in the aspects of ARMS Athletic Software, ARMS has put in place an acceptable level of controls/measures to safeguard security and accessibility.

ARMS provided an in-depth HECVAT assessment report, signifying a comprehensive examination of their services within the HECVAT framework, which reflects their dedication to addressing security and privacy issues. Furthermore, the vendor submitted a VPAT report, demonstrating awareness and commitment to enhancing the accessibility of their products for individuals with disabilities. Finally, documents indicate that ARMS has assessed and evaluated its internal controls (SOC 2 Type 1) that safeguard its data are sufficient and designed correctly.

DATA EXCHANGE

- ARMS has stated clearly that “Please note that most of this data (outside of demographic data for student athletes and staff) are not required to be utilized”. **It is the decision of the Client's Athletic Department as to which data elements they deem necessary to utilize in ARMS.** As emphasized and outlined by ARMS, the decision of sharing specific data relies on the client (Institution) and as such the Institution becomes the Data Controller (Data Steward).
- ARMS operate using different Data Modules, each designed to collect specific data to function. While ARMS explicitly states that none of its modules inherently require **Regulatory Protected Information like FERPA, HIPAA, and PCI data**, such information CAN be collected and stored at the discretion of the institution, and therefore the risk and management of this data lies with the institutional representatives (**Whitman College Athletics Department**) correctly configuring and applying role-based access.
- ARMS Software utilizes a subservice (third-party vendor) for its data and email communications.

PRIVACY

ARMS Software keeps user account information active in user registration databases in order to provide immediate access to your personalization preferences and data each time you visit the Site. It takes 60 days to permanently delete ARMS Software user accounts, and in most cases the accounts are deactivated and then deleted from the user registration database.

INTEGRATION AND TECHNICAL CONTROLS

ARMS has very thorough and detailed documentation of their protocols used for integrations, as well as their technical controls and overall computing environment. Industry standard authentication protocols are supported; most importantly, Whitman's preferred single sign-on technology appears to be supported and well understood. The means of transferring data (e.g., athlete demographics and academic enrollment) to and from ARMS servers also uses industry standard and secure protocols. ARMS provided incredibly detailed descriptions and diagrams of data flow through the web application and to off-site backup storage, and has a mature process for managing the integrity, reliability, and security of their application code.

WHITMAN'S RESPONSIBILITIES (COMPLEMENTARY USER ENTITY CONTROLS)

ARMS Software's controls are designed with the assumption that controls would be implemented within the user organization to complement their controls for the operation to be effective. ARMS Software is designated as the **data processor** in this context, while Whitman College is designated as the **data controller**. Therefore, ARMS Software holds the IT Department and Athletics Department responsible to perform the following functions as **data controller**:

- *Controls should be established to ensure a **password policy** has been defined and implemented for authenticating users to the college network. (IT)*
- ***Access provisioning** controls should be established to ensure system access is restricted to authorized student athletes, athletic staff, and administration. (Athletics)*
- *User account management controls should be in place to ensure **roles and permissions** assigned within the ARMS system are properly configured. (Athletics)*
- *Controls should be in place to ensure the **accuracy and completeness** of data loaded into the ARMS system. (IT and Athletics)*

- *Controls should be in place to assign users with responsibility for investigating, resolving, and communicating potential compliance alerts to appropriate authorities. (IT and Athletics)*
- ***Privacy controls** should be in place to ensure users are aware of the college privacy requirements and data being shared with other parties. (Athletics)*
- *User entities are responsible for **communicating instructions** to Arms Software regarding the collection, use, retention and disposal of personal [information] collected from data subjects. (Athletics)*
- *The **data controller** maintains the line of communication with individual data subjects. Communication of choices to data subjects regarding the collection, use, retention, disclosure and disposal is the user entity's responsibility. (Athletics)*
- *The **data controller** is responsible for determining the personal information to be collected from data subjects and providing instruction to Arms Software on what personal information is to be collected. (Athletics)*
- *The **data controller** is responsible for obtaining explicit consent for the collection of personal information from data subjects, as determined necessary. (Athletics)*
- *The **data controller** is responsible for obtaining explicit consent from data subjects to disclose personal information to third parties. (Athletics)*
- *The **data controller** is responsible for communicating with individual data subjects with an accounting of personal information held and disclosure of personal information retained, as requested. (Athletics)*

RISKS IDENTIFIED

- As primary **data controller**, the Athletics Department may expose the College to increased legal and regulatory obligations depending on what modules are adopted and what data is collected. As new modules are adopted, Athletics should work in consultation with IT staff to develop appropriate controls and processes to minimize risk and additional obligations.
- There is a heightened risk of a data breach and/or information disclosure if the College does not adhere to the Complementary User Entity Controls (CUECs).
- ARMS takes 60 days <https://armssoftware.com/privacy.html> to permanently delete users' accounts from its systems after a subscription ends. If the College terminates its agreement with ARMS and a compromise occurs during this period, then there is potential to lose student data during this time.

RISK RANKING

*On the basis of this assessment, the IT Team rates the use of this service to be **Moderate-to-High**.*

This risk rating is tied to transfer of academic records (FERPA) in the initial implementation of ARMS, over dependence of Complementary User Entity Controls, credit card processing for the camps module, and also the potential to store highly-sensitive and regulated data. The default risk is **Moderate**, but the **High** modifier is added to reflect the flexible and open nature of certain modules, such as Team Management and Workflow that enables the Athletics Department to collect and store highly sensitive and regulated data. (e.g., HIPAA and FERPA). This document has been shared with multiple parties to determine if the risks described are acceptable. All parties should review the document prior to the Services Agreement being signed by the individual with the appropriate authority to bind the College to this vendor.

IT RECOMMENDATION

- Appropriate use and access policies should be implemented and communicated to administrative users of the ARMS System to safeguard against the potential risks associated with privacy, security, regulations and compliances.
- As use of modules and features in ARMS Software will change over time, the Athletics department should meet with IT staff prior to implementation of any new modules or data collection processes to assist with analysis of associated risks and development of data protection processes.
- Role-based access controls should be implemented to limit access and activities to only those few needed to perform the business processes and functions associated with those roles. These role assignments should be reviewed regularly to ensure they are still appropriate given employee turnover and role changes.

REPORT PREPARED BY

Dorcas Attah
Information Security Officer

Mike Osterman
Director, Enterprise Technology

REPORT SHARED WITH

Kim Chandler
Director of Athletics and Chair of Sports Studies,
Recreation & Athletics

Dan Terrio
Chief Information Officer

Jeff Hamrick
VP for Finance and Administration

Alzada Tipton
Provost and Dean of the Faculty

Al Reiser
Associate Athletic Director

To Whom It May Concern:

To give you a sense of the need for a system like ARMS, I wanted to document the process of completing the NCAA compliance forms, and how the students and the college could be better served by having a system like ARMS. In addition to benefits like managing camps and clinics or enhancing recruiting, ARMS would have a direct benefit on the compliance process. It would allow us to focus our compliance meetings on more meaningful trainings, it would better facilitate the complex collection of paperwork, and it would minimize the risk of error. ARMS ultimately would enhance the work of the athletics department, and it would enhance the experience of the student-athlete.

In the NCAA compliance meetings, we spend most of our time focusing on forms rather than engaging in meaningful discussion. In the 2024 fall semester, I met with 273 athletes to have them sign their forms in person. Those meetings are an hour long. During those meetings I spend approximately 5 minutes discussing basic NCAA rules, and I spend 5 minutes talking about hazing and best practices. The majority of the rest of the time is spent going through forms that student-athletes need to sign. These are meetings where we spend the most of the time going through documents and having them sign paperwork. Potentially with a system like ARMS, the students could complete their paperwork online, and we could spend more meaningful time talking about things like hazing and engaging in deeper conversation about the NCAA rules.

I also spend a significant amount of time tracking the forms that students sign. From a compliance standpoint, the students need to complete five forms, two trainings, and additional paperwork for international students. The forms include the NCAA Student-Athlete Statement, the NCAA Drug Testing Consent Form, the Athletics Code of Conduct Receipt, the Whitman College Policies Receipt, and a Title IX Attestation form. International students need to gain additional amateurism clearance from the NCAA Eligibility Center. Finally, every student-athlete needs to complete Sexual Assault Prevention training and Hazing Prevention training through Vector. In total, I track on eight different forms or trainings across 273 students. Quick multiplication puts my spreadsheet at 2,184 documents that I am tracking for the Fall 2024 semester. These are things that I am collecting by various sources, including hardcopy for the four NCAA and Conduct Policy forms, a google form for the Title IX Attestation, a data set from the NCAA Eligibility Center for the International Students, and a data set from Vector for the online trainings. To track these documents takes significant time. I literally spent the first several weeks of the semester tracking and filing all of these documents. This is work that could be done much more efficiently with a system like ARMS.

There is also a risk of human error with the system as it currently exists. As I'm tracking on two thousand documents, it is easy to misfile something or record something incorrectly. As a tracking system, ARMS would minimize that risk. This is especially important, as significant NCAA penalties can occur if someone does not go through the paperwork correctly. For example, if someone were to compete prior to filling out the NCAA Drug Testing Consent Form, they could lose their collegiate athletic eligibility.

Here is the NCAA bylaw language that talks about the Drug Testing Consent form. Each of the above forms have similar statements and expectations from the NCAA.

14.1.4 Drug-Testing Consent Form.

14.1.4.1 Content and Purpose. Each academic year, a student-athlete shall sign a form prescribed by the Management Council in which the student consents to be tested for the use of drugs prohibited by NCAA legislation. Failure to complete and sign the consent form before competition shall result in the student-athlete's ineligibility for participation (i.e., practice and competition) in all intercollegiate athletics. (Adopted: 1/10/92 effective 8/1/92, Revised: 1/16/93, 1/10/95 effective 8/1/95, 1/14/97, 4/13/10)

ARMS has the potential to enhance several aspects of the athletic department, but from a purely compliance perspective, it would make things more efficient, it would make things safer, and it would allow for us to engage the student-athletes at a more meaningful level. ARMS would solve for a lot of issues within the athletics department, and the compliance office would simply run better with a system like ARMS.

Sincerely,

Albert Reiser
Associate Director of Athletics
Whitman College

Upper Class Housing	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033	FY 2034
12 month Residents	136	136	136	136	136	136	136	136	136
9 month Residents	76	76	76	76	76	76	76	76	76
Revenues									
Monthly Single Room Charge - 12mo	\$950	\$979	\$1,008	\$1,038	\$1,069	\$1,101	\$1,134	\$1,168	\$1,203
Monthly Single Room Charge - 9mo	\$1,125	\$1,159	\$1,194	\$1,229	\$1,266	\$1,304	\$1,343	\$1,384	\$1,425
Annual Single Room Charge - 12mo	\$11,400	\$11,742	\$12,094	\$12,457	\$12,831	\$13,216	\$13,612	\$14,021	\$14,441
Annual Single Room Charge - 9mo	\$10,125	\$10,429	\$10,742	\$11,064	\$11,396	\$11,738	\$12,090	\$12,452	\$12,826
College House Room Rate - 9mo (3% annual increase)	\$7,897	\$8,134	\$8,378	\$8,630	\$8,889	\$9,155	\$9,430	\$9,713	\$10,004
Single Residence Hall Room Rate - 9mo (3% annual increase)	\$8,636	\$8,636	\$8,636	\$8,636	\$8,636	\$8,636	\$8,636	\$8,636	\$8,636
Total Single Room Income - 12mo	\$1,550,400	\$1,596,912	\$1,644,819	\$1,694,164	\$1,744,989	\$1,797,339	\$1,851,259	\$1,906,796	\$1,964,000
Total Single Room Income - 9mo	\$769,500	\$792,585	\$816,363	\$840,853	\$866,079	\$892,061	\$918,823	\$946,388	\$974,780
Additional Expenses									
Upper Class Housing Utilities	\$168,750	\$173,813	\$179,027	\$184,398	\$189,930	\$195,628	\$201,496	\$207,541	\$213,767
1 Res Life	\$88,425	\$91,078	\$93,810	\$96,624	\$99,523	\$102,509	\$105,584	\$108,752	\$112,014
1 Custodian	\$52,650	\$54,230	\$55,856	\$57,532	\$59,258	\$61,036	\$62,867	\$64,753	\$66,695
1 Landscape	\$55,350	\$57,011	\$58,721	\$60,482	\$62,297	\$64,166	\$66,091	\$68,074	\$70,116
1 Physical Plant Maintenance	\$64,800	\$66,744	\$68,746	\$70,809	\$72,933	\$75,121	\$77,375	\$79,696	\$82,087
Supplies	\$20,000	\$20,600	\$21,218	\$21,855	\$22,510	\$23,185	\$23,881	\$24,597	\$25,335
Total New Expenses	\$449,975	\$463,474	\$477,378	\$491,700	\$506,451	\$521,644	\$537,294	\$553,412	\$570,015
Life Cycle Reserve Expenses									
0.50% on Building Value	\$385,000	\$396,550	\$408,447	\$420,700	\$433,321	\$446,321	\$459,710	\$473,501	\$487,706
Total Life Cycle Reserve Expenses	\$385,000	\$396,550	\$408,447	\$420,700	\$433,321	\$446,321	\$459,710	\$473,501	\$487,706
Net Income w/o Bond Maintenance	\$1,484,925	\$1,529,473	\$1,575,357	\$1,622,618	\$1,671,296	\$1,721,435	\$1,773,078	\$1,826,270	\$1,881,059
Annual Bond Service Wrapped Through 2049	\$688,854	\$1,653,250	\$1,653,250	\$1,653,250	\$1,753,250	\$1,753,250	\$1,758,000	\$1,767,250	\$1,765,750
Project Net Income Wrapped Through 2049	\$796,071	-\$123,777	-\$77,893	-\$30,632	-\$81,954	-\$31,815	\$15,078	\$59,020	\$115,309

BIP for CCV RLife Supplies

1 message

Andrew Johnson <johnsoam@whitman.edu>
To: "Jacobson, Bridget" <jacobsbk@whitman.edu>
Cc: Angela Harvey <harveya@whitman.edu>

Mon, Nov 18, 2024 at 2:08 PM

Hi Bridget,

Per our conversation, here is the BIP information:

Discretionary budget and Supplies for Residence Life CCV Staff Positions

Residence Life and Housing

GL: 3-96-81-30127-5090

Current FY 2025 Amount: \$543,007

Request Amount: \$2,150 (already included in the "supplies" line of the pro-forma CCV budget)

Responsible Staff Person: Director of Residence Life and Housing

Strategic Priority: #3 Vibrant Campus Community

Ongoing request

Justification: This would support the professional and student staff positions, and may include supplies for programs, decorations, and other purchases to make the space welcoming. The \$2,150 is the remaining amount between the BIP for student staff positions and the \$20,000 that was budgeted as supplies for CCV in the original pro-forma budget plan.)

Angela - Bridget will be entering this in the other shared doc for you to access.

Best wishes,
Andrew

Andrew Padilla Johnson, M.A.
Director of Residence Life and Housing
Whitman College
johnsoam@whitman.edu
(509) 527-5297
He/Him/They/Them

Re: FY26 BIP Care Coordinator

1 message

Thu, Oct 10, 2024 at 4:16 PM

Angela Harvey <harveya@whitman.edu>

To: Bridget Jacobson <jacobsbk@whitman.edu>, Laura Nix <nixll@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>

Hi Bridget,

I'm including Darlene and Laura here since this is my first time through BIPs and I want to make sure I'm giving correct advice.

Yes, the plan outlined in the memo is still an option, unless another idea for covering the rest of the position has emerged. 48.8% of the current salary would be \$29,280, but I expect you ought to account for the cost of living increase, which we estimate at 3%, so the BIP would be for \$30,158

The cost of OPE is not included in the BIP.

Thanks!

Angela

On Thu, Oct 10, 2024 at 3:18 PM Bridget Jacobson <jacobsbk@whitman.edu> wrote:

Hi Angela,

As I am looking at the CARE Coordinator Memo you shared on July 23, 2024, for the FY26 BIP, am I correct that we will request a BIP for 48.8% of the salary for this position to be funded by the DOS? If so, can you please provide me with the amount requested to fund this position?

Thank you,
Bridget

--

Bridget Jacobson (she/her/hers)
Assistant Dean of Students/Director of Student Life
345 Boyer Avenue, Memorial #325
Walla Walla, WA 99362
jacobsbk@whitman.edu
509-527-5158

"Always keeping students at the center of our work"

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

--

Angela Harvey
Budget Manager
Office of Accounting and Business Services | Rm.233
Whitman College
345 Boyer Ave | Walla Walla, WA 99362
509.526.3028

MEMORANDUM

TO: Bridget Jacobson, Assistant Dean of Students/Director of Student Life
Aimee Milne, Incoming Assistant Vice President for Wellness

FROM: Kazi Joshua, Vice President for Student Life and Dean of Students
Jeff Hamrick, Vice President for Finance and Administration

CC: Angela Harvey, Budget Manager
Darlene Wilson, AVP for Finance and Controller

SUBJECT: Advance planning for funding of CARE Coordinator role, and increased utilization of restricted funds in Health and Wellness.

DATE: July 23, 2024

The purpose of this memo is to formalize a sustainable future funding plan for the CARE Coordinator position rolling up to the Dean of Students, and to outline how future Health and Wellness positions will be supported with restricted funds where possible :

Background

As fiscal year 2024 closes, the **Tabbutt Family Counseling Center Endowment (2-89-42-30443-XXXX)** is in deficit by \$13,002 due to the CARE Coordinator salary allocation of 58.8% to that endowment. The remaining 40.2% of the position is charged to the **Vice President Student Affairs Office (1-90-42-30001-XXXX)**. The changes outlined in this memo will address this unsustainable salary allocation for FY25 while posing the question of how to fund the Care Coordinator position for fiscal year 2026 and beyond.

