

To: Budget Advisory Committee
From: Kathy Murray and Cabinet
Subject: Fiscal 2020 Budget priorities
Date: November 30, 2018

As you begin your review the Cabinet's budget priorities in detail, I want to share some of my observations.

Before turning to specific requests, I want to review two key planning assumptions because they make up a significant part of the increased allocations:

- One is financial aid, where we recommend an additional \$2.9 million to help Whitman achieve its access and affordability goals. As recommended by the strategic plan, these funds will support both need-based and merit aid increases. They will be targeted toward increasing the diversity of our incoming class, as well as reducing the financial aid gap of incoming students as we begin to work toward meeting full need for our entire student body.
- A second is allocating an additional \$2 million toward staff and faculty salaries, which would represent a 4 percent increase to the salary pool. This money would be allocated both toward merit increases, as well as for promotions and equity adjustments. After a number of years of more modest increases, we believe this decision is important as we work to recruit and retain the best staff and faculty for the college. In recent years, we have found it increasingly difficult to hire and keep the best employees, especially on the staff side, as regional and national wages have risen due to both decreased unemployment and new minimum wage standards in the state of Washington.

Next, I want to talk about a number of new staff position requests that the Cabinet and I have prioritized. I want to break these down into two areas: those that will help Whitman achieve the goals recommended through our strategic plan, and those necessary to help us achieve the fundraising goals that will ultimately make our strategic plan a success.

- Starting with the fundraising piece, we are recommending three new positions in development. It is quite typical to ramp up development staff when a college is considering the launch of a significant fundraising campaign, which we are. Should the board vote to enter a campaign at their February meeting, it will be critical to ramp up our fundraising capacity quickly, and these positions anticipate that need. Specifically, we are recommending an Associate Director of Prospect Management, a Director of Major Gifts, and an Administrative and Stewardship Assistant. More details about each role are in your materials. The Associate Director of Prospect Management position has already been approved by the Board, but I still believe it is important for you to be aware of it.
- Next, there are two positions—1.37 FTE--related to supporting students as they prepare for Life After Whitman. The .37 FTE increase is for the SEC School Programs Coordinator, making this position full-time to support student participation in the local schools. I want to note that this change, like the one position in Development, has already been made, and thus the college has committed to this increase. Again, I believe it's important for you to be aware of it. The second is the addition of another full-time Career Counselor.

Student interest in career counseling services has increase and the existing career counselor's schedule is already fully booked. It is our hope that this second position will give more students access to career planning resources earlier in their time at Whitman.

- Finally, there are five positions – totaling 3.65 FTE – that are dedicated to improving the Whitman experience for students, faculty and staff and to achieving our strategic goals around community and building a sense of belonging. These include three full-time positions: Senior HR Generalist, Internal Communications Specialist, and an additional Athletic Trainer. The HR position will allow Whitman's HR department to take on more of the important work around recruiting, retaining and supporting diverse staff and ensuring equity for our employees. The Internal Communications Specialist will help to make campus more welcoming and inclusive by ensuring that information is shared effectively and consistently, everything from what's happening on campus today to critical procedural information for faculty, staff and students. The additional Athletic Trainer will ensure that all athletes – of all genders, as well as varsity and club-sport participants – will have the support to participate in their chosen sports in a safe and healthy manner.

And finally, the two part-time positions include a half-time testing coordinator to better support the growing volume of students that need testing accommodations, and a rental fleet technician, only a .15 FTE increase, to support the growing demand for use of the college's vehicles for a variety of academic and co-curricular purposes.

I think it is important also to point out that two new tenure-track faculty lines were approved by the Board last May for searches during this academic year and appointments to begin in the fall. The dollars for those positions in Psychology and Film/Media Studies are included in the faculty salary budget.

While there are a lot of requests here across a broad range of areas, what makes me confident in these requests is the remarkable alignment in the vision for these positions. All are solidly focused on supporting the success of Whitman's strategic plan, and that, ultimately, is why they represent the Cabinet's top priorities. We also recognize that we may not be able to produce a balanced budget that includes all of these positions, so we are seeking input from the Budget Advisory Committee about which seem most critical to you.

Also, as Peter's memo indicated, we have not yet thoroughly studied the requests for additional program dollars. We will appreciate your input on those requests as well as we return to our work to develop a balanced budget in the coming weeks.

Thank you for your contributions to this important work.

BUDGET MODEL SUMMARY

Key Assumptions:

- 4% Tuition Increase
- 1547 FTE (405 first years 20 transfers)
- 43.5% First Year Discount Rate
- 4% Salary Pool
- + \$200,000 Annual Fund Gifts
- + \$200,000 Investment Income
- + \$1 Million Endowment Income

Projected Surplus: \$1,106,562

Requested "A" Priorities: \$1,452,521

Sensitivity:

- 7 fte \$209,000
- .5% First year Discount \$111,000
- .5% Tuition \$238,000
- .5% salary pools \$238,000

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Provost & Dean of the Faculty

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				281,366	343,259	0			
1	Dir of Maxey Museum requested 1.0 FTE; CDC recommends .50 FTE	MAXEY MUSEUM	1-53-29-20005		27,500			Alzada Tipton	A	
2	Sheehan Gallery Assistant	SHEEHAN GALLERY	1-54-29-20006		15,600			Alzada Tipton	A	
3	SEC - increase School Programs Coord FTE from .48 to .85	STUDENT ENGAGEMENT CENTER	1-88-42-20368		21,679			Alzada Tipton	A	A
4	Career Counselor NEW 1.0 FTE	STUDENT ENGAGEMENT CENTER	1-88-42-20368		55,000			Alzada Tipton	A	A
5	SSRA Athletic Trainer duties to include CLUB SPORTS coverage	SSRA Personnel Salaries	1-58-41-20445		42,000			Alzada Tipton	A	A
6	SSRA Administrative Asst - Increase FTE to .75	DIV I - Office	1-53-19-20092		4,587			R. Hanrahan / Alzada Tipton	A	
7	Camera repairs and silver recovery tanks for photographic fixer.	DIV II - ART - Bloomquist	1-54-18-20060	3,413		600		Rebecca Hanrahan	A	
8	Costs of college mandated shredding & supply costs.	DIV II - Office	1-54-19-20093	15,367		1,000		Rebecca Hanrahan	A	
9	Minimum wage increase; new chem lab supplies; other supply costs	DIV III - Chemistry	1-55-19-20076	88,445		5,031		Kurt Hoffman	A	
10	Increase in student wages/minimum wage rate.	DIV III - Computer Science	1-54-19-20810	0		4,120		Kurt Hoffman	A	
11	Service contract for the flow cytometer	DIV III - Science Equipment Maintenance	1-55-19-20079	125,496		13,000		Kurt Hoffman	A	
12	Copy and printings costs result of increased faculty in the building	Hunter Conservatory Office	1-55-19-20842	1,000		200		Rebecca Hanrahan	A	
13	Increase in student wages/minimum wage rate.	Penrose Library	1-60-21-20002	703,756		10,000		Alzada Tipton	A	

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Provost & Dean of the Faculty

