



**Washington State University  
2024 Supplemental  
Operating Budget Request**

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September 13, 2023

Governor Jay Inslee  
Office of Financial Management  
300 Insurance Building  
3rd Floor – North  
PO Box 43113  
Olympia, WA 98504-3113

Dear Governor Inslee,

Enclosed, you will find Washington State University's supplemental operating budget requests in advance of the 2024 legislative session. These requests align with and support the *Results Washington* goals promoting World Class Education and Healthy and Safe Communities.

This year's request has three components.

- The university is requesting \$19 million in Climate Commitment Act funds to reflect actual auction prices for carbon allowances to allow WSU to meet compliance obligations. This is in line with the intention of 2021's Senate Bill 5126 and the fiscal assumptions behind it, which provided WSU with funds to purchase allowances based on market prices anticipated at the time.
- The university, for the first time, is negotiating a contract with newly organized academic student employees represented by the United Automobile, Aerospace, and Agricultural Implement Workers of America. WSU will submit a fiscal impact upon the completion of a successful negotiation.
- WSU is requesting \$2.15 million to establish a new major in Supply Chain Management for its Bachelor of Arts in Business Administration Degree. This major would be offered at the WSU Vancouver and WSU Everett campuses to meet the workforce needs for skills associated with demand fulfillment, strategic procurement, logistics and transportation, warehousing, data-based forecasting, optimization, coordinating contracts, and quality improvement.

WSU would greatly appreciate your consideration of these important requests. We are proud to be of service to our state and look forward to working with you to enhance that service.

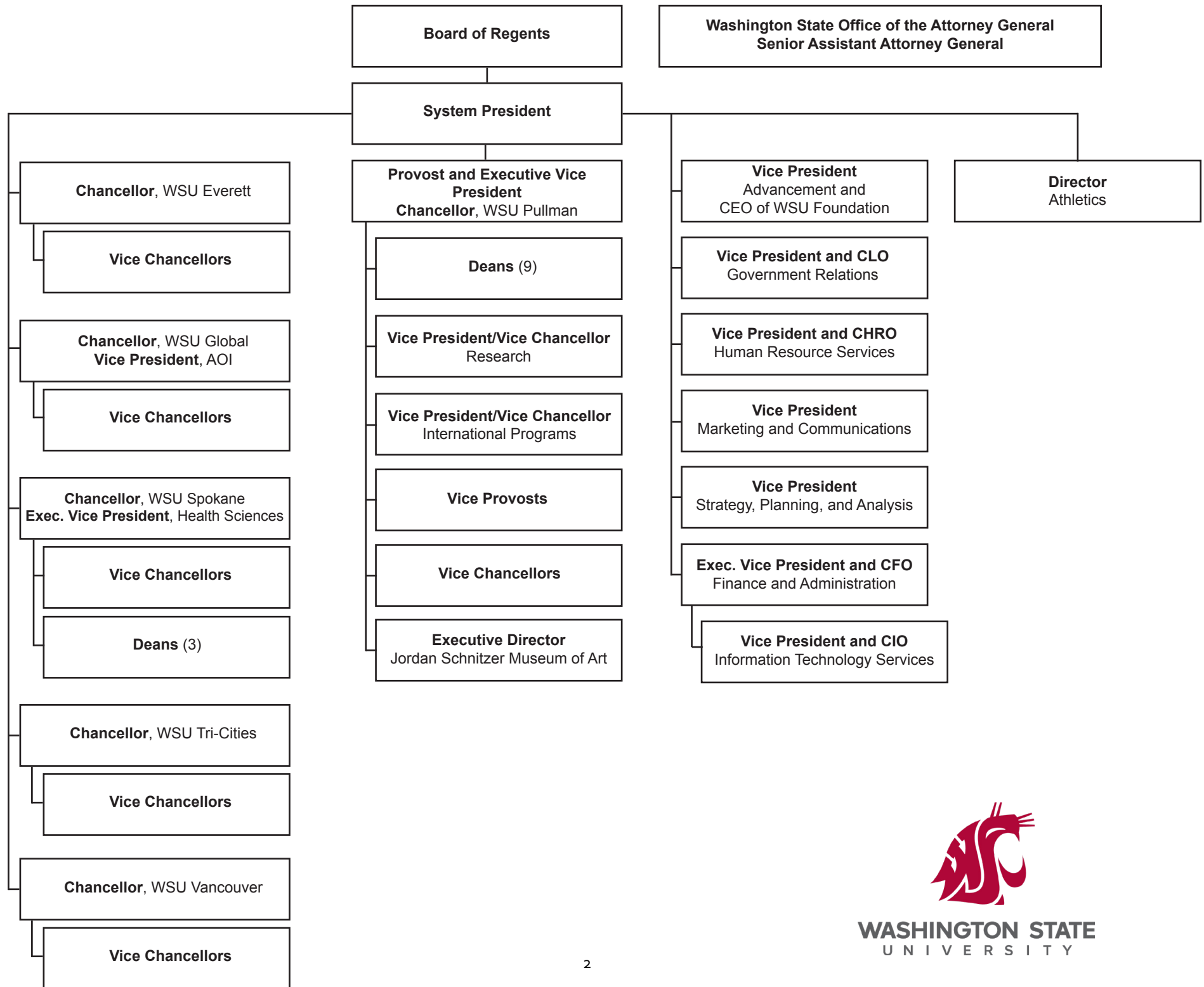
Sincerely,



Kirk H. Schulz  
President

Enclosures

cc: Elizabeth Chilton, Provost, and Executive Vice President  
Leslie Brunelli, Executive Vice President for Finance and Administration  
Chris Mulick, Interim Vice President for External Affairs and Government Relations



# WASHINGTON STATE UNIVERSITY

The background of the page features a photograph of a black lamp post with a glass globe. A purple banner with the white WSU cougar logo is attached to the post. The scene is set against a backdrop of trees with vibrant yellow and orange autumn foliage under a clear blue sky. A red banner is partially visible on the right side of the lamp post.

## WSU SYSTEM STRATEGIC PLAN 2020-2025

*Fall 2022 Update*

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# ACKNOWLEDGEMENT OF AMERICA'S FIRST PEOPLES

Washington State University acknowledges that its locations statewide are on the homelands of Native peoples, who have lived in this region from time immemorial.



We acknowledge that WSU locations statewide reside on 42 tribes and nations that share current and traditional homelands and waterways in what is now Washington State. Currently, 29 are federally recognized in Washington State, 3 in Idaho State, and 3 in Oregon State. Some of these nations represent multiple tribes and bands. We also recognize that the Morrill Act of 1862 established land-grant institutions by providing each state with “public” and federal lands, which are traced back to the disposition of Indigenous lands often taken by coercive and violent acts, and the disregard of treaties

The university expresses its deepest respect for and gratitude to these original caretakers of the region. As an academic community, we acknowledge our responsibility to establish and maintain relationships with these tribes and Native peoples, in support of tribal sovereignty and the inclusion of their voices in teaching, research, and programming. We also pledge that these relationships will consist of mutual trust, respect, and reciprocity.

## ***Tribes and Nations whose Homelands are in Washington State***

*All tribes are federally recognized, except for those marked with an asterisk \*, which non-federally recognized. Some of the non-federally recognized tribes are in the process of becoming recognized.*

### **Washington**

Chinook Indian Tribe\*  
Confederated Tribes of the Colville Reservation  
Confederated Tribes of the Chehalis Reservation  
Confederated Tribes and Bands of the Yakama Nation  
Cowlitz Indian Tribe  
Duwamish Tribe \*  
Hoh Indian Tribe  
Jamestown S’Klallam Tribe  
Kalispel Tribe of Indians  
Kikiallus Indian Nation\*  
Lower Elwha Klallam Tribe  
Lummi Nation  
Makah Tribe  
Marietta Band of Nooksack Tribe\*  
Muckleshoot Indian Tribe  
Nisqually Indian Tribe  
Nooksack Indian Tribe  
Port Gamble S’Klallam Tribe  
Puyallup Tribe of Indians  
Quileute Tribe  
Quinault Indian Nation  
Samish Indian Nation  
Sauk-Suiattle Indian Tribe  
Shoalwater Bay Tribe  
Skokomish Indian Tribe  
Snohomish Tribe\*  
Snoqualmie Tribe  
Snoqualmoo Nation\*  
Spokane Tribe of Indians  
Squaxin Island Tribe  
Steilacoom Tribe\*  
Stillaguamish Tribe of Indians  
Suquamish Tribe  
Swinomish Indian Tribal Community  
Tulalip Tribes  
Upper Skagit Tribe

### **Idaho**

Coeur d’Alene Tribe  
Kootenai Tribes of Idaho  
Nez Perce Tribe

### **Montana**

Confederated Salish and Kootenai Tribes

### **Oregon**

Confederated Tribes of Umatilla  
Confederated Tribes of Warm Springs  
Confederated Salish and Kootenai Tribes of the Flathead Reservation

# FROM THE PRESIDENT



## Charting a Course for the Washington State University System

The world that has shaped Washington State University over the past 130 years is changing more rapidly than ever. Societal, technological, economic, and cultural upheaval is constant.

As we chart the future course of our statewide system in the midst of this dynamic environment—an environment made more dynamic than we ever imagined due to the impact of COVID-19—we must evolve and adapt on a constant basis to maintain the University’s relevancy and value to society. We must expand on our ability to meet the future needs of the state of Washington, the Pacific Northwest, our nation, and beyond. We must serve the public good in new and innovative ways. Our 2020–2025 system strategic plan sets out the framework for us to do exactly that. The plan builds on our overarching institutional vision:

**Washington State University will deepen and expand its impact by building on the strengths of each campus and location for a stronger Washington state and global community.**

We have made much progress in the past few years in key areas that support our vision. The number of faculty receiving prestigious national awards is growing. Our research and development funding is at record levels. We are enrolling incredible students from around the world. We continue to build new relationships and partnerships with communities and stakeholders across the state that advance the public good. In creating this first-ever strategic plan focused on the WSU system, we have articulated the purpose, values, vision, and goals that connect all of our functions; all of our campuses, colleges, and units; and all of our stakeholders to our mission. We still have much work to do in this regard, but I am convinced this plan will enable

us to leverage our statewide resources and apply them in powerful new ways to benefit the state.

Notably, this plan focuses on our university’s land-grant mission and how we can best fulfil it at every level of our organization. One of our institutional strengths is providing access to higher education for students who have not yet had the opportunity to reach their full potential; we know better positioning each campus, college, and unit will allow them to make a stronger impact. By recognizing and building on the strengths that make us unique, WSU can better educate students, conduct scholarly inquiry, and share expertise and knowledge.

In determining the success of this plan, we will measure progress using metrics (see Appendix 3) that matter most to the fulfillment of our mission, such as the social mobility of students and our institutional impact on communities. We will measure the quality, not simply the quantity, of our actions.

As we proceed, this strategic plan also will guide us in making key institutional decisions and allocating resources. We will revisit the plan annually by engaging in conversations with our community, reviewing the checkpoints we establish to measure progress, and adjusting our objectives and strategies as the needs of the University evolve and the environment in which we operate as a system changes.

My sincere thanks to the entire WSU community, which participated at an unprecedented level, in crafting this plan. I hope you feel as energized about the future of the WSU system as I do. In a world being dramatically reshaped by the coronavirus pandemic, Washington State University’s ability to improve lives has never been more important.

**KIRK SCHULZ**

President

Washington State University System



# INTRODUCTION



When the Northwest Commission on Colleges and Universities (NWCCU) reaffirmed Washington State University's accreditation in August 2018, the accrediting organization recognized the university's institutional accomplishments during the review period by including several commendations in its final report. The commendations praised WSU for its:

- ▶ transparency and inclusiveness in decision-making;
- ▶ sense of loyalty within the WSU community;
- ▶ efforts to improve student access and success, especially among underrepresented groups;
- ▶ assessment of student learning outcomes;
- ▶ commitment to cutting-edge instructional approaches; and
- ▶ thematic approach to scholarship.

The 2020–2025 WSU system strategic plan capitalizes on these strengths and builds on the momentum that produced these commendations. Most notably, this plan is the result of a collaborative

effort by the university community to generate a collective vision of the “future WSU” and articulate goals and strategies that will move the WSU system toward that vision. It represents a synthesis of the most ambitious, challenging, and impactful ideas generated by the university's statewide community during an 18-month-long planning process. It is a truly collectively written road map for the future.

This plan also emphasizes WSU's commitment to its land-grant mission:

- ▶ education for all regardless of means or background;
- ▶ scholarly activity that benefits the public and especially Washingtonians; and
- ▶ outreach to the residents of the state to share the institution's expertise and positively impact people and communities.

WSU is the state's land-grant research institution within the state of Washington and is responsible for delivering a statewide impact. The university system embraces

this responsibility, and it is central to everything the institution does. The framework for this plan is thus WSU's commitment to the wellbeing of Washington residents and the commerce of the state, and a long-term goal around which this plan is oriented is for the university to be recognized as among the best land-grant institutions in the nation.

Some might question why WSU, or any institution of higher learning, needs a strategic plan when the institution's responsibilities are so clearly laid out: educate students, engage in scholarly inquiry, and share expertise with the public. In fact, the strategic plan serves as a guide to help the university make informed decisions about resource allocation and program development. It is also the university's primary means of tracking and demonstrating performance to stakeholders and legislators. It is not sufficient to conclude that WSU is meeting its responsibilities simply because students graduate and residents enroll in outreach programs and faculty produce scholarly works. The quality of the institution's performance must also be considered. This plan includes a set of outcome metrics (see Appendix 3) that are calibrated to specific aspects of WSU's responsibilities to help the institution determine what it is doing well and in which areas it can improve. These metrics will be analyzed yearly and the analyses will be published in an annual public report that is made widely available. A strategic plan is, then, necessary as WSU continues to grow and improve.

This plan also articulates goals and strategies for growth and excellence in education, scholarly work, and outreach. For the first time, it also specifies a goal to fully integrate and take advantage of the expertise that resides across the entire university system, as well as a number of strategies to accomplish this goal. The WSU system is one of distributed expertise and the university's larger goals can only be realized by taking full advantage of this expertise. The goals in all four areas of this plan are ambitious. Some may seem overly so. If some indeed prove to be too ambitious, falling short in those areas will still lead to meaningful improvements that can be built upon in the next strategic plan.



# WSU HISTORY AND EVOLUTION TO A STATEWIDE SYSTEM



## **Washington State University: The People's University, 1890-2020**

Who could have imagined the bright future that awaited Washingtonians in 1890 when Governor Elisha P. Ferry signed legislation creating an agricultural college and science school that led to the establishment of WSU on a wind-swept hilltop in Pullman, Washington?

From those early days, when the Washington Agricultural College and School of Science consisted of a one story, thirty-six by sixty-foot structure, Washington State University has evolved to become one of the nation's premier land-grant universities, a statewide enterprise of more than 31,000 students, 6,000-

plus employees, and a nearly \$400 million annual research operation. The university's ten degree-granting academic colleges offer almost 250 undergraduate and graduate degrees, with many academic programs top-ranked nationally.

That the university has evolved from its humble roots to become a valued partner in growing the state's economy and improving the quality of life for its residents is testimony to the achievements of the faculty, researchers, staff, and administrators who have worked to make the dream established 130 years ago an ongoing reality.

Along the path to achieving a remarkable record of public service, WSU has demonstrated an ongoing commitment to the land-grant

principle of providing access to higher education—often acting in advance of its peers in this regard. For example, the first student of color attended WSU in 1906, when Ihei Yamauchi enrolled to study civil engineering. The College of Veterinary Medicine graduated its first African American student in 1920—a time during which few African Americans attended colleges in the U.S., let alone a veterinary college. Similarly, the first woman graduated from the veterinary college in 1933, an era in which fewer than four percent of women in the country completed four years of college or more.

Looking back, the university's progress can perhaps best be summarized by reviewing its major achievements on the basis of four major stages of development.

### **The Early Days**

The fledgling school opened its doors in 1892 to 59 students who reflected the egalitarian principles set out in the Morrill Act that created the nation's land-grant institutions. The students were not from wealthy families. Instead, they were the sons and daughters of farmers, laborers, and shopkeepers, representatives of America's working and middle classes.

WSU's third president, Enoch A. Bryan, who served as president from 1893 to 1915, set the direction for the new college to become a higher education institution with a comprehensive curriculum, expanding its academic breadth beyond agriculture and science to include disciplines such as pharmacy, veterinary medicine, and the liberal arts. The effort culminated in the renaming of the school to the State College of Washington, or WSC, in 1905.

### **A Period of Growth**

The period between 1915 and 1945 can best be characterized as a period of growth for the college, both in academics and student life.

In 1917, under the direction of President Ernest O. Holland, five colleges (agriculture, home economics, mechanic arts and engineering, sciences and arts, and veterinary science) and four schools (education, mines, music and applied design, and pharmacy) were created, key steps toward eventual designation as a university. Similar growth occurred in campus facilities, as modern

laboratories, classrooms, and dining facilities were constructed.

The college obtained a chapter of Phi Beta Kappa, the nation's oldest and best known national honorary society, in 1929, recognition of WSC's commitment to the liberal arts as well as to practical education.

Enrollment during the 30-year period rose and fell in tandem with the country's economic fortunes, reaching a record of 4,035 students in 1940, only to fall steadily as World War II engulfed the nation, eventually dropping to 1,530 students in September 1945.

### **Achieving University Status**

With the end of World War II and the return of military veterans from overseas, enrollment ballooned to more than 6,000 students beginning in the late 1940s. The increase in students spurred a period of substantial growth on the Pullman campus that included construction of a new library, expanded faculty research, and the establishment of general education requirements in the humanities, social sciences, and natural sciences.

The maturation of the college was formally recognized on September 1, 1959, when WSC was renamed Washington State University. The new name recognized the reality that WSC featured multiple colleges offering both undergraduate and graduate studies, increasingly notable research, and a growing role in addressing the needs of the state.