Other underutilized endowments for Health and Wellness include the **Dawson Counseling Center Endowment (2-89-42-30404-XXXX)** , which has a \$45,000 payout for fiscal year 2025 and \$151,000 in carryover funds available. The **Schmitt Psychiatric Endowment, (2-89-42-30434-XXXX)** has a \$97,126 payout for fiscal year 2025 and \$92,126 in carryover funds available. An additional underutilized fund specific to Alcohol and Drug programs is the **Dawson-Santa Alcohol and Drug Endowment (2-89-42-30419-XXXX)**, which has a \$100,564 payout for fiscal year 2025 and \$154,551 in carryover funds available.

Short-Term Plan

The Dean of Students will correct the fiscal year 2024 deficit in Tabbutt by posting a journal entry for 6/30/24 to move \$13,002.16 from Residence Life Reserves (3-96-81-30131-6329) to the Tabbutt Endowment. The salary split for the CARE Coordinator for fiscal year 2025 will be adjusted down from 58.8% to 10% charged to the Tabbutt Endowment, a sustainable rate based on the fiscal year 2025 Payout of \$7,771. In FY25, \$15,892 of the funding shortfall for the CARE Coordinator position will come from budget reallocation of \$4,500 from the Intramural Debate Fund 1 Discretionary Budget (1-71-25-30424-XXXX) and \$11,392 from the Debate Fund 1 Budget (1-71-25-30423-XXXX) to the VP Student Affairs Office (1-90-42-30001-XXXX). For more details on the operating budget savings being reallocated to this position, please see the Swap-Out Initiative efforts outlined in the "Debate Memorandum Swap-Out Initiative 07232024," which is the source of the savings of \$15,892 available for reallocation as outlined above. These reallocations do provide a portion of the CARE Coordinator salary unfunded, with a net anticipated FY25 shortfall of \$23,636 in the VP Student Affairs Office (1-90-42-30001-XXXX) where the position will now be 90% allocated. To relieve this FY25 budget shortfall, the college will first exhaust any remaining funds in Tabbutt Family Counseling Center Endowment (2-89-42-30443-XXXX), then utilize salary savings available within the Office of VP for Student Affairs.

The Dean of Students is currently seeking a Psychiatric Nurse Practitioner who will start in fiscal year 2025, and which will be 100% charged to the Schmitt Endowment. Also in fiscal year 2025, the Dean of Students will be seeking a Counselor for the Counseling Center, to be charged to the Dawson Counseling Center Endowment upon hire. The Dean of Students will also be seeking qualified candidates to be funded by the Dawson-Santa Alcohol and Drug Endowment starting in fiscal year 2025.

Plan for Fiscal Year 2026 and Beyond

For fiscal year 2026, the CARE Coordinator salary allocation to the Tabbutt endowment will continue at 10%. Having sought out long term budget savings elsewhere in the department, as outlined in the "Debate Memorandum Swap-Out Initiative 07232024," the Dean of Students will submit a fiscal year 2026 Budget Initiative Proposal (BIP) to request funding for the 48.8% of the CARE Coordinator position previously charged to Tabbutt, bringing that position to 90% funded by the College going forward. Approval of this funding request is not assumed, and an alternative plan is encouraged.

Utilizing unspent current-use funds, as well as funds in endowment spending accounts, is a key element of the college's strategy for closing future gaps between budgeted revenues and budgeted expenses. The Office of Accounting and Business Services is currently completing a careful scrutinization of all restricted funds across the entire college through at least the end of calendar year 2024. It is working with vice presidents and other stakeholders to make recommendations for future spending practices from restricted resources that minimize the impacts of future budget-balancing efforts. We thank you in advance for taking an institution-wide perspective as you receive these updated spending plans, and are happy to meet with you to answer any questions.

Special Activities Scholarship Fees

Semester	Total Scholarships
FA20	\$4,400.00
SP21	\$8,500.00
	\$12,900.00
FA21	\$9,050.00
SP22	\$12,615.00
	\$21,665.00
FA22	\$12,457.50
SP23	\$14,458.00
	\$26,915.50
FA23	\$10,860.50
SP24	\$17,122.50
	\$27,983.00
FA24	\$21,040.00
SP25	

Equity and Inclusion In Outdoor Recreation: Adaptive Equipment Acquisition and Sustainability Plan

Submitted to: President's Budget Advisory Committee

Submitted by: Juli Dunn, AVP of Student Life / Brien Sheedy, Director of Outdoor Programs

Date: November 18, 2024

Executive Summary

This proposal requests funding to acquire and maintain adaptive outdoor recreation equipment, including adaptive climbing gear, water sports equipment, and trail chairs. This initiative aligns with the college's strategic goals to advance equity, inclusion, and transformative learning experiences. Additionally, this proposal outlines a sustainability plan, including ongoing maintenance and replacement costs, to ensure the long-term availability of these resources.

Strategic Alignment

This proposal supports Whitman's strategic priorities:

- 1. Equity and Inclusion:** By breaking down barriers to outdoor recreation, this proposal ensures equitable access for individuals with disabilities.
 - 2. Transformative Learning Experiences:** Adaptive equipment enables all students to engage fully in outdoor programs, fostering growth and a sense of belonging.
 - 3. Sustainability and Community Engagement:** The college demonstrates a commitment to long-term inclusion and resource stewardship by maintaining adaptive resources.
-

Proposed Equipment, Costs, and Maintenance Plan

- 1. Adaptive Climbing Equipment**
 - **Initial Purchase:** Ascenders, adaptive climbing harnesses, grip aids, and pulley systems.
 - **Initial Cost:** \$12,000*
 - **Annual Maintenance and Replacement Costs:** \$1,200 for inspections, harness replacements, and rope integrity checks.
- 2. Adaptive Water Sports Gear**
 - **Initial Purchase:** Sit-on-top kayaks with outriggers, hand-operated paddle systems, adaptive life vests, and transfer benches.
 - **Initial Cost:** \$10,000*
 - **Annual Maintenance and Replacement Costs:** \$1,000 for wear-and-tear on kayaks, paddle systems, and buoyancy aids.
- 3. Trail Chairs (Off-Road Wheelchairs)**
 - **Initial Purchase:** Durable trail chairs designed for rugged terrain with customizable seating.
 - **Initial Cost:** \$15,000*
 - **Annual Maintenance and Replacement Costs:** \$1,500 for tire replacement, frame inspections, and repairs.
- 4. Staff Training and Certification**
 - **Initial Cost:** \$5,000*

- o **Ongoing Costs: \$1500 annually for certification renewals and training new staff.**
- 5. Outreach and Awareness**
 - o **Initial Cost: \$500***
 - o **Ongoing Costs: \$300 annually for materials and event promotion.**

Total Initial Requested Amount: \$42,000

Annual Maintenance and Replacement Budget: \$5,000

Implementation Plan

- 1. Procurement Timeline: Equipment will be purchased at the beginning of FY26**
 - 2. Training: Staff training will occur within three months of equipment arrival, ensuring adaptive equipment's safe and effective use. Staff will then train student employees at the beginning of the academic year through a series of inservice trainings.**
 - 3. Program Launch: Adaptive programs will be integrated into outdoor activities as soon as possible, considering the need for necessary training and safety protocols, with outreach to inform the community of new opportunities.**
 - 4. Sustainability Plan: Maintenance will include annual inspections and repairs to ensure equipment remains safe and functional. Replacement costs will be incorporated into the outdoor program's ongoing budget, supplemented by grants and community partnerships.**
-

Conclusion

Investing in adaptive outdoor recreation equipment and planning for ongoing maintenance and replacement is vital in making Whitman's outdoor program inclusive and sustainable. This funding will empower individuals with disabilities to fully participate in outdoor pursuits, enhancing equity, community engagement, and transformative learning experiences.

We respectfully request \$42,000 in initial funding and an annual maintenance allocation of \$5,000 to ensure the success and sustainability of this initiative.

***One-time capital expenditures**

Budget Proposal for Involve Platform – Modern Campus

Request Amount: \$10,585.08

Fiscal Year: FY 2026

Purpose:

This proposal seeks \$10,585.08 to cover the ongoing annual costs of the Involve platform from Modern Campus. This platform is vital in advancing student engagement and success, aligning with Whitman College's strategic themes. Involve provides a comprehensive system for managing student activities, fostering connections, and tracking engagement, making it an essential tool for the College's continued excellence in academic and community development.

Strategic Alignment:

1. Academic Excellence and Distinction
 - o Rationale: The platform encourages student participation in academic clubs, research projects, and experiential learning, providing avenues for intellectual growth outside the classroom. It supports students as they explore new ideas and develop critical thinking skills that reflect Whitman's liberal arts mission.
2. Diversity, Equity, Inclusion, Anti-racism, and Access
 - o Rationale: The platform promotes inclusivity by offering an easy-to-navigate system where students of all identities and experiences can discover campus activities and resources. By centralizing event management and communication, Involve reduces barriers to participation, fostering a more equitable campus community.
3. A Vibrant Campus Community That Supports Learning, Thriving, and Lifelong Relationships
 - o Rationale: Involve helps create a more connected and engaging campus environment by centralizing all student organizations, activities, and events in one platform. This promotes social connections, facilitates involvement, and supports a thriving community where students form lasting relationships.
4. A Strong Launch Into Life After Whitman for All Students
 - o Rationale: The platform enables students to track their participation in co-curricular and extracurricular activities, building a portfolio of skills and experiences that enhance their resumes and career prospects. Supporting student leadership and involvement contributes to preparing students for post-graduate success.
5. Connecting Whitman, Walla Walla, and the World
 - o Rationale: Involve enables better coordination of community-based events and service opportunities, helping students connect with Walla Walla and beyond. It enhances collaboration between the College, local organizations, and the global community, furthering its impact on and off campus. Further, the platform provides students with a co-curricular transcript that they can take with them after graduating from Whitman.
6. Environmental Justice, Sustainability, and Climate Action
 - o Rationale: The platform supports sustainability by reducing paper use and streamlining event management processes. It also aids in promoting sustainability-related initiatives and organizations on campus, reinforcing Whitman's commitment to environmental justice and climate action.



Financial Breakdown:

The total annual cost for the Involve platform is \$10,585.08, which includes:

- Software Subscription Fee: \$9,000.00
- Maintenance & Support Services: \$1,200.00
- Annual Hosting Fee: \$385.08

Justification:

The Involve platform enhances Whitman College's ability to:

- Support student engagement through efficient and inclusive event management.
- Promote academic, social, and emotional well-being by fostering connections within the campus community.
- Equip students with experiences that align with their academic learning and prepare them for life after graduation.
- Integrate sustainability practices in campus operations, reinforcing Whitman's environmental justice values.

Conclusion:

This budget request for \$10,585.08 to cover the ongoing costs of the Involve platform aligns with Whitman College's strategic initiatives. Involve is an essential tool that enhances student engagement, operational efficiency, and community connections, ensuring Whitman continues to fulfill its mission with distinction for years to come.

FlyWire

1 message

Connor Stone <stonecd@whitman.edu>
To: Angela Harvey <harveya@whitman.edu>
Cc: Laura Nix <nixll@whitman.edu>, Deb Wright <wrightdl@whitman.edu>

Mon, Nov 18, 2024 at 8:44 AM

Hi Angela.

FlyWire is the vendor that we currently process the majority of our international wire transfers through for student payments.

The budget request is to add further services, including their student account payments platform with full Colleague integration. This will allow students and families to save payment accounts for more convenient payments and the platform is significantly more user-friendly than ACI. It will also serve as a "one-stop shop" of sorts for student finance; integration with Colleague allows FlyWire to display current balances in real time and payments will be applied without using our current manual batch process.

We are also requesting to add FlyWire payment plans to our current setup. This will allow students and families to enroll in payment plans with 0 intervention required on the part of Student Accounts. It also saves the method of payment and automatically pulls payments as payment due dates come up, reducing the likelihood of late or missed payments by students and families.

I think that more or less covers the big picture.

Connor Stone

Accounting Specialist
509-527-5143 (office landline in Memorial 233)

Memorial 233 - open weekdays 9 a.m. to noon & 1-4 p.m. for cash & check payments

Mailing address for paper checks - *please note your student's Whitman ID number on the memo line*

ATTN Student Accts
Whitman College
345 Boyer Ave
Walla Walla, WA 99362

Schedule A – Pricing

Software as a Service (SaaS) - PAID BY SCHOOL

Item Description	Monthly Subscription	One-Time Fees	Notes
Student Financial Software	\$1,995	\$5,000 for Phase 1: Collection Management for past due accounts. \$10,000 for future Phase 2: Real-Time Billing (Account Activity & Summary), Education Payments & Payment Plans for current student account presentment.	Base Student Financial Software platform includes: · Real-time integration with Colleague.

~~OPTIONAL Software as a Service (SaaS) - PAID BY SCHOOL~~

Item Description	Monthly Subscription	One-Time Fees	Notes
Agency Management	\$995	\$5,000 for future phase of configuration to add Agency Management	Up to four (4) agencies on Flywire's integrated list; first placement only. Agencies not on Flywire's integrated list subject to implementation fee per SOW.
PDF Collection Letter Configuration ----- Print/Mail	N/A	\$2,500	Includes first two (2) letters. \$250 for each additional letter. ----- \$0.40 + postage/each
Existing Past Due Plan Support	N/A	Per SOW	\$20/record import

Transactional Fees (as applicable)

Item Description	Fees	Paid By	Notes
Payment Plan Enrollment Fee	\$35/enrollment	Student/Authorized User	Retained by Flywire.
Credit/Debit Card Service Fee Payments for Tuition	2.85% US issued cards. 3.95% non-US issued cards. \$3 minimum	Student/Authorized User	Client will utilize Flywire as Merchant of Record to apply a service fee charge for domestic credit/debit transactions.
ACH Tuition Transactions	\$0.35	School	Client will utilize Flywire's PNC Gateway. Includes required NACHA account validation service. Invoiced monthly.
ACH Return Items	\$5	School	Invoiced monthly.
ACH Chargeback	\$20	School	Invoiced monthly.
ACH NSF	\$30	Payer	As applicable.

Pertaining to Flywire Platform:

- School staff training and system updates are provided at no charge during and post-implementation to ensure effective usage.
- A Statement of Work is prepared to outline what features the school will deploy. Any custom development requests that are outside of the standard product, service upgrades or enhancements will also be described/agreed upon. Custom development would apply at \$175.00/hour, subject to available engineering resources.

Facilities Base Increase BIPS Justifications FY26

Initiative	Budget	Justification
Custodian	Custodial	<p>Our custodial team is in need of at least an additional 1.0 FTE permanent Custodian.</p> <p>This position will support our commitment to providing a clean, safe, and healthy environment for all staff, faculty, and students at the college. This is paramount to ensuring the college meets the needs of the populations we serve so that we can continue to provide a safe educational setting for our students. Our campus has and will continue to change in regards to physical spaces that need to be cared for. In the past few years, we have assumed responsibility for:</p> <ul style="list-style-type: none"> • Jr/Sr Village • Edwards – Moore Clubhouse • Welty Health and Counseling Center • Two new themed interest houses • Lavender House • Spirituality House • Third Space Center • Phi Delta Theta • Tau Kappa Epsilon <p>We currently do not have the capacity to support and clean all of these new additions. Although This custodian would largely be responsible for cleaning the Village they would also help fill in as needed in the added spaces mentioned above. his much needed position will provide a Custodian to fill a vacancy due to the 2020 FSR initiative. This position will provide coverage for new square footage (e.g. Baseball Clubhouse, Third Space, Panhellenic Interest House) coming online spring 2024.</p>
General Maintenance Technician	Maintenance	<p>In support of recruitment and retention of students, this critical maintenance position will provide support to Academic, Administrative and Residence Housing and fill a vacancy due to the 2020 FSR initiative. This is paramount to ensuring the college meets the needs of the populations we serve so that we can continue to provide a safe educational setting for our students. Our campus has and will continue to change in regards to physical spaces that need to be cared for. In the past few years, we have assumed responsibility for:</p> <ul style="list-style-type: none"> • Jr/Sr Village • Borleske Stadium • Edwards – Moore Clubhouse • Seven interest houses (formerly Trust) • Third Space Center • Phi Delta Theta • Tau Kappa Epsilon <p>We currently do not have the capacity to support all the work orders which will result in all of our preventative maintenance lagging creating a much larger deferred maintenance and lifecycle backlog.</p> <p>Spring of 2024, such as a Panhellenic Interest House, Third Space House, potential Fraternity Houses, and also new facilities, such as the Baseball Clubhouse.</p>