Memo or justification

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7	Every two years the silver recovery tank for repairs/recovery system in the Reid Darkroom that filters silver out of the photographic fixer. Doing so makes the fixer safe to dispose of through the regular water treatment process. There are two tanks. Their regular shelf life is four years, or until they show excessive amounts of silver in the discharge. Annual repairs to 35 MM camera.
8	Because of privacy issues that have recently come to light across the college, the Division II Office budget is now expected to pay for the shredding service for Hunter, Harper Joy, Music, and Fouts, in addition to Olin. The cost for each building (excluding Olin) is \$33.08, once every three months for Harper Joy, and once every two months for Hunter, Music, and Fouts.
9	Department is offering a physical chemistry lab course for the first time in many years. This lab is a standard, required course in most chemistry departments, and we have revised the Chemistry major to require this lab. The cost of lab supplies and hazardous shipping fees for our laboratory courses have continued to increase.
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14	Terra Dotta study abroad software annual fee	OFC Office & Administration	1-62-29-20032	106,160		5,000		Alzada Tipton	A	
15	Club Sports Student Athletic Trainer	Club Sports	1-58-41-20124	100,100		7,000		Alzada Tipton	A	
16	Directed recruiting efforts to make men/women rosters similar in size	Golf-Mens and Women's	1-58-41-20113	47,160		10,000		Alzada Tipton	A	
17	Addition of George Fox Univ to the NW Conf/additional meet/costs	Swimming	1-58-41-20117	48,665		14,000		Alzada Tipton	A	
18	Whitman Teaches the Movement student leaders & minimum wage	Student Engagement Center	1-88-42-20368	50,363		3,000		Alzada Tipton	A	
19	Minimum wage increase for existing student employees	Student Engagement Center	1-88-42-20368	50,363		6,260		Alzada Tipton	A	
20	Whities Helping Whities - growth in popularity & number of events	Student Engagement Center	1-88-42-20368	50,363		6,000		Alzada Tipton	A	
21	Professional development for new career counselor (if approved)	Student Engagement Center	1-88-42-20368	50,363		5,000		Alzada Tipton	A	
22	REALLOCATION for professional development funding for SSRA asst	Contingency Academic Support	1-00-20-20845	27,500		(10,000)		Alzada Tipton	A	
23	coaches b/c they are now staff and not eligible to apply for ASID funding	General Athletics	1-58-41-20108	64,755		10,000		Alzada Tipton	A	
24	REALLOCATION for professional development needs for faculty	Contract Travel	1-52-29-20013	68,600		(20,000)		Alzada Tipton	A	
25	REALLOCATION for professional development needs for faculty	ASID	1-52-29-20011	338,300		20,000		Alzada Tipton	A	
26	NEW Entrepreneurship position/if approved, funds for professional dev	Student Engagement Center	1-88-42-20368	50,363		5,000		Alzada Tipton	B	
27	Archivists / Records Manager	Penrose Library	1-60-21-20002		53,500			Alzada Tipton	C	
28	SEC - Entrepreneurship Initiative NEW position	STUDENT ENGAGEMENT CENTER	1-88-42-20368		55,000			Alzada Tipton	C	

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29	SSRA - Increase in Cross Country Assistant Coach by 1000 hours	SSRA Assistant Coaches	1-58-41-20590		6,500			Alzada Tipton	C	
30	Increase in service contracts that have historically happened	DIV III - Science Equipment Maintenance	1-55-19-20079	125,496		6,504		Kurt Hoffman	C	
31	Replacement tripods	DIV II - ART - Bloomquist	1-54-18-20060	3,413		200		Rebecca Hanrahan	C	
32	Department Visiting educators	DIV II - AHVCS	1-54-19-20432	11,817		1,500		Rebecca Hanrahan	C	
33	Recoup reallocated funds for staff position - costs of tutoring students	COWS - Writing Center	1-54-19-20091	19,228		6,672		Rebecca Hanrahan	C	
34	Minimum wage, student lab assistants, telescopes	DIV III - Astronomy	1-55-19-20083	7,605		300		Kurt Hoffman	C	
35	Minimum wage, student employment costs	DIV III - Biology	1-55-19-20075	131,463		2,842		Kurt Hoffman	C	
36	Miscellaneous supplies and services	DIV III - Computer Science	1-54-19-20810	0		1,940		Kurt Hoffman	C	
37	Visiting Educator expenses	Gender Studies	1-50-19-20101	6,650		1,500		Rebecca Hanrahan	C	
38	Increase in student wages / minimum wage rate	OFC Office & Administration	1-62-29-20032	106,160		6,000		Alzada Tipton	C	
39	Tentative NCAA and Sports mandate that will increase travel	Men's Soccer	1-58-41-20115	40,575		10,000		Alzada Tipton	C	
40	Tentative NCAA and Sports mandate that will increase travel	Women's Soccer	1-58-41-20116	40,575		10,000		Alzada Tipton	C	
41	Student participation at University of Washington Undergraduate Conf	Whitman Undergraduate Conference	1-52-29-20022	24,000		3,000		Alzada Tipton	C	
42	Student employment interns; new career advising program; & WHW	Student Engagement Center	1-88-42-20368	50,363		29,320		Alzada Tipton	C	
43	Increase in minimum wage/student wages	Sheehan Gallery	1-54-29-20006	45,868		1,000		Alzada Tipton	C	

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44	Increasing writer fees	Visiting Writer Series	1-54-29-20009	15,000		5,000		Rebecca Hanrahan	C	
45	Increase in services and supplies	Penrose Library	1-60-21-20002	703,756		61,282		Alzada Tipton	C	
46	Accreditation / Assessment mid cycle evaluation Visit					5,000		Alzada Tipton	C	
47	SSRA - permanent shed for Outdoor game management					23,799		Alzada Tipton	C	

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48	Soda Blasting to refinish pool deck tiles					54,184		Alzada Tipton	C	
49	Securing Sherwood - re-keying exterior doors					3,200		Alzada Tipton	C	
50	Securing Sherwood - Key punch locks on team spaces					3,000		Alzada Tipton	C	
51	Securing Sherwood - Security Cameras					11,805		Alzada Tipton	C	

VP Student Affairs

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				129,800	179,000	19,600			
1	Full-time Testing Coordinator	Academic Resource Ctr.	1-87-29-30004		39,200		19,600	Antonia Keithahn	A	A
2	Student Labor Increase for Tutors and Note-Takers	Academic Resource Ctr.	1-87-29-3004	38,584		15,500		Antonia Keithahn & Janet Mallen	A	
3	Full-time Security Officer	Security	1-00-59-30032		45,100			Director	A	
4	Special Activities Fund	Dean of Students	1-90-78-30269	15,000		10,000		Bridget Jacobson	A	
5	Climbing Wall Manager/OPTrips Coordinator	Outdoor Program	1-97-43-30023		35,000			Brien Sheedy	A	
6	Outdoor Program Discretionary Budget	Outdoor Program	1-97-43-30023	24,900		5,000		Brien Sheedy	A	
7	(New Student Orientation) Immersion Program	Student Programs & Activities	1-97-43-30015	61,557		92,000		Barbara Maxwell	A	

