

Vice Presidents and Deans Recommendation for Fiscal Year 2019 Operating Budget

May 7, 2018

Background

Western's budget planning is complicated with both capital and operating budget processes occurring simultaneously. The capital budget recommendations are nearing completion. With regards to the operating budget, this year we have been planning both the biennial budget request (where we decide what to request from the State), and the internal fiscal operating budget allocation (where we decide how to allocate funds appropriated by the State). The recommendation for the biennial budget request to the State came out last week for campus review and comment. This document is the recommendation for the FY19 internal budget.

As noted above, the State operates on a biennial budget process. Much like the State legislative session, where the majority of the budget appropriations are made prior to the beginning of a new biennium and then modified in the shorter supplemental legislative session, Western builds internal budgets on a biennial basis. The majority of the operating budget is decided prior to the first year of the biennium, covering both fiscal years, and then the second year's process is designed to provide for possible adjustments for items that emerge after the original two-year budget was adopted.

Once again, we'd like to thank the faculty, staff and students who have brought us to this recommendation. In an effort to improve the internal process this past year, we developed in collaboration with the [University Planning and Resources Council \(UPRC\)](#), a definition for [Emergent Proposals](#). Twenty-three (23) emergent proposals were submitted up through the divisions, to the Vice Presidents, and then to the UPRC in mid-March. The proposals were discussed at two audiocast UPRC meetings and posted to the Budget Forum for campus comment in April. The detailed proposals and the recordings from the UPRC meetings can still be accessed through the [Budget Forum](#) (it requires you to select the Log in button at the bottom of the page, and utilizes your universal WWU account for security validation).

Utilizing initial feedback from the UPRC, the Vice Presidents and Deans met on May 1 and May 4 to discuss and finalize the following recommendation. Many of the items in this recommendation were included in last year's recommendation and are detailed again below in the [sources and uses table](#). We also received new appropriations from the State during the supplemental legislative session and the funding is included below for those new programs.

Recommendations

Our presentation of recommendations is designed to meet the needs of readers with varying interest in details. We begin with a table of "[Sources and Uses](#)" showing individual items of revenue and expenditures, rather than a line-item budget, to more clearly focus on the changes being proposed. We assume status quo revenues and expenditures, and then incrementally capture how revenues (sources) and expenditures (uses) affect our proposed operating budget. From this Sources and Uses table, you may follow the hyperlinks, which provide more information on each item.

Please also note that our operating budget focus is for recurring, base-budget tuition and state appropriations, intended to make sure no commitment made becomes a budgetary gap in the future. This year, however, there were proposals that we felt needed to be addressed immediately, and with limited funds, have utilized a strategy of partial funding. This will require the division to also come up with partial funding to cover the initiative start up. Non-recurring one-time expenses (e.g., startup costs for new faculty positions) are not shown in this presentation but were considered. Wherever an initiative is base-funded, we assured that associated one-time costs would also be covered in some fashion.

Next Steps

Comments, critiques, and suggestions for improvements are sought through **May 18**. Feedback and questions are best shared through the [Budget Forum](#) so that all can engage in discussion regarding the proposed budget. Staff members in Western's operating Budget Office are monitoring the forum and will offer clarifications to questions. We will be following that forum in order to benefit from the discussion. Additionally, a further conversation will occur at the UPRC meeting on May 9.

President Randhawa will finalize his operating budget recommendation to be mailed to the Board of Trustees the first week in June, for their consideration for approval at the June Board of Trustees meeting June 14-15, 2018.