Landscape Specialist	Grounds	<p>This critical mIn support of recruitment and retention of students, this critical Grounds department 1.0 FTE Landscape Specialist position fills growing need in Grounds. This will create a huge work load increase for the team. With just the Jr/Sr Village there is a large amount of shrub and landscaped beds that will have to be cared for. Including over 1500 grass plants annually as well as maintaining shrub beds, snow and ice removal in the winter. All seven of the new interest houses will require mowing and shrub bed maintenance. This is paramount to ensuring the college meets the needs of the populations we serve so that we can continue to provide a safe educational setting for our students. Our campus has and will continue to change in regards to physical spaces that need to be cared for, we have assumed responsibility for:</p> <ul style="list-style-type: none"> • Jr/Sr Village • Borleske Stadium • Edwards – Moore Clubhouse • Seven interest houses (formerly Trust) • Third Space Center • Phi Delta Theta • Tau Kappa Epsilon <p>We currently do not have the capacity to support all the work orders which will result in all of our preventative maintenance lagging and creating a much larger deferred maintenance issues.aintenance position will provide support to both Academic and Residence Housing and fill a vacancy due to the 2020 FSR initiative. This position will provide coverage for new square footage coming online Spring of 2024, such as a Panhellenic Interest House, Third Space House, potential Fraternity Houses, and also new facilities, such as the Baseball Clubhouse.</p>
Summere Conference Coordinator (student wages)	Conferemce Events Scheduling	<p>Due to the loss of the .5 FTE Coordinator positon, we are requesting that this much needed [ositon be replaced with a studnt at an RD or RA level.to provide leadership to our Summer Conference student workers.</p>
Sustainability Coordinator (50-50 with WWPS)	Sustainability	<p>This position is a great partnership with the WWSD and will help provide them educational oportunities and likley loop our CCEC studnts with an opporuntiy to proive classes in our public schools. This postion will also provide the critical support for the Sustainability Manager, especially as we begin the implementation of the Campus Sustainability Plan and the Energy Renwal and Decarbonization Plan. Currently, as a one-person department Sustainability has been fortunate to have the support of other Facilties Services departments and student assistants. However, to move forward with Strategic Priority #6 and achieve carbon neutrality the department would require additional technical full-time staff to accomplish the College’s goal. In light of the recent Art and Science assessment, Whitman’s sustainability leadership and progress is clearly a student recruitment and retention criteria and support our SP#6</p>

Sustainability Recycling Program (student wages and supplies)	Sustainability	<p>This increase in funding will address current inefficiencies, enhance recycling efforts across campus, and support the Sustainability Department in promoting waste minimization. Improving the recycling program is crucial for reducing landfill waste and promoting sustainability on campus. The additional funds will:</p> <ul style="list-style-type: none"> • Enable hiring more student workers and potentially a post-baccalaureate fellow to manage the recycling program effectively. • Provide new collection bins with smart sensors to streamline recycling efforts. • Facilitate the implementation of a comprehensive recycling education and outreach program. <p>These improvements align with the college's commitment to sustainability and will enhance recycling efficiency, ensuring a cleaner and more environmentally responsible campus.</p>
Sustainability EcoReps Program (student wages and supplies)	Sustainability	<p>This increase in funding will allow for more materials and labor to support and expand peer-to-peer sustainability learning and engagement across the student body. Currently, the EcoReps program operates with a minimal budget, supporting only two EcoReps. Increasing the budget for the EcoReps program will significantly enhance its ability to foster a culture of sustainability on campus. Specifically, the additional funds will:</p> <ul style="list-style-type: none"> • Enable the hiring of more EcoReps, allowing for broader peer-to-peer engagement. • Provide necessary materials and resources for effective sustainability programs and workshops. • Improve recycling practices and sustainability awareness in residence halls, contributing to the college's sustainability goals. <p>These improvements align with our institution's commitment to sustainability and will respond to the student body's demand for greater environmental engagement and education.</p>
Electricity	Utilites	This increase is due to the possible increase of costs for electricity.and added bldgs to the elecrticl meters
Natural Gas	Utilites	This increase is due to the potential increase of natural gas prices and longer periods of gas usage due to climate/temp. impacts.
Water	Utilites	This increase is due to the possible increase of costs for water.and added bldgs to the water meters

The Vibrant Campus Communities strategic priorities group (Faculty and Staff) identified six overarching themes, one of which was professional development. Within this list, and others, there is a consistent theme of staff feeling underfunded or that their area is disproportionately budgeted for development opportunities. With a growing number of professional, and sometimes certified staff, being reclassified to non-exempt, there is also the challenge of professional development travel and associated increased expenses only furthering the disparity between staff members and their opportunities for development. Another interesting aspect of this issue is that, within feedback sessions, many staff identified development requests for their supervisors. This indicates a desire to feel stronger support from well-equipped leaders on campus, which is an institutional effort without funding. An emerging goal from the group would involve the establishment of a supplemental professional development funding pool, where staff who serve in roles or units that do not have access to the necessary resources to support professional development, can submit proposals for the awarding of supplemental professional development funds.

Human Resources, in collaboration with Inclusive Excellence, is submitting a budget initiative proposal for one-time funds to pilot a staff professional development pool. The AVP for Human Resources and Vice President for Inclusive Excellence are requesting \$50,000.00 to support the creation of both an ongoing training program focused on developing strong, inclusive leadership training for on-campus leaders (\$10,000) and a pool of staff professional development funds (\$40,000.00) that would be awarded to staff members through a proposal process overseen by the two areas. Building on the post-sabbatical Faculty Forum model, recipients of Inclusive Excellence Professional Development Awards would be expected to share key insights and learning outcomes from their sponsored professional development experience with the campus community through a skillshop, microlesson, campus forum, Whitman Today, or some other mechanism. We will launch this pilot initiative during the 2025-26 AY and assess the outcomes at the end of that year. If the results are promising, we will submit a request for recurring funds to support this effort in fall 2026.

A \$50,000 granted request would be utilized in this way:

1. \$10,000 towards the creation of an ongoing training program focused on developing strong, inclusive leadership training for on-campus leaders. This training would be jointly developed by Inclusive Excellence and Human Resources, with additional collaboration as reasonable.
2. A \$40,000 pool of staff professional development funds. Human Resources would partner with Inclusive Excellence to develop a rigorous application process, as well as an expected learning deliverable and method for dissemination (perhaps not dissimilar to Faculty Forum).

If this BIP is approved, funds will be allocated to GL account 40832 Staff Professional Dev Fund.



ELIGIBILITY DETERMINATION MEMORANDUM

Whitman College

Project No.	700400, 721595	Applicant Type	<input type="checkbox"/> State Agency
Version No.	0		<input type="checkbox"/> Local Government
Damage Inventory No.	1281505, 1329084		<input type="checkbox"/> Tribe <input checked="" type="checkbox"/> Private Nonprofit
Project Title:	700400: January 20, 2020 to July 1, 2022 COVID Costs, 721595: Phase2FEMA		
Category of Work:	B – Emergency Protective Measures		

Amount Requested:	\$2,990,201.13	Eligibility Issue Type(s)	<input type="checkbox"/> Applicant Eligibility
Amount Denied:	\$1,274,260.26		<input type="checkbox"/> Facility Eligibility <input checked="" type="checkbox"/> Work Eligibility <input type="checkbox"/> Cost Eligibility
Issue Keyword(s):	Force Account Labor		

Project Description:

The coronavirus (COVID-19) pandemic resulted in a major disaster declaration (FEMA-4481-DR-WA) on March 22, 2020, for the State of Washington, during the incident period of January 20, 2020 through May 11, 2023. As a result of the COVID-19 pandemic, Whitman College (Applicant) is requesting funding under the Federal Emergency Management Agency (FEMA) Public Assistance (PA) program for costs incurred in response to the COVID-19 pandemic, including costs related to staffing its Emergency Response Team and Coronavirus Taskforce, purchasing and distributing personal protective equipment, conducting COVID-19 testing for faculty, staff and students, and safely opening and operating its facilities. FEMA obligated Project 700400 on October 24, 2023, for a total cost of \$2,670,184.03, and the period of performance for this project occurred between January 20, 2020, and July 1, 2022.¹ Project 721595 is currently in development for a total cost of \$320,017.10, and the period of performance for this project occurred between July 2, 2022, and May 11, 2023.²

Both Project 700400 and Project 721595 include force account labor costs for the Applicant’s personnel that worked on COVID-19-related tasks. For Project 700400, the Streamlined Project

¹ Grants Manager Project (GMP) 700400, DR-4481-WA, Whitman College [hereinafter *GMP 700400*], Documents, Summary of All Costs.xlsx, 700400 - DR4481WA - Validation Summary Sheet.xlsx.

² Grants Manager Project (GMP) 721595, DR-4481-WA, Whitman College [hereinafter *GMP 721595*], Documents, DR-4481 - Whitman College - 721595 - Cost Summary - 10-13-23.pdf.



Application and the Scope identify the force account labor as overtime.³ For Project 721595, the Streamlined Project Application identifies the force account labor as being paid at an unbudgeted straight time rate.⁴

On Project 700400, FEMA issued a request for information (RFI) for the Applicant to clarify if submitted force account labor hours were classified as overtime.⁵ In response, the Applicant explained that the labor costs were misclassified on the Streamlined Project Application, and that submitted labor costs included reassigned staff and temporary hires.⁶

On Project 721595, FEMA issued a RFI for the Applicant to clarify whether the submitted force account labor hours were unbudgeted and if the reassigned permanent staff members' positions were funded from an external source that did not fund COVID-19 work.⁷ In response, the Applicant explained that these employees were reassigned to unbudgeted positions directly tied to the performance of eligible COVID-19 emergency work as part of the College's Coronavirus Task Force and that the College only included unbudgeted labor hours, which were worked in addition to scheduled duties and hours, in its request for reimbursement.

Further, the Applicant informed FEMA that these positions are not typically funded by an external source; however, the COVID-19 emergency response hours were unbudgeted. As such, the College did not identify a funding source to cover these expenses and the College's budget only covered the job duties outlined in the job descriptions for these individuals. The College anticipated that the U.S. Department of Education Higher Education Emergency Relief Funds (HEERF) would cover these unbudgeted costs; however, HEERF did not permit reimbursements for these costs. Therefore, the College believes that this ineligibility for HEERF funding indicates that the reassigned unbudgeted labor costs are eligible for FEMA reimbursement.⁸ The Applicant provided documentation in support of these statements.⁹

Subsequently, FEMA issued a follow-up RFI for the Applicant to clarify the following information: 1) if the College incurred any costs beyond these employees' normal, budgeted salaries; 2) if these employees' pay normally would have been reduced if they did not work 40 hours in their budgeted positions; and 3) if the exemption for salaried employees was waived during the COVID-19 pandemic to allow these employees to be paid beyond their budgeted salaries.¹⁰ In response, the Applicant explained that it did not incur any additional payroll costs

³ *GMP 700400*, Streamlined Project Application.

⁴ *GMP 721595*, Streamlined Project Application.

⁵ *GMP 700400*, Request for Information, RFI-PRJ-91156, Line 4.

⁶ *GMP 700400*, Request for Information, RFI-PRJ-91156, Line 4.

⁷ *GMP 721595*, Request for Information, RFI-PRJ-102624.

⁸ *GMP 721595*, Request for Information, RFI-PRJ-102624, FEMA Response Cover Letter_SIGNED.pdf.

⁹ *GMP 721595*, Request for Information, RFI-PRJ-102624, I. Whitman College Emergency Operations Plan.pdf, II. EOC Coronavirus Task Force Fall 2020.pdf, III. Emergency Preparedness 2020-2023 Budget to Actual Reports.pdf, IV. Adopted 2019-2020 Budget.pdf, IX. FEMA COVID-19 Emergency Response Memos for Unbudgeted Duties (1).pdf, V. Adopted and Amended 2020-2021 Budget.pdf, VI. Adopted 2021-2022 Budget.pdf, VII. Adopted 2022-2023 Budget.pdf, VIII. Financial Sustainability Review Final Report.pdf, X. Job Descriptions from Human Resources for Budgeted Duties.pdf, XI. Exempt Staff COVID-19 Expenses for July 2, 2022 to May 11, 2023.pdf, XII. OPE Benefits Calculation Worksheet 2022-2023.pdf.

¹⁰ *GMP 721595*, Request for Information, RFI-PRJ-104209.



beyond the permanent employees' normal salaries; however, the College experienced significant employment costs due to the COVID-19 pandemic including furloughed and eliminated positions, and the College made significant wage and benefit reductions in order to be able to pay for the additional unbudgeted and unprecedented emergency preparedness costs, as well as to absorb lost revenue due to the College being forced to shut down.

The College explained that it could have reduced wages further or eliminated additional positions in order to afford to contract with third-party COVID-19 specialists; however, the College chose to retain as many of its existing employees as possible and reassign COVID-19 task force responsibilities internally. Additionally, the Applicant informed FEMA that these employees' pay would not have been reduced if the employees worked less than 40 hours per week and that these employees were not eligible to collect overtime based on the College's overtime policy. The overtime exemption was not changed during the COVID-19 pandemic. Permanent, exempt employees continued to be paid at a straight-time salaried rate, despite potential hours being worked in excess of 40 hours per week. The Applicant reiterated that the labor hours for their permanent employees who performed COVID-19 related emergency tasks were reasonable and necessary, and that the straight-time rates paid to the reassigned employees are eligible as unbudgeted and unfunded Emergency Work.¹¹ The Applicant provided documentation in support of these statements.¹²

Issue:

Are straight-time labor costs for permanent employees eligible for reimbursement under the FEMA PA program?

Applicable Statutes, Regulations, and Policies in Effect as of the Declaration of the Emergency or Disaster:

- The Robert T. Stafford Disaster Relief and Emergency Assistance Act, as amended (Stafford Act), 42 U.S.C. § 5121 et seq. (2019):

Stafford Act § 403(a)(3)

- Title 44 of the Code of Federal Regulations (C.F.R.) (2019):

44 C.F.R. § 206.228(a)(2)(iii)

- FEMA Policy:

¹¹ *GMP 721595*, Request for Information, RFI-PRJ-104209, FEMA RFI Response Cover Letter SIGNED 07.03.2024.pdf.

¹² *GMP 721595*, Request for Information, RFI-PRJ-104209, I. Whitman College Staff Handbook June 1, 2021.pdf, II. Whitman College Staff Handbook October 26, 2022.pdf, III. Exempt Staff COVID-19 Expenses for July 2, 2022 to May 11, 2023.pdf, IV. EOC Coronavirus Task Force Fall 2020.pdf, V. PAPPG 3.1 508 FINAL 5-4-2018.pdf.



Public Assistance Program and Policy Guide FP 104-009-2, V3.1 (Apr. 2018) (*PAPPG*)

PAPPG, at 23-24

Analysis:

Section 403(a)(3) of the Stafford Act authorizes FEMA discretionary authority to provide assistance to State, local and tribal governments, and certain private nonprofits that are essential to meeting immediate threats to life and property resulting from major disasters. Implementing this authority, 44 C.F.R. Subpart H authorizes FEMA to provide PA funding for specific work required as a result of the incident and emergency protective measures (EPMs) necessary to eliminate or lessen immediate threats to life, public health, or safety, as well as threats of significant additional damage to improved property.¹³ For emergency work, except in limited circumstances, the straight-time labor of an applicant's budgeted employees performing emergency work is not eligible.¹⁴ For unbudgeted employees performing emergency work, both straight-time and overtime labor are eligible.¹⁵ An applicant's permanent employees are considered to be budgeted employees, while temporary employees hired to perform eligible work are unbudgeted employees.¹⁶

An applicant may assign an employee to perform work that is not part of the employee's normal job, and in this case, FEMA provides PA funding based on the reassigned employee's normal pay rate, not the pay level appropriate to the work, because the Applicant's incurred cost is the employee's normal pay rate.¹⁷ Straight-time labor of a permanent employee funded from an external source (such as a grant from a Federal agency or statutorily dedicated funds) is eligible for PA reimbursement if the employee is reassigned to perform eligible emergency work that the external source does not fund.¹⁸

Here, the Applicant requests FEMA reimbursement for straight-time labor costs incurred by permanent employees, and asserts that these employees were reassigned to unbudgeted positions directly tied to the performance of eligible COVID-19 emergency work. While some of the tasks that these employees worked on were eligible EPMs, since these employees are permanent employees, FEMA considers the employees to be budgeted and only the employees' overtime labor costs would be eligible. However, these employees are considered exempt and per the College's policy, exempt staff are not eligible for overtime compensation.¹⁹ The Applicant states that these permanent, exempt employees were not paid overtime compensation if they

¹³ 44 C.F.R. §§ 206.223(a)(1), 206.225(a); *PAPPG*, at 19.

¹⁴ 44 C.F.R. § 206.228(a)(2)(iii).

¹⁵ *PAPPG*, at 24.

¹⁶ *PAPPG*, at 24.

¹⁷ *PAPPG*, at 24.

¹⁸ *PAPPG*, at 24.

¹⁹ *GMP 721595*, Request for Information, RFI-PRJ-104209, FEMA RFI Response Cover Letter SIGNED 07.03.2024.pdf.



worked beyond their normal 40 hours per week on COVID-19 tasks.²⁰ FEMA has determined that all of the hours worked by these permanent employees were straight-time labor; therefore, the hours worked by the permanent employees are not eligible for FEMA funding.

Furthermore, the Applicant explained that its COVID-19 emergency response hours were unbudgeted, and as such, it did not identify a funding source to cover these expenses.²¹ However, the positions for these permanent employees were budgeted and the Applicant stated that it did not incur any additional costs beyond the normal, budgeted salaries for these employees.²² While the Applicant incurred additional, unbudgeted costs in response to the COVID-19 pandemic, FEMA cannot reimburse for budgeted labor costs and does not reimburse for all costs associated with COVID-19, including lost revenue and increased operating costs. Not having a funding source or not receiving other federal funding does not make a cost eligible for FEMA reimbursement. Regarding reassignment, straight-time labor for a permanent employee is only eligible if that employee’s position is funded by an external source that does not fund the reassigned work.²³ Here, the Applicant informed FEMA that these positions are not typically funded by an external source.²⁴

Straight-time labor costs for permanent employees are not eligible for reimbursement under the FEMA PA program. Therefore, the Applicant’s request for reimbursement for straight-time labor costs for permanent employees, in the amount of \$1,152,966.74 on project 700400, and \$121,293.52 on project 721595 is denied. The Applicant’s request for reimbursement for labor costs for temporary, unbudgeted employees that performed eligible emergency protective measures are not at issue here and are found to be eligible. The Applicant’s request for reimbursement of the remaining costs in the amount of \$1,517,217.29 on project 700400, and \$198,723.58 on project 721595 are approved.