Memo or justification

1	In the past 3 years, the number of tests that the Academic Resource Center has proctored has increased by 37% (822 total proctored exams in 2015-16 to 1122 in 2017-18). We anticipate that this increase will continue as Whitman strives to more intentionally support the academic needs of all students admitted to Whitman; at current for the 2018-19 academic year, we are already up 21% from what we did last year (142 tests proctored through the 6th week of Fall 2017 versus 172 proctored through the 6th week of Fall 2018). Over the same period of time, Whitman has experienced a 43% increase (113 students receiving class accommodations in Fall 2015 to 161 students to date this fall). This position would give us full-time test proctoring support during the academic year.
2	The student labor budget for SAs, tutors and note-takers has not been increased since 2015 at the latest. At the time, the minimum wage, which we pay all our student employees, was \$9.47. Since 2015 we have seen an increase in need across all aspects of our work (tutor requests up 4%, note-taking requests up XX%, and an increased need for academic support as evidenced by an increase in midsemester grade reports, which are up 141%), We have also seen a more than \$2.00 increase in the minimum wage over this same period of time. To appropriately afford our SAs (as currently situated, 220 hours, 16 SAs, fall semester only), our peer tutoring and note-taking programs and to ensure our ability to provide peer tutors and note-takers free of cost to all students who need them, we need an additional \$15,500.
3	This would allow the office the ability to divide full-time officers into 2 part-time positions and make 2 part-time positions full-time.
4	(\$1,355) - 2017-18 budget year. To-date for FA18 semester, the scholarships awarded are \$12,092.50.
5	OP Director has been managing the facility and most institutions with a facility as large as Whitman's has a dedicated manager for this position. See memo details.
6	Increase for student wages. See memo details.
7	One of the strategic initiatives intended to give all students a small group experience at orientation.

VP Student Affairs

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	Total for all pages				129,800	179,000	19,600			
8	Opening Week	Student Programs & Activities	1-97-43-30015	61,557		27,500		Barbara Maxwell	A	
9	Student Group Support	Student Programs & Activities	1-97-43-30022	12,350		5,000		Barbara Maxwell	A	
10	New .35 FTE	Counseling Ctr.	1-89-42-30008		10,500			Thacher Carter Director	A	
11	Sophomore Programs	Residence Life	3-96-81-30126	14,204		1,000		Nancy Tavelli	A	
12	Sophomore Programs	Residence Life	3-96-81-30126	14,204		2,500		Nancy Tavelli	A	
13	Sophomore Programs	Residence Life	3-96-81-30126	14,204		500		Nancy Tavelli	A	
14	Sophomore Summit	Student Programs & Activities/Student Engagement Center	New?	NA		20,000		Barbara Maxwell & Kim Rolfe	A	

Memo or justification

8	<p>On-Campus Orientation: Thursday Dinner for Families: \$12,000 Friday, Lunch for Families: \$5,000 Entrance Cost for Tamastslukt Cult. Inst.: \$4,500 Buses for Tamastslukt Cultural Institute: \$6,000 Total: \$27,500</p> <p>Opening Week has an operating budget of \$61, 557.00. This budget has not had an increase since 2000. As costs have increased, the opening week budget compensated by eliminating items including one of the summer new student mailings and eliminating the 'free meals' for families. We currently ask family members to purchase meal tickets if they choose to eat the Thursday dinner and/or Friday lunch on campus with their student.</p> <p>From January 1-October 10 (covering both the January 2018 and the August 2018 new student orientation periods), we have spent \$72,008.70. Kazi made a one-time contribution of \$10,000 to the fall 2018 program to cover the cost of family members eating at no personal cost for the Thursday night dinner. What appears above is a request of \$17,000 to cover families eating at no personal cost to them for both the Thursday dinner and the Friday lunch. In addition, a new initiative we want to include in the August 2019 new student orientation program is sending all new students to the Tamastslukt Cultural Institute for a guided tour. The above costs represents both the per person fee to tour the museum and the costs to hire buses to transport students back and forth.</p>
9	<p>Budget has been over-spent the last few years, primarily because of student wages. 1. Student wages - \$1,500, Consent Condoms - \$1,500 and NASPA Conference - \$2,000.</p>
10	<p>The Counseling Center has been experiencing an increase in use by students. The in-take now requires a part-time person to assist.</p>
11	<p>Reunion dinners for all first-year sections.</p>
12	<p>Sophomore dinners.</p>
13	<p>Miscellaneous.</p>
14	<p>This program is one of the initiatives from Life after Whitman strategic planning tactics.</p>

Whitman College
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Highest - A
Medium - B
Lowest - C

Chief Financial Officer

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	Total for all pages				64,160	295,825	0			
1	Rising rent for storage space	Space rentals - PPlant	1-00-60-40098	4,700		1,700		Peter Harvey	A	
2	Reallocation	Business Office	1-00-59-40002	62,157		(3,000)		Walter Froese	A	
3	Reallocation	Audit and Tax services	1-00-59-40002	124,000		3,000		Walter Froese	A	
4	Rising service charges	Audit and Tax services	1-00-59-40002	124,000		13,000		Walter Froese	A	
5	Software to manage new hires and performance	Human Resources	1-00-59-40003	15,230		14,500		Shane Watkins	A	
6	Senior HR Generalist	Human Resources	1-00-59-40003	15,230	60,000	5,000		Shane Watkins	A	A
7	Address rising costs of liability insurance	Liability insurance	1-00-59-40018	315,000		200,000		Peter Harvey	A	
8	Address rising costs of athletic insurance	Varsity athletic insurance	1-98-41-40082	35,000		10,000		Peter Harvey	A	
9	Additional rental fleet technician	Grounds	1-94-60-40094		4,160			Dan Park	A	A
10	Two new student interns	Campus Sustainability	1-00-60-40780	9,000		3,000		Peter Harvey	A	
11	Student wages	Recycling	1-94-60-40102			2,000		Peter Harvey	A	

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Chief Financial Officer

Memo or justification

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2	This reallocation moves the cost of state charitable gift filings to the Audit and Tax budget. This was paid for by the decreasing costs to administer the Perkins loan program which is terminating.
3	
4	The rates charged for audit and tax work generally increase every year. The total increase of \$13,000 is set to cover the estimated charges for 2019-2020.
5	Upgrade software to onboard, recruit and manage performance.
6	This new position would take on more of the day-to-day issues the current junior staff can't. This in turn would relieve the current Director and Associate Director's time to focus on diversity recruitment and retention, on-boarding new employees and staff training.
8	The College has experienced large rate increases for the last two years.
9	Insurance premiums have increased over the last several years.
10	Adds a 320 hour part-time position to relieve landscape personnel to maintain the grounds for new facilities (Living at Whitman).
11	Students have requested opportunities to work on sustainability issues prior to graduation
12	Reliance on student labor has gone up as recycling efforts, on campus, have increased

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12	Reallocation: The cost of waste disposal for Cleveland Common will now be borne by the food service budget	Physical Plant Operations	1-94-60-40095			(36,000)		Peter Harvey	A	
13	Reallocation	FS - Food Service operations	3-00-82-40146			36,000		Peter Harvey	A	
14	One-Time: Two autoscrubbers for BFFC and Sherwood	Academic Custodial	1-94-60-40090	149,700		13,200		Dan Park	B	
15	One-Time: net cost of new aerator	Whitman Playing Fields	1-94-60-40085	30,000		25,325		Dan Park	B	
16	One-Time: new debris blower	Whitman Playing Fields	1-94-60-40085	30,000		8,100		Dan Park	B	

