Western Washington University begins the year 2014 in a strong position in many ways. However, as always, internal challenges to maintaining that position present themselves, as do opportunities to further strengthen that position and external threats to that position. This document will view those strengths, challenges, opportunities, and threats at a strategic level, with a view toward guiding the University’s thinking concerning its strategic plan and any need to update that plan.

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
<td>Outreach</td>
</tr>
<tr>
<td>The Liberal Arts and Sciences Foundation</td>
<td>Niches</td>
</tr>
<tr>
<td>Programs</td>
<td>Resources</td>
</tr>
<tr>
<td>Partnerships</td>
<td>Diversity</td>
</tr>
<tr>
<td>Processes</td>
<td></td>
</tr>
<tr>
<td>Values</td>
<td></td>
</tr>
<tr>
<td>Reputation/Position</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHALLENGES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources</td>
<td>Demographics</td>
</tr>
<tr>
<td>Diversity</td>
<td>Competition</td>
</tr>
<tr>
<td>Mission</td>
<td>Affordability</td>
</tr>
<tr>
<td></td>
<td>Campus Safety</td>
</tr>
</tbody>
</table>

**STRENGTHS**

- **People**: Western’s primary strength is its people: faculty, staff, students, alumni, and supporters. As a knowledge-centered organization, it cannot function at a high level without such a strength.
  - **Faculty**: Western’s faculty as a whole combines the passion for undergraduate education with a drive to conduct important research; in fact, many faculty see these aspects of education as inextricably linked. Further, Western’s faculty are committed to opening experiential opportunities for students, whether that be as research partners or as guides and mentors for students working in the community. Finally, Western’s faculty are committed to helping students fulfill the tag line “Active Minds Changing Lives” by working closely with them to provide the knowledge, skills, and abilities students need to fulfill their world-changing dreams.
  - **Staff**: Western’s staff in all areas understand and embrace the University’s academic mission and their role in supporting that mission. Whether their roles be student advising, facilities maintenance, advocacy with supporters and legislators, or the myriad others necessary to give students the best possible learning environment, staff through the University work with that goal in mind.
  - **Students**: Western continues to attract quality students, and the student body is becoming increasingly diverse. These students, who come to Western to learn how to make a difference in society, attract the strong faculty who in turn attract strong students in a symbiotic relationship. Student diversity, an important element in a well-
rounded education both in class and out of class, continues to increase, with all-time high in the fall 2013 class in the percentages of students of color (22.3%) and non-resident students (9.6%).

- Alumni: Western’s alumni display a strong commitment to their alma mater. This commitment manifests itself in several aspects of alumni support, whether it be the hiring of graduates, speaking in classes, mentoring, networking, or financial support. Alumni play a crucial role in the success Western students attain.
- Supporters: An increasing number of successful people in the Puget Sound area and beyond support Western even if they are not alumni. These people are attracted to Western because of its orientation and philosophy of education, its faculty, and its students. As with alumni, they support Western in many ways and often provide a margin of excellence that otherwise could not be reached.

- The Liberal Arts and Sciences Foundation: Western’s core values embrace the importance to all students of a strong educational base in the liberal arts and sciences. All colleges recognize the value of and support instruction in these base areas. Many of Western’s most effective teachers, whether they be tenure-track or non-tenure-track faculty, concentrate their efforts in this area.
- Programs: Western’s academic programs are well known for their strength in terms of preparing students for graduate-level education and challenging careers as leaders in their fields.
  - Discipline-based majors: In every college and in most departments, Western’s major programs provide students with great preparation for their careers, whether those careers be in the public sector, the private sector, education, or the not-for-profit sector. Students graduating with these majors are highly sought after by organizations and graduate programs.
  - Interdisciplinary programs: Western is highly unusual among institutions of higher education in having faculty and students who embrace the crossing of disciplinary lines. This is most obvious in two intentionally interdisciplinary colleges—Fairhaven College of Interdisciplinary Studies and Huxley College of the Environment. However, increasingly Western faculty are taking advantage of the freedom to explore such programs to work with colleagues from multiple colleges in subjects that leak outside the disciplinary silos, such as the Institute for Energy Studies. Western has committed to supporting such efforts with faculty governance and administrative infrastructure.
- Partnerships: Western understands it is embedded in multiple societies, both geographic and professional. It reaches out to partner with individuals and organizations in these societies to enhance its ability not only to fulfill its mission but to play its role as a publicly purposed institution.
  - Western is a leader in working with other educational institutions along the entire P-20 spectrum. Curricular programs operated through Woodring College of Education and others, outreach programs such as Compass2Campus, the Northwest Higher Education Coalition, and Western's partnerships with community colleges in the Puget Sound region and the Kitsap and Olympic peninsulas all help Western and its partner institutions further access to higher education.
  - Western is committed to effective partnerships with institutions of higher education from other countries. Exploration of these partnerships has accelerated. Infrastructure is being built to ensure that Western’s faculty and students have the opportunities they
need to gain a global perspective, whether through travel abroad or through interactions with exchange and other partners on Western’s campus.