Eligibility Determination: Partially Approved Denied

The Applicant’s request for \$1,274,260.26 in PA funding for straight-time labor costs for permanent employees is denied because the straight-time labor of an Applicant’s budgeted employees performing emergency work is not eligible for reimbursement under the PA program.

Notice of Right to Appeal:

The Applicant may appeal this determination, pursuant to Title 44 of the Code of Federal Regulations § 206.206, Appeals. The appeal may be submitted electronically via the FEMA Grants Portal/Grants Manager System (GP). If the Applicant elects to file an appeal, the appeal must:

²⁰ *GMP 721595*, Request for Information, RFI-PRJ-104209, FEMA RFI Response Cover Letter SIGNED 07.03.2024.pdf.

²¹ *GMP 721595*, Request for Information, RFI-PRJ-102624, FEMA Response Cover Letter_SIGNED.pdf.

²² *GMP 721595*, Request for Information, RFI-PRJ-104209, FEMA RFI Response Cover Letter SIGNED 07.03.2024.pdf.

²³ *PAPPG*, at 24.

²⁴ *GMP 721595*, Request for Information, RFI-PRJ-102624, FEMA Response Cover Letter_SIGNED.pdf.



- 1) contain documented justification supporting the Applicant’s position,
- 2) specify the monetary figure in dispute, and
- 3) cite the provisions in federal law, regulation, or policy with which the Applicant believes the initial action was inconsistent.

The appeal must be submitted to the Washington Emergency Management Division, by the Applicant, via email or via the FEMA Grants Portal/Grants Manager System (GM), within 60 days of its receipt of this determination. The Washington Emergency Management Division must then electronically transmit the appeal, through GM, with a written recommendation, to FEMA within 60 days from the date of this FEMA eligibility determination. If you have any questions, please contact the State of Washington Emergency Management Division, Jonathan Holmes at jonathan.holmes@mil.wa.gov.

Approval:

PA Management:

JUSTINE E SMITH
Digitally signed by JUSTINE E SMITH
 Date: 2024.10.08 09:38:33 -07'00'

Signature: _____

Date: _____

Document Index:

Document Description	File Name
Project 700400 Cost Summary	Summary of All Costs.xlsx
Project 700400 Validated Cost Summary	700400 - DR4481WA - Validation Summary Sheet.xlsx
Project 721595 Cost Summary	DR-4481 - Whitman College - 721595 - Cost Summary - 10-13-23.pdf
Applicant RFI Response	FEMA Response Cover Letter_SIGNED.pdf
Applicant Supporting Documentation	I. Whitman College Emergency Operations Plan.pdf
Applicant Supporting Documentation	II. EOC Coronavirus Task Force Fall 2020.pdf
Applicant Supporting Documentation	III. Emergency Preparedness 2020-2023 Budget to Actual Reports.pdf
Applicant Supporting Documentation	IV. Adopted 2019-2020 Budget.pdf



Applicant Supporting Documentation	V. Adopted and Amended 2020-2021 Budget.pdf
Applicant Supporting Documentation	VI. Adopted 2021-2022 Budget.pdf
Applicant Supporting Documentation	VII. Adopted 2022-2023 Budget.pdf
Applicant Supporting Documentation	VIII. Financial Sustainability Review Final Report.pdf
Applicant Supporting Documentation	IX. FEMA COVID-19 Emergency Response Memos for Unbudgeted Duties (1).pdf
Applicant Supporting Documentation	X. Job Descriptions from Human Resources for Budgeted Duties.pdf
Applicant Supporting Documentation	XI. Exempt Staff COVID-19 Expenses for July 2, 2022 to May 11, 2023.pdf
Applicant Supporting Documentation	XII. OPE Benefits Calculation Worksheet 2022-2023.pdf
Applicant RFI Response	FEMA RFI Response Cover Letter SIGNED 07.03.2024.pdf
Applicant Supporting Documentation	I. Whitman College Staff Handbook June 1, 2021.pdf
Applicant Supporting Documentation	II. Whitman College Staff Handbook October 26, 2022.pdf
Applicant Supporting Documentation	III. Exempt Staff COVID-19 Expenses for July 2, 2022 to May 11, 2023.pdf
Applicant Supporting Documentation	IV. EOC Coronavirus Task Force Fall 2020.pdf
Applicant Supporting Documentation	V. PAPPG 3.1 508 FINAL 5-4-2018.pdf

two BIPs to file on my behalf (if you please)

7 messages

Jeff Hamrick <hamrickj@whitman.edu>

Wed, Nov 6, 2024 at 11:01 AM

To: Angela Harvey <harveya@whitman.edu>

Cc: Tony Ichsan <ichsan@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>, Laura Nix <nixll@whitman.edu>

These are one-time capital project BIPs.

The operating fund of the college owes the junior-senior village project two chunks of change:

(A) \$2 million from the FY25 operating surplus

LESS the current balance (as of 11/1/2024, let's say) in the Trustee Strategic Initiatives Fund.

(B) PLUS the projected payment back to the feds in connection with the FEMA situation.

Could I get (A) and (B) filed as separate one-time capital BIPs with prospective claims against the FY25 operating surplus?

Thanks,

Jeff.

Tony Ichsan <ichsan@whitman.edu>

Wed, Nov 6, 2024 at 11:23 AM

To: Jeff Hamrick <hamrickj@whitman.edu>

Cc: Angela Harvey <harveya@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>, Laura Nix <nixll@whitman.edu>

You got it, Jeff...

[Quoted text hidden]

--



WHITMAN
COLLEGE

Tony Ichsan ARM, CEFP, LEED AP

Assistant Vice President of

Facilities Services

Pronouns: he/him (*what is this?*)

509.527.5999

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

Jeff Hamrick <hamrickj@whitman.edu>

Wed, Nov 6, 2024 at 11:24 AM

To: Tony Ichsan <ichsan@whitman.edu>

Cc: Angela Harvey <harveya@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>, Laura Nix <nixll@whitman.edu>

I think Angela will take point on these, Tony, but she might ask for simple documentation from you. We don't need complicated documentation; everybody knows what the village is and what the sources and uses plan is for it that the trustees approved back in February.

-j.

[Quoted text hidden]

Angela Harvey <harveya@whitman.edu>

Wed, Nov 6, 2024 at 2:13 PM

To: Jeff Hamrick <hamrickj@whitman.edu>

Cc: Tony Ichsan <ichsan@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>, Laura Nix <nixll@whitman.edu>

I will get started on this, Jeff.

I think I have what I need to do the first BIP. It will be for 2 million minus the \$663,000 balance of the Strategic Initiatives Fund = **\$1,337,000 BIP**

Darlene, Jeff clarified to me in person that the 2nd BIP (for payback of the FEMA dollars) was for the entire amount not just the reduced amount. My understanding is that he means the BIP should be the total FEMA in (including the accrual), subtract what we got to keep for the CCV. Does that agree with what you'd think?

So: \$2,670,184.03 subtract \$1,517,217.29 = \$1,152,966, rounded to **\$1,153,000 BIP**

AHST • GLAI - GLA Transaction Inquiry ☆

1 of 1

Actuals

Value 2/2

General Ledger Number : 8-00-59-40501-4399

Fiscal Year : 2024

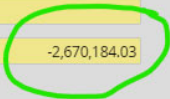
GL Account Description : Emergency Preparedness : Federal Governm

Date Range

Source Code

Reference No	Date	Description	Amount
1	06/30/2024	FEMA COVID Phase 1 Award	-267,018.00
2	11/21/2023	FEMA COVID reimb.	-2,403,166.03
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Sub-set total	
Total Actuals	-2,670,184.03
Actuals pending posting	
Grand Total	-2,670,184.03



Journal Entry J277746

[Back to 7-00-00-41079-6319 Jr-Sr Residential Village - Other transfer - in](#)

Status Complete
 Journal Type General
 Journal Date 07/02/2024
 Entered Date 10/22/2024
 Entered By Laura Nix
 Author LN
 Automatic Reversal No
 Attachments No Attachments

Printed Comments Approvers

1. Per TT designation 2/29/24, transfer: \$4,309,121 from Residenc Hall Reserves; \$2,967,143 from the Enrollment Reserve checking and funds invested with the trust; and \$1,715,940.87 of the FEMA reimbursements received. Initial designation amount of the FEMA funds was \$2,990,256, subsequent to the approval, the college received notification FEMA denied \$1,274,260.26. The full \$2,990M was not received as FEMA withheld a portion. The net amount of FEMA funding received is only \$1,517,217.29. 2. Record interfund rec/pay for the balance of the Enrollment reserve invested with the Trust to the CF... 3. CE JE 277744 rec/pay posted backwards. 22 Oct 2024 9:10 AM Laura Nix

JE Items	GL Account Description	Debit
1	RH Reserve - Renov & Repl : Other transfer - out	\$4,309,121.00
2	Enrollment reserve : Other transfer - out	\$537,997.06
3	Enrollment reserve : Other transfer - out	\$2,429,145.59
4	Emergency Preparedness : Other transfer - out	\$1,517,217.29
	GL Account Number 8-00-59-40501-6329	
	Project	
	Item Code	
	JE Item Description TT dsig to CCV - Emg Prep FEMA	

Angela

On Wed, Nov 6, 2024 at 11:02 AM Jeff Hamrick <hamrickj@whitman.edu> wrote:

[Quoted text hidden]

--
Angela Harvey
 Budget Manager
 Office of Accounting and Business Services | Rm.233
 Whitman College
 345 Boyer Ave | Walla Walla, WA 99362
 509.526.3028

Darlene Wilson <wilsond@whitman.edu>
 To: Angela Harvey <harveya@whitman.edu>
 Cc: Jeff Hamrick <hamrickj@whitman.edu>, Tony Ichsan <ichsan@whitman.edu>, Laura Nix <nixll@whitman.edu>

Thu, Nov 7, 2024 at 3:41 PM

I've attached the FEMA Determination Memo.

Project 700400 = \$1,517,217.29 approved (\$2,670,184.03 - \$1,152,966.74)
 Project 721595 = \$198,723.58 approved (\$320,017.10 - \$121,293.52)
 Total = \$1,715,940.87

We have received \$2,403,166.03 for Project 700400. We will need to pay back potentially \$885,948.74.

We haven't received anything yet for Project 721595.

Thanks,

Darlene R. Wilson, CPA

Assistant Vice President for Finance and Controller

Office of Accounting and Business Services

345 Boyer Ave | Walla Walla, WA 99362 | 509.527.4936



WHITMAN COLLEGE

[Quoted text hidden]



FEMA Determination Memo 10.10.2024.pdf

456K

Angela Harvey <harveya@whitman.edu>

Fri, Nov 8, 2024 at 8:30 AM

To: Darlene Wilson <wilsond@whitman.edu>

Cc: Jeff Hamrick <hamrickj@whitman.edu>, Tony Ichsan <ichsan@whitman.edu>, Laura Nix <nixll@whitman.edu>

Thank you, Darlene.

For project 700400 (January 2020 - July 2022), your documentation supports the amount I came to for the delta of FEMA dollars expected but not received:
\$1,153,000

For project 721595 (July 2022 - May 2023), were any of those anticipated/approved funds committed to the CCV project? Assuming so, I will add an additional
\$121,300 (delta between application & approved FEMA round 2) to the BIP amount. Meaning the total BIP will be for \$1,153,000 + \$121,300 = **\$1,274,300 BIP**

Sound right?

Thanks,

Angela

[Quoted text hidden]

Darlene Wilson <wilsond@whitman.edu>

Fri, Nov 8, 2024 at 10:02 AM

To: Angela Harvey <harveya@whitman.edu>

Cc: Jeff Hamrick <hamrickj@whitman.edu>, Tony Ichsan <ichsan@whitman.edu>, Laura Nix <nixll@whitman.edu>

Yes the second project will be committed to CCV once we receive those funds.

Thanks,

Darlene R. Wilson, CPA

Assistant Vice President for Finance and Controller

Office of Accounting and Business Services

345 Boyer Ave | Walla Walla, WA 99362 | 509.527.4936



WHITMAN COLLEGE

[Quoted text hidden]

Re: Whitman College: 12/1/2024-25 Crime Renewal Quote

5 messages

Jeff Hamrick <hamrickj@whitman.edu>

Fri, Nov 8, 2024 at 10:26 AM

To: "Roacho, Lissette" <Lissette.Roacho@marsh.com>

Cc: "lackeya@whitman.edu" <lackeya@whitman.edu>, "Garvin, Ryan R" <Ryan.R.Garvin@marsh.com>, Angela Harvey <harveya@whitman.edu>

Please bind on behalf of Whitman College.

@Angela -- there may be adjustments to make to our FY26 BIP in connection with property/terrorism/art/crime insurance.

Thanks,

Jeff.

On Fri, Nov 8, 2024 at 10:17 AM Roacho, Lissette <Lissette.Roacho@marsh.com> wrote:

Hi Jeff,

Attached is the 2024 FCC which includes a comparison to the expiring program and quote options from The Hartford for Whitman College 12/1/24 renewal. You'll note the first quote is per expiring terms with \$15k Social Engineering limit. The second quote increased the Social Engineering Limit to \$100k with an increased retention of \$10k and also includes a few enhanced terms.

2023 Premium: \$6,880

The Hartford – incumbent

-

Quote Option 1

- Terms per expiring *expect*:
 - Telephone Fraud is included
- **Premium \$6,757** (1.79% decrease from 2023)
- *Subjectivity* – signed and dated application

Quote Option 2

- Enhanced Terms:
 - In Transit Coverage - Included
 - Money Orders & Counterfeit Currency Fraud Coverage – Increased to \$1M
 - Credit Card Fraud Coverage - Included
 - Computer Systems Restoration Expenses - Included
 - Identity Recovery Expense Reimbursement - Included
 - Social Engineering - Increased to \$100k; retention is \$10K
 - Telephone Fraud limit \$1M; deductible is \$10K - Included
 - Investigation Expense sublimit – Included
- **Premium \$7,314** (6.31% increase from 2023)
- *Subjectivity* - signed and dated application

Note: Please review the quotes regarding terms and subjectivities for accuracy.

Please review the attached quotes and FCC and let us know if you have any questions. If you find everything to be in order, please provide authorization for Marsh to bind coverage.

Thank you,

Lissette

From: Garvin, Ryan R <Ryan.R.Garvin@marsh.com>

Sent: Thursday, October 17, 2024 8:35 PM

To: Baker, Lindsey <Lindsey.Baker@marsh.com>; Roacho, Lissette <Lissette.Roacho@marsh.com>

Subject: Confirmed Insured Name: Whitman College: 12/1/2024-25 Crime Renewal

Lindsey,

Client confirmed to use **Whitman College**

Ryan Garvin
California Producer License Number: 0160779

Senior Vice President | Risk Management
T +1 415 743 8315 | M +1 805 215 9125

ryan.r.garvin@marsh.com

Four Embarcadero Center, Suite 1100, San Francisco, CA 94111

Marsh USA LLC d/b/a Marsh Risk & Insurance Services in California, License Number: 0437153
www.marsh.com



A business of Marsh McLennan

From: Garvin, Ryan R
Sent: Thursday, October 17, 2024 5:10 PM
To: Baker, Lindsey <Lindsey.Baker@marsh.com>; Roacho, Lissette <Lissette.Roacho@marsh.com>
Subject: RE: App Question: Submission Items: Whitman College: 12/1/2024-25 Crime Renewal

Lindsey, I have requested clarification from the client. Thanks for catching this!

Ryan Garvin
California Producer License Number: 0160779

Senior Vice President | Risk Management
T +1 415 743 8315 | M +1 805 215 9125

ryan.r.garvin@marsh.com

Four Embarcadero Center, Suite 1100, San Francisco, CA 94111

Marsh USA LLC d/b/a Marsh Risk & Insurance Services in California, License Number: 0437153

www.marsh.com



A business of Marsh McLennan

From: Baker, Lindsey <Lindsey.Baker@marsh.com>

Sent: Thursday, October 17, 2024 4:45 PM

To: Roacho, Lissette <Lissette.Roacho@marsh.com>

Cc: Garvin, Ryan R <Ryan.R.Garvin@marsh.com>

Subject: App Question: Submission Items: Whitman College: 12/1/2024-25 Crime Renewal

Hello Lissette,

Can you please confirm the named insured?

The 2024 application list **The Board of Trustees of Whitman College**.

The 2023 policy list the named a **Whitman College**.

Please advise what needs to be used in 2024.

Also, does the client wish to market this coverage this year? Or only with the incumbent, The Hartford.

Please let me know as soon as available.