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VP Enrollment and Communications, Admission and Financial Aid

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	Total for all pages				45,000	28,000	0			
1	PowerFAIDS License	Financial Aid Services	1-00-42-50002	40,000	0	3,000		Marilyn Ponti	A	
2	Increased Recruitment Travel	Admission	1-00-42-50001	1,170,265	0	25,000		Adam Miller	A	
3	New Position: Assistant Director of Admission for Diversity Recruitment	Admission	1-00-42-50001		45,000	0		Adam Miller	A	

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VP Enrollment and Communications, Admission and Financial Aid

Memo or justification

1	See attached
2	See attached
3	See attached

Budget request justifications

Admission and Financial Aid

1. PowerFAIDS License (\$3,000/year)

Whitman currently has three licenses for PowerFAIDS, our financial aid software, which have been shared by four financial aid staff as well as by WCTS in their support of the financial aid office. With a large increase in financial aid applications in recent years (700 additional in the past year alone), it is critical that all financial aid staff are able to access PowerFAIDS at the same time. We are able to pick up the one-time license cost (approximately \$15,000) with surplus funds, but request the ongoing licensing funds of \$3,000/year.

2. Increased Recruitment Travel (\$25,000/year)

As the higher education landscape changes, the Admission team is working to expand our recruitment presence nationally. Travel is one aspect of this effort. Complicating this, travel costs have increased simply to maintain our current travel schedule. This is due to our move to locating our recruiting staff solely in Walla Walla, compared to our recent past, where we had recruiters based in Southern California, the Bay Area and the Seattle area. We expect to fund some of this travel by reallocating funds saved through other efficiencies (mailing costs, for example), but additional funds will be needed.

3. Assistant Director of Admission for Diversity Recruitment (\$45,000 salary – OPE not included)

The strategic plan calls for an additional staff member in the Admission office, to bolster our efforts to recruit an increasingly diverse enrolling class each year. This position will allow us to build stronger relationships with community-based organizations, develop new and stronger programming to attract underrepresented students, and develop a comprehensive regional recruitment strategy aimed at diversifying future entering classes.

Whitman College
Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Chief Information Officer

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				9,183	74,618	0			
1	Request to cover annual software maintenance increases (5-8% each yr)	Enterprise Technology	1-00-54-60003	342,721		27,200		Mike Osterman	A	
2	New Learning Management System (Canvas) to replace Cleo (Sakai)	Academic Technology Consulting	1-00-24-60004	345,686		31,450		David Sprunger	A	
3	Increase to Network Lifecycle	Network Replacement	1-00-24-60022	114,315		16,968		Kevin Kelly	A	
4	Information Security - Implement Multifactor Authentication	IT Security	1-00-54-60034	92,233		21,000		Linc Nesheim	A	
5	IMS Assistant to full-time from .75 FTE	Multimedia Development & Serv	1-00-24-60006		9,183			Jon Loney	B	
6	Classroom Technology Equipment	Multimedia Development & Serv	1-00-24-60006	79,530		6,000		Jon Loney	B	
7	Reduction to the Instructional Tech Replacement (lifecycle) budget	Instructional Technology Repl	1-00-24-60020	343,000		(28,000)		Joelle Chavre	A	

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Chief Information Officer

Memo or justification

1	The Enterprise Technology budget has remained flat since FY16-17, and over the past few years software maintenance has increased by 5-8% (on about \$250,000 of annual licenses) resulting in Enterprise Technology going over budget this past year by over \$13,000.
2	After a year long pilot project, it is the recommendation to replace Cleo (Sakai) with Canvas - See supporting report from the pilot project
3	With the addition of Stanton Hall, Cleveland Commons, the renovated Tech Services Building, additional wireless access points in existing residence halls, and extending the network to the Athletic Fields, there has been a large increase to the network equipment inventory (40 switches, 203 APs)
4	See Justification memo
5	Maintaining, troubleshooting and updating classroom technology has increased as the number of classrooms with technology has grown. IMS support for events (conferences, lectures, etc.) has increased as well. Having the IMS assistant full-time would help to provide better support.
6	IMS is requesting additional funding to allow for updating of classroom technology with more "smart" technologies that can report problems automatically hopefully reducing wasted class time due to technology failures.
7	For the past three years, WCTS has refined the computer replacement model as well as "right-sized" the inventory. This reduction is not because of a change to the replacement cycle, but reflective of better modeling and desire to maintain reserves at a responsible level.

Addendum to 2019-20 budget proposal for 1-00-24-60004: Funding for Instructure Canvas

Budget Request:

Canvas is an annual subscription-based service, which in the 2019-20 FY will cost \$31,450.¹ This cost is expected to rise by 5% per year.

Justification:

AITAG, a team of over 20 faculty pilot testers, and Technology Services recommend that Whitman replace its Learning Management System (LMS) CLEo (Sakai) with Instructure's Canvas. In our year-long pilot program exploring LMS options, faculty testers discovered and made use of a wealth of features in Canvas that promote teaching and learning, efficiency in teaching infrastructure (e.g. communications with students, assignment management, etc), and offer many opportunities for evaluation and assessment of students' progress beyond grading. Many of these features exceed CLEo's current or anticipated functionality. Canvas was demonstrated to be a well-supported, useful, reliable, forward-thinking product that complements Whitman College faculty and students' current strategies for teaching and learning.

We believe that it will be increasingly unlikely that future releases of Sakai will keep pace with advances in educational technology compared to a "software-as-a-service" (SAAS) product like Canvas. Further, Technology Services seeks to more heavily invest its efforts not in the behind the scenes maintenance of an LMS, but in supporting how Whitman uses the features of the system. Switching to Canvas will significantly reduce staff time spent on LMS maintenance, creating the ability for this to happen.

Background:

Why Canvas and not CLEo? Or something else?

The 2017 Learning Management System pilot test of Canvas and Schoology sought to establish how our current LMS, CLEo (then Sakai 2.9) compared to other SAAS LMS platforms for higher education. Our project investigated what other LMS platforms offer that make them attractive to our peer institutions, and what advantages these platforms offer that are relevant to our situation at Whitman College. Through evaluating future options for LMS adoption or upgrades, Technology Services hoped to gain a better understanding of how faculty and students use this type of software, what features they viewed as most important to teaching and learning, and how switching to a SAAS model might impact college resources spent in maintaining our LMS, which is currently self-supported on site.

In 2015, Technology Services undertook a survey of all faculty on their perceptions of Sakai CLEo, the LMS currently in use. Fifty-seven faculty took part in this survey. Based on survey results and market analysis, Technology Services selected Canvas by Instructure and Schoology

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by Schoology, as potential replacements for CLEo. The 2017 pilot test of these two platforms involved 23 faculty, seven Technology Services staff, and over 500 students making full use of the software through two semesters from spring term 2017 through fall term 2017. Data on general satisfaction, ease-of-use, technical difficulties, and feature desirability were collected from pilot test participants by means of survey instruments, focus groups, listening sessions, and an email listserv for tracking support requests. Technology Services staff also created a Pugh matrix evaluating the feature set of Canvas and Schoology against Sakai CLEo.