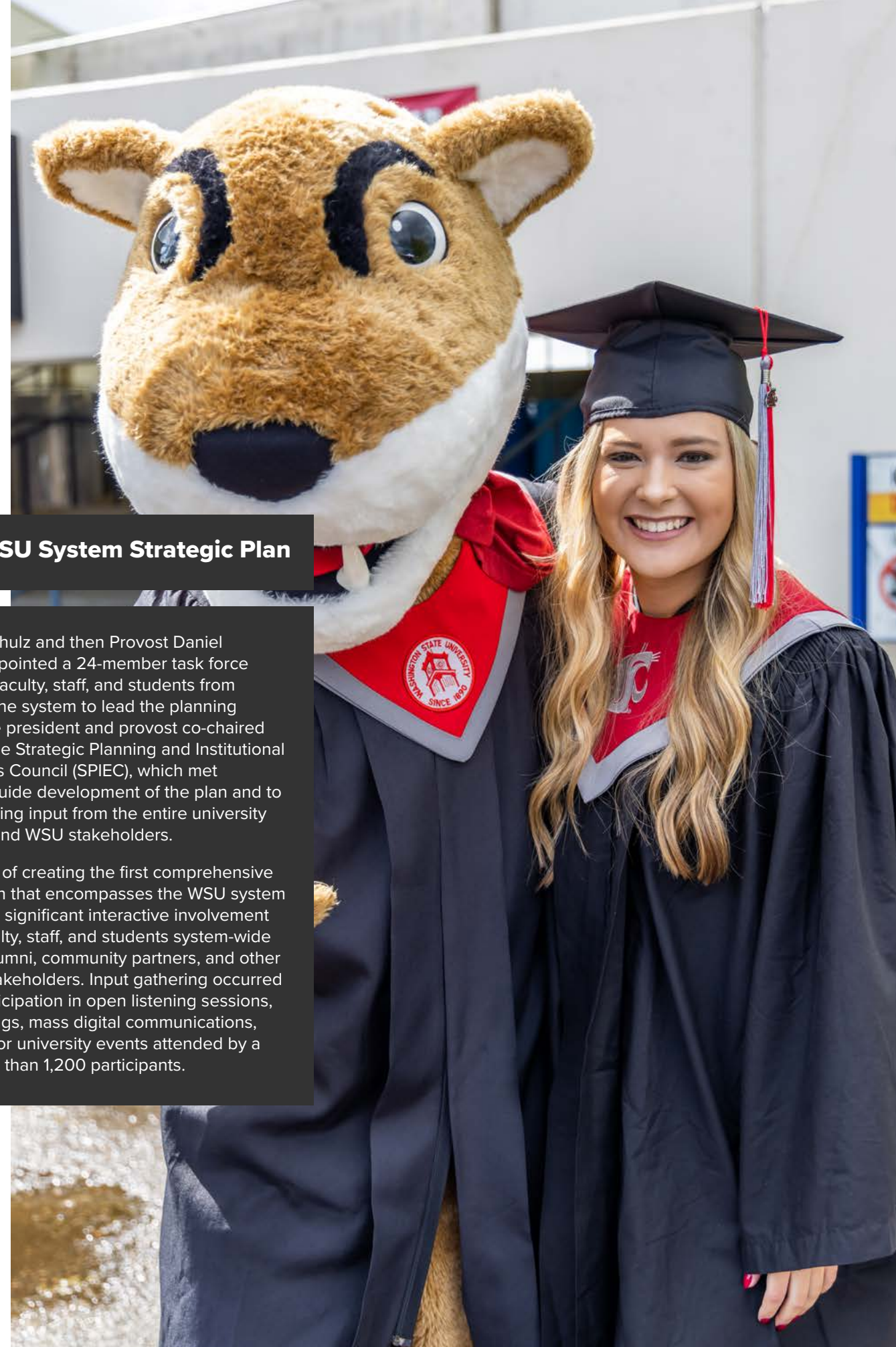
The growth curve accelerated from the mid-60s to the mid-80s. Enrollment increased by more than 50 percent from 1967 to 1985, to 16,500 students. Research grants mushroomed from \$11 million to \$68.5 million during the same period, a reflection of the priority placed on faculty research and scholarship. Areas of academic emphasis ranged from veterinary medicine to the biological sciences, nursing, the humanities, and social sciences.

### **Expanding Access to Education Statewide**

The reach of WSU's mission expanded significantly in 1989, when the university's statewide campus system was established under former WSU President Samuel Smith in response to a request from the state government for Washington State University and the University of Washington to offer education at multiple locations around the state to serve place-bound and job-bound students. WSU located campuses in Vancouver, the Tri-Cities (Richland), and Spokane, with Spokane being a cooperative venture with Eastern Washington University. Creation of new WSU learning centers located statewide and the extended degree programs further expanded access to the university.

The three regional campuses originally offered upper-division classes only and thus began as destinations for transfer students, which necessitated establishing strong relations with local community colleges—a robust partnership that continues today. As





enrollment grew throughout the 1990s, the campuses gained greater flexibility to serve the needs of the communities in which they were located. As an example, responding to community wishes, WSU Vancouver welcomed its first freshman class in fall 2006. WSU Tri-Cities followed suit in fall 2007. In 2011 the Spokane campus was designated by the university's Board of Regents as WSU Health Sciences Spokane, and the campus now is predominately focused on professional education and health research.

A campus in Everett was added in 2014 to meet the higher education needs of the north Puget Sound area. WSU Everett remains a transfer campus. Instructional sites now also exist in Bremerton, Yakima, and Walla Walla.

The WSU Global Campus, through its online programs, extends the university's land-grant mission worldwide to those who increasingly require a high level of flexibility while pursuing a quality education.

During the past decade, WSU's impact has reached unprecedented levels. Records have been set in

enrollment, fundraising, and research expenditures. The university completed 30 major construction projects from 2007 to 2015, including one of the world's most technologically advanced wine science centers at WSU Tri-Cities and the Paul G. Allen School for Global Animal Health at WSU Pullman.

In one of the most historic achievements in WSU's history, the Washington state legislature in 2015 granted approval for the university to establish a medical school on the WSU Spokane Health Sciences campus. Adhering to the land-grant tradition, the Elson S. Floyd College of Medicine seeks to expand access to health care in under-served communities across Washington and increase the ability of Washingtonians to earn a medical degree without leaving the state.

**Planning for the Future**

Shortly after beginning his tenure as WSU's 11th president on June 13, 2016, current WSU President Kirk Schulz announced the Drive to 25, a system-wide initiative designed to elevate WSU to recognized status as one of the nation's top 25 public

research universities. The objectives of the Drive to 25 are guiding decisions about institutional goals, priorities, and resource allocations affecting the university's teaching, research, and service mission. As such, the Drive to 25 served as a road map for the creation of the 2020-2025 WSU system plan.

As WSU system leadership worked toward the Drive to 25, it became apparent that the WSU system needed to be organized in a way that would make this level of progress and impact. With a focus on the OneWSU concept introduced in the 2020-2025 WSU system plan, a new vision statement was implemented in Fall of 2022. With a focus on leveraging the OneWSU system structure, the new vision is grounded in WSU's land-grant mission and deepening the university's impact.

**2025 WSU System Strategic Plan**

President Schulz and then Provost Daniel Bernardo appointed a 24-member task force made up of faculty, staff, and students from throughout the system to lead the planning process. The president and provost co-chaired the group, the Strategic Planning and Institutional Effectiveness Council (SPIEC), which met monthly to guide development of the plan and to ensure ongoing input from the entire university community and WSU stakeholders.

The process of creating the first comprehensive strategic plan that encompasses the WSU system has included significant interactive involvement by WSU faculty, staff, and students system-wide as well as alumni, community partners, and other university stakeholders. Input gathering occurred through participation in open listening sessions, online postings, mass digital communications, and two major university events attended by a total of more than 1,200 participants.

# THE WSU SYSTEM TODAY

Guided by Our Land-grant Identity



Washington State University is the land-grant research institution for the state of Washington. Land-grant schools are uniquely charged by the federal government with educating students from a broad range of backgrounds, conducting scholarly inquiry in the “practical arts,” and actively sharing their expertise and knowledge with the state’s residents.

Today WSU functions as a statewide system. The land-grant identity remains core to the university’s functioning, and the institution’s achievements in this regard are significant. WSU has a decades-long reputation for development of wheat strains that can grow under a variety of challenging conditions. More recently, among other accomplishments, university researchers have developed a method to create 3D-printed bone implants; established a nationally recognized bread research facility that helps wheat farmers make informed decisions about which varieties to grow; created and refined a measure designed to reduce the potential of school truancies that has been adopted statewide; and created a web-based pesticide education resource accessible to the public. On a yearly basis about one-third of WSU’s freshman class consists of first generation college students, and the university provides extensive and all-encompassing support to help students adjust to college life. The university maintains Extension offices in each of the state’s 39 counties, and more than 1 million people participate annually in the programs offered through these offices. WSU research centers also are located in Mount Vernon, Prosser, Puyallup, and Wenatchee, all key agricultural areas.

Importantly, while developing the multi-campus system WSU retained its college-based academic structure under which a single department chair or school director is responsible for all faculty in the unit regardless of where they reside, and a single dean is responsible for all units in the college. This means that all faculty, regardless of work location, must meet the same standards for tenure and promotion. Deans share responsibility and authority for departments, schools, or academic programs offered jointly across two or more colleges. Deans share responsibility with chancellors for the success of components of departments, programs, or schools residing on another campus.

While acknowledging the existing academic structure, the university recognizes the need for and increasing value of multidisciplinary research. The complex societal problems that exist can only be adequately addressed through the input of individuals from many different disciplines. Academic administrators and those faced with funding decisions will need to continue identifying mechanisms that properly support critical research that cuts across existing academic structures.

The institution operates as an integrated university system, with all campuses adhering to the same set of goals, practices, and policies—known as One WSU. For example:

- ▶ degree requirements are similar across campuses;
- ▶ all instructors and researchers, regardless of their location, are considered part of one faculty; and,
- ▶ the offices of student affairs and finance and administration are regarded as distinct but highly integrated components of the same administrative divisions.

The university has been redefining its administrative and operational structures to ensure delivery of an integrated set of services, while allowing each campus autonomy via the leadership of the chancellor and a clearly defined identity.



## Growth in the Twenty-first Century

In the wake of the 2008-09 recession, WSU experienced rapid growth in enrollment and now has a record-large student body, with 31,607 students enrolled across the six campuses for fall semester 2019. As well, the university embarked on an ambitious expansion campaign during the past decade that expanded its statewide footprint, establishing a world-renowned center for the study of animal-to-human disease transmission, launching a medical school in Spokane in response to critical statewide shortages in primary care physicians, creating the Everett campus, initiating construction of a five-building life sciences complex in Pullman, and opening a wine science center at the Tri-Cities campus. WSU thus has made some notable strides in establishing itself as a top-tier public university that remains true to its land-grant mission.

The state of Washington has one of the more robust economies in the nation, and since 2014 has yearly experienced a positive net migration in excess of 50,000 people. The state Office of Financial Management expects the state’s population to increase by 1.6 million people by 2040. The educational consulting firm of Ruffalo Noel Levitz predicts Washington to have the fourth-largest increase among all states in high school graduates between 2020 and 2030. For this rapidly growing population the state provides only six public universities to accommodate the educational needs of its residents, and only two of those, the University of Washington and Washington State University, are charged with active engagement in scholarly productivity. Further, WSU is directed to employ its expertise in the service of the economic and societal needs of state residents, through its research and outreach programs. Demand for educational access by Washingtonians will, then, continue to grow through at least 2040. WSU must pursue continual and unbroken growth in enrollment.

As a system, the university has extensive resources to sustain and develop the state of Washington. Each campus offers a distinctive learning environment to equip students with knowledge and life-long skills, while the resources of a globally-engaged research university provide a wealth of opportunities across the system to advance and translate knowledge and model creativity, and many units work with the broader community to address critical issues in Washington and throughout the world. To build the collective future of the WSU system, this strategic plan highlights and connects the distinctive strengths and forms of excellence that exist across the university.

Excellence takes many forms that merit the university’s shared investment. The WSU system provides Washingtonians with access to outstanding liberal arts education, hands-on learning experiences in fields, labs, and community centers, and research and educational experiences. Through preparing educators and health care providers, providing opportunities that expand cultural understanding and enrich lives, and fueling economic development, WSU shapes future leaders and strengthens communities. This plan highlights the institution’s strategic intentions related to educational development, scholarly research and creative work, and partnering with Washington communities. It also outlines next steps that will allow the university to be even more responsive to the challenges facing Washington’s towns and cities, the state and nation, and the world.



## **WSU SYSTEM OPERATING PRINCIPLES**

In a world defined equally by tremendous opportunities and rapid change, the vision of the Washington State University system is built on the foundational purposes of the land-grant university: to provide education to all, to conduct scholarly inquiry that benefits society, and to share expertise that boosts the lives of individuals and communities.

The WSU system's focus on academic excellence for the public good goes hand-in-hand with the university's commitment to diversity, equity, and inclusion. It is central to the institution's mission that each member of the community has full opportunity to thrive.

The principles that follow establish an overarching philosophy that unites the WSU system and provides clarity and consistency for guiding the institution's day-to-day actions. Some of the principles currently are operative while others are aspirational. The principles are specific enough to be meaningful, yet broad enough to remain relevant in an evolving environment. Adopted and practiced consistently across the WSU system, the principles will enable the University to act on its core ideology and progress toward its envisioned future.

### ***One WSU***

WSU delivers its educational, research, and outreach benefits statewide through its campuses and other locations statewide, including Pullman, Everett, Seattle, Spokane, Tri-Cities, Vancouver, Yakima, and Bremerton. In addition, the WSU Global Campus delivers academic programming worldwide in a virtual environment. The university focuses on critical problems and issues affecting the state of Washington, partnering with stakeholders to discuss and develop solutions. WSU sustains and enhances community-campus relationships in all locations.

### ***One Faculty***

All faculty, regardless of rank or appointment, are committed to the same standard of academic excellence across the system. The standards for faculty career advancement are fundamentally shared at all WSU campuses, ensuring a consistent level of educational experience and interdisciplinary scholarly quality and productivity system-wide.

### ***Fiscal Stewardship***

WSU's system-wide budget model supports student success and academic excellence in alignment with the university's system strategic plan and the institution's shared mission and purpose. All WSU campuses, colleges, and other units operate within their authorized budgets, and are responsible for achieving fiscal, enrollment, and operating goals, as well as developing new sources of revenue that will fund future investments.

### ***Data-informed Decision-making***

WSU proactively uses data in decision-making to enhance administrative efficiency and strategic leadership across the system. Strategic priorities, environmental sustainability, financial sustainability, resource allocations, transparency, and predictability are all based on data-informed performance indicators and metrics.

### ***One Degree***

The quality of a Washington State University degree will be the same at all campuses throughout the statewide system. All graduates earn a WSU diploma with no campus designation.

### ***Shared Accountability***

WSU vice presidents, chancellors, and deans and their leadership teams each have unique and connected leadership roles that may encompass campus, college, unit responsibilities, as well as WSU system responsibilities, and are collectively accountable for the success of the institution and the system.

### ***Operational Excellence***

WSU operates an efficient and effective organizational structure, characterized by system-wide operational and management processes that support and promote innovation, stewardship, entrepreneurship, and responsible risk taking. WSU core services, compliance, educational, executive, and business policies ensure organizational efficiency and effectiveness across the system.

### ***Community Partnerships***

WSU seeks out and embraces opportunities to partner with external stakeholders in an effort to solve the critical problems and issues that face the state of Washington and its residents. The university also encourages the development of entrepreneurial activities that lead to creative, solutions-oriented partnerships. WSU sustains and enhances community-university relations statewide.

# THE STRATEGIC PLANNING PROCESS

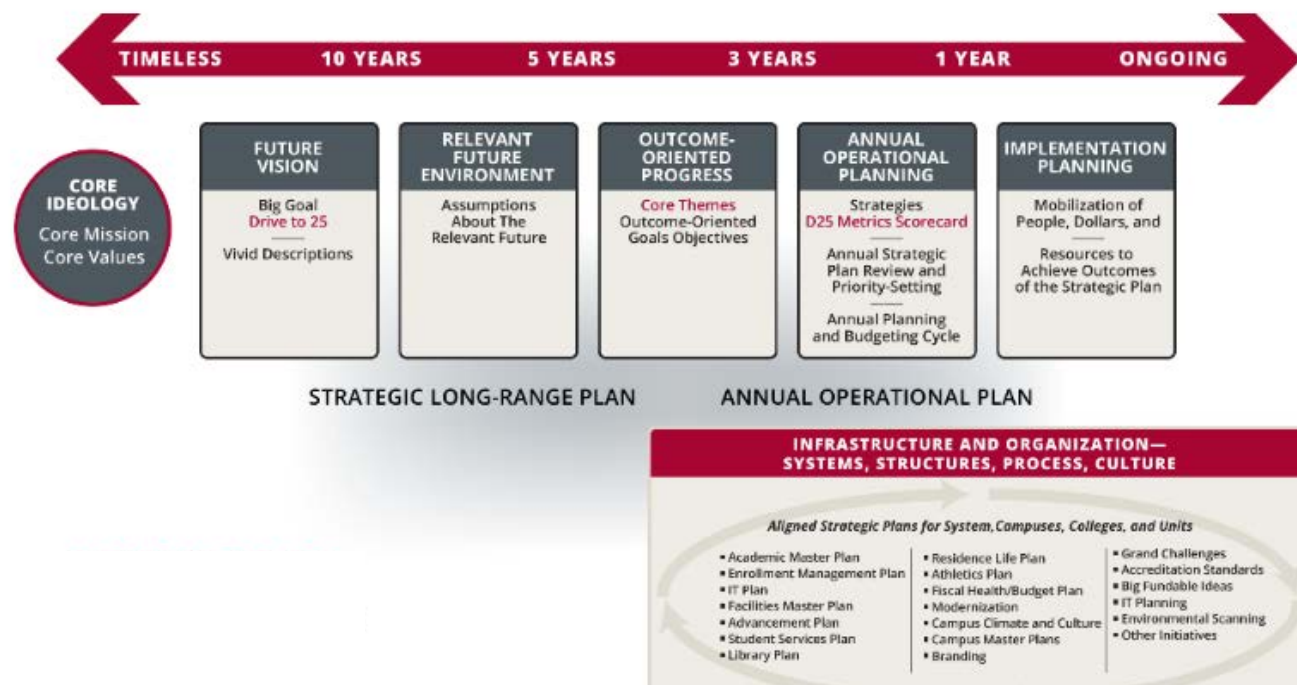


## A Model for Planning and Thinking Strategically

The Washington State University 2020-2025 system strategic plan describes a desired vision and the elements essential to achieving that vision. The plan is grounded in core ideology and driven by an envisioned future that realizes the full potential of WSU's ability to support its faculty, staff, and students. The university's commitment is articulated in goals that declare the outcomes or attributes the organization intends to achieve. Objectives represent key metrics affecting WSU's ability to achieve a goal and articulate the direction in which these issues must be moved.

The university system must continue to evolve to meet the needs of the constantly changing environment in which it operates. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

This strategic plan reflects a model that organizes conversations about the future into four distinct planning "horizons." This helps organizations in setting and implementing priorities as well as in ensuring relevance of long-range direction over time.



### Core Ideology and Envisioned Future

The four planning "horizons" framework consists of crafting a comprehensive strategic direction based on the balance between what doesn't change—the timeless principles of the organization's core purpose and core values (core ideology)—and what the organization seeks to become within a ten-year horizon—what would be possible beyond the restraints of the current environment. The ten-year horizon is characterized by the articulation of an envisioned future—an aspirational goal—and a vivid description—what it will be like to achieve the goal.

### Assumptions About the Future

The articulation of the envisioned future guides the organization as it considers the factors that will affect its ability to achieve its goals. Building foresight about the five-to-ten-year horizon—assumptions, opportunities, and critical uncertainties in the likely relevant future as well as emerging strategic mega-issues—suggests critical choices about the potential barriers the organization will face. This foresight also suggests the responses the organization will need to consider in navigating its way toward achievement of its aspirational goal.