Sources and Uses

Fiscal Year 2018-2019

	Proposed	Decided
Sources		
<u>Items Recommended and Decided July 2017</u>		
Rollover to Yr 2 of recurring Yr 1 under (over) commitments	647,564	647,564
Revenue from overhead assessment as auxiliary income has increased	266,461	266,461
Initiative 1433 Minimum Wage Funding	8,000	8,000
Inflation on Tuition Backfill	439,000	439,000
Compensation (Funding from the State)	1,716,000	1,716,000
Health Insurance Funding (\$913/emp/mo to \$957/emp/mo)	436,000	436,000
Carver Academic Facility Debt Service Funding (CPA Funded)	(59,000)	(59,000)
<u>Decisions/Changes Occurring since July 2017</u>		
Inflation on Tuition Backfill	36,000	36,000
Health Insurance Funding (\$957/emp/mo to \$916/emp/mo)	(407,000)	(407,000)
Study of Campus on Peninsula	70,000	70,000
Early Childhood Education Degree on Peninsula	700,000	700,000
Marine, Coastal, Watershed Sciences	1,306,000	1,306,000
Gold Star Families	39,000	39,000
Native American Curriculum	24,000	24,000
<u>Internal Funding</u>		
Tuition Revenue from Annual Rate Increases	2,333,136	2,333,136
Tuition Revenue Increase due to current enrollment changes	1,111,509	1,111,509
Tuition Revenue Increase due to projected enrollment changes	908,375	908,375
Total New Sources	9,575,045	9,575,045

Sources and Uses

Fiscal Year 2018-2019

	Proposed	Decided
Uses		
<u>Items Recommended and Decided July 2017</u>		
Compensation	5,017,962	5,017,962
Healthcare dollars needed to fund Compromise Budget Proposal	879,648	60,696
Carver Academic Facility Debt Service Funding (CPA Funded)	(59,000)	(59,000)
Disability Services	100,000	100,000
Student Employee Wage Schedule and Min Wage Changes (I-1433)	53,002	53,002
Utility Increase	109,350	109,350
Supplemental Retirement Funding	106,250	106,250
ESC-MCS Commitment	200,000	200,000
Access Funding	100,000	100,000
Miscellaneous - Small Dollar Amounts for Year 2 Commitments	2,218	3,318
<u>Decisions/Changes Occurring since July 2017</u>		
Health Insurance Funding (\$957/emp/mo to \$916/emp/mo)	(407,000)	(407,000)
Study of Campus on Peninsula	70,000	70,000
Early Childhood Education Degree on Peninsula	700,000	700,000
Marine, Coastal, Watershed Sciences	1,306,000	1,306,000
Gold Star Families	39,000	39,000
Native American Curriculum	24,000	24,000
Access funding	400,000	400,000
Banner 9 Hardware/Implementation: MS Azure	131,500	131,500
<u>Funded Through Emergent Requests</u>		
CHSS: Carver Academic Facility Anatomy/Physiology Cadaver Laboratory Technician	68,952	68,952
EOO: Civil Rights Investigator	111,834	111,834
VPUE: Honors Program Stabilization	292,388	292,388
Enterprise Risk Management	110,418	55,209
Associate Director for Alumni and Engagement	82,250	41,125
Block Funding for Access		156,000
Block Funding for IT	1,868,049	400,000
Block Funding for Investment in Continued Enrollment Activities to Achieve Institutional Goals and Meeting Crucial Student Services Needs	695,102	400,000
Block Funding for Marketing	92,643	92,643
Total New Uses	12,094,566	9,573,229
Surplus carried forward to FY2019-2020		1,816

Sources - Items Recommended and Decided July 2017 (7 items)

Rollover to Yr 2 of recurring Yr 1 under (over) commitments

Due to the timing of revenues and expenditures, there is a carryover between the two years of the biennium. This has to do with the way the legislature appropriates funding compared to our tuition revenue and commitments, primarily compensation, for the biennium. Salary policy from the state commits us to a full percentage higher in year two than year one. The state accommodates that commitment in their appropriation amounts, yet our tuition revenue cannot be raised an extra percentage higher in the second year. Therefore we must carry forward enough revenue from year one to year two to be able to meet that commitment.

Revenue from overhead assessment as auxiliary income has increased

Auxiliaries are the various components of Western's operation that must generate revenue to cover their costs. Examples include the Housing and Dining System, the Bookstore, and Campus Recreation, just to name a few. These and large self-sustaining entities are charged a fee to cover the cost of central services utilized as part of their operations. The amount included here as a source is a combination of increased auxiliary activity and a multi-year planned fee increase previously known to our auxiliary units.