Thank you,

Lindsey Baker

Assistant Vice President

Associate Placement Specialist

QSG FALCON FINPRO Team

Marsh USA LLC

Work Cell: (281) 433-1403

500 Dallas Street, Suite 1500, Houston TX 77002

Lindsey.Baker@Marsh.com | www.marsh.com

California License Number: 0192371

Upcoming PTO:

10/23-10/30



A business of Marsh McLennan

Any statements concerning actuarial, tax, accounting, or legal matters are based solely on our experience as insurance brokers and risk consultants and are not to be relied upon as actuarial, accounting, tax, or legal advice, for which you should consult your own professional advisors. Any modeling, analytics, or projections are subject to inherent uncertainty, and the Marsh Analysis could be materially affected if any underlying assumptions, conditions, information, or factors are inaccurate or incomplete or should change. The information contained herein is based on sources we believe reliable, but we make no representation or warranty as to its accuracy. Except as may be set forth in an agreement between you and Marsh, Marsh shall have no obligation to update the Marsh Analysis and shall have no liability to you or any other party with regard to the Marsh Analysis or to any services provided by a third party to you or Marsh. Marsh makes no representation or warranty concerning the application of policy wordings or the financial condition or solvency of insurers or reinsurers. Marsh makes no assurances regarding the availability, cost, or terms of insurance coverage.

From: Rocho, Lissette <Lissette.Rocho@marsh.com>

Sent: Monday, October 14, 2024 5:14 PM

To: Baker, Lindsey <Lindsey.Baker@marsh.com>

Cc: Garvin, Ryan R <Ryan.R.Garvin@marsh.com>

Subject: Submission Items: Whitman College: 12/1/2024-25 Crime Renewal

Hi Lindsey,

Attached is the app and requested docs for Whitman's Crime renewal. Please note Whitman would like to renew their social engineering at the \$15k expiring limits, but would also like a quote with \$100k limit.

Upon review please let me know if you need anything else.

Thank you,

Lissette

Lissette Roacho

Associate Client Executive

lissette.roacho@marsh.com

T 415-743-8021



California Insurance License #0437153

From: Caitlin Kiesz <kieszco@whitman.edu>

Sent: Monday, October 14, 2024 12:13 PM

To: Roacho, Lissette <Lissette.Roacho@marsh.com>

Cc: Jeff Hamrick <hamrickj@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Partain, Penny <Penny.Partain@marsh.com>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Information Request - Due 10/15

CAUTION: This email originated outside the company. Do not click links or open attachments unless you are expecting them from the sender.

Good Afternoon,

Attached is Whitman's application for crime coverage. As a reminder, we want to renew our \$15,000 limit for social engineering but have listed \$100K on the application (as instructed) since that was the lowest option other than \$0.

Thank you!

Caitlin Kiesz

Executive Assistant to the VP for Finance and Administration

Whitman College

509-527-5145

On Wed, Oct 9, 2024 at 10:02 AM Roacho, Lissette <Lissette.Roacho@marsh.com> wrote:

Caitlin - Great, thanks for the update.

Lissette Roacho

Associate Client Executive

lissette.roacho@marsh.com

T 415-743-8021



California Insurance License #0437153

From: Caitlin Kiesz <kieszco@whitman.edu>

Sent: Wednesday, October 9, 2024 9:37 AM

To: Roacho, Lissette <Lissette.Roacho@marsh.com>

Cc: Jeff Hamrick <hamrickj@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Partain, Penny <Penny.Partain@marsh.com>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Information Request - Due 10/15

CAUTION: This email originated outside the company. Do not click links or open attachments unless you are expecting them from the sender.

Thanks, Lissette! Yes - we are almost done with it. I am waiting on one person for a little bit of data so I will send them a reminder. We will have it done before the 15th!

Caitlin Kiesz

Executive Assistant to the VP for Finance and Administration

Whitman College

509-527-5145

On Wed, Oct 9, 2024 at 9:33 AM Roacho, Lissette <Lissette.Roacho@marsh.com> wrote:

Hi Jeff, Caitlin,

Friendly reminder to please submit the requested renewal info by Oct. 15th.

Thank you,

Lissette

Lisette Roacho

Associate Client Executive

lisette.roacho@marsh.com

T 415-743-8021



California Insurance License #0437153

From: Jeff Hamrick <hamrickj@whitman.edu>

Sent: Wednesday, September 18, 2024 2:05 PM

To: Roacho, Lisette <Lisette.Roacho@marsh.com>

Cc: Caitlin Kiesz <kieszco@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Partain, Penny <Penny.Partain@marsh.com>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Information Request - Due 10/15

CAUTION: This email originated outside the company. Do not click links or open attachments unless you are expecting them from the sender.

This approach is fine with me.

-j.

On Wed, Sep 18, 2024 at 2:03 PM Roacho, Lisette <Lisette.Roacho@marsh.com> wrote:

Hi Caitlin,

I heard back from the placement and they advised that \$100k is the lowest recommended social engineering limit and suggest getting a quote with the terms per expiring as well as an option for \$100k Social Engineering limit.

In order to get the two options, please mark \$100k on the app and confirm via email when you submit the renewal info that you would also like a quote with expiring \$15k limit.

Please let me know if you have any other questions.

Thanks,

Lissette

Lissette Roacho

Associate Client Executive

lissette.roacho@marsh.com

T 415-743-8021



California Insurance License #0437153

From: Caitlin Kiesz <kieszco@whitman.edu>

Sent: Monday, September 16, 2024 4:28 PM

To: Roacho, Lissette <Lissette.Roacho@marsh.com>

Cc: Jeff Hamrick <hamrickj@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Partain, Penny <Penny.Partain@marsh.com>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Information Request - Due 10/15

CAUTION: This email originated outside the company. Do not click links or open attachments unless you are expecting them from the sender.

Marvelous - thanks, Lissette! Appreciate this info!

Caitlin Kiesz

Executive Assistant to the VP for Finance and Administration

Whitman College

509-527-5145

On Mon, Sep 16, 2024 at 4:27 PM Roacho, Lissette <Lissette.Roacho@marsh.com> wrote:

Hi Caitlin,

The social engineering limit remained at \$15k, same as expiring. I attached the 2023 policy for reference. Page 29, Deception Fraud Endorsement reflects \$15,000 limit. For clarity, Deception Fraud and Social Engineering mean the same thing, however carriers use different terms.

I reached out to our placement contact to ask how the \$15k social engineering limit should be submitted given it's not an option. I'll advise once I hear back.

Thanks,

Lissette

Lissette Roacho

Associate Client Executive

lissette.roacho@marsh.com

T 415-743-8021



California Insurance License #0437153

From: Caitlin Kiesz <kieszco@whitman.edu>

Sent: Monday, September 16, 2024 11:29 AM

To: Roacho, Lissette <Lissette.Roacho@marsh.com>

Cc: Jeff Hamrick <hamrickj@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Partain, Penny <Penny.Partain@marsh.com>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Information Request - Due 10/15

CAUTION: This email originated outside the company. Do not click links or open attachments unless you are expecting them from the sender.

Hi Lissette,

We are working on the FALCON questionnaire and last year we answered our social engineering limit as 250,000. However, I have an email where you came back and asked if we *really* wanted to increase it from the prior year or keep it at 15K. We said we wanted it to remain the same. But 15,000 is not an option on the questionnaire so I am wondering what our current limit is listed as? Wondering if 15K was a typo and maybe we all meant 150K?

Thanks!

Caitlin Kiesz

Executive Assistant to the VP for Finance and Administration

Whitman College

509-527-5145

On Thu, Aug 29, 2024 at 1:28 PM Roacho, Lissette <Lissette.Roacho@marsh.com> wrote:

Coverage Line	Insurer	Renewal Application	Policy Number	Expiry Date
---------------	---------	---------------------	---------------	-------------

Crime	The Hartford	FALCON App	83 FA 0239062-23	12/1/2024
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Hello Jeff,

This email is to advise you that the above referenced policy will be renewing 12/1/2024.

In order to ensure that we have sufficient time to negotiate the best possible terms with the underwriters, we would like to begin the renewal process at this time. Underwriters will require the items noted below in order to prepare renewal quotes on your behalf. Please send this information to me by: **10/15/2024**

- Renewal Application (FALCON APP)
 - **Pg 1: Risk Details**
 - **Pg 2: Policy Period, Coverage Required, Prior Knowledge**
 - **Pg 3 or Pg 4: Applicant Information**
 - **Pg 9: Crime - All Questions**
 - **Pg 12: Loss History**
- Detailed description of operations
- Named Insured Schedule (please complete if applicable)
- Legal Organization Structure (including ownership percentages)
- List of all Subsidiaries/Affiliates to be covered under this policy
- Most recent audited company financials including interim financials, if audit is more than 6 months old

Renewal time is always a good time to poll HR, Legal, Risk Management and/or Benefits departments and any other pertinent departments for any "Claims" that are required to be reported under the policy. Additionally, any potential claims/circumstances that could give rise to a "Claim" under any "Claims Made" policy should also be reported directly to the insurance company. If any potential claim/circumstance is found, those specific situations should be reported under the current policy(-ies) so that, should it become a covered "Claim" later, the only limit affected/impaired is one under an expired policy. This is known as "circumstance reporting". Polling of all people who are in the claim-reporting chain (anyone who may have knowledge of any "Claims") and subsequently reporting any "Claim" is also important to avoid later denial of coverage for late notice. **"Claim" is defined by each policy and/or coverage section. Please review the definition of "Claim" to ensure that all potential claims are reported appropriately. If you have questions, I would be happy to discuss with you or the client.**

Please also note that additional policy limit options may be available upon request. A signed warranty statement will be required if higher limits are purchased.

For reference, Whitman's crime coverage renewed as follows last year:

Carrier: Hartford Fire Insurance Company

- Limit \$2,000,000 / Deductible \$25,000 except,
 - o \$50,000 limit / \$0 Deductible for Money Orders And Counterfeit Currency
- Annual Premium: \$6,880

Thank you,

Lisette

Lisette Roacho

California Producer License Number: 4076439

AVP, Associate Client Executive – Global Risk Management



4 Embarcadero
Center, Suite 1100
San Francisco, CA
94111

office 415.743.8021

mobile 415.244.9184

email lissette.roacho@marsh.com

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Rocho, Lissette <Lissette.Rocho@marsh.com>

Fri, Nov 8, 2024 at 10:34 AM

To: Jeff Hamrick <hamrickj@whitman.edu>

Cc: "lackeya@whitman.edu" <lackeya@whitman.edu>, "Garvin, Ryan R" <Ryan.R.Garvin@marsh.com>, Angela Harvey <harveya@whitman.edu>

Hi Jeff,

Thank you for the bind order. Can you please confirm if you would like to bind option 1 or 2?

Thanks!

Get [Outlook for iOS](#)

From: Jeff Hamrick <hamrickj@whitman.edu>

Sent: Friday, November 8, 2024 10:26:29 AM

To: Rocho, Lissette <Lissette.Rocho@marsh.com>

Cc: lackeya@whitman.edu <lackeya@whitman.edu>; Garvin, Ryan R <Ryan.R.Garvin@marsh.com>; Angela Harvey <harveya@whitman.edu>

Subject: Re: Whitman College: 12/1/2024-25 Crime Renewal Quote

[Quoted text hidden]

Jeff Hamrick <hamrickj@whitman.edu>

Fri, Nov 8, 2024 at 10:35 AM

To: "Rocho, Lissette" <Lissette.Rocho@marsh.com>

Cc: "lackeya@whitman.edu" <lackeya@whitman.edu>, "Garvin, Ryan R" <Ryan.R.Garvin@marsh.com>, Angela Harvey <harveya@whitman.edu>

My apologies; in my mind I had said/thought option 2. Please bind with respect to option 2.

-j.

[Quoted text hidden]

Rocho, Lissette <Lissette.Rocho@marsh.com>

Fri, Nov 8, 2024 at 12:14 PM

To: Jeff Hamrick <hamrickj@whitman.edu>

Cc: "lackeya@whitman.edu" <lackeya@whitman.edu>, "Garvin, Ryan R" <Ryan.R.Garvin@marsh.com>, Angela Harvey <harveya@whitman.edu>

Thanks Jeff, and no worries. We will bind option 2 as noted.

[Quoted text hidden]

[Quoted text hidden]

Angela Harvey <harveya@whitman.edu>

Fri, Nov 8, 2024 at 12:30 PM

To: Jeff Hamrick <hamrickj@whitman.edu>

Jeff,

It looks like this crime piece is charged to 40018 along with the rest of the Liability, not to 40096 with property/terrorism/art.

By adding in the \$7,314 expense for 2025, it increases the net ask for Liability to \$11,000 from \$3,000 (\$124,000 increased expenses less the budgeted rebate of \$113,000).

I've updated the BIP spreadsheet.

While I was looking at this, I recalled you mentioned there had also been a \$50K legal expense that was covered by the rebate. Do we anticipate that same Legal expense next year? Can you give me more detail about what it is? If so we'll want to budget it in, since we are budgeting the rebate.

Thanks,

Angela

[Quoted text hidden]

--

Angela Harvey

Budget Manager

Office of Accounting and Business Services | Rm.233

Whitman College

345 Boyer Ave | Walla Walla, WA 99362

509.526.3028

napkin update / FY25 property insurance

2 messages

Jeff Hamrick <hamrickj@whitman.edu>

Thu, Jun 27, 2024 at 5:53 PM

To: Tony Ichsan <ichsan@whitman.edu>, Darlene Wilson <wilsond@whitman.edu>, Angela Harvey <harveya@whitman.edu>, Laura Nix <nixll@whitman.edu>, Justin Rodegerdts <rodegejd@whitman.edu>

Good afternoon,

I just got done concluding some conversations with our partners in WICHE. Our FY25 property insurance premium will be \$601,836. This includes boiler, machinery, terrorism, library collections, art collections, and, of course, the actual core property insurance coverage.

Unfortunately, because I am not a prophet, I only tried this budget up to \$575,000 for FY25.

Two notes:

(1) We will clear the variance from E&G at the close of FY25.

(2) We will file a non-discretionary-type BIP for FY26 for the difference (\$26,836) plus an 8% increase over the actual FY25 amount (\$48,146), for a total of an incremental \$74,982 of requested budget. Angela, we might have you take point on this BIP by this point in time, if you're comfortable.

I will make some notes on the napkin so that we remember to create this BIP in October 2024.

Whitman has the lowest premium in the pool and the second-lowest FY24-to-FY25 increase.

-j.

Darlene Wilson <wilsond@whitman.edu>

Tue, Jul 2, 2024 at 10:36 AM

To: Jeff Hamrick <hamrickj@whitman.edu>

Cc: Tony Ichsan <ichsan@whitman.edu>, Angela Harvey <harveya@whitman.edu>, Laura Nix <nixll@whitman.edu>, Justin Rodegerdts <rodegejd@whitman.edu>

Noted

Thanks,

Darlene R. Wilson, CPA

Assistant Vice President for Finance and Controller

Office of Accounting and Business Services

345 Boyer Ave | Walla Walla, WA 99362 | 509.527.4936



WHITMAN COLLEGE

CLIC 2023 Surplus (loss) Allocation Calculation

Surplus Allocation												Surplus Allocation				
12/31/2021 After Surplus Allocation	Pct Allocation for 2022 Dividend Purposes	2022 Dividend Paid "Return of Surplus"	12/31/2022 after dividend/ before Surplus Allocation	2022 Surplus Adjustment	12/31/2022 after Surplus Allocation	Pct Allocation for 2023 Dividend Purposes	2023 Dividend Paid "Return of Surplus"	12/31/2023 after dividend/ before Surplus Allocation	2023 Surplus Adjustment	12/31/2023 after Surplus Allocation	Pct Allocation for 2024 Dividend Purposes	3% Dividend	4% Dividend	5% Dividend		
1,282,324	20.0%	\$ 128,232	\$ 1,154,092	\$ 280,615	\$ 1,434,707	14.9%	\$ 143,471	\$ 1,291,236	\$ 552,738	\$ 1,843,974	13.5%	\$ 55,319	\$ 73,759	\$ 92,119		
561,542	8.7%	\$ 56,154	\$ 505,388	\$ 307,859	\$ 813,247	8.5%	\$ 81,325	\$ 731,922	\$ 588,392	\$ 1,320,314	9.7%	\$ 39,609	\$ 52,813	\$ 66,019		
786,158	12.2%	\$ 78,616	\$ 707,542	\$ 39,277	\$ 746,819	7.8%	\$ 74,682	\$ 672,137	\$ 582,369	\$ 1,254,506	9.2%	\$ 37,635	\$ 50,180	\$ 62,719		
706,489	11.0%	\$ 70,649	\$ 635,840	\$ 639,919	\$ 1,275,759	13.3%	\$ 127,576	\$ 1,148,183	\$ (15,200)	\$ 1,132,983	8.3%	\$ 33,989	\$ 45,319	\$ 56,619		
33,999	0.5%	\$ 3,400	\$ 30,599	\$ (148,315)	\$ (117,716)	-1.2%	\$ (11,772)	\$ (105,944)	\$ 242,235	\$ 136,291	1.0%	\$ 4,089	\$ 5,452	\$ 6,819		
1,238,840	19.3%	\$ 123,884	\$ 1,114,956	\$ 710,254	\$ 1,825,210	19.0%	\$ 182,521	\$ 1,642,689	\$ 623,802	\$ 2,266,491	16.6%	\$ 67,995	\$ 90,660	\$ 113,319		
372,438	5.8%	\$ 37,244	\$ 335,194	\$ 354,490	\$ 689,684	7.2%	\$ 68,968	\$ 620,716	\$ 294,242	\$ 914,958	6.7%	\$ 27,449	\$ 36,598	\$ 45,719		
298,320	4.6%	\$ 29,832	\$ 268,488	\$ 166,163	\$ 434,651	4.5%	\$ 43,465	\$ 391,186	\$ 387,094	\$ 778,280	5.7%	\$ 23,348	\$ 31,131	\$ 38,919		
612,840	9.5%	\$ 61,284	\$ 551,556	\$ 909,605	\$ 1,461,161	15.2%	\$ 146,116	\$ 1,315,045	\$ 1,048,486	\$ 2,363,531	17.3%	\$ 70,906	\$ 94,541	\$ 118,119		
531,033	8.3%	\$ 53,103	\$ 477,930	\$ 556,730	\$ 1,034,660	10.8%	\$ 103,466	\$ 931,194	\$ 718,657	\$ 1,649,851	12.1%	\$ 49,496	\$ 65,994	\$ 82,419		
6,423,983	100.0%	\$ 642,398	\$ 5,781,585	\$ 3,816,596	\$ 9,598,182	100.0%	\$ 959,818	\$ 8,638,364	\$ 5,022,816	\$ 13,661,179	100.0%	\$ 409,835	\$ 546,447	\$ 683,019		
				\$ 9,598,181					\$ 13,661,180							
							Test>>	\$ 8,638,364				\$ 287,945	\$ 383,927	\$ 479,919		