### Strategic and Operational Planning

The linkage continues into the three-to-five-year horizon through the development of a formal long-range strategic plan, in which WSU articulates the outcomes it seeks to achieve for its faculty, staff, students, alumni, and other stakeholders. How will the world be different as a result of what the organization does? Who will benefit and what will the likely results be? Further, the articulation of strategies will bring focus to the organization's annual operational allocation of discretionary resources. Action plans, checkpoints, and milestones will be developed through a process of operational planning, indicating progress toward each goal in every planning year.

A strategic long-range plan is not intended as a substitute for an annual operating plan. A strategic plan does not detail all the initiatives, programs, and activities the organization will undertake in the course of serving its members, stakeholders, and industry, nor can it foresee changes to the underlying assumptions on which key strategic choices were based. Instead, the system strategic plan

focuses on the future and outlines—in broad strokes—how WSU will need to evolve to succeed. Consequently, the strategic plan implies change—doing new things or doing more or less of current activities to ensure successful outcomes. The university's campuses, colleges, and units will further define the operational aspects that support the framework of this plan, and they will also create or revise existing plans to complement and build on the direction established by the system plan.

### Ongoing Re-evaluation

Strategic planning for WSU should become the methodology for the organization's operations. If it is successful, this process will not have yielded a plan to be placed on the shelf but will have served as a catalyst for the process of planning strategically at all times and at all levels throughout the WSU system. In order to achieve its vision, the university must not look at strategic long-range planning as a one-time project that produces a milestone document of its best thinking at the moment. Instead, the entire WSU system must adopt strategic planning as an operational philosophy of ongoing re-evaluation of

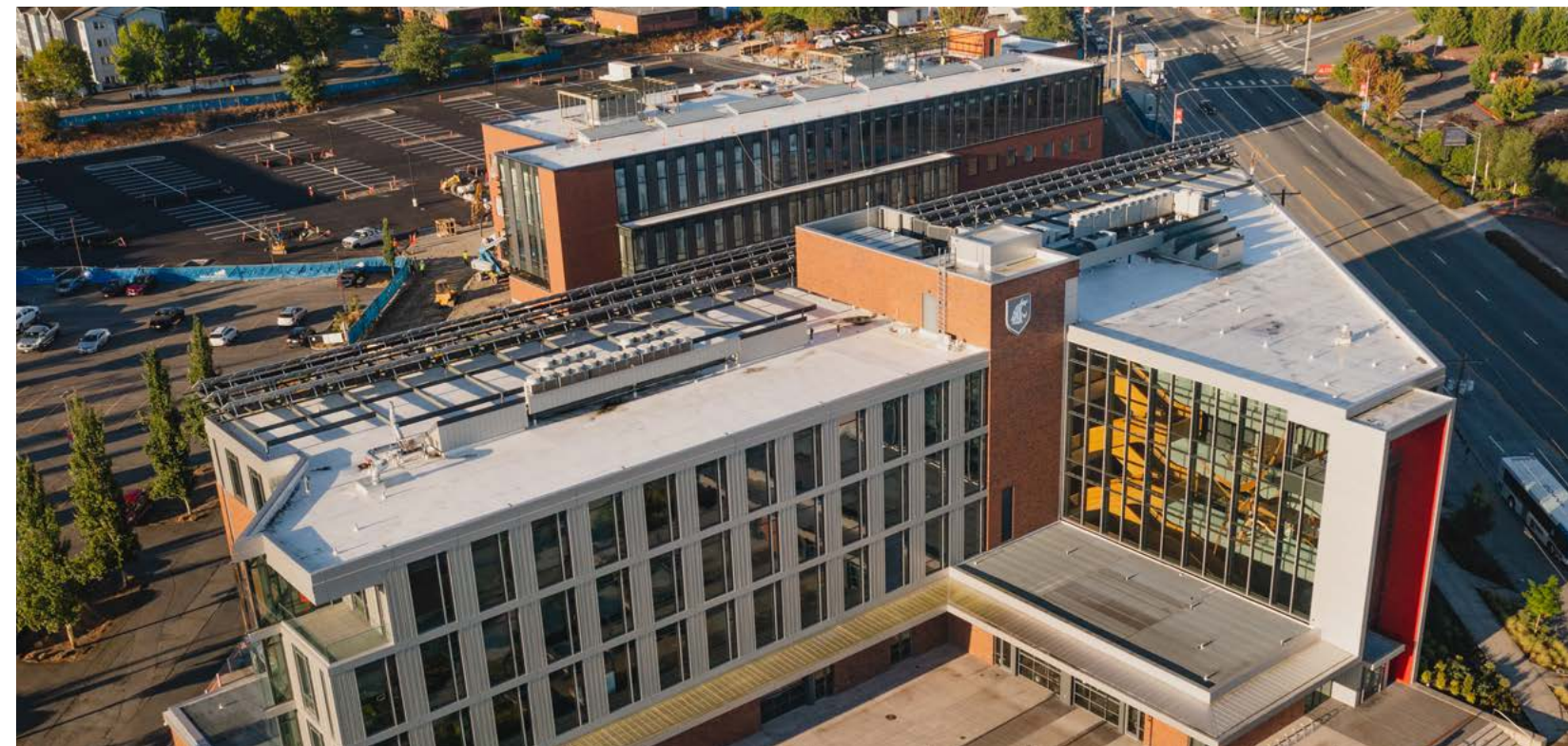
the critical knowledge bases that form the framework of its world, including:

- ▶ sensitivity to the needs of its constituencies;
- ▶ insight into the future environment;
- ▶ understanding of the capacity and strategic position of the organization; and
- ▶ effective analysis of the ethical implications of policy, program, and service choices.

### Environmental Scanning

#### Conducting an Environmental Scan

Environmental scanning is the ongoing tracking of trends and occurrences in an institution's internal and external environment that bear on its success, currently and in the future. The results are useful in shaping goals and strategies and selecting annual priorities. Effective environmental scanning examines both quantitative and qualitative changes. Ultimately, an institution should create a set of key environmental indicators—internal, external, qualitative, and quantitative—that have the most important potential impact on the work the institution does.



### Considering Internal and External Factors

These indicators may include internal issues and trends that are inherent to the institution, such as budget issues, enrollment fluctuations, fundraising opportunities, and changes in leadership. They may also include external factors in the environment outside of the institution that are out of the university's control such as:

- ▶ **Demographics**—locally, regionally, nationally, and increasingly internationally (e.g., population, racial/ethnic mix, immigration status, education levels, etc.)
- ▶ **Politics and public policy**—changes in governmental regulation, federal financial aid policies, and public attitudes toward institutions of higher education
- ▶ **Economies**—local, regional, national, and international
- ▶ **Labor market**—the demand in relevant fields and the associated skills desired by employers
- ▶ **Academic interests**—popular fields and the employment interests of prospective students and their families
- ▶ **Technology**—the increasingly rapid changes that impact nearly every aspect of higher education
- ▶ **Research**—changes in interests and funding from governmental, private, and foundation sources
- ▶ **Philanthropy**—changes in available funding and in the attitudes, interests, and approaches of donors

Environmental scanning will be conducted throughout the WSU system on an ongoing basis but an environmental scan document will be created annually, which will serve as a knowledge base. Strategic plan assumptions about the future support annual environmental scanning to inform the development of new initiatives, updates to the strategic plan, and SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis conversations system-wide.

### Annual Strategic Plan Review and Update

The WSU system's strategic long-range plan represents a compass the organization will use to guide its work over the next five years. Each year of its life, the plan will be updated based on experience or new circumstances or as new opportunities or challenges emerge. By 2024 or sooner, WSU should author a new strategic long-range plan based upon the new environment expected to exist in the latter half of the decade.

### WSU System-wide Strategic Planning Process— Campuses, Colleges, and Units

The system strategic plan will serve as the foundational document that guides the evolution of WSU's statewide enterprise from 2020 to 2025. The plan reflects the mission of the institution, and it also aligns with, and incorporates, other recent institutional planning efforts, including initiatives focused on modernization, campus culture, student success, and strategic research priorities. WSU's campuses, colleges, and other administrative units will develop or update their unit plans in the coming months. Those plans will complement and flesh out the big-picture goals, objectives, and strategies established by the framing of the system-wide plan.



# WSU'S CORE IDEOLOGY

**Core ideology** describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: **core mission**—the organization's reason for being, and **core beliefs and values**—essential and enduring principles that drive the institution.



## Core Mission

*Washington State University is a public land-grant research university that is committed to the principles of practical education for all, scholarly inquiry that benefits society, and the sharing of expertise to positively impact the state and communities.*

### ▶ WSU's educational mission

is to help students become more informed, aware, engaged, and creative—a process through which the university's graduates achieve upward social mobility. WSU strives to make its expertise available to anyone who seeks to benefit from it, regardless of where they live, where they come from, what they believe, or what their life experiences have been.

### ▶ WSU's scholarly mission

is directed toward the betterment of human existence through the uncovering of new information, the discovery of how to use that information to solve problems, and the creative expression of human experience. The university especially seeks to address issues that impact Washingtonians, and the institution works with residents, commerce, and lawmakers to identify those issues.

### ▶ WSU's outreach mission

is to serve the needs of Washingtonians by sharing its expertise and helping residents integrate that knowledge into their daily lives.

## Core Beliefs

▶ **The university strives to improve lives through the delivery of a practical education** as articulated in the Morrill Act of 1862 to establish the land-grant colleges. It welcomes students from all racial and ethnic backgrounds, gender identities and sexual orientations, economic backgrounds, students with disabilities, veterans, and first-generation students. In short, to paraphrase Congressman Morrill, WSU welcomes the sons and daughters of toil. Students with widely differing interests as well as varying levels of college preparation are welcome and encouraged to pursue a WSU education. Many transform their lives as a result of their university experience. The university seeks greater diversity in its student body. Keeping college affordable is implicit in WSU's focus. The university judges its success by its ability to help students become more informed, aware, engaged, creative, and socially mobile.

▶ **WSU focuses on improving the human condition through research, scholarship, and artistic activities.**

To address the vast and complex problems confronting the world, the university balances the twin needs of continuing the basic research that leads to fundamental discoveries with efforts focused on delivering practical solutions to everyday problems faced by communities in the state and beyond. As WSU strives to be a force for societal transformation, the university embraces entrepreneurial activities and seeks out partnerships that bring together the bold ideas and multidisciplinary expertise required to maximize the benefit to stakeholders and residents.

▶ **WSU accepts responsibility for enriching the social, economic, and cultural vitality of the region through service and outreach.**

The university delivers its educational, research, and outreach benefits statewide, with a particular emphasis on major population centers including Everett, Seattle, Spokane, Tri-Cities, Vancouver, Yakima, and Bremerton. WSU focuses on critical problems and issues affecting the state of Washington, partnering with stakeholders to develop solutions to a variety of challenges and spur economic prosperity. The university sustains and enhances community-campus relations statewide.

▶ **WSU engages globally for the future of the planet.** Every aspect of the university's teaching, research, and service mission has global implications—it is inherent in the mission of a Tier 1 national research university. All WSU faculty are part of an international community of scholars, so their endeavors potentially address a global audience. In serving local communities, WSU develops innovative approaches and solutions that can deliver benefits worldwide. Advancing the institution's global engagement is a critical component of future success.

▶ **WSU is committed to achieving an ethically and socially just society for all.** Instituting social change on a large scale begins at home. The university is committed to diversity, equity, and inclusion throughout every aspect of its statewide system. In the process a climate will be created that enables underrepresented students, faculty, and staff to not only survive, but thrive in communities that foster a sense of belonging in a culture of inclusion. The ultimate goal? Creation of an institutional culture in which inclusion and equity are the norms, a model that helps move the world toward a place in which all people are treated with dignity and respect.

## Core Values

▶ **Land-grant ideals.** Land-grant ideals of access to practical education for all regardless of background, the teaching of skills and knowledge necessary to be an engaged community member, scholarly inquiry for the betterment of society, and the sharing of institutional expertise with state residents.

▶ **Community.** A "Cougar Spirit" in WSU graduates that emphasizes community: both the community in which university faculty, staff, and students live and in the one made up of the family of Cougs worldwide.

▶ **Integrity, trust, and respect.** Trust and respect for all persons in an environment that cultivates individual and institutional integrity in all that the university does.

▶ **Equity, diversity, inclusion, and belonging.** Promotion of an ethical and socially just society through an intentional commitment to equity, diversity, and inclusion. Global citizenship. Stewardship of the planet's resources to ensure its vitality, as well as actions focused on social responsibility and cultural empathy in the context of an interconnected world.

▶ **Freedom of expression.** Free exchange of ideas in a constructive and civil environment, including the canons of academic freedom in teaching, research, and outreach.

▶ **Wellbeing.** Whole-person wellness for all members of the institution and a belief it is WSU's responsibility to contribute to the overall wellness of our communities and the broader society in which individuals reside.



## ENVISIONED FUTURE

The **envisioned future** conveys a concrete, but as yet unrealized, vision for the organization. It consists of **an aspirational goal**—a clear and compelling catalyst that serves as a focal point for effort—and **vivid descriptions**—vibrant and engaging descriptions of what it will be like to achieve the aspirational goal.

### *Vision (aspirational goal)*

*Washington State University will deepen and expand its impact by building on the strengths of each campus and location for a stronger Washington state and global community.*



## Vivid Descriptions

► **WSU will be a leading land-grant institution, as measured by accessibility, affordability, graduation rates, and public service.** Land-grant universities were created to change the world, and WSU will model the core principles upon which these institutions were founded. In the process the university will become a national leader in all three areas of its mission, setting an example for others to emulate.

► **WSU will be the university of choice for student success.** The university will provide an educational experience through which students develop their view of themselves and the difference they can make in the world. The university will have robust resources system-wide to provide an accessible, affordable, life-changing education to a diverse student body—highlighted by experiences, internships, and opportunities that will prepare students to be contributors and leaders in their communities, the state, the nation, and the world. Additional resources will better support first-time and under-served populations, both urban and rural. Innovative teaching will foster a community in which students expect to be challenged to learn, and to succeed. More students will graduate, ready to make a difference in the world. They will experience reduced time to degree completion, achieve higher graduation and placement rates, and earn greater numbers of advanced degrees. As a result, interest in WSU from prospective students will increase substantially.

► **The university will be a magnet for students seeking upward mobility.** The WSU system will offer a well-developed suite of resources to assist students who have no history of college attendance within their family, have significant financial need, or have gaps in their preparation for higher education. There will be no gap in graduation rates based on any demographic characteristics.

► **The people of the state of Washington will benefit to an even greater degree from the benefits the WSU system delivers through scientific innovation, research-based program delivery, and university-led practical problem solving.** WSU will increase the resources and improve the internal infrastructure required to enrich its ability to serve as a key player in solving the problems of the state, the nation, and the world.

► **WSU truly will become the state's university, enhancing opportunities for the state's residents to gain access to its expertise.** The caliber of the university's faculty will continue to grow, and students will receive an exceptional education. WSU's endowment will increase. Local economies will improve due to the high value human capital the university provides. Industry will look with greater frequency to WSU as a partner in creating programming that supports workforce development. The university will strengthen its capabilities in workforce development, innovative research, health care (throughout the state), and development opportunities for residents.

► **WSU's stature as a university will be dramatically elevated.** The university will be viewed as one of the top places in the United States to learn, teach, and study as it grows its reputation for transforming lives and bettering society. The institution will receive new opportunities for external research funding, including enhanced public and private partnerships, and most importantly—create richer educational experiences for students.

► **WSU's research will continue to change the state, nation, and world.** System-wide, university researchers will be highly visible in their communities. World-changing innovations developed throughout the WSU system will address the challenges of the state, the nation, and the world. The impact of WSU's efforts will lead to more community engagement as industry and other external stakeholders seek to partner with the university. The WSU system will have an enhanced ability to assess state economic needs and to adapt and provide research and education to address those needs. Research won't be only the purview of researchers. Every student—undergraduate, graduate, or professional, not just those in fields labeled “scientific”—will receive the opportunity to be involved in research to some degree. As WSU proactively addresses and demonstrates the benefits of its research in service to society, the university's contributions will play an important role in enhancing the reputation of higher education from a national perspective. An improved reputation for impactful research also will assist the recruitment of faculty, staff, and students, and research dollars will flow to the university at unprecedented levels. In fulfilling the land-grant mission, doors will be opened to greater collaboration with higher educational

institutions across the United States and beyond. WSU students will benefit from international partnerships and exchanges that allow them to learn from people worldwide, enriching their education and providing insights that can be applied in their future careers. Both partnerships with corporations and endowments will increase, and the WSU system's structure will create greater links between campuses for research partnerships.

► **The WSU system will be a vibrant, diverse, and thriving community of scholars, students, and staff, known for its integrated and informed campus communities.** WSU's collaborative, integrated multi-campus system will leverage its strengths to enable each component to respond more fully to those they serve and to the evolving environment. The WSU system will recognize and celebrate the uniqueness of each campus, college, and unit, as well as the role each plays in the success of the system. Campuses, colleges, and units may become known for specific areas of excellence, yet all disciplines will play a part in creating a transformative student experience. The sum of WSU will be stronger because of the way each of the parts will complement the system. All components of the system will benefit from the institution's enhanced and sustainable fiscal health, which will provide increased resources to meet needs and support growth. WSU will fully embrace and pursue a culture of philanthropy, further reducing its dependence on state funds. A dramatic increase in the endowment will occur. Improved and new facilities, labs, personnel, and equipment will create an infrastructure that will allow WSU to enhance the benefits of research that serves the public good.

► **WSU system-wide will achieve a deeper sense of responsiveness to communities statewide due to close dialogue and relationships between communities and the university focused on co-creation of solutions.** As a result, the campuses will become more integrated into their communities. Increased funding of outreach, education, and service activities will benefit local communities and broaden the institution's

impact statewide. These connections will become an institutional strength.

► **Faculty and staff at all locations across the WSU system will feel inspired, engaged, and supported by the institution as a whole and by each other.** New faculty and staff looking for employment will seek to join the university, and the satisfaction level of existing faculty and staff will reach unprecedented levels due to improved salaries and additional opportunities for professional development and training. An emphasis on shared governance throughout the system will more fully incorporate the input of faculty and staff in decisions affecting the strategic direction of the institution.

► **The pride that faculty, staff, students, alumni, and communities feel about the university will grow to unprecedented levels as they become even more engaged in helping WSU grow.** One of the university's biggest strengths is the sense of Cougar Pride. “Cougness” exists system-wide—at every college, campus, and unit. It lifts the WSU community when challenges arise. It drives fierce loyalty among members of the Cougar family—to each other and to serving the greater good. Cougar Pride inspires the WSU community to fearlessly pursue human advancement. It manifests itself when students and alumni rally to raise money for hurricane victims or volunteer to do home repairs for the elderly. It's evident when nursing students care for the homeless. WSU Athletics magnifies Cougar Pride, serving as the front door to WSU and introducing thousands of stakeholders to the rest of the university and its academic mission. WSU Athletics thus is an integral part of the university—nurturing a community mindset that is a unique blend of family, pride, and work ethic. Cougness provides the fertile soil that allows the WSU community to believe that it can make positive change in the world. It is at the heart of WSU's institutional ethos. Cougar Pride will drive the WSU community to achieve even more in the future.