- Western works closely with organizations in the Bellingham community and throughout Puget Sound in areas such as economic development and the ongoing development of the Bellingham waterfront. This is another area in which Western has invested in infrastructure to be more effective in forming and sustaining these partnerships.

- Processes: Western has worked hard in several areas to institute processes that enable efficient work and effective participation in University decisions.
  - Western instituted over the last five years processes and bodies that help to ensure the reality of shared governance matches its promise. These include the operating and capital planning and budgeting processes that intentionally seek input throughout from the campus community, as well as the University Planning and Resource Council that brings together representatives of all University stakeholders.
  - Western has conducted and continues to conduct various analyses to help streamline processes throughout campus. Further, it has instituted a process by which initiatives to increase functionality and ease of use of its Banner ERP software can be proposed and implemented.
  - Western is an innovative campus, one that works hard to be understanding of and adopting best practices, and even to be in the forefront of movements that allow institutions of higher education to be more efficient and effective.
  - Western has strong systems of accountability at all levels, for faculty, staff, and student behaviors and performance.

- Values: Western has a strong commitment to its core values and is very successful at living those values as an institution.
  - Western shows its commitment to sustainability through initiatives in many areas. Students lead many of these initiatives, as do staff and faculty within and across multiple divisions at the University.
  - Western has a strong belief in engagement with employees of all types. One example of the University’s acting on this belief is the involvement of representatives of all employee groups on bodies such as the University Planning and Resource Council and President’s Cabinet.
  - Western commits itself to a vibrant culture of student and employee health and safety. The Wade King Student Recreation Center and the Employee Wellness Program foster stakeholder health, and University Police and Environmental Health and Safety work to keep the workplace and study place as safe and conducive to good health as possible.
  - Western holds diversity of faculty and staff as a core value. In pursuit of that diversity, the University has committed funds designed to hire and retain faculty and staff from underrepresented groups, including bridge funding for opportunity hires that will increase the University’s commitment to diversity.

- Reputation/Position: Western as a university, and individual programs, carry strong reputations locally, regionally, and nationally. These well-earned reputations open doors to Western faculty, students, and staff; they also attract the interest of prospective faculty, students, staff, and supporters. In a virtuous circle, Western’s strengths—along with its consistent communication
about those strengths and Western’s mission—build its reputation, attracting people of quality, who then help Western’s strengths become even stronger.