Our data conclusively show that Canvas was preferred over Schoology and Sakai CLEo by faculty. Students also showed a preference for Canvas, although the results for students are less conclusive. Canvas was also evaluated to have a more extensive and robust feature set than Sakai CLEo according to our Pugh matrix. Schoology was rated similarly to Sakai CLEo in terms of satisfaction and determined to have a slightly less robust feature set. Subjectively, Canvas was regarded as a more effective LMS than Sakai CLEo by faculty in several key areas that are heavily used (content sharing, assessment & feedback to students). In addition, Canvas demonstrated strengths in several areas identified by EDUCAUSE's 2014 ECAR report as important trends in creating an agile educational technology infrastructure: Mobile accessibility, portal integration, customization and personalization, and Learning Tools Interoperability (LTI). Lastly, but not insignificantly, in 2018, Instructure now has 24.9% of the market share and is drawing clients away from other well-established platforms like Sakai and Blackboard. Sakai's use has slowly diminished during this same time frame and its market share has fallen to 2.7%. (Edutechnica 2018. <http://edutechnica.com/tag/market-share/>).

My office/department has a non-course site on CLEo. What happens to non-course sites?

Technology Services is still investigating this, but non-course sites (e.g. Dean of Faculty site) will either be housed in Canvas, or perhaps in a different space like Google Team Drives. More discussion and research will yield answers.

The summary mentioned "assessment." What does that mean?

Beyond grading students work in individual courses, Canvas offers a robust set of tools for student assessment to allow faculty to share grading rubrics with each other, track certain student usage activities of course materials (e.g. number of views or downloads), as well as opportunities to view (with permission!) student performance across multiple courses. Technology Services is still learning about all the capabilities, and will consult with AITAG and others to determine the assessment tools' functionality that is appropriate for Whitman to utilize.

¹ Actual cost of purchase is \$33,400. However, we would be realizing \$1,950 in savings by leaving CLEo. There are additional one-time costs for implementation which Technology Services will pay for through reallocation of existing funds.

Mult-Factor Authentiction (MFA) Budget Request ~ \$21K, annual

MFA reduces Whitman College's exposure risk

MFA increases credential security across IT systems that use a username and password, including myWhitman, email/calendar/collaboration apps, Learning Management System, etc. MFA will reduce the risks associated with the vulnerability inherent in the username and password combination -- specifically, this combination is easily compromised and is the target of ever-increasing [and sophisticated] campaigns to fool individuals into unknowingly providing their username and password into fraudulent websites and systems (i.e. phishing).

MFA is preventative

Recent breaches resulting from compromised credentials include government agencies like the Federal Office of Personnel Management and higher education institutions like the University of Maryland, where cleanup efforts cost millions of dollars. MFA prevents a bad actor with a compromised username + password access to our critical systems.

MFA will enable expanding services

WCTS has outstanding requests from various offices on campus that would like to offer extended functionality within existing systems. Extending functionality of high-risk systems (e.g. self-service financial aid, direct deposit enrollment/changes, tax document (e.g. W2) access) has not been pursued due to the increased risk of remotely accessing these functions with a single layer of security (username + password) protecting these services. MFA removes much of the risk of enabling and extending existing services to Whitman community members.

MFA will allow for the consolidation of infrastructure (and streamline user experience)

WCTS maintains duplicate, discrete identity and authorization systems in order to mitigate the risks of a single username + password combination. Properly managed MFA will allow WCTS to explore the consolidation of these duplicative systems -- freeing up both the financial and human resources that are currently consumed maintaining these systems.

An added benefit of this consolidation would be the elimination of separate logins for systems that occupy different security zones -- for example, currently a person has a separate username + password for accessing Colleague -- this consolidation would allow individuals to eliminate this additional credential in favor of a more sophisticated multi-factor logic to ensure the same level of security.

MFA is desirable and becoming 'expected'

MFA is an added layer of security that is becoming expected and standard among many organizations and institutions. Industry Best Practice recommends individuals leverage multi-

factor authentication on any service that offers this advanced mechanism. Examples include Microsoft, Apple, Google, Facebook, and most every banking or financial institution.

The current nature of our integrated and legacy systems has *prevented* Whitman College from being able to insert MFA with existing tools -- a modern, universal, supportable solution is necessary.

MFA and our peers

A survey of the Consortium of Liberal Arts Colleges shows that 80% of the respondents' report having a multi-factor solution in place already. Of those that do not have an MFA solution yet in place, 85% are planning to implement such a solution in the next 18 months.

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Vice-President for Development & Alumni Relations

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				360,000	63,000	0			
1	Assoc Director of Prospect Management	Development-General	1-91-55-70001		65,000				A	A
2	Director of Major Gifts	Development	1-91-55-70001		125,000				A	A
3	Administrative and Stewardship Support	Development	1-91-55-70001		35,000				A	A
4	Development Travel	Vice President for Development	1-91-55-70002	24,300		5,000			A	
5	Development Travel	Associate Vice President for Development	1-91-55-70035	22,500		5,000			A	
6	Development Travel	Development Officer--Major Gifts I	1-92-55-70025	22,050		5,000			A	
7	Development Travel	Development Officer--Major Gifts III	1-92-55-70028	22,050		5,000			A	
8	Development Travel	Associate VP for Development-I	1-92-55-70007	22,500		5,000			A	
9	Development Travel	Planned Giving to Leadership Annual Giving	1-91-55-70184	2,550		15,000			A	
10	Professional Development for Staff	Development Services	1-92-55-70004	133,950		8,000			A	
11	Alumni Relations Officer	Alumni Affairs	1-86-56-70009	164,830	45,000	15,000			B	
12	Annual Giving Officer	Annual Giving	1-93-56-70011		45,000				C	
13	Annual Giving Officer	Annual Giving	1-93-56-70011		45,000				C	

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Vice-President for Development & Alumni Relations

Memo or justification

1	See Budget Request Memo attached
2	See Budget Request Memo attached
3	See Budget Request Memo attached
4	See Budget Request Memo attached
5	See Budget Request Memo attached
6	See Budget Request Memo attached
7	See Budget Request Memo attached
8	See Budget Request Memo attached
9	See Budget Request Memo attached
10	See Budget Request Memo attached
11	We will seek funding for this position in fiscal year 2020-21
12	We will seek funding for this position in fiscal year 2020-21
13	We will seek funding for this position in fiscal year 2020-21

MEMORANDUM

TO: Whitman Budget Advisory Committee
FR: John Bogley, Vice President for Development and Alumni Relations
DA: November 14, 2018
RE: Budget Request Supporting Narrative from Development and Alumni Relations

Level A Priorities

Line 1. Associate Director of Prospect Management

This position was approved in June of 2018 by the Board of Trustees as an essential investment in launching the potential nucleus phase of a campaign—and it's a key gap in our skill-area coverage in the department, whether or not we have a campaign. Good data, good analysis of that data and partnership with the major gifts team to drive more efficient and timely work of the major gifts and planned giving fundraisers are primary focal points of this position, already approved by the Board of Trustees at the June retreat and off-cycle from our typical budget request process at Whitman. The staff work needs indicated from both the Pool Analysis and implementation of the Prospect Research and Management project completed earlier in 2018 make this position a pivotal one for our work.