► **All members of the WSU community will feel connected to WSU and understand their ability to contribute to the collective vision.** Community members will understand that each

individual can play a significant role in the university's vision, regardless of rank or position at WSU. The goals and metrics of the university will be focused equally on raising WSU's accomplishments in all three phases of the university's land-grant mission: teaching, research, and service. WSU will create the culture for operational excellence system-wide. It will be an outcome of living institutional values, not just a slogan, and the initiative will not focus solely on competition with other institutions. Each college, campus, and unit will be empowered to find ways to achieve excellence toward the collective vision.

► **WSU system strategic planning and goals will not be static.** Every year, the WSU community system-wide will engage in conversations focused on institutional actions, progress, and the path forward in fulfilling the strategic plan. “We have always done it that way” will not be a philosophy that guides future actions. Checkpoints for accountability will be established. Students, staff, and faculty from each campus, college, and unit will be encouraged to provide input on a regular basis. Individual units will be able to point to WSU's mission and vision as a guide for strategic decision making and resource allocation. The institutional commitment to continuous improvement will allow for flexibility and change as the needs of the university and students evolve, and as the environment in which the system operates changes. Throughout, the bottom line focus will remain unwavering: to serve the public good.

# ASSUMPTIONS ABOUT THE RELEVANT FUTURE



**Assumption** statements will help the WSU system purposefully update the strategic plan on an annual basis. When conditions change, strategy needs to be adjusted. An annual review of these assumptions will help the system ensure the ongoing relevance of its strategy. The assumptions that follow are based on a pre-COVID-19 environment. Due to the impact of the virus and the future implications of COVID-19 for society and economies globally, reviewing, reassessing, and updating our assumptions on a regular basis will be even more critical.

## Demographics

- ▶ The population of college-aged people nationally will continue to decline. Unless college-going patterns change, many institutions will experience large enrollment declines in the mid-2020s in line with predictions for the number of high school graduates.
- ▶ The number of traditional college-aged students will continue to decline nationally, and students over 25 who are working full-time (non-traditional students) may eventually become the majority of the student population in higher education.

- ▶ The diversity of the population will increase, and students will continue to come from more diverse economic, cultural, and educational backgrounds. Generation Zers are more racially diverse, with nearly half (48 percent) representing African American, Latinx, Native American, Pacific Islander, and Asian American demographics, among other groups. Institutions of all types must pursue a student body consisting of more students of color, but the specifics will differ by institution type and geographic location.
- ▶ Students increasingly will enter four-year institutions with at least some of their lower-level requirements met through dual enrollment or possession

- of an AA degree, which will require the four-year school to concentrate resources on upper-division education.
- ▶ There will be a gap in college preparedness for many post-pandemic students. Higher-education institutions must be responsive to a wide range of student wants and needs, including the imperative to prioritize mental health and other student support services.
- ▶ Funding challenges will continue to affect the student population. Millennials have more income but less wealth than older Americans had at the same age, due in part to student loan debt, and this will be a challenge in terms of funding their education.

## Social, Cultural, and Consumer Trends

- ▶ The current political climate which has emerged not only on university and college campuses but also in communities across the country will continue to put university administrators in a difficult place. One major challenge? They will need to strike a balance between allowing free speech and maintaining a secure and safe environment for students, faculty, and staff.

- ▶ The public will continue to scrutinize higher education policy and public skepticism about the value of higher education may place more emphasis on ROI (Return on Investment), micro-credentials, “mini-masters” academic programs, non-academic careers, and other non-traditional forms of education.
- ▶ Students increasingly will view themselves as customers and consumers, expecting high-quality facilities and services that will lead to a job.

- ▶ Society will expect students to be able to immediately apply their knowledge, which will place a burden on institutions to broaden and diversify their experiential learning opportunities.
- ▶ The world is changing quickly and in complex ways, and the pandemic intensified the pressures higher education institutions face, including changing labor markets and unpredictable staffing patterns that will result in disruptions to services, instruction, advising, and critical support areas.

## Economic Climate

- ▶ Economic inequality and uncertainty will continue to grow during the next ten years, with a larger segment of the population living on lower incomes with less access to wealth and higher cost of living.
- ▶ Business models of universities highly dependent upon tuition dollars and adjunct faculty will be tested more seriously than ever before.

- ▶ Federal and state funding of higher education and research will be an issue nationally, particularly in a post-corona virus environment.
- ▶ The reliance on philanthropy to provide funding support for student scholarships, research, and education initiatives will continue to increase.
- ▶ Society will expect more of universities in any economic climate,

- and the value of a 4-year degree will need to be strongly communicated.
- ▶ The economic climate will continue to be volatile. This volatility will require increased flexibility and innovation by WSU in leveraging each of the six campuses to meet student needs.
- ▶ With national declines in community college enrollment and transfers, connections to community colleges will be increasingly important.

## Legislative and Regulatory

- ▶ Population loss and economic shifts will continue to lead to the restructuring of major university systems. Structural changes in university systems, such as campus mergers, will be the subject of legislative activity in many states.
- ▶ The national focus on college affordability will continue, and state officials—from the capital to the campus—will likely feel more pressure to hold down the price of higher education. Higher education institutions that have traditionally relied on tuition and related fees, as well as government appropriations for revenue, will need

to diversify and pursue alternative revenue streams.

- ▶ An increased focus on sustainability in all its forms will continue to reshape policies and procedures at all levels of universities across the nation. Responding adequately to many of the issues will require additional funding. Increased policy and political pressure from the federal government may negatively impact an institution’s ability to recruit and retain qualified international students.
- ▶ Increased policy and political pressure from the federal government may negatively impact an institution’s

ability to recruit and retain qualified international students and employees.

- ▶ There will be continued uncertainty about immigration and other federal policies that will impact the flow of students around the globe and to higher education institutions in the United States.
- ▶ If proposed cuts in federal funding for the arts and humanities are enacted, societal relief in terms of access to arts and culture will diminish, thus increasing stress and increasing disparity in access. Universities will be increasingly challenged to communicate the value of arts and humanities.

## Higher Education

- ▶ Institutions must adapt to the challenges and “new normal” confronting society as a result of the corona virus pandemic. There will be long-term effects of learning disruption and lost socialization which will require increased flexibility and adaptation for both employees and students.
- ▶ As higher education is increasingly commodified, the role and purpose of the liberal arts and humanities will continue to be questioned. Current

national-level discussions indicate the liberal arts are again likely to be more highly valued in the short-term future.

- ▶ Reformation of core financial and educational practices, and greater business complexity, will require colleges and universities to provide greater transparency and implement new accountability structures to sustain public trust.
- ▶ Occupations that require highly specific skillsets will more frequently emerge and disappear, requiring institutions to be able to quickly

establish—and eliminate—degrees as dictated by the marketplace.

- ▶ A greater number of university administrative and service functions (e.g., financial management, housing, student services) will be privatized.
- ▶ In an era in which the value of higher education is being questioned at unprecedented levels, land-grant universities must recommit themselves to serving their local communities as part of the effort to demonstrate their value.

## Scientific and Technological Advances

- ▶ Data privacy issues will continue to impact higher education institutions. Among the top issues: the need to secure student and research data, guard against data breaches, and demonstrate responsible enforcement.
- ▶ Distance learning will be an increasingly common option in higher education as students seek flexible learning options. It may attract students who historically would have made brick and mortar model their first choice.

▶ Technology will continue to develop and become more accessible. Tech-savvy students will expect fast-paced, interactive technology, as well as new methods to be infused in their educational program and learning experience.

- ▶ Many students will have different communication skills than previous generations due to reliance on technology to communicate. As a result, many will enter college with various verbal and written skills.
- ▶ Students will continue to be challenged by their instructors to engage in more personal interactions,

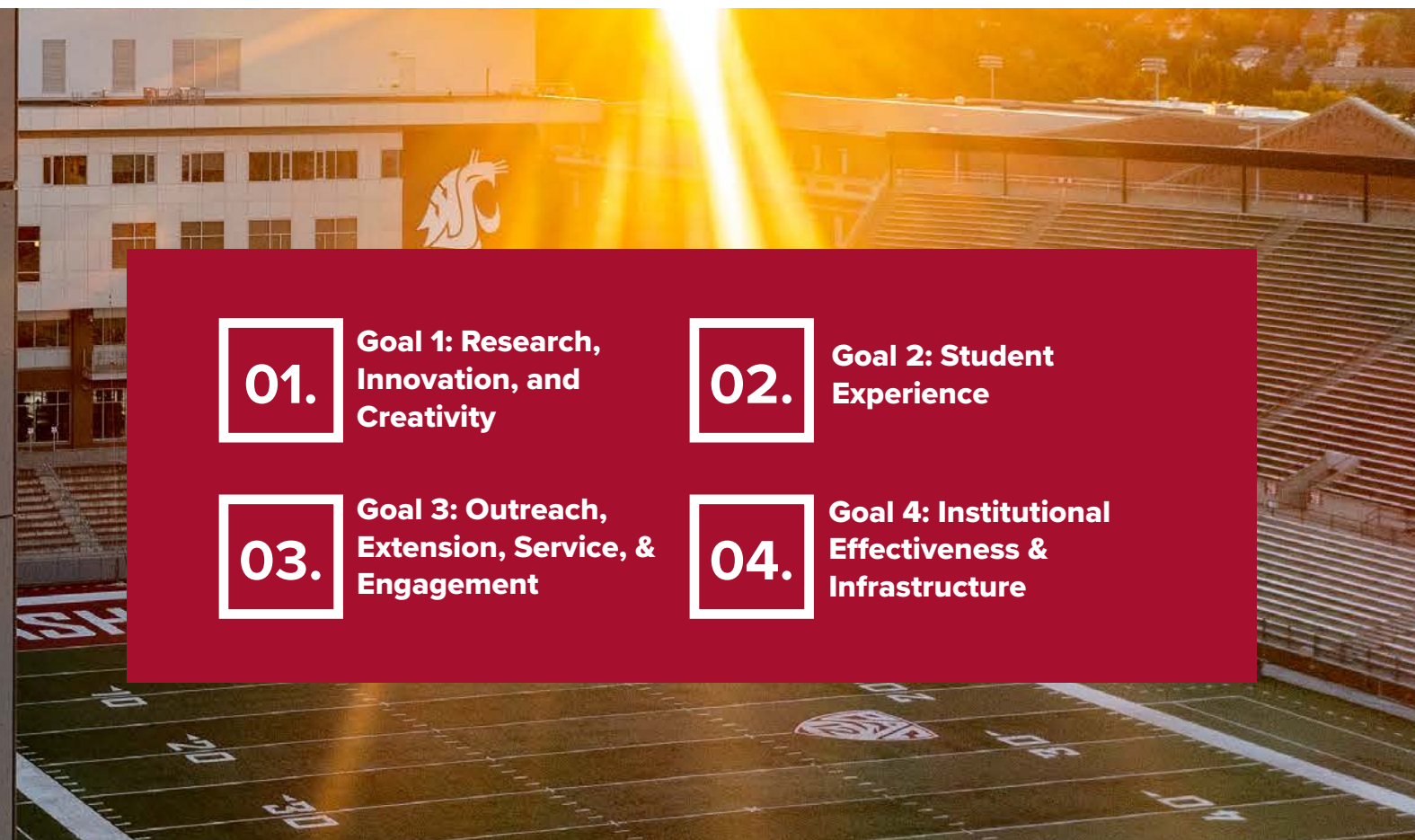
as more of them will have been raised with social media being their primary form of communication and connection.

- ▶ Climate change and societal disruptions will impact education environments, requiring universities to be flexible in using technology to meet student needs.
- ▶ As digital technology tools advance at a rapid pace, it will be increasingly important for higher education to implement institutional programs which derive tangible value from their data in an ethical and sustainable way.



## 3-5 YEAR OUTCOME-ORIENTED GOALS

**Goals** are outcome-oriented statements that represent what will constitute the organization's future success. The achievement of each goal will move WSU toward the realization of its vision. The goals below are not prioritized. Every goal will need to be accomplished if the organization is to fully achieve its vision. Each goal is accompanied by a set of objectives, which represent key issues affecting WSU's ability to achieve the goal and articulate milestones against which to measure progress. Possible strategies for reaching objectives are also identified. The prioritization of the goals, objectives, and strategies will be determined by the university community as part of the implementation of this plan.



01.

**Goal 1: Research, Innovation, and Creativity**

02.

**Goal 2: Student Experience**

03.

**Goal 3: Outreach, Extension, Service, & Engagement**

04.

**Goal 4: Institutional Effectiveness & Infrastructure**



# 01. Goal 1: Research, Innovation, and Creativity

Washington State University will be recognized for embracing risk and bold thinking to serve the needs of its communities through innovative research, scholarship, and creative activities.

### Objectives

- ▶ Expand research, scholarship, and creative activities that cross disciplines and employ new methodologies to address community needs and twenty-first century global challenges.
- ▶ Increase WSU's ability to highlight its achievements and their societal impact.
- ▶ Maximize the ability to shape research, creative activity, and entrepreneurship in direct partnership with the communities the university serves.
- ▶ Enhance WSU's ability to pursue, retain, and reward exceptional talent committed to creativity and bold thinking.
- ▶ Promote sustainable external partnerships to accelerate innovation and maximize the impact of the university's discoveries.

### Possible strategies

- ▶ Grow the global impact of WSU's research by building additional partnerships with leading universities, research institutes, and corporations in the United States and abroad.
- ▶ Create cross-disciplinary research teams that build on WSU's strengths in order to accelerate innovation and maximize impact.
- ▶ Establish community advisory groups in key research domains to allow researchers and stakeholders to propose ideas and get feedback. Leverage the WSU Extension network to partner with faculty, staff, and students to give university-led research greater impact.
- ▶ Invest in state-of-the-art instruments, facilities, and administrative infrastructure to provide the necessary support for a modern research environment.
- ▶ Actively recruit and retain research-focused faculty, graduate students, and staff from under-represented backgrounds, and create more positions for research-focused only faculty.
- ▶ Revise system-wide tenure and promotion policies to recognize and reward community-based research partnerships and entrepreneurial activities that include incentives for strategic risk-taking, bold thinking, interdisciplinary research activities, and high-impact achievements, in addition to the traditional metrics.

# 02. Goal 2: Student Experience

Washington State University students will engage in scholarship, research, and experiential learning activities to prepare future leaders, scholars, and global citizens.

### Objectives

- ▶ Increase educational affordability geared toward improving the completion and graduation rates of students. Increase career development resources for all students starting with their first year.
- ▶ Ensure every WSU student has the opportunity to participate in experiential learning and community engagement (e.g., service learning, internships, undergraduate research, creative discovery, study abroad, and/or leadership).
- ▶ Enhance the quality of the undergraduate academic experience with an eye toward greater mastery of learning goals along with increased student retention and graduation rates.
- ▶ Strengthen collaborations with industry partners to enhance the student experience, including practicums, internships, and research opportunities.
- ▶ Nurture and promote mental, physical, and social wellbeing among students.

### Possible strategies

- ▶ Develop a need-based financial aid model that eliminates unmet need over \$1,000.
- ▶ Establish a baseline of career services offered throughout the WSU system and significantly increase funding levels to ensure the career services provided align with industry standards.
- ▶ Ensure every degree program identifies or develops required experiential learning activities and that there is a system-wide ePortfolio solution that documents and showcases these experiences.
- ▶ Expand institutional support for pedagogical and curricular innovations along with faculty professional development in teaching.
- ▶ Establish baseline wellness services on all campuses and fund the proposal by the WSU Campus and Community Health Task Force to infuse an emotional wellbeing curriculum throughout the WSU experience, both in and out of the classroom.

# 03. Goal 3: Outreach, Extension, Service, & Engagement

Washington State University will be a national leader in advancing quality of life, economic development, sustainability, and equity through meaningful engagement in discovery, education, and service with partners throughout the state, nation, and world.

### Objectives

- ▶ Improve and implement cohesive, system-wide mechanisms for assessing and communicating the impact and value of outreach, Extension, service, and engagement.
- ▶ Increase the alignment of WSU priorities with the needs, challenges, and opportunities in the state of Washington identified via outreach, Extension, service, and engagement activities.
- ▶ Increase outreach, Extension, service, and engagement activities across all colleges, all campuses, and throughout the state, as an essential element to achieving WSU's land-grant mission.
- ▶ Increase and enhance partnerships with under-represented communities.
- ▶ Increase university-wide resource investment in outreach, Extension, service, and engagement activities.
- ▶ Increase the impact of outreach, Extension, service, and engagement activities to improve human health.

### Possible strategies

- ▶ Provide training for all WSU personnel, including new hires, to learn about the university's land-grant history and mission, to improve and coordinate communication, and embed in the WSU brand the importance/advantages of outreach, Extension, service, and engagement activities at a land-grant university.
- ▶ Implement university-wide systems to better incentivize and reward programs and individuals to engage in outreach, Extension, and service activities (e.g., tenure/promotion portfolios).
- ▶ Leverage Extension by creating programs and processes that forge linkages (e.g., faculty affiliations, joint grant and project work, and student engagement); increase participation in outreach, Extension, service, and engagement activities by academic units; and inform/benefit the university's teaching and research missions.
- ▶ Develop and implement a university requirement that WSU students learn about and participate in outreach, Extension, service, and engagement activities as an essential part of the student experience.
- ▶ Prioritize outreach, Extension, service, and engagement activities as a strategy for diversifying extramural resource acquisition.

# 04. Goal 4: Institutional Effectiveness & Infrastructure

WSU will advance a culture of engagement and collaboration across its multi-campus system that values and invests in resources—physical, financial, human, and intellectual—leveraging these to become the social and economic drivers for the community, the state, and the world.

### Objectives

- ▶ **Budget and planning:**
  - ▶ Align financial resources with strategic plan goals.
  - ▶ Engage in integrated planning of current educational programs and research efforts to maintain and strengthen their quality.
- ▶ **Modernization of infrastructure:** Modernize facilities, technology, business practices, and campus environments to be safe, sustainable, and supportive for future areas of growth and leading-edge practices in teaching, learning, and research.
- ▶ **System:** Enhance overall internal buy-in for the WSU system and appreciation for all of its assets and components.
- ▶ **Staff recruitment and retention:** Increase the hiring and retention of exceptional faculty and staff—who represent diversity in all its forms—to advance research and the educational experience.

