

S&A Annual Financial Report Questionnaire

CWU Office of Case Management

- 1. Please provide an explanation of how the program plans to spend the budget in each line item of the Annual Financial Report. Items that are vague, such as "contract services" should be clearly explained. Please include an explanation of increases or decreases from the previous year's expenses.**

All S&A funds for the Office of Case Management go toward salary & benefits for two of the four Case Management team members.

- 2. What was your fund balance at the end of the year? If positive or negative, please provide a detail explanation.**

Our fund balance (positive) at the end of this past fiscal year totaled \$45,408. This balance was as a result of application of salary savings accumulated during a timespan in which one position was unfilled for multiple months. It was then determined that this \$45,408 would be applied to cover the changes involved in salary/compensation when one Case Manager was promoted to the new position of Assistant Director of Case Management in April 2018 (creating a vacancy for an additional Case Manager).

During this funding cycle, it is understood that any overages or negative balances will be reconciled within the Student Success Division to cover any potential shortfalls (e.g. salary increases or other unanticipated expenses).

- 3. Have alternative (non-S&A Fee) funding sources been pursued to the fullest possible extent? If yes, please elaborate. Please list all funding received for this program and the source(s) of the funding.**

Yes, most recently we've submitted the positions supported by S&A funds to be considered for state budget funds as a continuous source for FY 2021. It is unknown at this time whether this application will be considered and will not have an impact on the current 2019-2020 funds.

In addition to our S&A funds, we are also funded by state dollars in the amount of \$190,025. These funds are used to cover the salary/compensation of our other 2 team members, staff professional development opportunities, and general operating costs for the Office of Case Management.

- 4. Are there any long-term obligations or contracts associated with this funding request?**

No

- 5. Does your program provide employment opportunities for students? Please explain the nature of student employment within your unit, including total FTE and number of students employed.**

The program has never had student employees, though this would be something we'd love to grow into the program in the future.

- 6. How many students utilize the services and activities provided by your program? Describe how statistics are obtained and provide demographics as applicable.**

For Fall of 2019, 348 new student referrals were made for Case Management and an additional 312 were ongoing care contacts from previous quarter(s) of contact for a total of 660 individual students in Fall 2019 (9/1/19-12/15/20). We have used a Case Management Database, built in 2012-2013 and supported by CWU IT Professional Marion Andrin, which allows us to run quarterly and annual reports. As of this date (1/17/20), we are now using a new documentation system ("Guardian") and will hope to continue providing reports with similar data and improve other elements of data collection, especially related to demographics of our students receiving CM services. We have recently provided multiple years of data to generate a bigger picture of our students in CM services with CWU specialists and will be getting follow up reports in the upcoming months.

- 7. How do you assess the effectiveness of the services and activities you provide to students? Is student input collected and used in this process?**

While we have not had a consistent measure to assess effectiveness of our services, we have a significant number of stakeholders across campus (academic and otherwise), not to mention students, who can (and do) provide qualitative feedback regarding impacts of services for our students. It is our goal to utilize a more general survey tool to align with similar departments for data collection and outcomes in the near future.

- 8. Does your program have an advisory committee? If so, in what capacity is it involved in your budgeting process?**

No, though it does report directly to Dean of Student Success, Gregory Heinselman. Dean Heinselman and his leadership team have assisted in recent adjustments to our team's resources and have played a more informal advisory role in the process. We are provided support by DOSS personnel for budget management.

- 9. What would be the impact to students if this program's funding were increased by 15-20%?**

If the entirety of the program funds (S&A plus state dollars) were to be increased by 15-20%, this could allow for a new position added to the team, possibly as a Resource Specialist (if not another Case Manager). If the S&A-specific funds we currently have were increased by 15-20%, we believe that we could provide additional professional development opportunities to the campus and to the team, possibly hire student employees for our specific department, improve upon our current access to Case Management resources, etc.

10. What would be the impact to students if this program's funding were decreased by 15-20%?

If the program's funding was decreased by 15-20%, it is unclear how that would impact our students, but we know it would be problematic for staff retention, which has a very serious negative impact on students (limited access to crisis response services, disconnection from established supports, etc.). If unable to retain staff, the ripple effect would most definitely have a negative impact on student care outcomes.

11. What are your program goals or learning/operational objectives? How are you assessing the effectiveness of your program in achieving those targets?

We are currently in the process of building our own program separate from other areas previously aligned (no longer part of Office of Student Rights & Responsibilities). We are working on our mission, vision, goals & objectives at this time and have in draft format but expect to be able to share them formally at our next S&A reporting opportunity. Please advise if these are still requested in spite of being in draft format at this time and we will be happy to forward that request through Dean Heinselman for approval.