Line 2. Director of Major Gifts

Whitman's major gifts program is the engine that will drive campaign success and reaching our overall fundraising goal. In its review of our development program, Bentz Whaley Flessner has recommended strongly the addition of a leader of our major gifts team who also has responsibility for some of our highest capacity donors. Working in partnership with the Associate Vice President for Development, the Vice President for Development and Alumni Relations, and the Prospect Management team, the person in this position will deepen our outreach to leadership donors and provide greater leadership and focus on the efforts and results of the major gift officers. In addition to the Bentz Whaley Flessner recommendation, this position was strongly recommended in the Boston Consulting Group's Best Practices Benchmarking report in 2016.

Line 3. Administrative and Stewardship Support

For executive leadership and our major gifts team the demands of organizing a campaign require extensive administrative support and our team is both highly capable and very lean. The success of our fundraising work is dependent upon generous donors, but also those who provide administrative support for travel, record keeping, donor communications, logistics for events, and other office support. Their work makes the externally-focused fundraisers more efficient and provides better stewardship of gifts. The addition of one administrative assistant is an important investment in organizational efficiency during the high-paced work required in a campaign and necessary given the proposed other additions to staff requested above.

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

VP Enrollment & Communications

Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
Total for all pages				45,000	0	0			
1 New Position: Internal Communications Specialist	Communications	1-95-59-80001		45,000	0		Gina Ohnstad	A	A

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

VP Enrollment & Communications

Memo or justification

1	See attached

Budget request justifications

Communications

1. Internal Communications Specialist (\$45,000 salary – OPE not included)

Increasing a sense of belonging for all members of the Whitman community—students, faculty and staff—is a key piece of Whitman’s strategic plan. Improving Whitman’s internal communications efforts is an important tactic to achieve this goal. This position would focus on improving and streamlining all kinds of communications within Whitman. They would help all members of the community better understand what’s happening across campus by promoting events, ensuring broad participation in important campus-wide conversations, and more-effectively disseminating critical information such as benefits information for faculty and staff, and registration information for students. This staff member would collaborate across campus on content creation and work with other communications staff to make best use of channels including the college’s website, social media, new apps, and printed materials.

Whitman College

Request form for 2019/2020 budget

Prioritize;
Highest - A
Medium - B
Lowest - C

VP for Diversity and Inclusion

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				70,000	62,967	0			
1	New Director of Intercultural Center	Intercultural Center	1-81-42-90002		70,000	10,000		VP For Diversity and Inclusion	A	
2	New Budget Line	LGBTQIA+ Resources	New	New		6,000		Maggi Banderas and Korin Bradley	A	
3	Increase in discretionary budget	Intercultural Center	1-81-42-90002	50,705		15,000		Maggi Banderas	A	
4	Increase in discretionary budget	Multicultural House	1-81-42-90014	11,000		550		Maggi Banderas and Jennifer Lopez	A	
5	Increase in discretionary budget	Diversity Affinity Support	1-81-43-90022	1,500		11,500		Maggi Banderas	A	
6	Increase in discretionary budget	International Student Program	1-81-43-90003	22,668		19,917		Kyle Martz	A	

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

VP for Diversity and Inclusion

Memo or justification

1	See attached memo from Helen Kim
2	See attached Intercultural Center memo
3	See attached Intercultural Center memo
4	See attached Intercultural Center memo
5	See attached Intercultural Center memo
6	See attached International Student and Scholar Services memo

TO: Cabinet Members

FROM: Helen Kim, Interim VP for Diversity, Equity, and Inclusion

RE: Request and Rationale for Director of Intercultural Center position

DATE: November 16, 2018

On May 16, 2018, President Murray sent an e-mail to the Whitman community detailing various strategic planning tactics that rose to the level of priorities for the college's senior leadership. Under its broader recommendation of investing in the Whitman experience for all members of the Whitman community, the addition of resources in the Intercultural Center, specifically in programming and director-level staff to support a more diverse student population emerged as a priority tactic.

My request for Director of the Intercultural Center aligns with this tactic and recognizes a very clear need for someone at a more advanced-level staff position than the current Associate Director who largely manages and oversees the vast programming that takes place to support students from diverse backgrounds, particularly those from historically underrepresented groups. As the college continues to prioritize increasing the socioeconomic and racial/ethnic diversity of the student population and the strategic plan that accompanies these demographic changes, a Director of the Intercultural Center will be key in crafting and enacting a vision for a campus unit that will likely become an increasing place of focus, activity, and support for students, staff, and faculty.

Based on discussions with Telara McCullough and her compilation of CUPA salary survey data from the Panel of 19, Panel of 42 and internal equity comparison data for other Whitman Student Program Directors, I propose that this 1.0 FTE position have a salary of \$70,000 + OPE. I am also requesting \$10,000 of non-personnel costs to fund professional development opportunities.

**2019-2020 Budget request
Intercultural Center
Explanation**

The request attached highlights the changes in our student population and the changing demands and expectations that our department has faced over the last few years and that continue to emerge as we tackle these changes and embrace the tactics of our campus strategic plan. The main focus of all these initiatives is to increase student-centered programs, learning opportunities, and other efforts to ensure that learning on campus continues, that dialogue and conversation is encouraged, and that our students from traditionally underrepresented groups are able to develop a true sense of belonging on campus.

Below I am highlighting the items in our budget that are new or that represent a significant monetary adjustment as we move forward with an explanation for the request.

Intercultural Center & GAC Budget request - \$15,550.00 Increase

- Leadership Scholars - \$5000.00 Increase
A cohort-based program focused on leadership development among students who are first-generation, working-class, or those who have overcome hardships and demonstrated the potential of leadership through their application materials. Through community building, individual advising, and leadership development we help create a sense of belonging for this group of students while encouraging their involvement and growth in our campus. This is one of the programs that our department oversees that provides ongoing support to students that participated in the Summer Fly-In. The program was established by Kazi Joshua in 2016-2017 without an established operations budget. In the first year (with just one group of first-year students), the cost of the program was \$2,500. This would be an initial request to have a sustainable budget to support this program, recognizing that we will add students every year.
- Freedom Songs - \$2000.00 Increase
A student-initiated program (started in 2016 by Joel Ponce '16). It was funded via the Rabinowitz Award for the last two years, with the IC serving an advisory role and with the intention that, in order to make sure that the legacy of the program continues, the IC would absorb it into the departments' programming efforts. The program, a social justice concert featuring Whitman students, serves to elevate marginalized voices while creating opportunities to dialogue related to race, justice, and belonging.
- Staff Conferences/Travel - \$3500.00 Increase
Professional development budget for Associate Director, Program Adviser & WISE Coordinator. Our work requires remaining informed on changing needs, best practices, and new learning opportunities for our students and the campus as a whole. In the past, we've had a limited budget set aside for this (limited to one conference, usually NCORE, for the Assistant Director). It is important that we support this work, and all the individuals working with students, by encouraging and supporting ongoing learning and professional development opportunities.
- Student Conference/Travel - \$2000.00 Increase
For the last few years, we have built on the culture of encouraging students to pursue learning and development opportunities through student conferences; most of these efforts have been and will continue to be supported through the ASWC Travel & Student Development Fund as it is available to all students. However, having resources in our budget to support portions that are not covered through that funding (such as meals), is critical if we want to continue to offer these opportunities to students and allows students with fewer personal resources to even consider participating in conferences and

similar learning opportunities. These opportunities have been well received in the past and have helped develop more leadership and engagement among our students.