### Possible strategies

- ▶ Produce an annual operating budget that promotes transparency around the current allocation of resources and informs the planning of future incentive-based budget models.
- ▶ Promote an enhanced infrastructure and technology planning process incorporating input from a wide range of internal stakeholders to prioritize deferred maintenance and long-term technology needs that support WSU's aspirational growth.
- ▶ Form a team representative of the system and all its components to identify hindering and helping forces to promote system-wide best practices, opportunities for local decision-making, and collaboration based on a set of shared values and principles.
- ▶ Continue to advance and enhance programs focused on the hiring and retention of diverse faculty and staff including recruitment initiatives, training, mentoring/equity advisor programs, and university and community resources.





# APPENDIX

- 1: WSU System Locations
- 2: Campus Profiles
- 3: Strategic Plan Metrics
- 4: Definition of Planning Terms
- 5: Strategic Planning Key Steps and Timeline
- 6: Strategic Planning and Institutional Effectiveness Council (SPIEC) Membership

## APPENDIX 1: WSU SYSTEM LOCATIONS



- |                                  |   |
|----------------------------------|---|
| Campuses (6)                     | County Extension Offices (39)                     |
| Research & Extension Centers (4) | Extension Tribal Office (1)                       |
| Research Units & Stations (4)    | Extension Energy Program (1)                      |
| Small Business Dev. Centers (24) | Other Major Program Locations (Bremerton, Yakima) |

# APPENDIX 2: CAMPUS PROFILES

WSU operates at campuses and locations throughout the state of Washington. The following profiles are based on when the 2020-2025 system strategic plan was created.

## WSU Everett

WSU Everett is student- and community-centered, bringing industry-aligned undergraduate programs with an interdisciplinary focus to the North Puget Sound region to prepare students to compete globally in the local economy. The campus offers junior- and senior-level courses in seven high-demand bachelor's degree programs, including data analytics, engineering, hospitality business management, and integrated strategic communication. It also serves as a clinical campus for the Elson S. Floyd College of Medicine based in Spokane. WSU Everett is located in a four-story

facility constructed in downtown Everett that opened in 2017. The campus enrolls nearly 300 students.

### Student Profile, Fall 2019

- ▶ Total enrollment: 283
  - ▶ Undergraduate: 283
- ▶ Students of color: 34.6%
- ▶ International: 5.7%
- ▶ Women: 27.9%
- ▶ First generation: 41.7%

### WSU Everett Current Strategic Plan

(<https://everett.wsu.edu/wsu-everett-strategic-plan/>)

## WSU Global Campus

In addition to serving students through its brick-and-mortar campuses, the university also reaches out to the residents of Washington and beyond through the WSU Global Campus, which delivers degrees online, and professional education, which includes a range of non-credit continuing education programs, such as seminars, workshops, conferences, trade expositions, and online certificates. Several of these programs have earned national acclaim. The WSU Global Campus serves more than 3,000 students through its online offerings. With programs in fields including accounting, management, management information systems, economics, data analytics, criminal justice, human development, humanities, social sciences, integrated strategic communications, and psychology, students around the world

have access to WSU's world-class faculty and academic programs regardless of geography.

### Student Profile, Fall 2019

- ▶ Total enrollment: 3,265
  - ▶ Undergraduate: 2,126
  - ▶ Graduate: 1,139
- ▶ Students of color: 29.2%
- ▶ International: 5.2%
- ▶ Women: 60.1%
- ▶ First generation: 29.4%

### WSU Global Campus Current Strategic Plan

(development of plan in process)

## WSU Pullman

The Pullman campus is the oldest (founded 1890) and largest campus in the WSU system. Most of the system's senior administrative team, including WSU's president and provost, are based in Pullman. Enrollment totaled 20,976 students for the 2019 fall semester. About 1,500 faculty, supported by 1,600 graduate assistants and 2,900 administrators and staff, work on the Pullman campus. WSU Pullman offers studies in more than 200 undergraduate, graduate, and professional programs.

Due to significant investments from the state as well as private and federal support, outstanding new campus facilities have been constructed and others upgraded during the past decade. Major new facilities include a digital classroom building, multiple plant sciences facilities, a multicultural center, a veterinary and biomedical research building, and the PACCAR Environmental Technology Building.

WSU Pullman is a hub for most of the university's student organizations, including its athletic teams, as well as galleries, performance venues, and museums dedicated to art, anthropology, zoology, and other topics. The Pullman campus is largely residential; 46 percent of students live in residence halls, university-owned apartments, or fraternity and sorority houses.

### Student Profile, Fall 2019

- ▶ Total enrollment: 20,976
  - ▶ Undergraduate: 18,346
  - ▶ Graduate: 2,173
  - ▶ Professional: 457
- ▶ Students of color: 29.7%
- ▶ International: 9.1%
- ▶ Women: 50.5%
- ▶ First generation: 31.0%

### WSU Pullman Current Strategic Plan

(development of plan in process)

## WSU Health Sciences Spokane

Located about 75 miles north of Pullman, WSU Health Sciences Spokane is the university's urban health sciences campus, which prepares the state's future generations of physicians, nurses, pharmacists, and other health professionals. Nearly 1,700 undergraduate, professional, and graduate students pursue degrees at the 48-acre campus. WSU Health Sciences Spokane is home to several modern facilities including the Pharmaceutical and Biomedical Sciences building, which houses the latest in health science laboratories and classroom technology. The campus also houses programs offered by Eastern Washington University and is located just across the Spokane River from Gonzaga

University. Fittingly, this area of Spokane is referred to as the University District, or U-District.

### Student Profile, Fall 2019

- ▶ Total enrollment: 1,685
  - ▶ Undergraduate: 534
  - ▶ Graduate: 325
  - ▶ Professional: 826
- ▶ Students of color: 31.9%
- ▶ International: 2.3%
- ▶ Women: 71.6%
- ▶ First generation: 30.4%

### WSU Health Sciences Spokane Current Strategic Plan

(development of plan in process)

## WSU Tri-Cities

WSU Tri-Cities is located on 200 acres along the banks of the Columbia River in the southeastern part of the state. The campus serves more than 1,800 students by offering 50-plus undergraduate and graduate degree programs, many of them in STEM-related disciplines. The Ste. Michelle Wine Estates WSU Wine Science Center opened on campus in 2016. The facility—one of the most technologically advanced wine science centers in the world—represents the thriving partnership between the Pacific Northwest wine industry and WSU. The campus also is home to the Bioproducts, Sciences, and Engineering Laboratory, built in partnership with nearby Pacific Northwest National Laboratory. In addition, WSU

Tri-Cities serves as a clinical campus for the Elson S. Floyd College of Medicine.

### Student Profile, Fall 2019

- ▶ Total enrollment: 1,813
  - ▶ Undergraduate: 1,603
  - ▶ Graduate: 210
- ▶ Students of color: 42.4%
- ▶ International: 2.2%
- ▶ Women: 56.1%
- ▶ First generation: 41.8%

### WSU Tri-Cities Current Strategic Plan

(<https://tricitie.wsu.edu/administration-and-leadership-at-wsu-tri-cities/campus-strategic-planning/>)

## WSU Vancouver

As the second largest campus in the WSU system, WSU Vancouver offers big-school resources in a small-school environment. Now enrolling more than 3,500 students, WSU Vancouver provides affordable, high-quality baccalaureate- and graduate-level education to benefit the people and communities it serves. As the only four-year research university in Southwest Washington, WSU Vancouver helps drive economic growth through relationships with regional businesses and industries, schools, and nonprofit organizations. Areas of research focus include sustainable water, brain health, and smart devices. WSU Vancouver also serves as a clinical campus for the Elson S. Floyd College

of Medicine. Ninety-two percent of WSU Vancouver alumni remain in the region after graduation to live, work, and contribute to their communities.

### Student Profile, Fall 2019

- ▶ Total enrollment: 3,585
  - ▶ Undergraduate: 3,170
  - ▶ Graduate: 415
- ▶ Students of color: 29.1%
- ▶ International: 2.6%
- ▶ Women: 54.4%
- ▶ First generation: 43.4%

### WSU Vancouver Current Strategic Plan

(<https://www.vancouver.wsu.edu/strategic-plan/>)

## WSU Extension

With locations throughout the state, WSU Extension is the front door to the university. Extension builds the capacity of individuals, organizations, businesses, and communities, empowering them to find solutions for local issues and to improve their quality of life. Extension collaborates with communities to create a culture of life-long learning and is recognized for its accessible, learner-centered, relevant, high-quality, unbiased educational programs. WSU Extension partners with businesses, communities, and volunteers to develop programs that drive innovation, invention, and technology transfer. Extension offers programs statewide that address a wide range of topics, including digital inclusion, food safety, horticulture, parenting, stormwater,

and pest management. More than one million individuals participate in Extension-managed programs annually.

### Extension County Offices

- ▶ One in each of the 39 counties in the state of Washington

### Research and Extension Centers

- ▶ Mount Vernon Northwestern Washington Research and Extension Center
- ▶ Prosser Irrigated Agriculture Research and Extension Center
- ▶ Puyallup Research and Extension Center
- ▶ Wenatchee Tree Fruit Research and Extension Center



# APPENDIX 3: STRATEGIC PLAN METRICS

For current priorities and metrics, please see the annual report for the WSU System Strategic Plan.

**Goal 1: Research, Innovation, and Creativity:** Washington State University will be recognized for embracing risk and bold thinking to serve the needs of its communities through innovative research, scholarship, and creative activities.

## Objectives

1. Expand research, scholarship, and creative activities that cross disciplines and employ new methodologies to address community needs and twenty-first century global challenges.
2. Increase WSU's ability to highlight its achievements and their societal impact.
3. Maximize the ability to shape research, creative activity, and entrepreneurship in direct partnership with the communities the university serves.
4. Enhance WSU's ability to pursue, retain, and reward exceptional talent committed to creativity and bold thinking.
5. Promote sustainable external partnerships to accelerate innovation and maximize the impact of the university's discoveries.

## Metrics

- ▶ Licensing agreements
  - Licensing revenue
  - Number of agreements
- ▶ Research and development expenditures per full-time, tenured/tenure track faculty (T/TT)
  - Federal R&D
  - Total R&D
- ▶ Graduate and professional degrees awarded per T/TT
- ▶ Faculty promotions: Associate to Full Professor

**Goal 2: Student Experience:** Washington State University students will engage in scholarship, research, and experiential learning activities to prepare future leaders, scholars, and global citizens.

## Objectives

1. Increase educational affordability geared toward improving the completion and graduation rates of students.
2. Increase career development resources for all students starting with their first year.
3. Ensure every WSU student has the opportunity to participate in experiential learning and community engagement (e.g., service learning, internships,

undergraduate research, creative discovery, study abroad, and/or leadership).

4. Enhance the quality of the undergraduate academic experience with an eye toward greater mastery of learning goals along with increased student retention and graduation rates.
5. Nurture and promote mental, physical, and social wellbeing among students.

## Metrics

- ▶ Affordability Index
  - ▶ Percentage of need met for undergrad students awarded any need-based aid
  - ▶ Number of degree-seeking undergrads with no financial need who received non-need-based scholarship or grant aid (exclude athletic awards and tuition benefits)
  - ▶ Average dollar amount of institutional non-need-based scholarship or grant aid awarded to degree-seeking undergrads with no financial need
  - ▶ Proportion of need-based vs. non-need-based aid (scholarships, institutional aid, tuition and fees)
- ▶ Retention Rates
  - ▶ Pell
  - ▶ First generation
  - ▶ Race/ethnicity
  - ▶ Sex
- ▶ 6-year graduation rate
  - ▶ Pell
  - ▶ First generation
  - ▶ Race/ethnicity
  - ▶ Sex
- ▶ Number of students engaged in experiential learning and community engagement
  - ▶ # students involved in undergraduate research
  - ▶ # students in study abroad programs
  - ▶ # students in service learning
  - ▶ # students in internships
- ▶ Number of doctorates awarded
  - ▶ # of PhDs
  - ▶ # of MDs
  - ▶ # of EdDs
  - ▶ # of DVMS
  - ▶ # of PharmDs
- ▶ Social mobility index
  - Percent Pell
  - ▶ 6-year Graduation rate
  - ▶ 8-Year Graduation rate
  - ▶ Net price
  - ▶ # of Pell recipients earning bachelor's degrees

**Goal 3: Outreach, Extension, Service, and Engagement:** Washington State University will be a national leader in advancing quality of life, economic development, sustainability, and equity through meaningful engagement in discovery, education, and service with partners throughout the state, nation, and world.

## Objectives

1. Improve and implement cohesive, system-wide mechanisms for assessing and communicating the impact and value of outreach, Extension, service, and engagement.
2. Increase outreach, Extension, service, and engagement activities across all colleges, all campuses, and throughout the state, as an essential element to achieving WSU's land-grant mission.
3. Increase and enhance partnerships with under-represented communities.
4. Increase the impact of outreach, Extension, service, and engagement activities to improve human health.
5. Increase the alignment of WSU priorities with the needs, challenges, and opportunities in the state of Washington identified via outreach, Extension, service, and engagement activities.
6. Increase university-wide resource investment in outreach, Extension, service, and engagement activities.

## Metrics

- ▶ Outreach, Extension, service, and engagement activities of campuses, colleges, schools, and units
  - ▶ Total # of activities
  - ▶ # of activities focused on improving human health outcomes
  - ▶ # of participants; learning hours in activities
  - ▶ Total # of external partnerships
  - ▶ # of external partnerships with under-represented communities
- ▶ Sponsored funding for community-engaged research initiatives with external partners that addresses key quality-of-life indicators (economic growth, health, environment) in the state of Washington
- ▶ Media stories (featuring WSU's impact on the state, nation, and globally)
  - ▶ Number
  - ▶ Reach
- ▶ Social Engagement and Service
  - ▶ # of students in ROTC programs
  - ▶ # of alumni service projects
  - ▶ # of WSU colleges that provide matching funds for undergraduate students who receive Segal AmeriCorps Education Award for having completed national service
  - ▶ Voting engagement
- ▶ Amount of volunteer time contributed (Extension)

**Goal 4: Institutional Effectiveness and Infrastructure:** WSU will advance a culture of engagement and collaboration across its multi-campus system that values and invests in resources—physical, financial, human, and intellectual—leveraging these to become the social and economic drivers for the community, the state, and the world.

## Objectives

1. Budget and planning:
  - ▶ Align financial resources with strategic plan goals.
  - ▶ Engage in integrated planning of current educational programs and research efforts to maintain and strengthen their quality.
2. Modernization of infrastructure: Modernize facilities, technology, business practices, and campus environments to be safe, sustainable, and supportive for future areas of growth and leading-edge practices in teaching, learning, and research.
3. System: Enhance overall internal buy-in for the WSU system and appreciation for all of its assets and components.
4. Staff recruitment and retention: Increase the hiring and retention of exceptional faculty and staff—who represent diversity in all its forms—to advance research and the educational experience.

## Metrics

- ▶ Percent of faculty/staff diversity
- ▶ Facility condition index (FCI)
- ▶ Reserves
  - ▶ University reserves
  - ▶ Central reserves
- ▶ Return on investment (from alignment of goals and strategies)
- ▶ Annual giving

# APPENDIX 4: DEFINITION OF PLANNING TERMS

## ► CORE IDEOLOGY

- An organization’s consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: core mission—the organization’s reason for being, and core beliefs and values—essential and enduring principles that drive the organization.

## ► MISSION

- The fundamental purpose for which the institution exists.

## ► BELIEFS AND VALUES

- Essential and enduring tenets that guide behavior and decision-making and shape institutional culture.

## ► VISION

- What the institution seeks to be or become within a future time horizon—consists of a big goal statement and vivid descriptions.

## ► ASSUMPTIONS

- Future-oriented statements that serve as projections about the future environment that the institution is likely to be operating in as it moves toward achievement of its vision.

## ► GOALS

- Outcome-oriented statements, worded in the future tense, that describe what will be achieved for stakeholders, and the progress that will be made toward the long-range vision.

## ► OBJECTIVES

- Measurable, attainable milestones that describe progress toward key issues affecting the ability to achieve the goal, and what would constitute success in observable or measurable terms. Indicates a direction—increase, expand, decrease, reduce, consolidate, abandon, improve, distribute, or enhance.

## ► METRICS

- Numeric or data-oriented milestones to achieve by a specific point in time on the way to accomplishing the goal. Describes the measure or change that will be used to assess progress and set future benchmarks and targets.

## ► TACTICS

- Specific actions taken by the institution to commit its resources to accomplishing the goal. Brings focus to operational allocation of resources. Indicates an activity—redesign, refine, identify, revise, develop, implement, create, or establish.

# APPENDIX 5: STRATEGIC PLANNING KEY STEPS AND TIMELINE

## Planning Process and Timeline

The planning process incorporated nine steps that took place between August 2018 and June 2020.

### August 2018—March 2019

#### Step 1: Setting the Stage

- Analyze the 2018 WSU accreditation report completed by the Northwest Commission on Colleges and Universities
- Develop planning model for creating a new strategic plan
- Launch the planning process with communication from President Schulz
- Conduct system-wide listening sessions on current strategic plan

- Core purpose and core values
- Envisioned future (big goal/vivid descriptions)
- Short-term, outcome-oriented goals and objectives

### October—November 2019

#### Step 6: Crafting the Plan: Concept Teams

- Form concept teams
- Teams draft goals, objectives, and strategies to be included in the strategic plan based on input from the visioning conference, “What We Know” document, and associated research

### January—April 2019

#### Step 2: Expanding the Effort

- Analyze data from initial listening sessions
- Create Strategic Planning and Institutional Effectiveness Council (SPIEC), with system-wide representation
- Engage senior leadership teams—president’s cabinet, deans, campuses, colleges—in strategic dialogue about the WSU system

### December 2019

#### Step 7: Strategic Plan Document Drafting

- Draft the first iteration of the strategic plan
- Relying on the input gathered, a small team writes the first draft of the plan
- The draft addresses purpose, values, and vision and goals, as well as underlying assumptions about the future

### May 2019

#### Step 3: Convening the Community: Land-grant Symposium

- Host full day, system-wide dialogue focused on the future of land-grant institutions
- Explore in-depth the three primary elements of WSU’s land-grant mission: teaching, research, and service

### February 3—February 24, 2020

#### Step 8: Stakeholder Input on Draft Strategic Plan

- Community provides comments about the draft plan
- Draft plan is revised to incorporate feedback received

### June—September 2019

#### Step 4: Building a Knowledge Base

- Design environmental scanning process
- Design knowledge repository
- Evaluate knowledge gaps
- Engage in quantitative/qualitative research with internal and external stakeholders
- Survey community online about purpose, values, vision, goals, and assumptions
- Create “What We Know” document

### March—June 2020

#### Step 9: Strategic Plan Submitted to WSU Board of Regents

- Regents review, comment, and approve plan

### October 2019

#### Step 5: Convening the Community: Visioning Conference

- Gather community input regarding:
  - Assumptions about the future
  - SWOT analysis

# APPENDIX 6: WSU SYSTEM STRATEGIC PLAN COORDINATING COUNCIL (SSPCC)

The SSPCC's primary purpose is to ensure implementation of the Washington State University System Strategic Plan. It is also formed to help ensure integration between the plan and other major planning processes, as well as alignment between the system strategic plan and campus, college, and unit strategic plans.