Initiative 1433 Minimum Wage Funding

The passage of Initiative 1433 provided for Washington's minimum wage to increase to \$12.00 in 2019 and \$13.50 in 2020. Beginning with 2021, the minimum wage will be adjusted with inflation. Due to the fact that Western adjusted and internally funded full-time employee salaries to as close to a minimum of \$15.00 per hour as the classified salary matrix would allow us several years ago, the state only needed to provide funding to bring our student salaries up to the new minimum wage. This amounts to an allocation \$8,000 in FY19.

Inflation on Tuition Backfill

The College Affordability Act of 2015 provided that the net revenue loss (that was backfilled with state appropriations) would be adjust for inflation in subsequent biennia.

Compensation (Funding from the State)

The biennial budget passed on June 30, 2017 included funding equivalent to increases of 2% July 1, 2017, 2% July 1, 2018 and 2% January 1, 2019. Actual compensation increases will be implemented according to language in collectively bargained contracts and professional staff compensation guidelines.

Health Insurance Funding (\$913/emp/mo to \$957/emp/mo)

The biennial budget passed on June 30, 2017 included planned healthcare insurance rates increase for FY19 from \$913 per eligible employee per month to \$957 per eligible employee per month.

Carver Academic Facility Debt Service Funding (CPA Funded)

The capital funding to complete the renovation of the Carver Academic Facility received in the 2015-17 biennium required a commitment that Western fund \$6 million of the project. In our 2017-19 biennial request, we proposed the legislature approve funding from local building funds to the operating budget to enable us to use the state's debt funding mechanism (certificate of participation) to meet this commitment. The legislature approved our proposal and funded the amount needed to meet these debt service payments back to the state. The amount needed in FY18 was \$59,000 higher than the amount needed in FY19. This shift in funding needs to be requested each biennium moving forward, allowing Western the flexibility of changing the source to pay this debt service in the future.

[Return to Sources and Uses](#)

Sources - Decisions/Changes Occurring since July 2017 (7 items)

Inflation on Tuition Backfill

The College Affordability Act of 2015 provided that the net revenue loss (that was backfilled with state appropriations) would be adjust for inflation in subsequent biennia.

Health Insurance Funding (\$957/emp/mo to \$916/emp/mo)

The supplemental budget passed in March 2018 decreased the FY19 rates from the projected \$957 per eligible employee per month to \$916 per eligible employee per month. This then resulted in funding being swept back by the State (\$407,000), and decreased Western's planned need in FY19 from \$879,648 to only \$60,696.

Study of Campus on Peninsula

The 2018 Supplemental State budget provided one-time funding for a feasibility study of Western creating a four-year degree granting campus on the Kitsap or Olympic Peninsula. WWU must submit a report on the finding of the study to the Governor and appropriate committees of the Legislature by December 2018.

Early Childhood Education Degree on Peninsula

Funding was provided in the 2018 Supplemental State budget for the creation and implementation of an early childhood education degree program at the Western on the Peninsulas campus, in collaboration with Olympic College. At full implementation, the Western on the Peninsulas campus is expected to grant approximately 75 bachelor's degrees in early childhood education per year.

Marine, Coastal, Watershed Sciences

The 2018 Supplemental State budget provided \$1.3 million in funding for Western to develop a new program in Maine, Coastal and Watershed Sciences. The program is being developed to be delivered at the Shannon Point Marine Center.

Gold Star Families

Funding was provided in the 2018 Supplemental State budget for an annual \$500 textbook stipend for family members of armed forces, veterans, and active duty National Guard members lost or seriously disabled during service to help cover the cost of books while pursuing higher education.

Native American Curriculum

The 2018 Supplemental State budget provided funding for teacher preparation programs to integrate Native American curriculum developed by the Office of the Superintendent of Public Instruction into existing history and government course requirements.

[Return to Sources and Uses](#)

Sources - Internal Funding (3 Items)

Tuition Revenue from Annual Rate Increases

In accordance with the College Affordability Act of 2015, Western has the authority to *raise resident undergraduate (RUG) tuition operating fees* by the average annual percentage growth rate in the median hourly wage for Washington for the previous 14 years as determined by the federal bureau of labor statistics. For fiscal year 2019, this average rate is 2.0 percent, and it is our recommendation to raise *RUG* tuition by 2.0%.

