

**10-Year Roadmap  
Activity Work Plan  
February 25, 2013**

**Stable and Accountable Funding**

<b>Challenge Area</b>	<b>Stable and Accountable Funding</b>
<b>Planning Activity</b>	Develop a public higher education plan of financing which addresses sustainable funding sources and defensible funding benchmarks.
<b>Lead Members</b>	Marty Brown and Paul Francis
<b>Staff Team</b>	Jim Reed, Lead, Rachelle Sharpe, Larry Lee
<b>External Resources</b>	Marc Webster – OFM, Denise Graham, Nick Lutes – SBCTC, Violet Boyer – ICW, Jane Wall, COP, Steve Trotter - TESC Joan King - WSU

<p><b>Scope</b></p> <p><b>Policy Issues and Legislative Reference</b></p> <p>The legislature has charged the Council with the responsibility to propose, to the governor and the legislature, goals for increasing educational attainment in Washington and, to recommend the resources necessary to achieve those goals.<sup>1</sup></p> <p>To do so, the Council is to articulate fiscal priorities, strategies, and funding recommendations in two ways which align with the state’s budgeting cycle:</p> <ol style="list-style-type: none"> <li>1. Identify fiscal <i>priorities and strategies</i> for meeting the goals as part of a Ten-Year Roadmap. The 10-Year Roadmap is to be submitted to the legislature and governor by December of each odd-numbered year.<sup>2</sup></li> <li>2. Submit as part of a short-term Strategic Action Plan, budget recommendations for major policy changes<sup>3</sup> in accordance with priorities set forth in the Ten-Year Roadmap. The council is to update the Strategic Action Plan and submit it to the governor and legislature by December of each even-numbered year.</li> </ol> <p><b>Question(s) to be Addressed in the Ten-Year Roadmap</b></p> <p>What are the relative priorities of the strategic objectives and actions recommended in the Ten-Year Roadmap within the Readiness, Affordability, Capacity and Success, and Technology Challenge Areas?</p> <p>Which of those prioritized strategic objectives and recommended “milestones” would have a fiscal implication representing a funding policy change?</p> <p>What financing strategies and plan can be identified to respond to those policy change funding needs in a stable and accountable manner?</p>
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<sup>1</sup> See the attached summary of the provisions of E2SHB 2483 concerning the Council’s duties pertaining to fiscal priorities and budget recommendations.

<sup>2</sup> See attached illustration: Conceptual Organization of the 10-Year Roadmap.

<sup>3</sup> In the context of state budgeting, “*policy changes*” are adjustments above or below the adjusted carry-forward, or maintenance level, of prior biennium appropriations.

## Methods

1. Comparative state-level and peer institution data will be based on the GCS Peer Institution Report by the OFM/ERDC, the 2012 State Higher Education Finance report published by the State Higher Education Executive Officers Association (SHEEO), as provided by the Office of Financial Management.
2. Washington state higher education funding and enrollment data (FY 2000-FY 2013) will be based on historical budget information provided by the Legislative Evaluation and Accountability Program (LEAP)
3. SNG enrollment and funding projections from the WSAC

## Key Stakeholders:

- Governor's Office
- Higher Education Legislative Committees
- Legislative Fiscal Committees
- Public and Independent Institutions of Higher Education
- Student Associations and Representatives
- Faculty Representatives
- Business Leaders

## Schedule:

Task	Complete By (month/day)
1. Finalize Work Plan with Council Leads	4/1
2. Workgroup meeting to review Work Plan	4/10
3. Workgroup work session to review preliminary Roadmap objectives/actions and relationship to Stable and Accountable Funding recommendations.	5/25
4. Draft Issue Briefing for review by Workgroup and Lead Council members	6/14
5. Revised Issue Briefing reviewed by stakeholders	6/28
6. Final edits	7/5
7. Issue Briefing transmitted to Council	7/10
8. Issue Briefing presented to Council	7/17
9. Workgroup review of Council discussion	7/24
10. Draft Policy Recommendations for review by Workgroup and Lead Council members	8/16
11. Revised policy recommendations for review by stakeholders	9/5
12. Final edits of Funding Recommendations	9/12
13. Recommendations transmitted to Council	9/17
14. Recommendations presented to Council	9/24

## **Council Fiscal Recommendation Duties per E2SHB 2483**

### **Section 103**

(1(a))The Council is to propose to the governor and the legislature goals for increasing educational attainment in Washington, recommend the resources necessary to achieve the goals, and monitor progress toward meeting the goals;

(2(c)) The roadmap must outline strategies that address... Higher education finance planning and strategic investments including budget recommendations necessary to meet statewide goals;

### **Section 104**

(1)The council shall identify strategies for meeting the goals and priorities by means of a short-term strategic action plan and a ten-year plan that serves as a roadmap.