December 31.	Lewis & Clark	Reed	SPU	Whitman	Whittier	Redland
2019 loss ratios	36.1%	62.4%	25.5%	44.8%	107.4%	56.1%
2020 loss ratios	35.0%	59.7%	39.3%	42.0%	99.1%	52.1%
2021 loss ratios	17.7%	55.3%	49.1%	47.6%	98.4%	52.1%
2022 loss ratios	40.4%	61.6%	69.9%	41.7%	103.4%	55.1%
2023 loss ratios	41.7%	55.0%	63.0%	61.3%	97.0%	58.1%
2019-2020 Improvement (decline)	1.1%	2.7%	-13.8%	2.8%	8.3%	4.0%
2020-2021 Improvement (decline)	17.3%	4.4%	-9.8%	-5.6%	0.7%	0.0%
2021-2022 Improvement (decline)	-22.7%	-6.3%	-20.7%	6.0%	-5.0%	-3.0%
2022-2023 Improvement (decline)	-1.2%	6.6%	6.9%	-19.6%	6.5%	-2.0%

Ratios is all losses to all premiums. while member has been CLIC for 2019 and 2020. moves to rolline 15 years starting 2021

Premium and Exposure History

Premium History – CLIC Premium (Combined All Coverages)

School	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Lewis & Clark	230,421	313,751	371,423	433,870	391,679	451,508	475,934	426,941	706,805	709,012
Reed	163,380	258,490	266,717	380,534	407,800	536,948	584,833	607,754	663,516	655,043
SPU	233,354	276,631	396,743	435,745	368,984	449,588	574,998	697,715	958,267	881,103
Whitman	197,819	304,544	396,400	460,398	452,723	484,161	495,589	489,055	517,319	561,136
Whittier	475,647	557,906	563,824	636,475	693,281	811,354	700,032	674,224	654,980	851,439
Redlands	412,579	566,178	687,857	805,856	875,934	903,636	834,411	851,864	935,520	935,810
College of ID	140,652	140,056	129,072	153,406	140,244	160,947	168,103	162,139	183,232	167,303
Linfield	196,776	230,225	266,993	326,992	269,243	429,218	485,659	573,286	680,594	720,059
Willamette	256,396	379,821	590,779	619,142	656,917	752,578	863,610	698,824	799,784	428,114
UP	300,170	393,687	527,769	692,555	735,348	788,869	975,047	893,493	1,107,766	1,025,200
Totals	2,607,195	3,421,289	4,197,577	4,944,973	4,992,153	5,768,807	6,158,216	6,075,295	7,207,783	6,934,219

Notes: CLIC limits increase from \$500,000 to \$1M as of 7/1/2015; CLIC Fiduciary limit increased to \$1M as of 7/1/2017; Deductibles increased as of 7/1/2022; CLIC GL Unaggregated, Fiduciary separate limit and confidence level decreased to 65% as of 7/1/2024

Premium History – Excess Premium (Combined All Excess Coverages)

School	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Lewis & Clark	51,536	52,547	55,170	54,589	50,975	63,259	78,118	81,201	142,123	171,650
Reed	33,377	37,728	36,633	43,444	47,826	68,897	87,268	95,031	100,088	123,635
SPU	50,928	45,844	62,329	58,612	51,217	66,778	104,765	140,825	181,750	205,288
Whitman	40,997	49,668	59,951	60,493	61,734	70,749	84,697	98,346	85,633	115,805
Whittier	102,910	81,232	73,542	72,016	80,461	103,815	106,382	110,780	101,248	175,590
Redlands	95,660	116,538	106,321	108,867	122,274	132,950	144,974	159,910	144,529	186,673
College of ID	36,188	21,127	18,158	18,962	18,391	23,065	28,769	30,627	31,748	35,573
Linfield	42,395	36,173	38,807	40,990	36,319	65,789	87,291	113,117	130,638	160,386
Willamette	61,086	62,198	86,687	76,888	83,769	108,390	144,446	136,640	147,114	90,992
UP	63,888	69,902	74,942	88,285	99,730	113,575	169,423	168,441	198,885	231,860
Totals	578,966	572,957	612,540	623,146	652,696	817,267	1,036,133	1,134,918	1,263,756	1,497,452

Notes: CLIC limits increase from \$500,000 to \$1M as of 7/1/2015; CLIC Fiduciary limit increased to \$1M as of 7/1/2017; Deductibles increased as of 7/1/2022; CLIC GL Unaggregated, Fiduciary separate limit and confidence level decreased to 65% as of 7/1/2024

Dept	Summer Wages	9 % OPE
20001	612.49	\$ 55.12
20002	16196.85	\$ 1,457.72
20003	3618.17	\$ 325.64
20005	944.4	\$ 85.00
20006	2917.6	\$ 262.58
20022	8608	\$ 774.72
20032	251.84	\$ 22.67
20056	94.44	\$ 8.50
20059	955.32	\$ 85.98
20061	4391.46	\$ 395.23
20062	558.77	\$ 50.29
20065	283.32	\$ 25.50
20069	2247.2	\$ 202.25
20071	82.64	\$ 7.44
20072	259.71	\$ 23.37
20073	35.42	\$ 3.19
20074	20.8	\$ 1.87
20075	10758.63	\$ 968.28
20076	2368.9	\$ 213.20
20077	59.03	\$ 5.31
20078	55.09	\$ 4.96
20081	768.36	\$ 69.15
20083	1223	\$ 110.07
20092	196.75	\$ 17.71
20093	417.11	\$ 37.54
20107	127.49	\$ 11.47
20125	940.47	\$ 84.64
20140	5728	\$ 515.52
20169	2828.08	\$ 254.53
20186	5120	\$ 460.80
20187	201552	\$18,139.68
20195	11.81	\$ 1.06
20199	320	\$ 28.80
20242	4597.11	\$ 413.74
20266	9000	\$ 810.00
20346	32119.09	\$ 2,890.72
20357	1600	\$ 144.00
20365	47.22	\$ 4.25
20386	720	\$ 64.80
20426	1082.13	\$ 97.39
20458	3904	\$ 351.36
20585	6188	\$ 556.92
20599	237.4	\$ 21.37
20602	88	\$ 7.92
20619	6013.4	\$ 541.21

20622	1600	\$	144.00
20630	188.88	\$	17.00
20636	511.55	\$	46.04
20662	110.18	\$	9.92
20719	5488	\$	493.92
20738	3784	\$	340.56
20781	3456	\$	311.04
20807	936.53	\$	84.29
20823	320	\$	28.80
20868	8204.48	\$	738.40
20871	5627.06	\$	506.44
20872	1180.5	\$	106.25
20874	3072.45	\$	276.52
20909	10760	\$	968.40
20919	934.37	\$	84.09
20930	5447.62	\$	490.29
20934	1539.37	\$	138.54
20941	566.64	\$	51.00
20950	7936	\$	714.24
20951	744	\$	66.96
20955	85	\$	7.65
20958	13696	\$	1,232.64
20963	8794.76	\$	791.53
20966	4400	\$	396.00
20981	2317.33	\$	208.56
20982	5288	\$	475.92
20983	3761.86	\$	338.57
20987	8744	\$	786.96
21003	2014.72	\$	181.32
21010	7472	\$	672.48
21024	6311.75	\$	568.06
30013	165.27	\$	14.87
30015	16530.03	\$	1,487.70
30020	888.53	\$	79.97
30023	3175.55	\$	285.80
30057	2030.46	\$	182.74
30089	3887.8	\$	349.90
30114	1240.53	\$	111.65
30128	11269.84	\$	1,014.29
30148	2782.06	\$	250.39
30211	2531.77	\$	227.86
30217	8051.03	\$	724.59
30254	59.03	\$	5.31
30394	22640.06	\$	2,037.61
30462	7.87	\$	0.71
40002	8175.2	\$	735.77

40003	1534.65	\$	138.12
40088	299.06	\$	26.92
40094	10801.82	\$	972.16
40102	1160.83	\$	104.47
40128	129.86	\$	11.69
40147	6572.6	\$	591.53
40780	3683.16	\$	331.48
41001	1692.05	\$	152.28
41006	23411.57	\$	2,107.04
50001	24755.7	\$	2,228.01
50002	188.88	\$	17.00
60004	21012.87	\$	1,891.16
60006	692.56	\$	62.33
70001	4013.7	\$	361.23
70004	3336.88	\$	300.32
70005	3378.91	\$	304.10
70009	708.31	\$	63.75
70011	4696.84	\$	422.72
70014	53.22	\$	4.79
80001	8600.99	\$	774.09
90002	661.15	\$	59.50
90003	1886.12	\$	169.75
90014	1707.79	\$	153.70
90027	851.05	\$	76.59
	\$60,723.73		FY24 OPE
	\$62,150.74		FY26 OPE
	\$ 1,427.01		BIP for OPE

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Washington's Minimum Wage Going Up to \$16.66 Per Hour in 2025

Oct 3, 2024

Washington's minimum wage will rise to \$16.66 an hour next year, a 2.35 percent increase over 2024.

Washington's minimum wage will rise to \$16.66 an hour next year, a 2.35 percent increase over 2024.

State law directs L&I to calculate the minimum wage for the coming year using the federal Bureau of Labor Statistics' Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W). To make the calculation, L&I compares the CPI-W from August of the previous year to August of the current year.

[According to the bureau](#), housing and food costs increased over the last 12 months, leading to the increase in the CPI-W.

In 2024, Washington has the highest state-level minimum wage in the nation. The federal minimum wage remains set at \$7.25 an hour.

Cities can set minimum wages higher than the state. Seattle, SeaTac, Tukwila, Renton, Bellingham, and Burien all will have higher wages in 2025.

The state minimum wage applies to workers age 16 and older. Under state law, employers can pay 85 percent of the minimum wage to workers ages 14-15. For 2025, the wage for younger workers will be \$14.16 per hour.

[More information about the minimum wage is available on L&I's website](#), along with details about overtime, rest breaks, meal periods, and how to file a wage complaint. A poster with information about the 2025 minimum wage is also available in 15 different languages.

Employers and workers may also call L&I's Employment Standards Program at 360-902-5316 or 1-866-219-7321 with questions.

The increase in the state minimum wage also affects the pay for some specific types of workers and employment situations including overtime exempt employees.

Overtime exempt employees

Along with calculating the new minimum wage, L&I uses that information to update the minimum salary thresholds for overtime exempt employees. This change impacts how much executive, administrative, and professional workers plus computer professionals and outside salespeople must earn in salary to be exempt from the requirement to pay them overtime.

For 2025, small employers with up to 50 employees must pay overtime exempt workers at least 2 times the minimum wage. That means an exempt employee will have to earn at least \$1,332.80 a week (\$69,305.60 a year). For large employers, with 51 or more employees, overtime exempt workers must make at least 2.25 times the minimum wage. That means an exempt employee for one of these larger employers must earn at least \$1,499.40 a week (\$77,968.80 a year).

L&I updated the rules for exempt workers in 2020, creating an eight-year [implementation schedule](#) that incrementally raises how much more than minimum wage salaried employees must be paid to be exempt from overtime until it reaches 2.5 times the minimum wage in 2028. The pace of the increase is based on the size of the employer.

The same rules allow exempt computer professionals to be paid an hourly rate rather than the salary required for most exempt employees. That hourly rate is 3.5 times the minimum wage, regardless of employer size. For 2025, that will be \$58.31 per hour.

Non-compete clauses

The department also uses the CPI-W to calculate the minimum annual salary threshold for a non-compete clause or contract to be enforceable. Non-compete agreements typically prevent an employee or independent contractor from working for a competitor or starting a similar business while employed or after leaving their current job. In Washington, non-compete agreements are valid only when the employee or independent contractor earns at least a set amount. For employees in 2025, the threshold will be \$123,394.17. For independent contractors, the 2025 threshold will be \$308,485.43.

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BIP #1 : New budget for centralized management of Student worker minimum wage increases

- Angela's Original Estimate +\$70,780 to departments and offices to cover student minimum wage increase based on 3% increase from FY26 SSCOB I requests
 - Actual 2.35 percent minimum wage increase = All Planned Fund 1,2,3 = $\$2,098,366 * 1.0235 = \$49,311$ **BIP to 1-00-59-41371-5005 Student Wage Budget pool**

BIP #2: New budget for centralized management of Student worker minimum wage OPE

- Angela's original estimate: +\$1,822 Student Summer OPE (3% of FY24 Actual of \$60,723 OPE Summer wages only at reduced 8.5% rate)
Actual BIP based on 2.35% minimum wage increase: $\$60,723 * .0235 = \$1,427$ **Student Summer OPE - 1-00-59-41371-5030**



RESOURCES COMMITTEE

Jeff Hamrick
Vice President for Finance and Administration
November 14, 2024

Designation of Funds and Endowment Amendments

Following is a summary of funds available for designation by the Trustees:

Cumulative balance as of 02/29/24 (i.e., after trustee-approved designations): \$0

Further Uses:

None to report at this time.

Further Additions:

Previously-designated unrestricted matured life contract and estate residuals designated for the junior-senior residential village project: \$25,441. (This amount is not included in the figure below.)

Matured life contracts and unrestricted estates (plus potential residual amounts that come in later):

Source	Dollar Amount
Bertha Dedman Trust	\$243,896
Ruth Baumgarter Gift Annuity	\$3,194
Barbara Stubblefield Estate	\$51,321
Douglas Polley Estate	\$58,480
Subtotal	\$356,892

Remainder of fiscal year 2024 operating surplus available for designation: \$663,000

Grand Total Available for Designation by Board of Trustees: **\$1,019,892**

Recommended Designations of Funds

At this time, the President’s Cabinet is not recommending any designation of funds to the Resources Committee and Board of Trustees.

In spring 2025, the Vice President for Finance and Administration anticipates recommending the designation of a portion of the balance on the aforementioned page for the junior-senior residential village project. This recommendation for designation will come as part of a wider amendment to the sources and uses plan for the junior-senior residential project.

Other Endowment Amendments

At this time, the President's Cabinet is not recommending any endowment amendments to the Resources Committee and the Board of Trustees.



RESOURCES COMMITTEE

Jeff Hamrick
Vice President for Finance and Administration
November 14, 2024

Reserves Report as of June 30, 2024

Note: The Restricted Enrollment Reserve, the Retiree Medical Reserve, and the Life Cycle Reserve are all partially co-invested in the endowment.

Restricted Enrollment Reserve

Historically, this reserve was intended to cover budget shortfalls in net tuition revenue due to not making enrollment and/or financial aid targets. Prior to the start of fiscal year 2025, it had not been used or added to in some time. The first \$500,000 was invested in a money market account and the balance was invested with the endowment. In February 2024, the Board of Trustees authorized the Vice President for Finance and Administration to repurpose this reserve in support of the junior-senior residential village project; a related transfer took place at the start of fiscal year 2025. Recall that there is also a net operating revenue contingency budget built into the college's operating budget. For fiscal year 2025, that contingency budget is \$2,217,000. For fiscal year 2024, that budget was \$1,025,000. The contingency budget for fiscal year 2026 will be similar to this size. We will no longer report on this restricted reserve after the November 2024 meeting of the Board of Trustees.

- Value as of 6/30/2024 - \$0

Retiree Medical Reserve

Reserve funds have been set aside to offset the liability for certain future retiree medical benefits. The liability is recalculated every year by the college, which was \$4,862,346 as of June 30, 2024. Because the reserve has grown to be greater than the liability, the college has stopped contributing to the reserve and is paying current retiree benefits out of the reserve. The methodology for estimating the liability is reviewed periodically by an actuary. The plan was terminated in 1992, but current employees were grandfathered into the plan. The first \$600,000 (i.e., approximately three years of estimated expenses) is invested in a money market account and the balance is invested with the endowment.

- Value as of 6/30/2024 - \$8,507,105
- The President's Cabinet is currently considering a proposal to recommend that the Board of Trustees reallocate part of this reserve to support an accessibility-related project at Maxey Hall. A recommendation may be forthcoming at the February 2025 meeting of the Board of Trustees.

Life Cycle Reserve

The Life Cycle Reserve contains funds that are set aside to pay for the replacement of components of facilities (e.g., HVAC, roofs, electrical systems, elevators, fire alarm systems, etc.) when they reach the end of their useful lives. It is meant to prevent the accumulation of deferred maintenance. This model and funding is overseen by the Resources Committee and reviewed annually. Funds are invested with the endowment. However, fluctuations in the value of this reserve account also occur as the college enacts Board-approved plans to implement certain Life Cycle projects.

- Value as of 6/30/2024 - \$38,244,958
- Plans to spend approximately \$5,000,000 from this reserve during summer 2025 and academic year 2025-2026 will be considered by the Resources Committee at its November 2024 meeting. Note that the reserve will be added to in fiscal year 2025 vis-a-vis typical transfers from the operating budget.