Tuition rates for *nonresident undergraduate (NRUG)*, *resident graduate (RG)* and *nonresident graduate (NRG)* student are set by the Board of Trustees after analyses of market constraints of supply and demand, and comparison costing with our peers. After completion of these analyses, it is our recommendation to raise *NRUG* tuition by 5.0% per year for several years to eventually position this classification of student between Washington State University's and Eastern Washington University's rates. An increase of 4.5% on *RG* and *NRG* positions Western appropriately in the market for these student classifications.

Tuition Revenue Increase due to current enrollment changes

This increase reflects a more formulaic approach to budgeting tuition revenue from past practice. In recent years, tuition increases reflected incremental changes in rates from year to year, with realized tuition above budgeted amounts directed towards one-time obligations and building the institutional cash reserves for use in the event of an emergency. Continuing the practice established for FY18's budget, we are budgeting 98 percent of the revenue expected from our current year enrollment, keeping a small buffer for minor decreases in credit hours. All revenue generated above this budget amount will be directed in the ensuing year for one-time expenses and to replenish the cash reserve.

Tuition Revenue Increase due to projected enrollment changes

This increase reflects projected revenue generated by a modest increase in budgeted enrollment of our undergraduate students equivalent to 125 students. The projection assumes an increase of 100 resident undergraduates and 25 nonresident undergraduate students.

[Return to Sources and Uses](#)

Uses – Items Recommended and Decided July 2017 (10 Items)

Compensation

The biennial budget passed on June 30, 2017 included funding equivalent to increases of 2% July 1, 2017, 2% July 1, 2018 and 2% January 1, 2019. Actual compensation increases will be implemented according to language in collectively bargained contracts and professional staff compensation guidelines.

Healthcare dollars needed to fund Compromise Budget Proposal

The biennial budget passed on June 30, 2017 included planned healthcare insurance rates increase for FY19 from \$913 per eligible employee per month to \$957 per eligible employee per month. The supplemental budget passed in March 2018 decreased the FY19 rates from the projected \$957 per eligible employee per month to \$916 per eligible employee per month. This then resulted in funding being swept back by the State (\$407,000), and decreased Western's planned need in FY19 from \$879,648 to only \$60,696.

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Disability Services

Western has experienced significant growth in the number of students with disabilities seeking disability based services and auxiliary aids to ensure equal access to course content. Providing disability based services and auxiliary aids is a federal, state and university requirement. Since the inception of a disabilities services budget in the late 1990s, the annual allocation has been based on availability and not actual estimated expenses creating an annual end-of-year deficit and backfill with temporary funds. While this funding may not put all the annual expenses on recurring funding, it will help reduce the needed backfill at the end of each fiscal year.

Student Employee Wage Schedule and Min Wage Changes (I-1433)

The passage of Initiative 1433 provided for Washington's minimum wage to increase to \$12.00 in 2019 and \$13.50 in 2020. Beginning with 2021, the minimum wage will be adjusted with inflation. I-1433 also provided WWU with the opportunity to reassess its Student Employment Wage Schedule considering that the schedule was implemented in 1999 and had not been modified since. This funding enables Western to revise the current Undergraduate Student Employee Wage Schedule from five classifications to three to create better broad banding and a more accurate representation of the levels of work performed by students.

Utility Increase

Utilities are essential to power lights and equipment, heat buildings, and provide water and are subject to annual inflationary pressures. This funding covers the projected inflationary increase on utility rates paid by the university to utility providers.

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Supplemental Retirement Funding

The supplemental retirement program split from the WWURP in 2009. The legislature limited the supplemental benefit eligibility to those employees participating in the URP on June 30, 2011. There are approximately 660 employees currently eligible to receive future benefits from this plan, with 55 retirees currently receiving supplemental retirement benefits. Funding to support this plan had not been adjusted since 2012 and, according to estimates from an actuarial report commissioned by the state, is not currently sufficient to cover the commitment to our retirees without running into a deficit. Since this benefit is evaluated for each individual retiree eligible, it is difficult to fund with precision, so this allocation increases the recurring funding to fund the projected growing expense.