CHALLENGES

- **Resources:** Western made the intentional choice during the recent recession and resultant budget cuts to protect its core academic function of teaching, and continued student access to that teaching, as much as possible; it then, as the economy recovered, made the choice to increase faculty resources through the hiring of tenure-track faculty in the last few years. This decision has had positive consequences, as the quality of its programs has been maintained and enhanced. However, the decision’s side effects in two areas mean the University has two distinct challenges related to resources. Other resource-related challenges also exist.
  - **Staffing:** Most if not all areas of the University are operating with as lean a staff as possible. In some cases it is likely that staffing levels are not sufficient for performance to be sustainably high. Some staff are attempting to perform, in addition to their own jobs, functions that previously were assigned to staff positions that no longer exist. These issues have effects on performance that may be exacerbated by lowering morale among staff. Classified staff increasingly feel marginalized at the University. The lack of staff affects important student metrics such as retention rates and time to degree; more important, it affects the lives of the students Western pledges to serve as well as the faculty and staff who are serving those students.
  - **Operating dollars:** The need to maintain access has caused some academic units to shift funds from operating dollars (those covering goods and services, travel, equipment, and other non-personnel expenses) to personnel, in particular faculty expenses. It also has caused the other divisions on campus to give up resources to Academic Affairs. To make up for these cuts, divisions have used creative ways to fund operations, but there are limits to that creativity.
  - **Workforce maintenance:** Besides the workforce challenges mentioned under staffing, in all areas the workforce is aging. Over the next several years, as the large number of faculty and staff in the Baby Boom generation retire, their expertise, experience, and institutional knowledge will be taken with them. Because resources are lacking, many, particularly in staff positions, cannot receive training that would help managers and administrators engage in professional development of younger staff as part of succession planning. Departments will face the possibility of changes in departmental, college, or even university culture with the replacement of Baby Boom-aged faculty and staff by their younger successors.
  - **Infrastructure:** Western has many relatively recently constructed buildings. However, many are older and in need of substantial maintenance and upgrade work. To the extent this work is deferred, programmatic needs may not be met and basic building performance may be compromised. Technology infrastructure also is in need of support as investments have not been possible for several years.

- **Diversity:** Western’s commitment to diversity in its faculty, staff, and student body is strong. However, challenges do exist in this area.
  - **Demographics:** although Western continues to increase its numbers of faculty, staff, and students from underrepresented groups, that progress has reached neither the level nor
the velocity desired. Competition for faculty, staff, and students from underrepresented groups is strong. This factor is likely to become stronger, at least in terms of students, as the trend of underrepresented groups forming an increasingly high percentage of high school graduates continues.

- **Climate:** Western views itself and is viewed for the most part as a welcoming community. However, perceptions of the climate reported by faculty, staff, and students from underrepresented groups are not as positive as is desired. The reputational effect may very well contribute to difficulty in attracting people from underrepresented groups, and the perceptions may contribute to difficulty in retention.

- **Mission:** Generally Western’s mission and strategic plan are clear and embraced by the faculty and staff. However, five aspects have been sources of concern or questions and need to be addressed.
  - **Graduate programs:** Western is proud of its place as a premier undergraduate-centered university. It also has recognized historically that graduate education can enhance the undergraduate experience in a number of ways, meaning that investment in graduate education is also investment in undergraduate education. The emphasis placed on undergraduate education, however, does cause questions on the relative role to be played and relative emphasis to be placed on graduate education.
  - **Scholarship and creative activity:** Western is often described as a university that values both teaching and research (broadly defined to include both scholarship and creative activity). In fact, a highlight often mentioned to visitors is that Western faculty engage their undergraduate students in research, both in and out of the classroom, to a degree unusual in universities of any type. However, Western’s support for research activity lags behind aspirant peer schools, and its message to the outside community typically concentrates heavily on its teaching mission.
  - **General education:** As mentioned previously, the liberal arts and sciences are the core of all Western education. The nature of that core, as embodied in the General Education Requirements, is in question. Students historically have not seen the value of Western’s general education program until well after graduation; instead, they see it as a series of check boxes to fill out. Multiple attempts to revise either the program or its narrative have not materially improved student perception, and satisfaction with the general education program continues to be markedly lower than that with other aspects of the Western experience.
  - **Extended education:** Many on Western’s campus interpret its mission as primarily, indeed almost exclusively, focused on programs on the Bellingham campus delivered with state support largely by tenure-track faculty. This has been Western’s focus since its beginning and a major source of its competitive advantage, although a few programs have served non-traditional populations through extended education. A growing number of people advocate interpreting Western’s mission as including non-traditional delivery of a Western education, including mode of delivery and location, without losing a focus on what Western traditionally has done very well.
  - **International:** Western’s mission seems to many on campus to point to a strong international program by highlighting the world as one community Western serves as well as proposing to bring together people of diverse backgrounds and perspectives.
However, although structure has been put into place to accomplish more internationally, international programs and partnerships have lagged behind in growth due to several factors.