The SSPCC is charged with overseeing implementation of the WSU System Strategic Plan with the following four key purposes:

- ▶ Monitoring progress toward system goals and objectives and preparing progress reports for system leadership and members of the Board of Regents.
- ▶ Serving as a steward of the system strategic plan and facilitating processes that keep campuses, colleges, and units aligned and responsible to the plan.
- ▶ Serving as a coordinating team to help integrate major institutional planning processes across the system.
- ▶ Providing regular communications to the WSU community about developments and progress of the plan.

The SSPCC may execute its responsibilities in phases to first focus on its primary purpose of system strategic plan implementation. Over time and as the institution's planning functions and processes mature, both the institution and the SSPCC will develop capacity and capabilities to achieve institutional planning alignment and integration.

The SSPCC may accomplish its work through the appointment of subcommittees or ad hoc committees to address specific needs or carry out specific projects.

**Goal Leads:** Goal Leads serve as liaisons between the SSPCC and the unit(s), councils, committees, or task forces assigned to make progress on their respective goal area objectives. They will also work in collaboration with the Office of Strategy, Planning, and Analysis (including the Office of Institutional Research). They are responsible for communicating to the SSPCC the strategies and timelines that will be employed to achieve the system goal and objectives. They are also responsible for status reporting on progress made and for contributing to progress reports that will be provided to institutional leadership and the Board of Regents. As a first order of business, the Goal Leads will be determined by the Standing Member vice presidents and chancellors when the SSPCC first convenes and will be evaluated each year thereafter according to the appointment term guidelines.

## STANDING MEMBERS

- ▶ Vice President for Strategy, Planning, and Analysis (Chair)
- ▶ Provost (or designee)
- ▶ Vice President for Finance and Administration (or designee)
- ▶ Vice President for Health Sciences (or designee)
- ▶ Vice President for Marketing and Communications (or designee)
- ▶ Vice President for Research (or designee)
- ▶ Chancellors (or designees)
  - ▶ Everett
  - ▶ Global
  - ▶ Pullman
  - ▶ Spokane
  - ▶ Tri-Cities
  - ▶ Vancouver

## GOAL LEAD MEMBERS

- ▶ Goal 1 Lead(s)
- ▶ Goal 2 Lead(s)
- ▶ Goal 3 Lead(s)
- ▶ Goal 4 Lead(s)

## EX OFFICIO MEMBERS

- ▶ Executive Director, Institutional Research
- ▶ Director of Strategic Communication, Office of Strategy, Planning, and Analysis

## ADMINISTRATIVE SUPPORT

- ▶ Executive Assistant and Project Specialist, Office of Strategy, Planning, and Analysis





**WASHINGTON STATE UNIVERSITY**

**SYSTEM  
STRATEGIC  
PLAN**



**UPDATED FALL 2022**

**STRATEGY.WSU.EDU**



Dollars in Thousands

ACT001 - Agency Activity Inventory
365 - Washington State University
2024 First Supplemental Budget Session
24\_SPLR - 2024 Supplemental Request

\*

Appropriation Period: 2023-25 Sort By: Activity

A001 Administration

This activity is the executive leadership of the university and is composed of the Board of Regents, President's Office, Faculty Senate, Government Relations, Vice President for Finance and Administration, Assistant Attorney General, and the Executive Vice President and Provost.

Table with 4 columns: Account, FY 2024, FY 2025, Biennial Total. Rows include FTE, 001 General Fund, 001-1 State, 148 Inst of Hi Ed-Dedicated Local Acct, 148-6 Non-Appropriated, 062 WSU Building Account, and 062-1 State.

Statewide Result Area: World Class Education

Statewide Strategy: Provide convenient and efficient post-secondary education

Expected Results

The administration activity provides executive leadership to the university and strengthens the ability of the university to achieve its goals efficiently and effectively.

**ACT001 - Agency Activity Inventory**  
**365 - Washington State University**  
**24\_SPLR - 2024 Supplemental Request**

*Dollars in Thousands*

\*

*Appropriation Period: 2023-25    Sort By: Activity*

**A002    Community Outreach**

As a land-grant institution, the University provides services to the general public such as economic development, lectures, and conferences. Two major programs, the Cooperative Extension program and the Small Business Development Center, provide technical and other assistance to small businesses, individuals, and communities. KWSU radio and television provide educational programming throughout Washington.

| <b>Account</b>                                 | <b>FY 2024</b> | <b>FY 2025</b> | <b>Biennial Total</b> |
|--|----------------|----------------|-----------------------|
| <b>FTE</b>                                     | 458.7          | 465.8          | 462.3                 |
| <b>001 General Fund</b>                        |                |                |                       |
| 001-1 State                                    | \$23,155       | \$23,013       | \$46,168              |
| <b>148 Inst of Hi Ed-Dedicated Local Acct</b>  |                |                |                       |
| 148-6 Non-Appropriated                         | \$30,038       | \$30,343       | \$60,381              |
| <b>143 Inst of Hi Ed-Federal Approp Acct</b>   |                |                |                       |
| 143-6 Non-Appropriated                         | \$8,315        | \$8,315        | \$16,630              |
| <b>149 Inst of HI ED-Operating Fees Acct</b>   |                |                |                       |
| 149-6 Non-Appropriated                         | \$4,504        | \$4,540        | \$9,044               |
| <b>23P Model Toxics Control Operating Acct</b> |                |                |                       |
| 23P-1 State                                    | \$244          | \$244          | \$488                 |
| <b>218 Multimodal Transportation Account</b>   |                |                |                       |
| 218-1 State                                    | \$50           | \$50           | \$100                 |
| <b>062 WSU Building Account</b>                |                |                |                       |
| 062-1 State                                    | \$20           | \$19           | \$39                  |

**Statewide Result Area: World Class Education**

**Statewide Strategy: Increase access to high-quality post-secondary education programs**

**Expected Results**

Community Outreach improves the economic vitality of the state's businesses and improves educational and cultural opportunities for individuals.

**ACT001 - Agency Activity Inventory**  
**365 - Washington State University**  
**24\_SPLR - 2024 Supplemental Request**

*Dollars in Thousands*

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*Appropriation Period: 2023-25    Sort By: Activity*

**A003    Instruction**

The University provides undergraduate and graduate education in the liberal arts and natural sciences, as well as in agriculture, engineering, business, health sciences, veterinary medicine, and education.

| <b>Account</b>                                 | <b>FY 2024</b> | <b>FY 2025</b> | <b>Biennial Total</b> |
|--|----------------|----------------|-----------------------|
| <b>FTE</b>                                     | 4,082.5        | 4,226.2        | 4,154.4               |
| <b>08A Education Legacy Trust Account</b>      |                |                |                       |
| 08A-1 State                                    | \$16,998       | \$16,997       | \$33,995              |
| <b>001 General Fund</b>                        |                |                |                       |
| 001-1 State                                    | \$206,128      | \$211,686      | \$417,814             |
| <b>148 Inst of Hi Ed-Dedicated Local Acct</b>  |                |                |                       |
| 148-6 Non-Appropriated                         | \$110,201      | \$111,328      | \$221,529             |
| <b>149 Inst of HI ED-Operating Fees Acct</b>   |                |                |                       |
| 149-6 Non-Appropriated                         | \$239,943      | \$244,508      | \$484,451             |
| <b>23P Model Toxics Control Operating Acct</b> |                |                |                       |
| 23P-1 State                                    | \$26           | \$26           | \$52                  |
| <b>24J Workforce Education Investment Acc</b>  |                |                |                       |
| 24J-1 State                                    | \$23,121       | \$24,996       | \$48,117              |
| <b>062 WSU Building Account</b>                |                |                |                       |
| 062-1 State                                    | \$324          | \$323          | \$647                 |

**Statewide Result Area: World Class Education**

**Statewide Strategy:    Provide convenient and efficient post-secondary education**

**Expected Results**

The instruction activity improves the quality and productivity of the state's workforce and improves the value of a university education.

**ACT001 - Agency Activity Inventory**  
**365 - Washington State University**  
**24\_SPLR - 2024 Supplemental Request**

*Dollars in Thousands*

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*Appropriation Period: 2023-25    Sort By: Activity*

**A004    Research**

Washington State University provides research programs in close relationship with its instruction and public service programs. The Agricultural Research Center provides scientific analysis and practical solutions to problems affecting farmers, processors, merchandisers, exporters, and consumers of agricultural products. Grants and contracts provided by federal, state, and private sources allow the university to conduct vital research and training to benefit the people of Washington.

| <b>Account</b>                                 | <b>FY 2024</b> | <b>FY 2025</b> | <b>Biennial Total</b> |
|--|----------------|----------------|-----------------------|
| <b>FTE</b>                                     | 1,803.3        | 1,833.5        | 1,818.4               |
| <b>26C Climate Commitment Account</b>          |                |                |                       |
| 26C-1 State                                    | \$4,160        | \$4,161        | \$8,321               |
| <b>315 Dedicated Cannabis Account</b>          |                |                |                       |
| 315-1 State                                    | \$189          | \$197          | \$386                 |
| <b>001 General Fund</b>                        |                |                |                       |
| 001-1 State                                    | \$47,992       | \$48,154       | \$96,146              |
| <b>145 Inst of Hi Ed-Grants/Contracts Acct</b> |                |                |                       |
| 145-6 Non-Appropriated                         | \$231,485      | \$233,326      | \$464,811             |
| <b>148 Inst of Hi Ed-Dedicated Local Acct</b>  |                |                |                       |
| 148-6 Non-Appropriated                         | \$19,169       | \$19,364       | \$38,533              |
| <b>143 Inst of Hi Ed-Federal Approp Acct</b>   |                |                |                       |
| 143-6 Non-Appropriated                         | \$2,993        | \$2,993        | \$5,986               |
| <b>149 Inst of HI ED-Operating Fees Acct</b>   |                |                |                       |
| 149-6 Non-Appropriated                         | \$9,335        | \$9,502        | \$18,837              |
| <b>23P Model Toxics Control Operating Acct</b> |                |                |                       |
| 23P-1 State                                    | \$1,115        | \$1,116        | \$2,231               |
| <b>062 WSU Building Account</b>                |                |                |                       |
| 062-1 State                                    | \$41           | \$42           | \$83                  |

**Statewide Result Area: World Class Education**

**Statewide Strategy: Provide access to high-quality research opportunities**

**Expected Results**

The research activity improves the economic vitality of businesses and individuals and improves the health of Washington citizens.



**ACT001 - Agency Activity Inventory**  
**365 - Washington State University**  
**24\_SPLR - 2024 Supplemental Request**

*Dollars in Thousands*

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*Appropriation Period: 2023-25    Sort By: Activity*

**Grand Total**

|              | <b>FY 2024</b> | <b>FY 2025</b> | <b>Biennial Total</b> |
|--------------|----------------|----------------|-----------------------|
| <b>FTE's</b> | 6,368.1        | 6,549.7        | 6,458.9               |
| <b>GFS</b>   | \$289,931      | \$295,620      | \$585,551             |
| <b>Other</b> | \$711,964      | \$722,183      | \$1,434,147           |
| <b>Total</b> | \$1,001,895    | \$1,017,803    | \$2,019,698           |

## Activity Inventory Indirect Cost Allocation Approach

Agency: 365 - Washington State University

Date: 9/13/2023

**Allocation Method Description:** WSU allocated indirect costs in a two step method. Step one was to allocate indirect costs for Primary Support and Libraries over Instruction, Research, and Community Outreach. Step 2 was to allocate Plant Operations, Computing, and Institutional Support (other than program 081) over the four activities of Instruction, Research, Community Outreach, and Executive Administration (Program 081). The summary for all funds is shown below.

|   | % Allocation Received | Dollars Allocated FY1 | Dollars Allocated FY2 | Total Allocated |
|---|-----------------------|-----------------------|-----------------------|-----------------|
| <b>Program 01 Instruction</b>               | 78%                   | \$234,840,000         | \$236,059,000         | \$470,899,000   |
| <b>Program 02 Research</b>                  | 11%                   | \$33,106,000          | \$32,630,000          | \$65,736,000    |
| <b>Program 03 Public Srv.</b>               | 9%                    | \$28,112,000          | \$27,910,000          | \$56,022,000    |
| <b>Program 081 Executive Administration</b> | 2%                    | \$5,962,000           | \$5,772,000           | \$11,734,000    |
| <b>Total</b>                                | 100%                  | \$302,020,000         | \$302,371,000         | \$604,391,000   |



Dollars in Thousands

**ABS024 Recommendation Summary  
Washington State University  
2024 First Supplemental Budget Session  
24\_SPLR - 2024 Supplemental Request**

|  | Average Annual<br>FTEs | General<br>Fund State | Other Funds      | Total Funds      |
|--|------------------------|-----------------------|------------------|------------------|
| CB T0PL Current Biennium Base          | 6,454.7                | 564,519               | 1,434,012        | 1,998,531        |
| <b>2023-25 Current Biennium Total</b>  | <b>6,454.7</b>         | <b>564,519</b>        | <b>1,434,012</b> | <b>1,998,531</b> |
| <b>Total Carry Forward Level</b>       | <b>6,454.7</b>         | <b>564,519</b>        | <b>1,434,012</b> | <b>1,998,531</b> |
| Percent Change from Current Biennium   | .0%                    | .0%                   | .0%              | .0%              |
| <b>Maintenance – Other Changes</b>     |                        |                       |                  |                  |
| MLCC Climate Commitment Act            | 0.0                    | 19,016                | 0                | 19,016           |
| <b>Maintenance – Other Total</b>       | <b>0.0</b>             | <b>19,016</b>         | <b>0</b>         | <b>19,016</b>    |
| <b>Total Maintenance Level</b>         | <b>6,454.7</b>         | <b>583,535</b>        | <b>1,434,012</b> | <b>2,017,547</b> |
| Percent Change from Current Biennium   | .0%                    | 3.4%                  | .0%              | 1.0%             |
| <b>Policy – Other Changes</b>          |                        |                       |                  |                  |
| PL SC Supply Chain Management Degree   | 4.3                    | 2,016                 | 135              | 2,151            |
| <b>Policy – Other Total</b>            | <b>4.3</b>             | <b>2,016</b>          | <b>135</b>       | <b>2,151</b>     |
| <b>Policy – Comp Changes</b>           |                        |                       |                  |                  |
| PL GB Academic Student Empl Bargaining | 0.0                    | 0                     | 0                | 0                |
| <b>Policy – Comp Total</b>             | <b>0.0</b>             | <b>0</b>              | <b>0</b>         | <b>0</b>         |
| <b>Subtotal - Policy Level Changes</b> | <b>4.3</b>             | <b>2,016</b>          | <b>135</b>       | <b>2,151</b>     |
| <b>2023-25 Total Policy Level</b>      | <b>6,458.9</b>         | <b>585,551</b>        | <b>1,434,147</b> | <b>2,019,698</b> |
| Percent Change from Current Biennium   | .1%                    | 3.7%                  | .0%              | 1.1%             |

**ABS024 Recommendation Summary**  
**Washington State University**  
**24\_SPLR - 2024 Supplemental Request**  
*Dollars in Thousands*

**ML CC Climate Commitment Act**

Funding is requested to purchase carbon offset allowances as required by 2021’s Climate Commitment Act embodied in Senate Bill 5126. Current market rates are significantly greater than estimated when the legislation was enacted in the 2021 legislative session. WSU recently acquired less than 10% of the allowances required to offset carbon dioxide emissions for calendar year 2023, at a market price of over three times the rate assumed when base funding was provided.

**PL SC Supply Chain Management Degree**

Washington State University requests funding to add a new Supply Chain Management major to the Bachelor of Arts in Business Administration. The pandemic and its aftermath have clarified for the broader community what has been long understood by business: effectively functioning supply chains are critical to our interconnected global economy. Supply chain management as a domain currently features a shortage of workers and future leaders with knowledge, skills, and expertise in the field. The addition to the workforce of skilled individuals with supply chain management expertise is crucial to sustaining the economic success of the state and region.

**PL GB Academic Student Empl Bargaining**

Washington State University is bargaining with the United Automobile, Aerospace, and Agricultural Implement Workers of America, Local 4121 (UAW), which has been chosen as union representative by a selection of Academic Student Employees at Washington State University (Bargaining Unit 23).

**Report Number: ABS024**

| <b>Input Parameters</b>     | <b>Entered as</b> |
|-----------------------------|-------------------|
| Session                     | 2024 Supplemental |
| Agency                      | 365               |
| Version Source              | A                 |
| Version                     | 24_SPLR           |
| Version Option              | (None)            |
| Program                     | Agency Level      |
| Roll Up                     | N                 |
| Include Budget Level Detail | CL,ML,PL          |
| Include Text                | Y                 |
| For Word                    | N                 |
| Display Parameter Page      | Y                 |



### Agency Recommendation Summary

Funding is requested to purchase carbon offset allowances as required by 2021’s Climate Commitment Act embodied in Senate Bill 5126. Current market rates are significantly greater than estimated when the legislation was enacted in the 2021 legislative session. WSU recently acquired less than 10% of the allowances required to offset carbon dioxide emissions for calendar year 2023, at a market price of over three times the rate assumed when base funding was provided.

### Fiscal Summary

| Fiscal Summary<br><i>Dollars in Thousands</i> | Fiscal Years    |                | Biennial        | Fiscal Years   |                | Biennial        |
|---|-----------------|----------------|-----------------|----------------|----------------|-----------------|
|   | 2024            | 2025           | 2023-25         | 2026           | 2027           | 2025-27         |
| <b>Operating Expenditures</b>                 |                 |                |                 |                |                |                 |
| Fund 001 - 1                                  | \$12,293        | \$6,723        | <b>\$19,016</b> | \$7,810        | \$8,959        | <b>\$16,769</b> |
| Total Expenditures                            | <b>\$12,293</b> | <b>\$6,723</b> | <b>\$19,016</b> | <b>\$7,810</b> | <b>\$8,959</b> | <b>\$16,769</b> |

### Decision Package Description

Senate Bill 5126 established greenhouse gas emission caps and provided for the purchase of offset credits (allowances) to meet compliance obligations. For fiscal notes during the 2021 Legislative session, the Department of Ecology provided state agencies with floor price assumptions for the purchase of allowances to estimate fiscal impact. These lead agency price assumptions included 7 percent increases each year. Based on the assumed pricing and emissions estimated at 2019 levels (79,851 metric tons of carbon dioxide equivalent emissions), WSU received a base level of funding of \$1,718,000 beginning in FY 2023 for purchase of offset allowances and administration of the program. There was no increase in base funding to keep pace with assumed price increases. WSU was not successful in acquiring any credits through the established auction process with its FY 2023 allocation and the funding was reverted to the state at the end of the fiscal year.