- Other - \$3050.00 Increase

These changes reflect the need for general year-to-year adjustments to already established expenses as costs increase.

- Supplies
- Printing & communication
- Staff expenses & miscellaneous
- GAC Building managers (salaries)
- GAC student staff meals
- GAC supplies

Affinity Group Support - \$11,500.00 Increase

One of the Enhancing Diversity, Equity and Inclusion Working Group tactics states that we need to “review the material support for affinity groups and determine if is sufficient and make appropriate recommendations if necessary.” Over the last couple of years, students have expressed the needs for affinity group support and community building opportunities. Under the current ASWC structure (which is very similar to what we find in our peer institutions), club organizations that are closed by identity cannot receive financial support through ASWC. For this reason, it is critical that we develop an institutional structure of support for these groups. This year we’re operating a funding structure through the generous support of the Dean of Students office, but it is critical that the Intercultural Center (the DEI office’s arm focused on student support) be able to continue to support this growing need.

- General affinity group support - \$8000.00 Increase

Three years ago there were 3 affinity groups on campus: FGWC (funded through DOS office), PRISM (funded through long-established endowed budget) and WCF (support through InterVarsity); as stated above, this has changed significantly and will continue to evolve and we need to be prepared for those changing needs.

- Current list of affinity groups (not including at least 3 Religious/Spiritual Life supported groups)
 - APIA – Asian Pacific Islander Association
 - FGWC – First Generation/Working Class
 - FUBU – For Us, By Us
 - Men of Color
 - PRISM – LGBTQIA+
 - SASA - South Asian Students Association
 - WISC - Women in STEM Club
 - WoCV - Womxn of Color Voices

- FGWC group support & FGWC mentorship support - \$3000.00 Increase

Building on the strategic tactic to “continue support of the Summer Fly in program and related support activities,” our work connected to FGWC student populations continues to grow and evolve. This year, the FGWC Mentor Program budget (currently supported by the general IC budget) is \$1,500 per year. The Program Adviser oversees this program and has noted the progressive increase of FGWC students on campus; this has increased the number of students who participate in the program - this year we have our largest group of participation, which affects allocation of funds for each event. The Mentor Program aims to put on an event every month to build community and sense of belonging (7-8 events annually), and with the current budget we will have to reduce the number of events. This would affect FGWC students’ ability to create community amongst themselves and with their mentors. The current request will allow the program

to continue to support the community needs - it would allow for more students to participate, and thus enhance their sense of well-being and belonging on campus.

LGBTQIA+ Resources - \$6000 New Budget

This is a completely new budget request to support the work of the LGBTQIA+ Resource Coordinator - a part-time position that was created in 2016 and has been operating without a budget through the support of the IC & RSL operating budgets. With this minimum request, the staff member would have an operational budget for the work they do in addition to working with PRISM interns to manage the endowed budgets (with a yearly payout of approximately \$2,500-3,000) for student programming. This budget request cover:

- Professional association membership & resources
- Conference/Travel
- Intern wages (2 interns) & meals
- Supplies & Printing
- Safe Zone Training for campus

Proposed ISSS Budget for 2019-2020

Current annual budget: **\$22,668**

Requested increase: **\$19,917**

Requested total budget for 2019-2020: **\$42,585**

International Student Orientation - \$19,000 (\$6,000 increase from \$13,000)

In line with the strategic priority of Increasing access and affordability and enhancing equity and inclusion, this increase is needed to allow all incoming international and multinational students to have the same ability to participate in orientation programs as their U.S. peers. Due to increased international class sizes and the fact that there will be no head count for the various orientation programs until June 15, 2019, this increase in funding will ensure that all international students will have the same ability as their U.S. peers to choose to participate in a Scramble, SCORE or Exploration. 2019 will mark the first year that the same options are available to incoming international students as well as U.S. students. This will also provide more opportunities for international students to meet their U.S. peers, begin building friendships through small group experiences and start to create a home for themselves here.

Intern wages - \$1,700

This increase accounts for the minimum wage increase to \$12/hr in Washington State In 2019, and will allow ISSS to continue to provide an internship opportunity that amounts to five hours of work per week when classes are in session.

Pre-Orientation Packet - \$1,285

ISSS has been asked to take over production costs for these packets, which were previously paid for by other offices (Admission, New Student Orientation).

Professional development - \$6,000 (\$4,000 increase from \$2,000)

In line with innovating the curriculum and enhancing diversity and inclusion, the College has created a Center for Global Studies and a Global Studies concentration, which will result in an increased number of international faculty visiting Whitman. Coupled with increased international class sizes and a currently volatile immigration landscape, it is imperative that the international adviser stay up-to-date on changing policies, procedures and best practices, and develops and maintains good working relationships with governmental officials and immigration compliance officials at other institutions.

NAFSA membership & manual license - \$850

NAFSA membership and an annual license for the advising manual are critical keystones for immigration compliance, and the slight increase this year will allow for the purchase of some additional training and educational materials.

Friendship Family program - \$2,500

This program has grown along with the international community at Whitman, and has had a waiting list in recent years as we try to expand our network of families. The added numbers at our three annual all-group meals require additional funds, as well as increased efforts on the part of the IC to provide educational guidance materials to participating families and students. The Friendship Family program is a critical piece of how we support the tactics of celebrating our location, by helping facilitate personal connections between international students and scholars and the local community, and that of enhancing inclusion, helping to create a more welcoming environment and make Whitman and Walla Walla feel more of a second home to the international community at Whitman.

**International Student & Scholar Services
Budget Increase Proposal 2019 – 2020**

The International Student & Scholar Services program is continuing to grow at a fast pace, from 75 enrolled students in Fall Semester 2015 to 116 enrolled students in 2018, along with six College employees on scholar visas and 14 recent graduates engaging in employment authorization opportunities across the U.S. Combined with enrolled "Third Culture Kids," or multinational U.S. students who have largely lived abroad before coming to Whitman, the international student community has grown to comprise over 8% of the overall student population. Due to the significantly increased number of admitted international students since the 2012-2013 academic year, and our inclusion of multinational students in international programs and services, this budget proposal is based on an estimated 40 new incoming students who will require international programs and services in the 2019-2020 year.

The following budget increase request is grounded in an attempt to be as inclusive and equitable as possible in the welcome that our international community receives at Whitman. Historically, international students at Whitman College have had the opportunity to engage in orientation programs to a limited and much lesser degree than their U.S. peers: international students could choose one of two Scrambles of the same design, and could participate in roughly two-thirds of a SCORE. In order to provide new international students with the same options to engage in orientation programs as their U.S. peers in 2019, the international student orientation program must be reduced in duration and offered twice. If the international orientation program cannot be offered as two separate programs before New Student Orientation, the result will be that new international students may not participate in any Scramble, SCORE, or Exploration. The only other alternative would be to eliminate International Student Orientation entirely, which would be detrimental to new international students' transition to Whitman College and would leave them dangerously under informed about their rights, responsibilities and obligations as students present in the U.S. on nonimmigrant visas.