- **Student Demand:** As with many four-year higher education institutions, Western has some difficulty in responding quickly to shifting trends in student enrollment. It must find the balance between flexibility and stability, and it must detect the difference between a true trend and a one-time event. Such a true trend, evident over the last several years, is a shift in demand toward the sciences. Western’s challenge is to maintain a high level of access to accommodate that shift in the current or any future model of allocation of resources.

- **Risk Management:** The University has strong Internal Audit and Risk Management functions. These functions can be strengthened through better integration at the strategic and operational levels. At the strategic level, Enterprise Risk Management could more formally be incorporated into the planning process. At the operational level, risk management could also be more formally part of any audit findings to help units effectively and efficiently respond to such findings. These changes will provide better information to the Board of Trustees’ Audit Committee.

**OPPORTUNITIES**

- **Outreach:** Western’s strong reputation, built on the strengths described above, allow it to work externally with individuals and groups that can enhance the quality of its education. There is a wide variety of such individuals and groups covering all sectors of society. Many are highly interested in working with Western in ways that involve and help students.
  - P-12 Schools: Public schools are going through demographic and other changes. Their knowledge of Western through existing successful programs such as Woodring College, SMATE, and Compass2Campus (as examples) provide Western with the chance to extend these and other programs further into Washington’s schools. Western can thus help the schools prepare students for college, benefiting the community with the likely side effect that many of those students will be interested in attending Western.
  - Higher education: Western’s leadership in the Northwest Higher Education Coalition gives it a forum from which to help shape and indeed model the collaboration among all types of higher-education institutions in the region. Additionally, Western administrators have taken on leadership roles in statewide organizations, including the Council of Presidents. These forums allow Western to promote its values statewide and to influence the conversation about higher education in Washington.
  - Community: Western is increasingly recognized as an important element in the development of the Bellingham/Whatcom County community. For example, Western has been and will continue to be an important participant in conversations about the future of the Bellingham Waterfront. This participation allows Western to have a measurable impact on any development and possibly locate programs that will expand student and faculty opportunities within the community. Western also took the lead in a planning process funded by a grant for emergency planning with other county institutions and has worked with Whatcom Community College and Bellingham Technical College to develop a joint position in this area. With increased permanent
presence in Seattle and Everett and on the Kitsap Peninsula, Western also has the opportunity to play important and similar roles along both sides of Puget Sound.

- Economic development: Western units have played important roles in economic development in Whatcom County for many years. However, Western now is looked to as a leader in conversations about economic development. Further, Western’s interest in partnerships off campus has encouraged community organizations, particularly those that promote innovation and entrepreneurship, to desire partnerships with Western and access to Western expertise and creative thinking. These types of partnership can give students and faculty experience and entrepreneurial opportunities.

- Private and NGO sectors: Western’s students have become increasingly involved in experiential learning, with positive results for the organizations with which they have worked. This creates continuing opportunities to expand experiential learning programs, be they internships, class projects, service learning, or co-curricular programs run through student clubs or other organizations.

- International: Western’s growing reputation opens doors abroad to possibilities for student and faculty exchange, faculty-led study abroad experiences, and perhaps even joint degree offerings. All of these possibilities would strengthen Western’s internationalization efforts.

- Donors: Western’s Foundation has had success in its comprehensive campaign. However, further opportunities exist as more alumni of financial means are discovered and Western’s programs and philosophy appeal increasingly to non-alumni of means.