As of mid-August WSU had utilized about a third of the base funding for FY 2024 to acquire 7,726 of its necessary 80,000 (estimated) allowances for calendar year 2023. By November 1<sup>st</sup> of 2024 and each year thereafter WSU must acquire 30% of the necessary allowances for the previous calendar year to avoid penalties. Penalties include a timeline within which entities must acquire four allowances for every allowance short of the 30% target. Failing that, penalties of \$10,000 per day are imposed. If funded this request will be used to purchase required allowances for calendar years 2023, 2024, and 2025 in a timely manner to avoid the penalties described above.

## Assumptions and Calculations

### Expansion, Reduction, Elimination or Alteration of a current program or service:

Not applicable - this request would not expand, reduce, eliminate, or alter a current program or service.

### Detailed Assumptions and Calculations:

In alignment with the Department of Ecology definition, the ceiling prices have been estimated based upon the Consumer Price Index for all urban consumers on the first day of December 2022 (7.7 percent) plus 5 percent. WSU's calendar year allowance target is 80,000. The fiscal detail assumes that in FY 2024 the remaining allowances needed for calendar year 2023 (80,000 - 7,726) and all of 2024 will be acquired. Thereafter, the assumption is that one calendar year's allowances will be purchased in each fiscal year. Detail calculations are illustrated in the table below:

| Climate Commitment Act Compliance Cost                                  |                                      |   |                |                      |                |                      |
|---|--------------------------------------|---|----------------|----------------------|----------------|----------------------|
|   | Allowance Ceiling Price <sup>1</sup> | Estimated CO <sup>2</sup> Emissions Allowances Required | FY-2024        | FY-2025              | FY-2026        | FY-2027              |
| CY 2023 (30% Obligation)  |                                      | 24,000  |                |                      |                |                      |
| Allowances acquired August 2023   |                                      | -7,726  |                |                      |                |                      |
| CY 2023 (30% Obligation Remaining)                                      | \$81.47                              | 16,274  | \$ 1,325,843   |                      |                |                      |
| CY 2023 remaining allowances  | \$91.82                              | 56,000  | \$ 5,141,735   |                      |                |                      |
| CY 2024   | \$91.82                              | 80,000  | \$ 7,345,335   |                      |                |                      |
| CY 2025   | \$103.48                             | 80,000  |                | \$ 8,278,193         |                |                      |
| CY 2026   | \$116.62                             | 80,000  |                |                      | \$ 9,329,523   |                      |
| CY 2027   | \$131.43                             | 80,000  |                |                      |                | \$ 10,514,373        |
| <b>WSU CY 2024 CCA Administrative Expenses</b>                          |                                      |   |                |                      |                |                      |
| Salary  |                                      |   | \$ 60,000      | \$ 60,000            | \$ 60,000      | \$ 60,000            |
| Benefits  |                                      |   | \$ 13,000      | \$ 13,000            | \$ 13,000      | \$ 13,000            |
| Mandatory CCA Third Party Emissions Verification/Administrative reviews |                                      |   | \$ 125,000     | \$ 90,000            | \$ 125,000     | \$ 90,000            |
| Less: Base Funding Appropriated in FY-2023                              |                                      |   | \$ (1,718,000) | \$ (1,718,000)       | \$ (1,718,000) | \$ (1,718,000)       |
| Biennial totals   |                                      |   | \$ 12,292,913  | \$ 6,723,193         | \$ 7,809,523   | \$ 8,959,373         |
|   |                                      |   |                | <b>\$ 19,016,105</b> |                | <b>\$ 16,768,896</b> |

<sup>1</sup> Ceiling prices are estimated based on CPI for urban consumers as of Dec. 2022 (7.7%) + 5%, as defined by Dept of Ecology

### Workforce Assumptions:

Not applicable - this request would not fund additional staff FTEs.

## Strategic and Performance Outcomes

### Strategic Framework:

Funding for this request will allow WSU to purchase the required carbon allowances per the Climate Commitment Act, supporting the Results Washington goal for sustainable energy and a clean environment.

### Performance Outcomes:

Not applicable for this specific request.

## Equity Impacts

### **Community outreach and engagement:**

While this request for additional funding to purchase carbon allowances may not impact equity directly, it is important to note the focus of the Climate Commitment Act on environmental equity. The purchase of carbon allowances will fund the Climate Commitment Act, and per the Laws of 2023, ch. 475, § 939: “Projects or activities funded by the account must meet high labor standards, including family sustaining wages, providing benefits including health care and employer-contributed retirement plans, career development opportunities, and maximize access to economic benefits from such projects for local workers and diverse businesses.”

### **Disproportional Impact Considerations:**

Please see statement above regarding this request's impact on equity in Washington.

### **Target Populations or Communities:**

Please see statement above regarding this request's impact on equity in Washington.

## Other Collateral Connections

### **Puget Sound Recovery:**

Not applicable.

### **State Workforce Impacts:**

Not applicable.

### **Intergovernmental:**

Not applicable.

### **Stakeholder Response:**

Not applicable.

### **State Facilities Impacts:**

Not applicable.

### **Changes from Current Law:**

Not applicable.

### **Legal or Administrative Mandates:**

Not applicable.

### **HEAL Act Agencies Supplemental Questions**

Not applicable.

## IT Addendum

**Does this Decision Package include funding for any IT-related costs, including hardware, software, (including cloud-based services), contracts or IT staff?**

No

| Objects of Expenditure<br><i>Dollars in Thousands</i> | Fiscal Years |         | Biennial | Fiscal Years |         | Biennial |
|---|--------------|---------|----------|--------------|---------|----------|
|   | 2024         | 2025    | 2023-25  | 2026         | 2027    | 2025-27  |
| Obj. E  | \$12,293     | \$6,723 | \$19,016 | \$7,810      | \$8,959 | \$16,769 |

## Agency Contact Information

Chris Jones

(509) 335-9682

[chris.jones@wsu.edu](mailto:chris.jones@wsu.edu)





## Agency Recommendation Summary

Washington State University requests funding to add a new Supply Chain Management major to the Bachelor of Arts in Business Administration. The pandemic and its aftermath have clarified for the broader community what has been long understood by business: effectively functioning supply chains are critical to our interconnected global economy. Supply chain management as a domain currently features a shortage of workers and future leaders with knowledge, skills, and expertise in the field. The addition to the workforce of skilled individuals with supply chain management expertise is crucial to sustaining the economic success of the state and region.

## Fiscal Summary

| Fiscal Summary<br><i>Dollars in Thousands</i> | Fiscal Years |                | Biennial       | Fiscal Years   |                | Biennial       |
|---|--------------|----------------|----------------|----------------|----------------|----------------|
|   | 2024         | 2025           | 2023-25        | 2026           | 2027           | 2025-27        |
| <b>Staffing</b>                               |              |                |                |                |                |                |
| FTEs  | 0.0          | 8.5            | <b>4.25</b>    | 10.5           | 13.2           | <b>11.85</b>   |
| <b>Operating Expenditures</b>                 |              |                |                |                |                |                |
| Fund 001 - 1                                  | \$94         | \$1,922        | <b>\$2,016</b> | \$1,817        | \$1,817        | <b>\$3,634</b> |
| Fund 149 - 6                                  | \$0          | \$135          | <b>\$135</b>   | \$333          | \$603          | <b>\$936</b>   |
| <b>Total Expenditures</b>                     | <b>\$94</b>  | <b>\$2,057</b> | <b>\$2,151</b> | <b>\$2,150</b> | <b>\$2,420</b> | <b>\$4,570</b> |
| <b>Revenue</b>                                |              |                |                |                |                |                |
| 149 - 0424                                    | \$0          | \$135          | <b>\$135</b>   | \$333          | \$603          | <b>\$936</b>   |
| <b>Total Revenue</b>                          | <b>\$0</b>   | <b>\$135</b>   | <b>\$135</b>   | <b>\$333</b>   | <b>\$603</b>   | <b>\$936</b>   |

## Decision Package Description

WSU's proposed Supply Chain Management major will focus on digitization of supply chain planning, including demand fulfillment, strategic procurement, logistics and transportation, warehousing, data-based forecasting, optimization, coordinating contracts, and quality improvement. The demand for this program and skilled supply chain managers is strong, especially in the Pacific Northwest. Producing more graduates skilled in this space will help the local manufacturing and transportation economy. Firms such as Boeing, PACCAR, Intel, Amazon, Costco, Starbucks, Christensen Fuels, Lineage Logistics, and countless smaller manufacturing firms that rely on distribution of products and their customers will benefit from better management of their supply chains and distribution logistics. However, too few public colleges in the region have supply chain management undergraduate programs to produce graduates with these needed skills.

According to a 2022 survey by McKinsey & Co.<sup>1</sup>, many companies want to incorporate digitization into their supply chain but, “an acute shortage of talent is holding organizations back in their efforts to accelerate digitization and implement advanced planning systems.” Only 10 percent of respondents stated that they have the talent they need. Respondents in the automotive, aerospace and defense sectors were especially likely to say that they had talent shortages. And, Boundless Learning (formerly Pearson)<sup>2</sup> reports that there is a 14 percent 10-year expected job growth for supply chain managers. Moreover, the McKinsey survey shows that after the 2019-20 worldwide supply chain disruptions, 71 percent of firms plan to revise how they manage their inventories, “looking for smarter ways to ensure resilience while keeping inventory costs under control.” To find newer, smarter methods, it would help these firms to hire recent supply chain management graduates taught in the most recent, best practices. These needs are reflected in the specialized skills found in supply chainrelated job postings: the top 10 skills include ‘data analysis,’ ‘SAP applications’ and ‘process improvements.’

Not only nationally, but also in the state of Washington demand is strong. Using Lightcast<sup>3</sup> data, WSU found that in the last year there were 39,273 unique postings for jobs in supply chain management and operations in the state of Washington alone, growing at 7.9 percent over five years. Again, there is no way the current handful of college programs can meet such demand.

Demand is particularly strong for a new kind of supply chain management program, focusing on digitization. The McKinsey survey also reveals that, “most companies ramped up their digital supply chain investments significantly over the past two years. Digital tools have been critical to companies’ efforts to improve the resilience of supply chain planning and execution. That story continues in our most recent survey: in almost every sector, more than 90 percent of respondents report that they invested in digital supply chain technologies last year.” This reinforces the need for management programs, but such programs that focus on digitization (using digital models to operate supply chain) that no other such bachelor’s program in the state indicates a focus on digitization.

This program would be offered in-person, on campus at WSU’s Everett and Vancouver campuses, proximate to the companies with the most need for graduates from supply chain management programs, and where the Carson College of Business already has in-person programs and infrastructure (facilities, classroom spaces, etc.) to provide the necessary foundation and core courses required for the major. Both campuses sit

on the I-5 corridor, the main artery for transportation in the state, and most students at these campuses have deep ties to these regions and are less likely to take their new skills out of state.

Finally, the Lightcast data reveal that of the 39,273 unique supply chain management postings this last year in the state, 21,563 were in the North Puget Sound Region (1,574 in Everett), and 1,354 in Vancouver (plus 8,082 in Portland). Additional data from Ruffalo Noel Levitz, a firm that specializes in enrollment analysis, shows that in 2021 within 100 miles of the Everett campus, the demand for supply chain management is similar to the high demand for computer science, yet all schools in the region produced only 143 bachelor's degrees in the field. This proposal would help meet strong industry demand.

1 McKinsey & Co (2023, August 26). *Taking the pulse of shifting supply chains*. Published online: <https://www.mckinsey.com/capabilities/operations/ourinsights/takingthepulseofshiftingsupplychains>.

2 Boundless Learning (2023). *MS Supply Chain Research Review and Program Design Introduction*. [Unpublished raw data].

3 Newell, K. (2023). *Logistics, Materials, and Supply Chain Management (52.0203)*. [Lightcast data set.]

## Assumptions and Calculations

### **Expansion, Reduction, Elimination or Alteration of a current program or service:**

Not applicable, as this proposal is for a new academic program.

### **Detailed Assumptions and Calculations:**

The state funding requested will support the 7.0 faculty positions needed to bring the supply chain management program to full capacity. Importantly, each position is needed to provide instruction at both locations, either in person or remotely. Students in Vancouver will be dependent on faculty based in Everett and vice versa.

Tuition funding driven by student enrollment will fund additional overhead support (finance, human resources, information technology) and advising staff. Salaries and FTEs for these positions were calculated using university averages as of September 2023.

Benefits were calculated using estimated FY24 rates, including health and retirement benefits, OASI, Medicare, paid family and medical leave, and unemployment insurance.

Goods and Services costs include:

FY25 only - \$5,000 per faculty member in the first year of employment for technology as part of startup package

FY25 and onward - \$12,500 per faculty member per year in research support, based on college norms (includes membership in ADVANCE)

Travel costs include:

FY24 - cost of seven faculty searches (assumes 4 candidates per search, \$3,000 for each candidate visit) + travel costs for 2 faculty to travel to conferences to promote program (\$5,000 per faculty)

FY25 - relocation costs for seven new faculty (\$10,000 per faculty)

### **Workforce Assumptions:**

The table below summarizes total FTE, salaries, and benefits by employee type.

|            | FY2024 |           |          |           |
|------------|--------|-----------|----------|-----------|
|            | FTE    | Salaries  | Benefits | Total     |
| Faculty    | 7.0    | 1,318,000 | 411,000  | 1,729,000 |
| Exempt     | -      | -         | -        | -         |
| Classified | -      | -         | -        | -         |
|            | 7      | 1,318,000 | 411,000  | 1,729,000 |
|            | FY2025 |           |          |           |
|            | FTE    | Salaries  | Benefits | Total     |
| Faculty    | 7.0    | 1,318,000 | 411,000  | 1,729,000 |
| Exempt     | 0.8    | 61,000    | 21,000   | 82,000    |
| Classified | 0.7    | 37,000    | 16,000   | 53,000    |
|            | 8.5    | 1,416,000 | 448,000  | 1,864,000 |
|            | FY2026 |           |          |           |
|            | FTE    | Salaries  | Benefits | Total     |
| Faculty    | 7.0    | 1,318,000 | 411,000  | 1,729,000 |
| Exempt     | 2.3    | 174,000   | 61,000   | 235,000   |
| Classified | 1.2    | 68,000    | 30,000   | 98,000    |
|            | 10.5   | 1,560,000 | 502,000  | 2,062,000 |
|            | FY2027 |           |          |           |
|            | FTE    | Salaries  | Benefits | Total     |
| Faculty    | 7.0    | 1,318,000 | 411,000  | 1,729,000 |
| Exempt     | 4.8    | 365,000   | 129,000  | 494,000   |
| Classified | 1.4    | 76,000    | 33,000   | 109,000   |
|            | 13.2   | 1,759,000 | 573,000  | 2,332,000 |

## Strategic and Performance Outcomes

### **Strategic Framework:**

This funding directly advances Results Washington's Goal 1: WorldClass Education by creating increased capacity for in demand degrees and preparing students with the necessary knowledge and skills to successfully pursue a career in supply chain management.

Further, implementation of the supply chain management degree will serve WSU's strategic plan goal to enhance the student experience. The new degree offering will serve multiple goal objectives, including to 1) enhance the quality of the undergraduate academic experience with an eye toward greater mastery of learning goals along with increased student retention and graduation rates and 2) strengthen collaborations with industry partners to enhance the student experience, including practicums, internships, and research opportunities.

More information on WSU's 2020-25 System Strategic Plan can be found here: <https://strategicplan.wsu.edu/plans/system-plan/>

### **Performance Outcomes:**

At full capacity, WSU expects the supply chain management academic program to enroll 190 students and confer 80 degrees annually between the Everett and Vancouver campuses.

## Equity Impacts

### **Community outreach and engagement:**

The Carson College of Business at Washington State University serves the state of Washington through its multi-campus system, and grants more business degrees than any other school in the state. The program includes about 27 percent first-generation students. WSU's presence throughout the state, and its emphasis on educating any student who is willing and able to do the work, allows the Carson College to increase the diversity of program graduates. Carson College's tightly linked curricular and co-curricular efforts (all students are required to complete professional development activities in the Career Amplifier program every year in order to graduate) ensures that these graduates are prepared to support the organizations where they will work, across the state

### **Target Populations or Communities:**

Please see statement above regarding this request's impact on equity in Washington.

## Other Collateral Connections

### **Puget Sound Recovery:**

Not applicable.

### **State Workforce Impacts:**

Not applicable.

### **Intergovernmental:**

Not applicable.

### **Stakeholder Response:**

Not applicable.

### **State Facilities Impacts:**

Not applicable.

### **Changes from Current Law:**

Not applicable.

### **Legal or Administrative Mandates:**

Not applicable.

### **HEAL Act Agencies Supplemental Questions**

Not applicable.

## IT Addendum

### **Does this Decision Package include funding for any IT-related costs, including hardware, software, (including cloud-based services), contracts or IT staff?**

No

## Objects of Expenditure

| Objects of Expenditure<br><i>Dollars in Thousands</i> | Fiscal Years |         | Biennial       | Fiscal Years |         | Biennial       |
|---|--------------|---------|----------------|--------------|---------|----------------|
|   | 2024         | 2025    | 2023-25        | 2026         | 2027    | 2025-27        |
| Obj. A  | \$0          | \$1,416 | <b>\$1,416</b> | \$1,560      | \$1,759 | <b>\$3,319</b> |
| Obj. B  | \$0          | \$448   | <b>\$448</b>   | \$502        | \$573   | <b>\$1,075</b> |
| Obj. E  | \$0          | \$123   | <b>\$123</b>   | \$88         | \$88    | <b>\$176</b>   |
| Obj. G  | \$94         | \$70    | <b>\$164</b>   | \$0          | \$0     | <b>\$0</b>     |

## Agency Contact Information

Chris Jones  
 (509) 335-9682  
 chris.jones@wsu.edu



## Agency Recommendation Summary

Washington State University (WSU) bargained with the United Automobile, Aerospace and Agricultural Implement Workers of America (UAW) regarding academic student employees (ASEs). This decision package is to request state appropriations for the economic items in the ratified Contract that will result in additional costs on state funds.

## Fiscal Summary

| Fiscal Summary<br><i>Dollars in Thousands</i> | Fiscal Years |                | Biennial       | Fiscal Years   |                | Biennial        |
|---|--------------|----------------|----------------|----------------|----------------|-----------------|
|   | 2024         | 2025           | 2023-25        | 2026           | 2027           | 2025-27         |
| <b>Operating Expenditures</b>                 |              |                |                |                |                |                 |
| Fund 001 - 1                                  | \$543        | \$4,330        | <b>\$4,873</b> | \$5,209        | \$5,317        | <b>\$10,526</b> |
| Total Expenditures                            | <b>\$543</b> | <b>\$4,330</b> | <b>\$4,873</b> | <b>\$5,209</b> | <b>\$5,317</b> | <b>\$10,526</b> |

## Decision Package Description

In 2008 the Legislature approved and the governor signed legislation authorizing collective bargaining rights to academic student employees at Washington State University. As a result, the Coalition of Academic Student Employees (CASE), represented by the UAW, formed in 2023 and began bargaining its first contract. Terms were reached and the contract was ratified by union membership in January, 2024.