(1(b))The council shall identify the resources it deems appropriate to meet statewide goals and also recognize current state economic conditions and state resources.

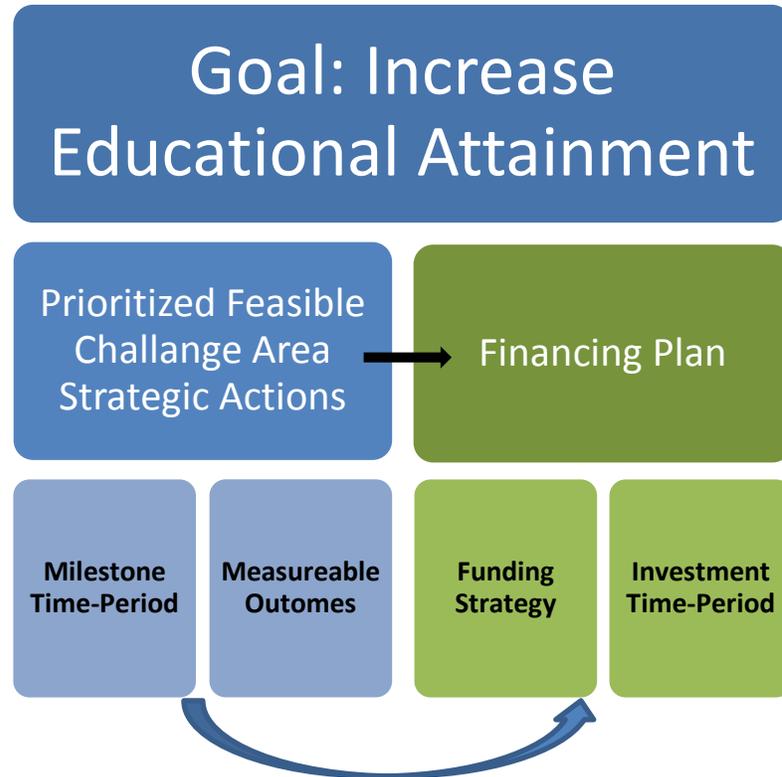
### **Section 110**

(1)It is the intent of the legislature for the council to make budget recommendations for allocations for major policy changes in accordance with priorities set forth in the ten-year plan, but the legislature does not intend for the council to review and make recommendations on individual institutional budgets... It is the intent of the legislature that recommendations from the council prioritize funding needs for the overall system of higher education in accordance with priorities set forth in the ten-year plan. It is also the intent of the legislature that the council's recommendations take into consideration the total per-student funding at similar public institutions of higher education in the global challenge states.

(2) By December of each odd-numbered year, the council shall distribute guidelines which outline the council's fiscal priorities under the ten-year plan....

(3) The council shall submit recommendations on the operating budget priorities to support the ten-year plan to the office of financial management by October 1st each year, and to the legislature by January 1st each year.

## Conceptual Organization of 10-Year Roadmap



### KEY PRECEPTS

- The Council would review the various policy planning options identified within the Student Readiness, Affordability, Capacity and Student Success, and Technology Challenge areas.
- This review would first focus on the feasibility of policy options and the relative priority of those options deemed feasible. Specific **Strategic Action(s)** for those options would then be articulated.
- Milestone *Time-Periods* for implementing the **Strategic Actions** within the 10-Year Planning period would then be identified, along with *Measurable Outcomes* and the time-period of those outcomes.
- The Financing Plan of the 10-Year Roadmap would follow from, and be determined by, the prioritized Strategic Actions.
- For those Strategic Actions which have a fiscal impact requiring funding above current levels, a **Funding Strategy** would be determined. An **Investment Time Period** would then be identified based on the Milestone Time-Period of the prioritized Strategic Action.
- Adjustments in the 10-Year Roadmap Strategic Actions and specific budget recommendations would then be made, as provided in statute, in the 2014 Strategic Action Plan.