- Niches: Western has many strong programs that fill niches in their fields, defined as areas of specialization outside the usual practice—programs that specialize in preparing students for graduate school, programs that educate students to fill particular slots in a field or an industry. Two further possibilities are available:
  - Interdisciplinary programs: Organizations in all sectors look increasingly for their leaders to people who can see multiple perspectives, a skill that is intentionally and naturally developed through interdisciplinary education. Western’s development of successful interdisciplinary programs, and the interest and capability of its faculty to work across disciplines, could give students the chance they would like to have. It is beyond this analysis to suggest specific areas or structures, but multiples of each are possible.
  - International: Western is devoting resources to studying the best strategy to approach internationalization of the University and implementing infrastructure enhancements in this area. In particular Western, because of its location, alumni, and connections already made, has a strong opportunity to partner with institutions in eastern and southern Asia.

- Student Demand: If shifts in student demand pose a challenge, they also present an opportunity for Western’s strong science programs to further serve the needs of the state, and do so in a way that continues to highlight the advantages of a Western, liberal arts-and-sciences based education. If Western can find the right balances, it could not only better meet the needs of students and employers, but contribute substantially to the well-being of the state by educating students who will become leaders in their fields.

- Resources: The Washington State Legislature increasingly understands the role of higher education in the state, in multiple areas including economic development and strengthening
society. More specifically, the Legislature has recognized Western’s high quality—during the recession by not cutting Western’s budget as extensively as those of other institutions, and more recently by increasing Western’s budget to a greater extent than those of other institutions. The Legislature also funded several Western initiatives. Western has an opportunity to build on that support in seeking additional funding.

- Diversity: Although demographic issues pose both challenges and threats to Western, they also give opportunities. Western can be a leader in adjusting to the new demographics, becoming more attractive to the most richly diverse population in the state going forward. In doing so, Western can further fulfill its mission of serving the state by giving those students a Western-quality education.

THREATS

- State Fiscal Capacity: The state’s fiscal structure is designed for an economy that no longer exists. Unless there is the will to fix the tax structure, improvements in the state’s economy do not produce corresponding revenue increases. On the expenditure side, states are facing major budget impacts as the federal government shifts various obligations to the state level. Additionally and specific to our state, the need to comply with State Supreme Court directive to significantly increase funding for K-12 education places an additional major burden on the already broken and overburdened revenue structure. Most of the state’s budget is protected from significant cuts because of constitutional, political, or statutory considerations. Cuts thus will have to come from the remaining minority portion of the budget; most of the money in that portion is in the social services and higher education sectors. Higher education, historically and in the current political configuration of the legislature, largely loses in that competition. Consequently, for the next biennium, our current best estimates are that higher education will once again face budget reductions, perhaps as bleak as any we have seen in the past decade. We will not have the same capacity to compensate for those reductions with tuition increases of the magnitude seen in 2009-13 because of market, political, and (possibly) statutory constraints.

- Demographics: Some demographic trends pose a threat to Western’s traditional student population of students from middle- and upper-middle class families. To the extent that these trends threaten Western’s traditional student population, without action they also threaten Western’s ability to deliver the high-quality education it has become known for.
  
  - Numbers: The number of graduates from Washington’s high schools has declined from its peak a few years ago. It will not reach the peak level again for several years. In combination with the changed competitive environment (see below), this promises to push either the number or the quality of Western students (quality as measured by Admissions Index scores) down from their current levels. If demographic trends that show a higher percentage of high school graduates coming from groups that have historically had low college-attendance rates, it is possible that the actual number of high school graduates interested in attending four-year universities will decline further than the overall number of high school graduates.
  
  - Enrollments and Revenues: Western already is seeing the effects of the dynamics identified in the preceding bullet. The University had to expend substantial effort to sustain enrollment levels for Fall 2013. Even with similar efforts, enrollments for Fall 2014 could possibly drop by between 100 and 150 students. Given Western’s reliance on tuition to
cover 70% of the costs of instruction, there is a $1 million loss of revenue for each enrollment drop of 129 full-time students. Any such revenue decreases would have to be matched by permanent base budget reductions; such reductions logically would be targeted at course offerings, as there would be fewer students under such a scenario.

- Student Support Services: A growing number of students accessing high education are bringing complex personal and academic barriers that require additional support. These challenges leave the individual student at risk of not completing his or her undergraduate degree. Support services ranging from increased academic advising to mental health services will need to be evaluated as a part of investing in the achievement of both individual graduation goals and statewide achievement goals.