These employees are central to WSU’s teaching and research missions. WSU requests state funding to cover costs associated with the university’s state-funded activities. Failure to fund this contract will require budget reductions at the university to accommodate this new obligation. This would be the fourth such round of reductions in five years. Previous reductions have been enacted to respond to softening enrollments, augment state funding to enhance employee cost of living increases, and set tuition rates that on three occasions have been approved at levels below state’s tuition growth factor in order to promote college affordability.

Washington State University requests full state funding for the bargaining agreement in the amount of \$4.87 million for the 2023-25 biennium. The expected need for the 2025-27 biennium is \$10.52 million. Due to an expected fifth year of declining enrollments and net operating fees in FY-2025, WSU requests that the state’s fund split methodology not be applied to this request. WSU does not expect to have additional tuition dollars in FY-2025 to fund the bargaining agreement, and thus would need to reallocate funding away from existing institutional priorities. The state’s fund split methodology anticipating new tuition revenues have routinely resulted in shortfalls, producing COLAs of just 1 percent, 1.5 percent and 2.5 percent for faculty and staff in FY19, FY20 and FY23, respectively. Each required a university budget cut to supplement state funding just to get to these low levels.

Funding this request in whole will ensure that existing WSU activities can be sustained while meeting the requirements of the bargaining agreement.

The current bargaining unit configuration of CASE based on the Public Employee Relations Commission (PERC) interim certification is:

Bargaining Unit 23 - All employees enrolled in academic programs and employed by Washington State University in the following classifications: Graduate Teaching Assistant; Graduate Staff Assistant; Graduate Project Assistant; Graduate Veterinary Assistant; Tutor, Reader and/or Grader in all academic units and tutoring centers; Graduate Research Assistant, and any other student employees whose duties and responsibilities are substantially equivalent to those employees in the described positions; excluding students who have incidental or no service expectancy imposed upon them by the employer, casual employees, confidential employees, supervisors, employees covered under chapter 41.76 RCW, employees included in any other bargaining unit, and all other employees.

The following is a summary of the 2023-2024 WSU/UAW negotiations for an initial Contract. This summary highlights the significant economic items of the Contract. It is not intended to provide detailed information concerning each Article or provision. This decision package is included here to provide a means to request state funding to implement the labor agreement. The term of the new Contract is through August 15, 2026.

### Wages

Effective the first full monthly pay period occurring no more than 90 calendar days from ratification WSU will implement the below minimum salary steps based on assigned work location or provide a 5 percent salary increase, whichever is greater. (Table 1)

| <b>Minimum Salary Step and Monthly Salary at 50% FTE by work location</b> |             |               |
|---|-------------|---------------|
| <b>Location</b>   | <b>Step</b> | <b>Salary</b> |
| Pullman   | 59          | 2,318.50      |
| Spokane, Prosser, Tri-Cities, Wenatchee                                   | 66          | 2,485.50      |
| Mt. Vernon, Puyallup  | 73          | 2,664.50      |
| Vancouver, Everett  | 84          | 2,974.00      |

Effective August 16, 2024 ASEs will receive pay increases based on their education levels, with a 5 percent increase to the base for those Admitted to Doctoral Programs, and an additional 5 percent increase for Doctoral Candidates on top of the location increases noted above. (Table 2)

| <b>Effective August 16, 2024</b>  |                                     |               |   |               |   |               |
|---|-------------------------------------|---------------|---|---------------|---|---------------|
| <b>Minimum Salary Step and Monthly Salary at 50% FTE by work location and educational level</b> |                                     |               |   |               |   |               |
| <b>Location</b>   | <b>Admitted to Master's Program</b> |               | <b>Admitted to Doctoral Program (Nearest step for Master's Program at location + 5% )</b> |               | <b>Doctoral Candidate (Nearest step for Admitted to Doctoral Program at location + 5% )</b> |               |
|   | <b>Step</b>                         | <b>Salary</b> | <b>Step</b>   | <b>Salary</b> | <b>Step</b>   | <b>Salary</b> |
| Pullman   | 59                                  | 2,318.50      | 64  | 2,437.00      | 69  | 2,561.00      |
| Spokane, Prosser, Tri-Cities, Wenatchee   | 66                                  | 2,485.50      | 71  | 2,612.00      | 76  | 2,747.50      |
| Mt. Vernon, Puyallup  | 73                                  | 2,664.50      | 78  | 2,800.00      | 83  | 2,945.50      |
| Vancouver, Everett  | 84                                  | 2,974.00      | 89  | 3,124.00      | 94  | 3,284.50      |

Upon Contract implementation hourly wage rate ranges for the newly created classifications will begin as follows (Table 3)

| <b>Temporary Hourly Wage Rate Minimums</b> |                          |
|--|--------------------------|
| <b>Work Location</b>                       | <b>Wage Rate Minimum</b> |
| Pullman                                    | 17.09                    |
| Spokane, Prosser, Tri-Cities, Wenatchee    | 17.60                    |
| Mt. Vernon, Puyallup                       | 17.94                    |
| Vancouver, Everett                         | 18.28                    |

### **Health Insurance**

WSU currently provides student health insurance to Graduate Assistants. For the 202425 plan year WSU will reduce the plan deductible for preferred providers from \$500 to \$300 and OutofNetwork providers from \$1,000 to \$300. The estimated cost for this change is \$79,000 annually beginning in FY2025, based on preliminary estimates from the existing insurance carrier on how much employerpaid premiums would increase. For the 20252026 plan year, open discussions with the bargaining unit will occur January 31, 2025 through April 15, 2025. WSU may implement a renewal of existing plan if no agreement on plan changes is reached.

### **Building Fees**

ating fees and the nonresident building fee differential for eligible graduate assistants. Beginning August 16, 2025 cost for the building fee waiver is \$335,000 annually beginning in FY2026.

### **Additional Economic Items Not Included in State Funding Request**

The following items are included for informational purposes, but their costs are not included in the funding request.

### **Child and Dependent Care**

Beginning August 16, 2024, eligible ASEs may receive up to the following amounts as a subsidy for child or dependent care expenses incurred during the ASE's appointment period. The university agrees to commit no more than \$150,000 total per year.

- a. Fall Semester: up to \$2,025
- b. Spring Semester: up to \$2,025
- c. Summer Session: up to \$1,550

### **Professional Development and Career Counseling**

Supports ASE application for travel funds for conference presentations, professional and career development, inter-campus travel for up to \$1,500 and encourages mentorship compacts to support professional development.

### **Non-Economic Items**

The following items are included for informational purposes only.

#### **Summer session**

Assistantships and hourly appointments are paid at or above the salary/hourly wage rates established in the Wages Article assistantship. Effective summer 2025, activity-based appointments will be paid at or above the equivalent hourly rate as established by the assistantship salary table in the Wages Article.

#### **Holidays**

Provides 12 paid holidays for eligible ASEs.

#### **Pregnancy/Parental Leave**

Provides up to six consecutive weeks of paid pregnancy/parental leave for eligible graduate assistants.

#### **Vacation Time Off**

Graduate assistants on nine-month, 50 percent appointments are awarded a pool of 48 hours of paid vacation time off annually at the start of each appointment period, to be used during semester breaks or as otherwise approved by their supervisor. Vacation time off expires at the end of the appointment and is not eligible for shared leave donation or pay out. Vacation Time Off is prorated for assistantships by FTE and appointment duration.

#### **Sick Time Off**

Graduate assistants on nine-month, 50 percent appointments are awarded a pool of 36 hours of paid sick time off annually at the start of each appointment period. Sick time off expires at the end of the appointment (for graduate assistants), is not eligible for shared leave donation or pay out. Sick time off is prorated for assistantships by FTE and appointment duration. Temporary hourly employees earn sick leave at a rate of 1 hour to every 40 hours worked.

#### **Leave Without Pay**

Graduate Assistants on nine-month, 50 percent FTE appointment or longer who are approved for leave without pay for care for self will continue to receive university-provided health insurance coverage for up to 12 weeks. For ASEs employed for fewer than two semesters, the amount of unpaid leave will be prorated.

This includes military, jury duty and child care emergency leave and leave without pay for faith and conscience provisions. The University will determine the method of leave/time off tracking.

### **Title IX**



Added Title IX language in accordance with WSU Executive Policy #15 Policy Prohibiting Discrimination and Harassment and amendments.

**Empowering Prevention and Inclusive Communities (EPIC)**

University and the Union will work together to create a peer lead pilot program regarding sexual harassment and prevention training. The University will fund the hiring of one 50 percent FTE ASE to work on the design and implementation of the program

**Layoff**

The university will end or reduce an ASE appointment no sooner than the end of the term/semester for which the notice of layoff is provided. The university will use its best efforts to place the affected ASE on assistantship in another bargaining unit position with a similar term and, if possible, similar compensation

**No Strike No Lockout**

Nothing in the Contract permits or grants to any employee the right to strike or refuse to perform their assigned duties. Nothing in the Contract permits or grants the university the right to lock out employees

The university and the union also agreed on a variety of provisions related to standardizing recruitment and onboarding, including job postings, offer letters, job descriptions, personnel files and orientation as well as providing additional resources to international student employees.

**Assumptions and Calculations**

**Expansion, Reduction, Elimination or Alteration of a current program or service:**

Not applicable: this request will not expand, reduce, eliminate, or alter a current program or service.

**Detailed Assumptions and Calculations:**

Costing for the agreement included two populations within the Coalition of Academic Student Employees (CASE): graduate students on assistantships, and undergraduate hourly employees in certain job classifications.

**Graduate Assistant Costing**

The roster of CASE members who are graduate assistants was identified using a September 2023 employee snapshot from WSU's Workday system. The total unique headcount in this file was 1,478. Since this snapshot's purpose was to represent a full academic year of graduate assistant employment, terms were normalized to nine months and FTE to fifty percent. The resulting beginning salary base had a less than 1 percent variance to total prior year (FY-23) payroll actual expenditures for graduate assistant salaries, so the base was deemed to be a reasonable estimate.

Because the employee snapshot report had no funding information, estimated expenditures by fund were derived from a payroll costing allocation report that the WSU Budget Office uses for modeling salary changes. This report used an October 2022 snapshot and was deemed a reasonable estimate of funding for state funds based on comparison with prior year (FY-23) payroll actual expenditures and WSU's data used in the 2023-25 Compensation Impact Model (CIM) submission to the state. Table 4 shows the estimated percent distribution of graduate salaries to fund.

| Fund                                     | % Salary Base |
|--|---------------|
| 001-General Fund                         | 58.3%         |
| 145-Inst of Hi Ed-Grants/Contracts Ac ct | 27.6%         |
| 148-Inst of Hi Ed-Dedic ated Local Ac ct | 10.0%         |
| 522-Inst of Hi Ed-Associated Students    | 1.7%          |
| 570-Inst of Hi Ed-Other Enterprises      | 0.3%          |
| 846-Grant-In-Aid Scholarship/Fellowship  | 2.1%          |
| <b>Grand Total</b>                       | <b>100.0%</b> |

Costs for the wage-affecting economic items in the decision package were modeled on the salary base and adjusted by the effective date of the item. The estimated building fee waived per graduate student was set equal to the AY 2024-25 annual resident building fee amount of \$389. Health insurance costs were estimated based on preliminary costing provided by the current insurance carrier.

**Undergraduate Student Hourly Costing**

The roster of CASE members who are undergraduate student hourly employees was derived from an October 2022 employee snapshot that was reviewed by WSU, UAW, and PERC. Actual payroll expenditures for these employees were reported from WSU's Workday system and used to inform the percent cost allocation by fund (Table 5) for the new hourly wages and across-the-board increase scheduled for October 1, 2025.

| Fund  | % Salary Base |
|---|---------------|
| 001-General Fund                            | 40.2%         |
| 143-Inst of Hi Ed-Morril-Bankhead-Jones Act | 0.9%          |
| 145-Inst of Hi Ed-Grants/Contracts Acct     | 17.7%         |
| 148-Inst of Hi Ed-Dedicated Local Acct      | 21.1%         |
| 522-Inst of Hi Ed-Associated Students       | 12.6%         |
| 570-Inst of Hi Ed-Other Enterprises         | 2.7%          |
| 573-Inst of Hi Ed-Housing & Food Acct       | 1.5%          |
| 846-Grant-in-Aid Scholarship/Fellowship     | 3.3%          |
| <b>Grand Total</b>                          | <b>100.0%</b> |

**Total Costing of Economic Items for Budget Request**

The total state funds requested for each economic are shown in Table 6. Dollars are rounded to the thousands.

| STATE FUNDS  | 2024           | 2025             | 2026             | 2027             |
|--|----------------|------------------|------------------|------------------|
| April 1, 2024 - New Assistantship Salary Ranges w/Location Pay | 534,000        | 3,204,000        | 3,204,000        | 3,204,000        |
| August 16, 2024 - Education Premium Pay                        | -              | 999,000          | 999,000          | 999,000          |
| October 1, 2025 - 3.00% General Wage Increase                  | -              | -                | 544,000          | 652,000          |
| April 1, 2024 - New Student Hourly Classifications             | 9,000          | 48,000           | 48,000           | 48,000           |
| Enhancement to Graduate Health Insurance Plan                  | -              | 79,000           | 79,000           | 79,000           |
| Building Fee Waived - Lost Revenue                             | -              | -                | 335,000          | 335,000          |
|  | <b>543,000</b> | <b>4,330,000</b> | <b>5,209,000</b> | <b>5,317,000</b> |

The total estimated costs across all funds are shown in Table 7.

| ALL FUNDS  | 2024           | 2025             | 2026             | 2027             |
|--|----------------|------------------|------------------|------------------|
| April 1, 2024 - New Assistantship Salary Ranges w/Location Pay | 915,000        | 5,495,000        | 5,495,000        | 5,495,000        |
| August 16, 2024 - Education Premium Pay                        | -              | 1,713,000        | 1,713,000        | 1,713,000        |
| October 1, 2025 - 3.00% General Wage Increase                  | -              | -                | 955,000          | 1,146,000        |
| April 1, 2024 - New Student Hourly Classifications             | 21,000         | 123,000          | 123,000          | 123,000          |
| Enhancement to Graduate Health Insurance Plan                  | -              | 134,000          | 134,000          | 134,000          |
| Building Fee Waived - Lost Revenue                             | -              | -                | 575,000          | 575,000          |
|  | <b>936,000</b> | <b>7,465,000</b> | <b>8,995,000</b> | <b>9,186,000</b> |

**Workforce Assumptions:**

No assumptions were made with regards to changes in FTEs as a result of this bargaining agreement.

## Strategic and Performance Outcomes

### **Strategic Framework:**

The retention of Academic Student Employees engaged in instruction and research supports the University as it strives to achieve the Results Washington goals of WorldClass Education and a Prosperous Economy.

The retention and recruitment of quality Academic Student Employees supports Washington State University's strategic goals, including:

GOAL 1: Research, Innovation, & Creativity

Washington State University will be recognized for embracing risk and bold thinking to serve the needs of its communities through innovative research, scholarship, and creative activities.

GOAL 2: Student Experience

Washington State University students will engage in scholarship, research, and experiential learning activities to prepare future leaders, scholars, and global citizens.

### **Performance Outcomes:**

This request for funding will increase WSU's performance in research and student success by attracting and retaining quality Academic Student Employees.

## Equity Impacts

### **Community outreach and engagement:**

Successfully recruiting and retaining staff supports the University's mission. In addition, compensation enhancement helps the university recruit and retain a diverse staff in an incredibly competitive environment. Funding this request is expected to have positive impacts on its diverse student body and address inequities in the following ways:

- Recruiting top diverse graduate students in a competitive environment
- Decreasing inequity in pay across academic student employee positions
- Ensuring a level of wages and benefits to meet needs of students who do not have alternative income sources
- Supporting graduate students, as well as undergraduate students who are served by them, in their educational pursuits
- Continuing WSU's research mission, with better packages to recruit top graduate research assistants

### **Target Populations or Communities:**

Please see response above regarding equity impacts.

## Other Collateral Connections

### ***Puget Sound Recovery:***

Not applicable.

### ***State Workforce Impacts:***

Not applicable, as this request concerns a new collective bargaining agreement.

### ***Intergovernmental:***

Not applicable.

### ***Stakeholder Response:***

Not applicable.

### ***State Facilities Impacts:***

Not applicable.

### ***Changes from Current Law:***

Not applicable.

### ***Legal or Administrative Mandates:***

Not applicable.

### ***HEAL Act Agencies Supplemental Questions***

Not applicable.

## IT Addendum

### ***Does this Decision Package include funding for any IT-related costs, including hardware, software, (including cloud-based services), contracts or IT staff?***

No

## Agency Contact Information

Chris Jones  
(509) 335-9682  
chris.jones@wsu.edu



Dollars in Thousands

**ABS031 Agency DP Priority (PL)**  
**(List only the program Policy Level budget decision packages, in priority order)**  
**365 - Washington State University**  
**2024 First Supplemental Budget Session**  
**24\_SPLR - 2024 Supplemental Request**

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**Decision Package**

**Code**

**Decision Package Title**

PL-SC

Supply Chain Management Degree

PL-GB

Academic Student Empl Bargaining



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## Fund Balance Management

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**Provide a narrative summary of the historic management and uses of accounts 148 and 149, including an explanation of any reserve or working capital policies that govern fund balances in these accounts. If your institution does not have a reserve or working capital policy, please explain why.**

Fund (account) 148 includes self-sustaining activities which promote the education, research, and public service missions of the University. In total WSU has about 2,100 separate accounts of this nature.

Primary fund 148 revenue sources include self-sustaining activities such as summer session, facilities and administration (F&A) recoveries on contracts and grants, and other sales, services, and fees revenue.

Examples of some of the key types of self-sustaining activities accounted for in fund 148 by the various state programs are as follows:

**Instruction** includes program fees for WSU summer session and WSU's highly ranked online self-sustaining MBA program.

**Public Service** includes various conferences, institutes, and certificate programs, as well as the Washington Animal Disease Diagnostic Laboratory (WADDL) and Beasley Coliseum operations.

**Primary Support** includes instructional support activities such as the WSU creamery, veterinary teaching hospital and clinical operations, and office of research activities such as vivarium services and research centers.

**Institutional Support** includes the university development office and the enterprise system teams that manage WSU's student and financial information systems.

Tuition (account 149) plus state appropriations comprise WSU's core operating funds. A little over 80% of tuition is spent programmatically for instruction, academic and student support and libraries. About 85% of pooled state and tuition funding supports salary and benefits of WSU employees. Faculty provide students with the very best instruction, access to research, and mentoring opportunities that often define their academic careers. Staff members serve students throughout their learning experience with advising, counseling, financial aid, course registration, libraries, custodial, and campus safety, as well as core services such as information technology, payroll, accounting, and compliance.

The WSU Executive Policy Manual addresses budget responsibility in Executive Policy #1. In this policy, vice presidents, deans, directors, principal investigators and other administrators have the authority and responsibility to manage the budgets of the units they administer, including reserve balances.