Trustee Strategic Initiatives Fund

The Trustee Strategic Initiatives Fund is the repository for the portion of operating surpluses allocable to the Board of Trustees at the close of each fiscal year, as well as any larger unrestricted bequests that are realized by the college.

- Value as of 6/30/2024 - \$663,000
- At its February 2024 meeting, the Board of Trustees authorized the Vice President for Finance and Administration to reallocate the then-current balance to the junior-senior residential village project. As of March 31, 2024, \$700,000 was transferred into a special construction fund to manage the installation of the photovoltaic arrays planned for the rooftops in the junior-senior residential village. An additional \$200,000 was transferred into another construction fund to manage the installation of four electric vehicle chargers at the junior-senior residential village. The remaining balance was transferred to the junior-senior residential village project fund at the close of fiscal year 2024.
- On account of the decision to fund only eleven supplemental capital projects from the fiscal year 2024 operating surplus, the non-deployed remainder of the fiscal year 2024 operating surplus, or \$663,000, will be available in this fund for transfer to the junior-senior village project after the close of fiscal year 2025.
- Note that there is an additional \$356,892 from matured life contracts and unrestricted realized bequests, still sitting in the college's trust. This amount will be moved over to the Trustee Strategic Initiatives Fund by the winter 2024 Board of Trustees meeting.

President’s New Initiatives Fund

The President’s New Initiatives Fund is not, strictly speaking, a reserve fund, though it is a restricted fund. It receives funding, from time to time, by designation of the Board of Trustees from the Trustee Strategic Initiatives Fund. While primarily intended to support innovative academic, co-curricular, and administrative ideas that are aligned with the President’s and the college’s strategic planning priorities, the fund nonetheless can be used by the President to address smaller contingencies that arise.

- Value as of 6/30/2024 - \$1,858,964
- There are no plans to transfer funds out of this reserve in connection with any projects at this time. However, this fund supports a number of operating initiatives (e.g., the funding for the Special Assistant to the President for Native American Outreach, funding for the Johnson Faculty Fellows, etc.) and may be used to seed initiatives flowing from the Art & Science recommendations.

Other Reserves

The following reserves are short-term in nature and can be drawn down in any given year. Funds are invested at money market rates, but the income goes to support the general operating budget (i.e., the investment income line), and not to the reserves themselves:

	<u>June 30, 2024</u>	<u>June 30, 2023</u>
Departmental surpluses	\$474,061	\$1,099,872
Scientific replacement reserve	94,446	113,700
Self-funded medical insurance reserve	3,417,360	2,983,278
Fringe benefits reserve	4,824,898	4,816,897
Property insurance reserve	0	0
Liability insurance reserve	84,901	7,826
Residence life reserve*	896,174	4,809,121
Food service reserve	1,155,295	984,619
Bookstore reserve	66,937	34,665
Outdoor rental shop reserve	42,142	40,460
Property acquisition reserve	330,206	335,428

*At its winter 2024 meeting, the Board of Trustees authorized the Vice President for Finance and Administration to reallocate \$4,309,121 from this reserve in support of the junior-senior residential project. The transfer was effected as of the start of fiscal year 2025.

The College’s Unrestricted Quasi-Endowments

The Board of Trustees has the authority, upon the recommendation of the President or the Vice President for Finance and Administration, to designate unrestricted funds to function as endowment, even if there is no governing endowment agreement. The Board of Trustees can even mandate that these funds — called quasi-endowments — be used for particular purposes, which makes them in some sense restricted. However, because the Board of Trustees also has the authority to decommission these funds functioning as endowment and to then re-allocate them for other purposes (e.g., an opportunistic real estate purchase), they might reasonably be viewed as reserves. (And, in fact, ratings agencies such as Moody’s do so for certain analytical

purposes.) As of June 30, 2024, the college had four major quasi-endowments. Three of these quasi-endowments have had a purpose assigned to them by the Board of Trustees. The other is unrestricted in purpose, which means that distributions from it flow to the benefit of the college’s operating fund.

<u>Quasi-Endowment Name</u>	<u>Type</u>	<u>June 30, 2024 Value</u>
Trustee-Designated Bond Fund	Designated	\$25,750,590
2021B WHEFA Quasi-Endowment	Designated	\$14,484,673
Quasi-Endowment (Scholarship)	Designated	\$51,355,584
Undesignated Quasi-Endowment	Undesignated	\$123,240,793
Total		\$214,831,640

A final note about the junior-senior residential village. The Board of Trustees has elected to reallocate some of the college’s accumulated operating surpluses, unrestricted realized bequests, and some restricted reserves in support of the junior-senior residential village. In the event that the college realizes a gift to the junior-senior residential village during the middle of its construction, or even in the aftermath of its construction, the original sources and uses plan for this project will be amended and submitted to the Board of Trustees for approval. The President’s Cabinet anticipates such an amendment at the February 2025 meeting of the Board of Trustees.

Budget increases 2025-2026		Note: Lines 3 & 4 will is not a budget request and one that will be handled through reallocation at the start of FY26		
Lifecycle Increases	1-00-24-60022	Network & Server Replacement	\$3,400	Increased inventory due to construction projects
	1-00-54-60029	Telephone Equipment Replacement	(\$4,370)	Decrease as Zoom Phone has less equipment that needs replacements.
	1-00-24-60020	Instructional Technology Repl	\$15,000	Increased inventory and higher cost items
	1-00-54-60021	Administrative Technology Repl	\$5,000	Increased inventory
				Restore amount that was approved for FY25, but then reduced
		Subtotal:	\$19,030	
Annual software licenses/maintenance contracts increases	1-00-24-60004	Academic Technology Consulting	\$5,300	Software License Increases
	1-00-54-60002	Technology Infrastructure	\$16,000	Maintenance Contracts and Student Printing Increase
	1-00-54-60003	Enterprise Technology	\$20,000	Software License increases, including Colleague,, Localist, etc.
	1-00-54-60034	IT Security	\$30,000	Annual Subscription increases
	1-00-59-60025	General Telephone Acct	\$15,000	Right sizing Zoom Licensing post implementation
	1-00-54-6XXXX	Institutional Software	\$28,000	Software Licenses for VIA TRM, BambooHR and Google WorkSpaces Plus, TerraDotta
		Subtotal:	\$114,300	
Google Backup	1-00-54-60002	Technology Infrastructure	\$110,000	
Reestablish the enitry of the oiginally approved Card Reader Lifecycle budget	1-00-54-60039	Card Reader Lifecycle	\$30,000	
ARMS	1-00-54-6XXXX	Institutional Software	\$24,000	

Budget Requests FY26 – WCTS

Lifecycle increases for academic and administrative technology (computer) replacement:

1-00-24-60020	Instructional Technology Repl	\$15,000
1-00-54-60021	Administrative Technology Repl	\$5,000

These increases are to accommodate for the increase in inventory as well as computer replacement costs increasing for certain devices that are above our standard configurations.

Annual Software License and Maintenance Contract renewal increases:

1-00-24-60004	Academic Technology Consulting	\$5,300
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This increase is to cover expected increases to software licenses such as Canvas, Endnote, WebHelpDesk, and more

1-00-54-60002	Technology Infrastructure	\$16,000
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This increase includes the expected increase to the Cisco SmartNet Maintenance Contract and a small increase to address a trending increase to student printing.

1-00-54-60003	Enterprise Technology	\$20,000
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This increase includes known increases to Ellucian Colleague and associated licenses for the next year. It also addresses increases to other non-Ellucian software licenses (such as DocLocator, Localist, etc.).

1-00-54-60034	IT Security	\$30,000
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This increase is to address increases to information security licenses that are critical to be able to protect the College's information assets and technology infrastructure and aid towards being able to continue to secure Cyber Liability Insurance. License increases include licenses for the intrusion detection/prevention firewall, multifactor authentication, information security awareness training, internal vulnerability identification, Windows server audit logging, privileged access management, managed software deployment, secure document sharing, and endpoint detection and response.

1-00-59-60025	General Telephone Acct	\$15,000
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This increase is related to right-sizing the license count for Zoom One Enterprise post implementation of Zoom Phone.

1-00-54-6XXXX	Institutional Software	\$28,000
---------------	------------------------	----------

This request is related to a new GL to centralize institutional software licenses, and it includes increases to BambooHR, VIA TRM and TerraDotta (software for overseas programs and international student support) and Google Workspaces Plus for Education.

Reestablish the full formally approved Card Access Lifecycle Budget:

1-00-54-60039 Card Reader Equipment Repl \$30,000

In the current fiscal year, WCTS was approved to establish a lifecycle budget for card access to be able to strategically replace aging door hardware which includes card readers and door controllers. The approved budget was \$65,000 but was reduced by \$30,000. We are looking to have the \$30,000 reestablished.

There are now over 400 doors that have card access, a combination of wireless readers and wired readers (that also need door controllers).

All the nearly 150 wired card access doors have controllers that are reaching an end of life. The door controllers will be end of sale in December 2024 and end of support June, 2026. Reestablishing the original budget would allow us to replace all the aged door controllers in a time frame of 3-5 years. Without the addition budget, it could take 7-10 years to replace all the door controllers. This could create risk to accessing buildings with door controllers not being replaced until 5-7 years past their end of support. And the old door controllers could go end of life meaning they may not even work with the card access software system before we could get them all replaced.

Reestablishing the budget would also provide the flexibility to be planful in replacing aging wireless and wired card readers or at least be able to have equipment on hand to quickly replace failed card readers.

Google Storage Backup Solution:

1-00-54-60002 Technology Infrastructure \$110,000

As the College becomes more reliant on the Google Workspaces Plus suite of tools (email, doc, sheets, drive, etc), there is risk that the data is not backed up. While Google does have redundancy and resilience built into their platform, there could still be a failure of their system resulting in loss of data. And we cannot restore data from accidental deletion. Finally, having a backup solution would assist in the timely deletion of google accounts and data as students, faculty and staff are no longer a part of the Whitman community (per a document retention schedule for each constituent) without the risk of breaking shared file links to community members that are still at Whitman.

Teamworks ARMS (Athletics):

1-00-54-6XXXX

Institutional Software

\$24,000

This request is for a new software solution to streamline the processes with regards to NCAA compliance, athletics recruiting, branding and marketing, camps and clinics, event registration and management, and facilities scheduling.

See athletics BIPS justifications for expansion of support for this need.

In the summer of 2024, Communications, in collaboration with the Office of Finance and Administration and the Office of the President, launched a search for a partner to help improve the campus experience for both internal and external constituents—helping visitors, students and employees navigate campus from key entry points to frequently visited destinations.

We were interested in a partner to help us with a phased plan that starts with improvements to campus wayfinding, is followed by improvements to building signage and concludes with gateway/monument designs for campus entrances. The scope of this work will also include a comprehensive assessment of the visitor journey and the creation of wayfinding standards.

After a nationwide search that included proposals from four potential partners and virtual interviews with two, we chose to partner with [Selbert Perkins Design](#). Selbert Perkins has extensive experience at higher education institutions of varying sizes and their work samples and discovery processes were superior to the other candidates. We launched work with them in October, executed a discovery visit to campus in December and have received preliminary cost estimates for all three phases of the work. This can be seen in accompanying document. SPD is in the process of the conceptualizing and design development phases, with the goal of completion in early spring and construction and implementation for phase 1 during the summer of 2025.

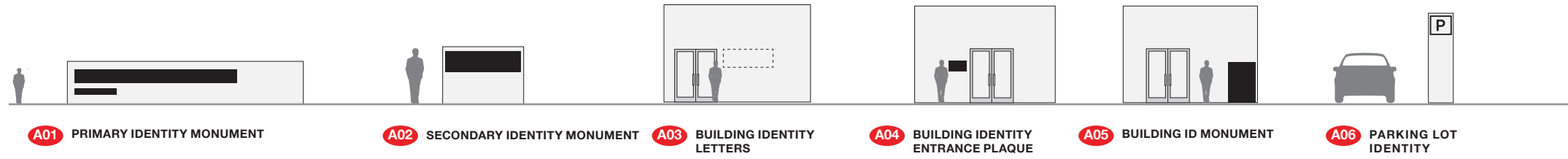
Phase 1 includes wayfinding signage and is expected to total \$110,000.

Two sentence summary:

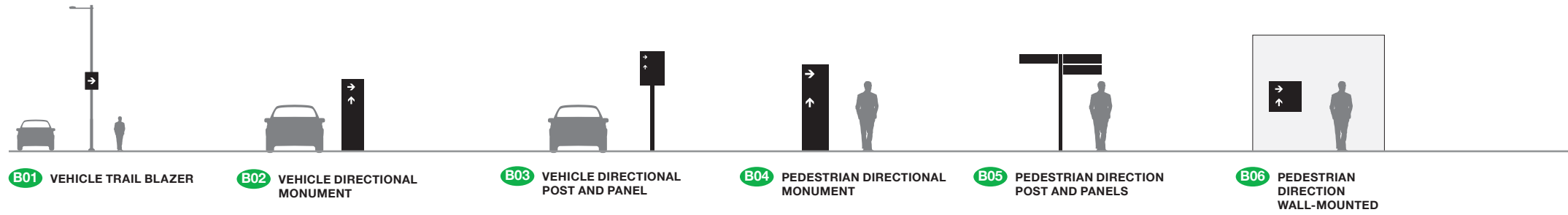
The college has partnered with Wayfinding experts Selbert Perkins Design to execute a plan to improve the campus experience for both internal and external constituents—helping visitors, students and employees navigate campus from key entry points to frequently visited destinations. The design development is underway using funds from Communications, the Office of Finance and Administration, and the Office of the President, however, once the plan is completed, one-time funds totaling \$110,000 will be needed to purchase and install wayfinding signage (phase 1) starting in the summer of 2025.

SUMMARY OF SIGN TYPES

IDENTITY

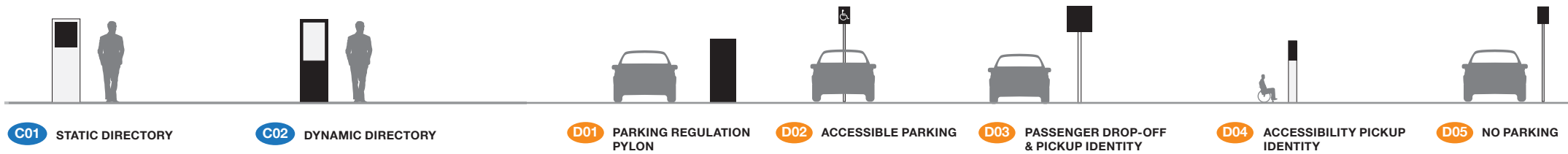


DIRECTION

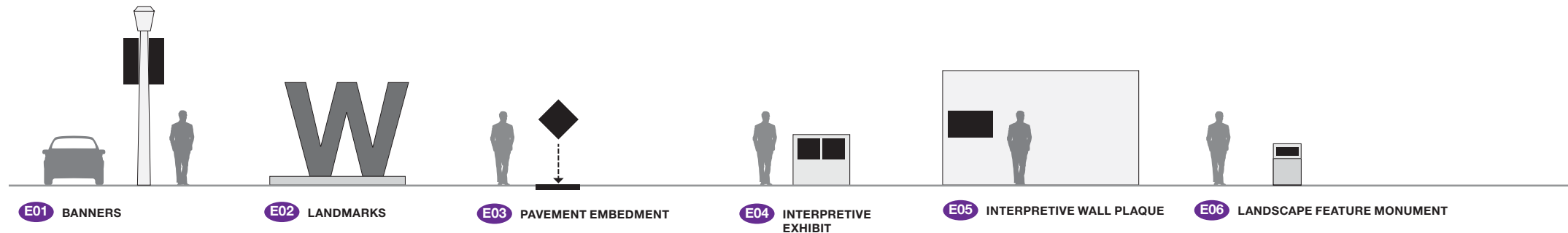


INFORMATION

REGULATORY



AMENITIES



12/19/24

COST ESTIMATE

Sign Types					
Sign Type	Description	Illumination	QTY	Unit Cost	Extended Total
A01	Primary Identity Monument	yes	1	\$ 90,000	\$ 90,000
A02	Secondary Identity Monument	yes	8	\$ 12,000	\$ 96,000
A03	Building Identity Letters		20	\$ 3,000	\$ 60,000
A04	Building Identity Plaque		14	\$ 800	\$ 11,200
A05	Building Identity Monument	yes	12	\$ 2,400	\$ 28,800
A06	Parking Lot Identity Pylon		9	\$ 2,400	\$ 21,600
B01	Vehicle Trail Blazer		6	\$ 600	\$ 3,600
B02	Vehicle Directional - Monument	yes	6	\$ 2,400	\$ 14,400
B03	Vehicle Directional - Post and Panel		3	\$ 1,200	\$ 3,600
B04	Pedestrian Directional - Monument	yes	10	\$ 2,000	\$ 20,000
B05	Pedestrian Directional - Post and Panels		8	\$ 3,000	\$ 24,000
B06	Pedestrian Directional - Wall-mounted		8	\$ 800	\$ 6,400
C01	Site Map - Static		5	\$ 1,500	\$ 7,500
C02	Site Map - Dynamic	yes	2	\$ 12,000	\$ 24,000
D01	Parking Regulations Post and Panel		6	\$ 700	\$ 4,200
E01	Banners		40	\$ 350	\$ 14,000
E02	Landmark Sculpture	yes	1	\$ 175,000	\$ 175,000
E03	Pavement Embedment		10	\$ 900	\$ 9,000
E04	Interpretive Exhibit		3	\$ 2,340	\$ 7,021
E05	Interpretive Wall Plaque		2	\$ 1,400	\$ 2,800
E06	Landscape Feature Monument		6	\$ 700	\$ 4,200
					\$ -
					\$ -
Subtotal					\$ 627,321
Fabrication Tasks					
	Survey, Shop Drawings, and Engineering				\$ 60,000
	Project Management and Permitting				\$ 50,000
	Equipment and Agency Coordinations				\$ 60,000
	Installation ROM				\$ 100,000
Tax	8.00%				\$ 43,912
Grand Total					\$ 941,234

Digital Advertising BIP Documentation

Now that we are well into our second admission cycle with a robust digital advertising strategy, we would like to advance our effort—particularly to generate more revenue by recruiting students with a high ability to pay.