- Competition: Several aspects of the competitive environment are changing. Some changes are in response to the demographic trends mentioned above, and some are in response to resource constraints arising from the recent recession. Most of these trends are linked to maintaining or increasing enrollment and tuition dollars. Other aspects of the competitive environment are changing due to other trends, including technology and private support.
  - In-state students: Four-year institutions, noting the demographic trends mentioned previously, have begun to offer greater incentives of different types for high-potential students to enroll at their institutions. The University of Washington has increased the number of in-state students it will enroll. Some two-year institutions have begun to offer four-year degrees called bachelor’s of applied science that have similar titles to degrees at four-year institutions.
  - Out-of-state and international students: These populations have become increasingly attractive for several reasons: They increase the diversity of student populations, they fill seats not being filled by in-state students because of the demographic trends, and they bring additional revenue through tuition premiums (even if those premiums are reduced through incentives such as tuition waivers). For students within the United States, the competitive pressure is compounded: each institution is recruiting out of state, so institutions are competing with each other in multiple geographic markets, each trying to retain its own in-state students and poach the other institution’s in-state students. The international population faces similar pressures, although because of the continued prestige of a U.S.-based degree, the pressures are somewhat less.
  - Technology: Developments in technology, particularly information technology and access, allow the opportunities to gain an education to multiply. The traditional face-to-face education that has been Western’s competitive advantage for many years may become less important to students as a result. Massively open online courses, or MOOCs, may evolve from their current form to something that is more of a threat to traditional education. Finally, the sense that technology allows for increased alternatives to formal education may grow, reducing demand for what Western provides.
  - Private support: As state support diminishes and the ability to afford a college education diminishes (trends discussed below), private support becomes more important in three areas for Western: student support, basic operations, and provision of the margin of excellence. Scholarship dollars, donor time and funds to support necessary initiatives, and supporter time and funds to make good programs best-in-class all are important. However, competition for time and dollars has increased and will continue to increase from at least two sources: other institutions of higher education, and the not-for-profit
sector more generally, which relies on the same finite reservoir of time and dollars as Western with similarly increasing needs.

- Compensation: Western’s faculty and administrative salaries have historically varied from relatively competitive within the market to far below market, depending on the discipline of hire. Although the University has made efforts to increase the competitiveness of its faculty and administrative salaries, the wave of retirements mentioned previously will not just be a phenomenon at Western. As faculty and administrators from the Baby Boom generation retire, the competition to replace them will be heavy, especially for race and gender diverse candidates. As private institutions increase fund-raising and tuition to fund increased salaries, and as research institutions increase reliance on self-sustaining funds to augment state support, Western may find it increasingly difficult to attract the quality of faculty and administrators on which it depends for its excellence. Further, classified staff have had no cost-of-living increases in the value of steps in their salary structure since 2008. As a result, our ability to attract quality applicants has been reduced, and we are seeing a potential erosion in Western’s ability to retain qualified and competent staff in these vital positions. Finally, Western’s professional staff received their first salary increases in more than four years in 2013; again, Western’s ability to attract and retain these important staff is increasingly compromised by the lack of salary increases; this same lack is negatively affecting employee morale.

- Mission: Western is proud of its mission as a liberal-arts-and-sciences based institution of higher education. However, the value of such an education is increasingly questioned by some outside the academy, and even some within the broader academic community. Education in the areas of science, technology, engineering, and mathematics (popularly known as STEM) is seen as opposed to the type of education upon which Western prides itself. Western must be aware of any threats this view causes and be ready to assert the foundational importance of a liberal education without thereby denigrating focus in STEM and other areas.

- Campus Safety: University campuses across the country have seen an increased number of violent incidents. As well, natural disasters have increasingly hit campuses. Western is in an area prone to earthquakes and threatened by tsunamis; as with all organizations, it is in danger of suffering through acts of violence from multiple sources. As a repository of information, much of it personal in nature, Western also is vulnerable to cyberattack.