

WESTERN WASHINGTON UNIVERSITY

President's Advisory Committee on Institutional Resource Modeling

Fall 2018

CHARGE

Background

At the start of Western's strategic planning process in the fall of 2016, the University recognized the need for a complementary resource planning process, to ensure our strategic plan is connected to a realistic sense of the additional funding it will take to advance our goals and objectives. The purpose of a resource plan is not to determine funding levels for particular programs or areas of the University, but to quantify, at a high level, the additional funding required to advance these aspirations. This "prosperity gap" is itself divided into two parts: (a) the difference above current funding levels required to adequately support *existing* services into the future, and (b) the additional funding required to advance the institution's aspirations and priorities set forth in the strategic plan. Since the future financial and operational environment is expected to be dynamic, institutional resource modeling is not necessarily focused on developing accurate forecasts. Having a general sense of what these amounts might be—even if quite large—will helpfully orient Western's efforts and expectations as to how, where, and when we may be able to generate these revenues.

If the 2018-2025 Strategic Plan defines Western's goals and aspirations for the next seven years—e.g., increasing the six-year graduation rate for students of color 10-15%—the institutional resource modeling process aims to define the resources that will most likely be required to accomplish them.

Charge

Defining the prosperity gaps related to each of the Strategic Plan's aspirational metrics will require the specific expertise of professionals in academic affairs, business affairs and enrollment and student support services to generate the resource models. In addition, the broad perspective and insights of Western's faculty, staff, administrators, and students will be needed to guide the process and to review the assumptions and models for relevancy and consistency with the strategic plan. To that end, the President charges an advisory committee to guide a resource modeling exercise to estimate the prosperity gap associated with achieving key strategic plan objectives.

The outcome from this activity is *a scenario or a small set of scenarios* that identify the general types and relative sizes of expected expenditures. The envisioned time horizon is the next three biennia, through 2025. The scenarios are based on assumptions that are consistent with Strategic Plan 2018-25 and the Overall Metrics approved by the Board of Trustees. These include Western's role in advancing the Washington Student Achievement Council goals of significantly increasing adults with post-

secondary education, meeting current and emerging areas of need in the state (employment trends, geographic needs, student demographic shifts, etc.), and ensuring delivery of high-quality education.

The intent is to keep the work focused on a manageable number of objectives and to develop the scenarios quickly. At the same time, we want to make sure that the work of the Committee is informed by input from University's different governance groups. The key objectives, planning assumptions, and the resulting scenarios will be shared broadly with the university community during the development stage, including relevant planning groups, such as the UPRC. We will be seeking input from the university community to ensure that relevant factors are considered in the modeling process. The process will also engage closely with the Board of Trustees regarding critical assumptions about the future operations of the university and the resulting resource scenarios.

The deliverable from the work of the Committee is a set of resource scenarios. Unlike a strategic plan or a budget model, there is no specific outcome that needs to be approved or adopted at the end of the modeling process. The scenarios inform the University and its administration on important revenue generating strategies (for example, enrollment mix, shaping legislative requests, fundraising), while likely providing the challenge of thinking creatively to expand our revenue base to advance the goals and priorities we aspire to achieve. The exercise does not contemplate changes to our current budget biennial processes nor does it assume exemption from them.

The role of the Committee is advisory in nature and it will complete its work and deliver its final report to the President, preferably by April 15, but no later than May 15, 2019. The final work will be presented to the Board of Trustees for acceptance at its regularly scheduled meeting after completion but no later than the Board's regular June 2019 meeting.

Membership:

Membership will consist of individuals from each of the representative constituencies (faculty, professional staff, classified staff, and students), selected by the President from 4-8 nominations received from each group. The President will add representatives from relevant administrative groups and will appoint the Committee chair (or co-chairs).

Staffing will be provided and the Committee will be assisted and guided in its efforts by a professional consultant with expertise in conducting institutional resource modeling exercises.

The Committee shall be dissolved upon completion of its charge, no later than the end of the regular 2018-19 academic year.