This change in International Student Orientation will require significantly increased funds for dining hall services for participating students and an increase in student staff. Another need for a significant increase in funding is institutional immigration compliance. In the current political climate and considering the drastic policy and procedural changes that have been enacted in recent months, it is imperative that the International Student & Scholar Adviser regularly attend the regional and national NAFSA conferences. This is crucial in order to keep pace with the rapidly changing immigration landscape, consult with colleagues and government officials on continually evolving best practices and ensure federal compliance for the College. The creation of the Center for Global Studies and the Global Studies concentration will precipitate an increase in international scholars, which is an additional reason for increased professional development within ISSS. Other reasons for the increase in funding include the creation of the Global Whitties program, a peer mentoring program for international students, as well as the inclusion of pre-orientation communications expenses in the ISSS budget, as Admission and New Student Orientation have asked that ISSS take over these expenses.

Social Security - \$600

Historically, this service to international students was subsidized by IC office staff using their own personal vehicles and gas to transport students to and from the Social Security Administration office. The increased number of trips required to meet increasing student numbers made it clear that this was a liability, and all trips are now being conducted in College owned vehicles or vehicles rented under the College's rental agreement. This increase will allow us to offer five different dates to new international students to make the trip to apply for an SSN.

Sprintax Federal Filing & Tax Determination System - \$4,000 (increase from \$900 for tax filing only)

The Sprintax Federal Filing & TDS will allow the College to provide expert service to international students as well as staff and scholars, while removing our liability and lightening an increasingly challenging workload for ISSS, Human Resources and the Business Office. Historically, ISSS & the Business Office collaborated to provide tax workshops for international students, which exposed the College to legal liability and required Business Office staff to be available after office hours to assist students. The increasing numbers of international students and visiting scholars, as well as the demographic change of the student population and the increasing number of international students with complex tax histories in the U.S. has put an untenable burden on the Business Office, Human Resources and the Office of the Provost, who have reached out to ISSS to take over portions of the work, which is far outside the realm of immigration compliance and international advising. This software ensures tax compliance for the international community, whether students or employees, without leaving the College liable, nor putting an extra burden on employees who do not have the required expertise and licensure to execute these tasks appropriately. Providing qualified and easily usable tax services not only makes the College more accessible to the international community and creates a more inclusive environment in which international community members need not see their U.S. tax obligations as an insurmountable, often quite confusing hurdle to participation in programs such as the Whitman Internship Grant, practical training opportunities, etc.

Academic year social activities – \$1,400

This increase is needed due to increasing number of international students and their families with an increased level of mobility. The number of families of international students with the means to travel and visit their students while at Whitman has risen steadily, and has increased costs for the senior graduation brunch with visiting families and the international student social at the beginning of the school year, during which returning students have the chance to meet new international students. Being able to celebrate student success and providing a warm welcome to visiting international families contributes to an inclusive environment for a diverse student population from all over the globe.

Academic break social activities – \$1,600

Increased numbers of international students and rising costs in general require a small increase in this portion of the budget, so that ISSS can continue to sponsor three dinners during longer academic breaks, one local trip in Walla Walla and one trip to Pendleton to learn about local history & culture, in line with the tactic of Celebrating Our Location. Additionally, as these group meals are strategically planned to help offset gaps in dining hall services, this portion of the budget also helps us in pursuing the tactic of Increasing Access & Affordability

Global Whitties Mentoring Program - \$3,000

ISSS was tasked in late 2017 with re-creating a peer mentoring program for international students, currently in its pilot year and being funded by the Dean of Students Office. This program had been attempted in the past to little success, albeit much, much smaller in scope due to lack of funds. This funding will allow ISSS to recruit and train returning international

students to be mentors, along with providing all-group meals for all participating students, monthly activities for the mentor pairs to engage in together, as well as subsidizing meals for mentors living off-campus to dine with their mentees. This program is part of our efforts to enhance diversity, equity and inclusion on campus, by providing another resource for international students as they transition to college and life in the U.S.

Cell phone reimbursement - \$650

All international students are given the international adviser's mobile phone number during the "onboarding process" (visa eligibility review, visa acquisition, etc.) to aide communication and to prevent high phone bills for international calls. This has also played a key factor in timely responses to emergencies when international students are abroad and need immediate immigration assistance.

Whitman College
Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Associated Students of Whitman College

	Description of budget request (note here if one-time expense)	Department or budget name	Department Datatel number	Current Discretionary Budget amount	Personnel costs without OPE	Non- personnel costs	Cabinet Alternate Amount	Responsible staff person or position	Officer Priority	Cabinet Priority
	Total for all pages				36,886	0	0			
1	Outdoor Program Rental Shop Manager Salary	Outdoor Program	2-85-44-30089		36,886				A	

Whitman College

Request form for 2019/2020 budget

Prioritize:
Highest - A
Medium - B
Lowest - C

Associated Students of Whitman College

Memo or justification

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Since 2003 ASWC has been paying the salary of the outdoor program rental shop manager and current manager, Alicia Riley, has held said position for the past ten years. Over the past fifteen years, the position has evolved and now directly benefits the school. While it also still benefits students, without this position many events and opportunities would not be available. ASWC made it possible for the OP to become what it is today- a 'Signature Program' of the college, a defining part of what makes Whitman College what it is. The Outdoor Program has grown in significance as part of the fabric of what Whitman College is. Almost half of the incoming first year class attend a 6-8 day wilderness Scramble trip defining their very first experience at Whitman College, to the Trips program which runs over 70 day and overnight trips/year, to the SSRA course offerings that allow for students to develop their leadership potential, learn technical skills, gain an appreciation for nature and the wilderness, and build empathy for others. In short, the OP is an integral part of the Whitman College experience, and the Rental Shop is the engine room for all operations of the Outdoor Program. We believe that a position so essential to the functioning of the college should be funded directly by the college, and not as an expenditure of ASWC. Without the manager to the run the shop, all of the above programs would not be able to function. Additionally, the rental shop manager personally teaches SSRA classes such as intermediate whitewater kayaking, wilderness skills, and coordinates all of the SSRA skiing classes through Bluewood and the wilderness first responder courses. They also plan the Banff Film Festival showing every January in Cordiner, which over 1000 people, including students, staff, faculty, and community members attend. The OP staff supports this change and hopes that the college will agree that it is time to transition the funding of the OP Rental Shop Manager position from ASWC payroll to the college payroll. ASWC has no plans to abandon funding of the Rental Shop Manager position if the college does not agree to the change because we know that this position is essential to this campus. However, both the OP and ASWC agree that the position deserves to be funded by the college directly, and what was a practical solution in 2003 does not make sense anymore. Having students control a full-time staff's salary, is a huge issue, mainly because this staff person doesn't see the same pay raises as other staff members at Whitman. This is problematic because if ASWC VP's of Finance don't do their due diligence, the rental shop manager could be unfairly paid for years, never seeing a raise for years. Students inside and outside the outdoor program are very concerned with these issues and would like to see the school take on the this responsibility and treat all full-time staff members with the same benefits, especially when their work benefits the school as a whole.