We currently have \$50,000 budgeted for digital advertising and have used an additional \$10,000 annually from Communication’s surplus funds to add to this work. As a reminder, we use two primary strategies: display retargeting and pay-per-click ads. The Google display retargeting campaign served Whitman ads to prospective students and families after they visited key pages on whitman.edu. The pay-per-click campaign targets potential students and families—with a high ability to pay in Washington, Oregon and Northern California—who conduct education-related searches online using keywords relevant to Whitman. For example, if a student searches for “colleges in Washington” or “liberal arts colleges,” they will be served Whitman ads via Google. During the previous yield season (March and April 2024), we also executed a campaign targeting students who were admitted to Whitman, serving them (as well as their families) digital ads—on websites and apps—to encourage these students to enroll officially at Whitman.

This year, we reallocated funds from other areas in Communications so we could expand our digital advertising strategies to target transfer students, using geo-targeting near community colleges in Washington that we partner with or that are nearby Whitman.

Below are some recruitment results we saw from our first year of advertising.

Applications in Response to Digital Advertising for the Class of 2028:

- 101 applications
- 19 enrolled, 25 admitted (did not accept offer), 11 waitlisted, 46 not admitted
- 3 enrolled were first touches from the advertising campaign
- Enrolled students all matriculated in Fall 2024
 - Estimate Family Contribution info:
 - Highest EFC: \$323,113
 - Lowest EFC: \$1,900
 - Average EFC: \$52,862
 - Median EFC: \$28,420
 - Geographic distribution:
 - Washington: 13
 - California: 3
 - Alaska: 1
 - Idaho: 1
 - Oregon: 1

For fiscal year 2025-2026, we would like to add several strategies to what we are already doing, including platform-specific social media campaigns on YouTube and Instagram and more advertising focused on

transfer students. We would also like to experiment with TV streaming service ads—an emerging tactic by colleges to meet potential students where they're online.

We could easily double the amount spent on digital advertising, but propose an additional \$30,000 as a more reasonable ask given budget constraints and with the additional consideration that this is a revenue-generating request.

Magazine Paper BIP Documentation

Over the past few years, we have seen a dramatic increase in paper prices as businesses regained momentum post-pandemic. Demand higher than supply, raw material shortages, and increased energy costs are driving the spike.

Below you can see the cost differences in paper from 2021 to June 2024. We saw an increase of more than \$30,000 between FY23 and FY24 alone.

Whitman Magazine

Cost difference from 2021 until June 2024

	2021-2 2	2022-23	2023-202 4	Difference between 2022-2023 & 2023-2024
48pp Whitman Magazine (3 issues)	\$48,960	\$67,320	\$85,167	+\$17,847
80pp Annual Report of Giving (1 issue)	\$23,558	\$32,496	\$42,130	+\$9,634
#9 Remit Envelope (printed all at once)	\$4,500	\$5,540	\$8,198	+\$2,658
Totals	\$78,430	\$106,856	\$135,495	\$30,139
Increase %		30.68%	23.63%	

Communications has not asked for a budget increase for paper in at least the past 7 years, and maybe longer. We will continue to assume some of the costs, but the prices are large enough now that we will have to consider fewer magazines if we do not get some of the increased costs covered. For that reason, we are requesting \$25,000.

Subject: Financial Aid Services - Budget Request for 1.0 FTE

Date: November 6, 2024

By: Sandy Henry, Director of Financial Aid Services

This budget request is for an additional position of an Assistant Financial Aid Director, 1.0 FTE in order to fully staff the financial aid office.

The Financial Aid Office is a mission critical department at every institution of higher education in the nation. Every financial aid office requires a very specific skill set of trained staff members in order to recruit & retain students, as well as process, award, and stay compliant with all federal, state, and institutional regulations.

Financial aid staff are required to be educated in all technical and procedural components of federal and state compliance regulations, along with a multitude of software platforms (Colleague, Slate, COD, multiple FSA sites, NSLDS, etc.), in an ever-changing environment of federal & state financial aid regulations.

Adequate staffing of the Financial Aid Office is a regulatory requirement of all institutions of higher education that offer Title IV financial aid to their students per 34 CFR 668.16 (Administrative Capability) of the Federal Higher Education Act. In order to be fully compliant with this regulation for Administrative Capability, the financial aid office is required to have the ability to maintain processing and procedures, have the ability to complete tasks that allow financial aid staff to function as an engaged member of the Whitman Community by utilizing a natural balance of vacation and sick leave, and by ensuring that there are trained staff to manage all federal and state financial aid processes during staff transitions.

With that said, the financial aid office has undergone a 100% turnover of trained financial aid staff in the past 3 years, which has left the office staff feeling overwhelmed, overworked and unable to provide the level of excellent customer service students deserve and expect at a private institution, such as Whitman College. The current staffing level is experiencing high pressure pain points throughout the cyclical cycles of financial aid processing, without much relief. Financial aid for the past 3 years has been working in what I call a fire-fighting mode, where bandwidth is stretched beyond capacity. Financial aid staff have only been able to complete what is absolutely necessary to get the minimum student awarding and regulatory work completed. A properly staffed financial aid office is able to support recruitment and retention efforts best by being proactive with student support, updating website pages, keeping data current, updating policies and procedures as required, providing excellent customer service, helping students and families proactively, and work through each cycle without feeling overwhelmed and overworked.

Over the past 3 years, due to the heavy workloads created by financial aid staff transitions and increasing numbers of early financial aid guarantees and CSS profile/FAFSA reviews, the college has been paying for an outside contractor, Blue Icon (NASFAA). This additional staffing has been required to ensure the ability to stay compliant and complete the necessary need calculations with the use of additional financial aid forms, such as the CSS profile needed for our current institutional methodology. The cost of the Blue Icon contractors to work through only the heaviest recruiting & repackaging returning student cycles has come at a significant expense to the college for the past three years (see below):

Blue Icon – Contractor Expenses

2021-22 = \$96,619

2022-23 = \$47,031
2023-24 = \$40,000
2024-25 = \$74,000

Adding weight to an already extended workload to the financial aid office is the addition of processing Early Financial Aid Guarantees (EFG's) a few years ago. The addition of EFG processing has created a significant pain point, as EFG's have moved up the processing cycle in the financial aid office to begin each July. July, August, and September are already very heavy workload cycles in the financial aid office for year-end reporting of all federal & state financial aid programs, calculating and packaging all returning students, appeal review, professional judgements, as well as the start of fall semester. The start of October when financial aid forms (FAFSA & CSS Profile) typically open each year for the new recruitment cycle, is when most universities typically experience their heaviest cycles. With the demand for EFG's increasing each year and processing financial aid offers for non-applicants as early as October for need based students, the financial aid staff have continued to take on additional workload without additional staffing to cover the increased workload.

Here are the numbers of EFG applications processed over the past several years:

Early Financial Aid Guarantees – Increased processing growth each year:

2022-23 = 380 EFG's processed
2023-24 = 432 EFG's processed
2024-25 = 500+ EFG's (projected) with 302 YTD 11/04/24

Whitman yields approximately 40% of all EFG's processed, which is wonderful! We estimate to yield (matriculate) 40% of the 500+ EFG's projected for fall 2025, which would mean approximately 200 students. The EFG's are an excellent recruiting tool being utilized by the admissions office at Whitman College. Of the projected 500+ EFG's this year, we anticipate about 80% of EFG applicants to submit an application to Whitman (as shown in recent years). However, the time and effort it takes the financial aid office to load records, process documents, calculate awards, process appeals, and communicate with families takes a great deal of time, which is probably why this is not a program that many institutions would entertain, unless they are prepared to increase staff coverage to support this type of effort.

Current staffing levels (4 staff members) in the financial aid office do not allow for the necessary and timely coverage required for policy and procedure updates, necessary website updates such as consumer information compliance reviews, process and procedure audits, and proactive student outreach, just to name a few.

Whitman College is an institution that utilizes the use of both the FAFSA & CSS profile in their need calculations through the process of IM (Institutional Methodology) calculation processing. The use of both the FAFSA & CSS Profile means that the financial aid office here at Whitman reviews double the number of financial aid forms than non CSS profile schools, which in turn takes more time and staff to complete.

CSS Profiles reviewed and processed:

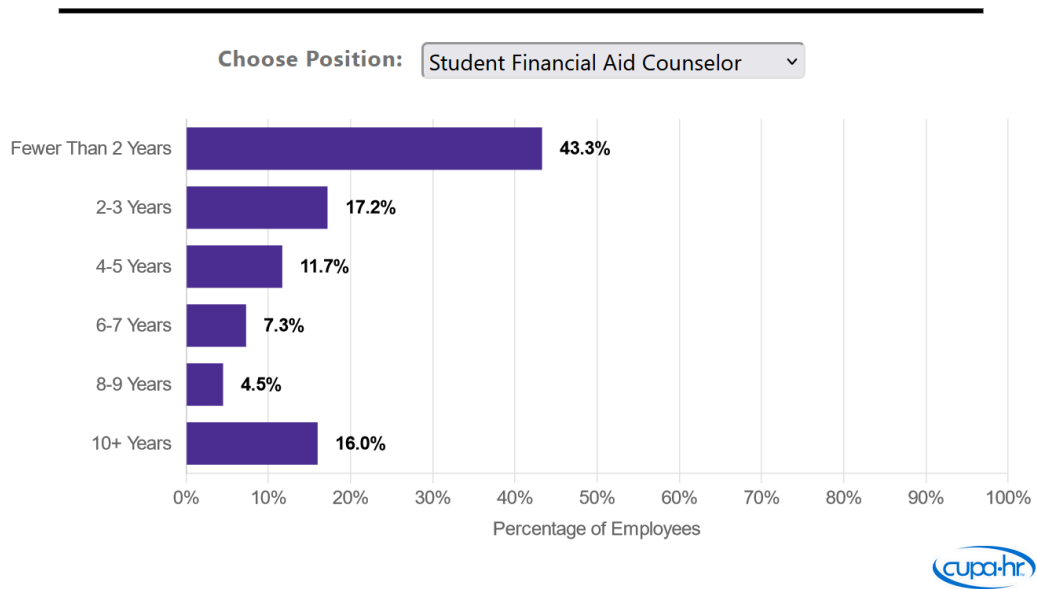
2021-22 = 2,968 (Domestic & international Students)
2022-23 = 2,729 (WISFAA – International Forms were moved to Slate – Domestic Students Only)
2023-24 = 2,778 (Domestic Students Only)
2024-25 = 2,985 (Domestic Students Only)

Recent publications, such as research brief written by CUPA HR, have published special reports on financial aid trends, noting specifically that lower paid financial aid counselors do not tend to stay in financial aid, due to the pay rate in comparison to other administrative positions, and the knowledge base and complexity of financial aid requirements of the position (See link below).
<https://www.cupahr.org/surveys/research-briefs/higher-ed-financial-aid-workforce-may-2024/>

Financial Aid Services - Turnover Rate for Financial Aid Counselors

Prior to 2021, the financial aid office staff of Marilyn Ponti, Tyson Harlow, & Karri Mickelson were the three staff members with longevity here at Whitman College. The position that has been difficult to keep longer than a couple of years is that of the Financial Aid Counselor, due to the lower wage & complexity of financial aid regulatory processes. As you can see from the CUPA HR graph below from 2022-23, this is a common occurrence amongst financial aid offices throughout the nation. Hence the reason we are seeking an Assistant Financial Aid Director position in order to obtain longevity and lessen the risk of transitional staff.

2022-23 Administrators and Professionals in Higher Education Surveys
Distribution of Years in Position by Financial Aid Position



Student Financial Aid Counselors – Turnover Rate at Whitman College

Nicole Redman – March 2021 - Current

Dorie Moore – July 2021 – July 2023

(Resigned for maternity leave and to be a stay home mom)

Mindy Pomerinke – unknown to 2021

Amber Pope – unknown – March 2018

NASFAA (National Administration for Student Financial Administrators) published a staffing benchmarking report in 2024 to assist financial aid offices in determining the appropriate number of staff members needed to effectively run a financial aid office and ensure correct Administrative Capability to ensure federal compliance. While the percentage of Whitman students who apply for financial aid is lower than at many colleges, it is also true that Whitman's use of the CSS Profile makes each individual student's financial aid analysis more time intensive. With this in mind, NASFAA's estimate of 5.8 FTE is a reasonable benchmark to consider.

As demonstrated in the NASFAA Benchmarking report shown below, Whitman College's recommended staffing FTE for the financial aid office is 5.8 people.

The approval of this budget request would get us to 5 FTE in the financial aid office.

NASFAA Staffing Model

[Print Form & Results](#)

Staff Size Benchmarking

In 2024, NASFAA updated the way it collected financial aid office size since the creation of the Staffing Model. We encourage you to review the [NASFAA Staffing Model Usage Guide](#) to better understand the data used to calculate this output.

Average FTE for similar institutions: 5.8

NASFAA (National Administration for Student Financial Aid Administrators)
Staffing Model & Benchmarking Report (2023-24 Total Headcount)

* Institution:

* Total Number of Undergraduate Students:

* Total Number of Graduate/ Professional Students:

* Which best describes your financial aid office environment?



Your institution is considered a minority serving institution for the following categories:

- Alaska Native and Native Hawaiian Institution
- Asian American and Native American Pacific Islander Serving Institution
- Hispanic-Serving Institution
- Historically Black College or University
- Native American-Serving Non-Tribal Institution
- Predominantly Black Institution
- Tribal College or University

Your institution's sector as reported to IPEDS:

Whitman College’s Strategic Priority Alignment:

This proposal for an Assistant Director of Financial Aid position aligns Whitman’s Strategic Priorities, as described below:

Strategic Priority #1 – Academic Excellence

While Financial Aid Services is not an academic program, financial aid and its processes do align with experiential learning, as students utilize the financial aid office staff to navigate real life expenditures, budget for living expenses as a student, and plan for the future through federal financial aid exit counseling, and planning for repayment of student loans once they graduate from college. The financial aid office plays a critical role in attracting academically accomplished students who have several colleges to choose from.

Strategic Priority #2 – Diversity, Equity, Inclusion, Anti-Racism, and Access

The Office of Financial Aid Services is strongly aligned with Diversity, Equity, Inclusion, Anti-Racism, and Access by eliminating financial barriers to allow students full access to the curriculum, to co-curricular opportunities, and to a thriving life on campus. The Financial Aid Office staff provide sessions to Summer Fly in students each year, to explain financial services at the student level and emphasize our open-door office policy so students feel comfortable coming into the financial aid office for financial guidance and support.

Strategic Priority #3 – Vibrant Community Campus

As members of the campus community here at Whitman, the financial aid staff work hard to support learning, thriving, and lifelong relationships for every student through continued financial literacy and retention efforts. The Financial Aid office staff prioritize attending campus events that aim at retaining and helping students feel comfortable asking questions about their financial wellness while here at Whitman.

Strategic Priority #4 – Strong Launches into Life after Whitman

Prior to graduation, every student is provided the opportunity to attend an exit counseling session regarding federal financial aid. And, any student that has utilized student loans is provided written information regarding their rights and responsibilities as a borrower, repayment options, and how to navigate this process as they graduate from Whitman. A strong launch after graduation and learning about what comes next after graduation prepares students for financial wellness after college and throughout their lives. We often get calls and emails post-graduation to assist students with their repayment options.

Strategic Priority #5 – Connecting Whitman, Walla Walla, and the World

The Financial Aid Office staff counsel students daily about the financial aspect for off campus study programs here at Whitman. Financial aid is an integral part of teaching students how financial aid translates to off campus programs, and off campus living. We help students feel financially confident about the ability to afford to study abroad, and find connection with global perspectives through off campus studies, and living off campus here in Walla Walla in private housing.

Budget Initiative Proposal Definitions support

The addition of 1 FTE in the financial aid office would...

Directly support Health and Safety by providing the financial aid department with adequate staffing to support a healthy work life balance by providing staff the ability to feel they can take vacation and sick time, without over-burdening the remaining office staff.

Directly mitigate risk and large losses by providing the necessary staff to ensure compliance with all federal and state regulations, providing more time to conduct audits of their work to ensure accuracy each semester, and bring policies and procedures current with regulatory review requirements.

Directly enhance revenue by ensuring proper awarding of all students, and enabling the business office to rely on the discount rate established each year during the recruiting cycle, by not having delays in awarding and endowment exchanges due to staffing levels.

Directly reduces future costs by employing the proper number of staff members to support the department and eliminating the need to pay for outside contractors.

In conclusion, I understand that the college is in the process of reviewing budgets for future budget reductions. However, I would respectfully request that this budget request of 1.0 FTE for the Financial

Aid Office be approved as an important countermeasure to eliminate the need for the extensive future cost of outside contractors. This would provide a staffing model that supports longevity, and our ability to recruit and retain students to continue the Whitman College mission.

Sincerely,

Sandy Henry
Director of Financial Aid Services