ESC-MCS Commitment

The Multicultural Center seeks to develop, recruit, retain, support, and sustain our community of diverse scholars, students, and staff who can fully engage and participate in teaching, research, and service. The center will provide tools, resources and space to establish a learning environment in which students from all backgrounds can thrive in their chosen fields of study. This commitment is for the operating expenses of the facility and is based on the use of space in the student union building by university groups.

Access Funding

It is well documented that there are course and program access constraints at Western that currently are preventing students from declaring certain majors and also from completing degrees within a reasonable or desired timeframe. Alleviating this pressure is important, and this allocation provides funding to the Provost to complete the commitment to fund the eight faculty positions for which we are recruiting this year and to address some of the most pressing access issues.

Miscellaneous – Small Dollar Amounts for Year 2 Commitments

This \$3,318 finalizes the commitments made in FY18 for the part-time Victim Advocate position, the implementation of the Facilities Management enterprise information system (AiM), and replacing soft funding with recurring dollars to fully fund the Web Tech and Social Media positions in University Relations and Marketing.

[Return to Sources and Uses](#)

Uses – Decisions/Changes Occurring Since July 2017

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Banner 9 Hardware/Implementation: MS Azure

This represents the initial costs of implementing Banner 9, moving from on premises hardware to MS Azure (the cloud), and providing bolt-on equipment replacement in support of DegreeWorks, AiM, Nolij and TEM.

[Return to Sources and Uses](#)

Uses – Funded Through Emergent Requests (9 Items)

CHSS: Carver Academic Facility Anatomy/Physiology Cadaver Laboratory Technician

The planned completion of the instructional lab spaces in the Carver Academic Facility has been recently designed to include the use of human cadavers for teaching purposes. The inclusion of human cadavers in anatomy and physiology courses is strategic in that the vast majority of these graduates will someday work directly with the health, well-being and life of humans and as such, require experiences with the unique nature of real human anatomical and physiological models. WWU is far behind its peer institution in this capacity. As CHSS and CSE continue to develop programs in Allied Health, the use of this space will continue to see high demand in serving the above majors, and a lab technician to support the use of human cadavers in these courses is a critical and emergent need.

EOO: Civil Rights Investigator

Over the last two years the number of student, faculty, and staff complaints and concerns of discrimination based on legally protected characteristics has risen dramatically, leaving the Equal Opportunity (EO) Office with inadequate staff to handle these. Federal civil rights laws and implementing regulations require, and University policy provides, avenues of redress for complaints of discrimination based on legally protected characteristics including race, sex, national origin, religion, gender identity, gender expression, age, disability, and veteran status (among others). Providing an effective and timely avenue of redress is a compliance requirement, and is also necessary to fulfill our institutional commitments to equity, fair treatment, and social justice.

VPUE: Honors Program Stabilization

Student interest and rates of retention within Western's Honors Program have increased dramatically such that participating students now far exceed course and staffing capacity. Whereas 60% of admitted Honors students previously left the Program in their second year, most Honors students are now retained within the Program. Consequently—and despite no change in the number of enrolled first-year Honors students-- demand for seats in Honors classes and Senior Capstone Projects has increased by 40% over the last three years. Secondly, after numerous consultations with WWU Admissions and review of successful practices at other institutions, Honors successfully piloted a diversity recruitment initiative wherein the Honors Director and Assistant Director guest lecture within ethnically diverse high schools in our state, providing engaging lessons in their areas of specialization and familiarizing students with WWU and our Honors Program. This pilot has increased interest in Honors and WWU among sophomores and juniors at these schools and has resulted in requests for more such visits. Importantly, the pilot has confirmed our view that it is not enough to be welcoming to underrepresented students who visit us; instead, we need to bring our faculty to them. A result of the current Director's efforts to ensure that the Program provides value to all participants, this rapid increase in retention and these additional recruitment visits require increased staffing and base funding.

Enterprise Risk Management

Development of the University's Enterprise Risk Management (ERM) program has been recognized by the University's Board of Trustees as the desired framework for meeting the Governor's 2016 Executive Order 16-06 to adopt best practices for actively engaging the University community in discussions regarding the management of strategic risks in order to provide reasonable assurance of success in fulfilling the University's mission and strategic plan. The Board recently changed the charter of the Board of Trustees Audit Committee to now be the University Finance, Audit and Enterprise Risk Management Committee. Through Enterprise Risk Management, the Board and the campus can routinely identify, evaluate and plan for risks that have the greatest potential for impacting the University's mission and strategic plan fulfillment, as well as allowing us to assess risks while taking advantage of opportunities.

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Associate Director for Alumni and Engagement

The concept of “engagement”, and how we increase engagement with our alumni and constituents, has become the touchstone for most advancement organizations supporting higher education. Integrated advancement organizations are looking for more and more ways to increase engagement because the data shows that constituents with strong engagement also have greater propensity to support the University in other ways, including with their financial gifts. In response, University Advancement has started to roll out a new initiative we call “Western Engaged” (WE). The intent of this initiative is to encourage our divisions and colleges to participate in the engagement process through the implementation of new systems, processes, and training across the University. The basis of this emergent budget request is the funding for an Associate Director of Alumni and Constituent Engagement. This person will champion Western Engaged across the campus and will be the main contact person for the colleges. This person will also be a CRM power user and will assist in training the colleges on how to use the CRM to input data as well as extract it.

Block Funding for Access

It is well documented that there are course and program access constraints at Western that currently are preventing students from declaring certain majors and also from completing degrees within a reasonable or desired timeframe. Alleviating this pressure is important, and this allocation provides funding to the Provost to complete the commitment to fund the eight faculty positions for which we are recruiting this year and to address some of the most pressing access issues.

Block Funding for IT

The vast majority of the equipment that provides the data network on campus, as well as Western’s current phone system is either end-of-support or will be in the next three years, leaving critical infrastructure without replacement parts or software security updates. Our wired network does not provide sufficient power-over-Ethernet capacity to meet the campus’s growing needs for electronic access control, cameras and security equipment, IP telephones, and newer wireless access points.

It is nearly impossible (and now more expensive) to buy teaching technology (e.g. laptops, tablets, etc.) that have analog connections (e.g. VGA video connectors). Most General University Classrooms (GUCs) at Western have aging and obsolete analog media equipment prone to failure, incompatible with faculty laptops and lacking in high-quality projection. There are only 14 digital classrooms among the 137 GUCs. Replacement equipment capable of processing digital signals will require new switchers, control panels, document cameras, and new cabling from the switcher to the projector. New projectors will be needed for those classrooms not already within the scope of our current projector replacement project.

We are investigating the options of submitting several decision packages through both the operating and capital budget processes for potential replacement funding through the State. However, there are critical needs that simply cannot wait, so we are recommending funding to address the most critical while we work on long-term solutions through the State processes.

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Block Funding for Investment in Continued Enrollment Activities and to Achieve Institutional Goals and Meeting Crucial Student Services Needs

Investments in enrollment strategies serve Western as a whole as a large majority of the institution's income is generated from tuition. As competition for students in the state of Washington and across the region increases, particularly to enroll students from under-represented groups, this is an area where continued investment in resources benefits the entire institution.

Short-staffing of key services for students continues to impact student success and retention. While we have made steady progress in improving staffing levels, more is required in some critical areas. Increasing the number of mental health and accommodations counselors to support the needs of students with disabilities, and academic support coordinators with intercultural and multicultural expertise are vital in meeting both current and future needs for the university.

Block Funding for Marketing

There is growing recognition that higher education is an increasingly competitive marketplace. With this recognition comes an acknowledgment that to compete for the best students and faculty, to generate significant donor and funding agency investment, and to command adequate tuition levels, universities need more than just great curricula. They require great marketing, along with innovation, and – importantly – a differentiated and consistently messaged brand positioning in a sea of similarly positioned institutions.

Western has never undertaken true brand advertising and promotion. Rather, our efforts to date have been highly decentralized, resulting in fragmented and finite programmatic messaging from Admissions, Advancement and Extended Education that lacks cohesion and coordination. In addition to engaging in more coordinated planning and execution with campus stakeholders, all of our efforts would benefit from higher-profile brand advertising that provides lift to our programmatic efforts.

In addition to the recurring dollars shown here, the VPs'/Deans' recommend a \$300,000 one-time allocation to fund brand advertising through online, print, and media buys.

[Return to Sources and Uses](#)