



Board of Trustees

Enrollment Management and Student Affairs Committee

11:00 AM
December 20, 2022

Catherine Dower Center for Performing & Fine Arts, Room 127

A live stream of the meeting for public viewing will also take place on YouTube at the following link: <https://www.westfield.ma.edu/live>

For information about Westfield State's COVID-19 procedures, visit: www.westfield.ma.edu/covid

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| 1. Call to Order | Trustee Martinez-Alvarez |
| 2. Approval of Minutes
a) October 12, 2022 | Trustee Martinez-Alvarez |
| 3. Items for Information
a) Admissions and CGCE Update
b) Financial Aid Update
c) Student Engagement
d) Student Wellness | Mr. Mike Mazeika/Ms. Jessica Tansey
Ms. Simone Backstedt
Ms. Maggie Balch
Ms. Maggie Balch |

Attachment(s):

- a) October 12, 2022, Minutes
- b) Slide Presentation



Board of Trustees

Advancement and Enrollment Management Committee

October 12, 2022

Minutes

Arno Maris Gallery, Room 201, Ely Campus Center

And via Zoom, in accordance with Massachusetts Gov. Charlie Baker's Executive Order Suspending Certain Provisions of the Open Meeting Law, G.L. c. 30A, § 20 dated March 12, 2020.

A live stream of the meeting for public viewing also took place on YouTube.

MEMBERS PRESENT: Committee Chair Lydia Martinez-Alvarez, Vice Chair William Reichelt, Secretary Melissa Alvarado, and Trustee Chloe Sanfacon

MEMBERS EXCUSED: Trustee Paul Boudreau

TRUSTEE GUESTS PRESENT: Trustees Theresa Jasmin, Dr. Robert Martin, Chris Montemayor, Ali Salehi, and Dr. Gloria Williams

TRUSTEE GUESTS PARTICIPATING REMOTELY: Trustee Madeline Landrau

Also present/participating remotely were Westfield State University President Dr. Linda Thompson, Enrollment Management Vice President Daniel Forster; Director of Financial Aid Simone Backstedt; Director of Admissions Mike Mazeika; Associate Registrar/Director of Graduate Program Admission Jessica Tansey; Executive Director of Communication, Marketing and Branding Dr. Leslie Rice; Institutional Advancement Vice President Lisa McMahan; Senior Annual Giving Coordinator Courtney Blajda; Interim Director of Advancement and Major Gifts William Hynes; and Associate Director of Alumni Relations Ryan Meersman.

The meeting was called to order at 10:50 AM by Committee Chair Martinez-Alvarez. A roll call was taken of the committee members participating as listed above and it was announced that the meeting is being livestreamed and recorded.

MOTION made by Trustee Reichelt, seconded by Trustee Sanfacon, to approve the minutes of the June 28, 2022, meeting. There being no discussion, **Motion passed unanimously.**

Tuition Discount Modeling. Mr. Forster stated the Financial Aid office is working toward a new structure for budgeting for financial aid. In the past, they were able to increase aid approximately \$200,000 per year, but were still losing ground, especially for the neediest students. In the last two fiscal years, reserves were used to increase financial aid awards. Most universities use the tuition discount rate model where they determine what percentage of money coming in will go back out to help students. It is much more effective. Ms. Backstedt presented a sample of student aid given over the last fiscal year when we were still on a fixed model. Mr. Forster stated we are over budget in financial aid as we typically over award and then

recoup funds not used due to attrition or students leaving. This line item will be brought back into budget. There were over 100 appeals last year and the majority of the additional \$500,000 in aid was given to those students, bringing in approximately 50 additional students. Most appeals are \$2,000 or more, which can tip the family in our favor. It was requested to track how many students enrolled due to receiving part of the \$500,000 through an appeal. Chair Martin requested that at some point in the future the balance between merit and need based aid be discussed.

CGCE Update. Ms. Tansey presented an update on graduate and continuing education:

- For fall, numbers have been consistent with graduate and matriculated students. The Master of Social Work enrolled the first cohort of an online class.
- For Spring 23, graduate enrollment is on target with last year, undergraduates are down in applications and acceptances.
- Each contact with students makes a difference by removing barriers, especially for these non-traditional students who are making a huge effort to get back to school.
- Some academic departments are responding to interest in online classes.
- We need to be flexible with what we offer to students. They want to know how quickly they can get their degrees. It was requested to report back at a future meeting what students want for classes.

Class Profile. Mr. Mazeika stated he is hoping for an increase in out-of-state students as a result of the extra efforts to recruit them this year. Approximately 33% of the class is local and the remainder mostly from all across the state. There is a slight increase in transfer students. There were 143 students lost between depositing and enrolling. Because of collaboration between the admission, billing, and registrar's offices, the enrollment numbers were finalized earlier this year. Less than 50% of transfer students came from the four local community colleges, but 55% of transfer students came from a Massachusetts community college. Admissions sampled 4,400 students who chose not to enroll and received a 3.7% response rate. Significant data points included:

- More than 60% said we were not in their top two choices
- For 36% we were their first or second choice
- The number one reason was cost and/or financial aid
- The second reason was "other" which included acceptance to other schools or a better feeling
- The third reason was location
- For 50% of respondents, they did not visit campus due to distance, cost, time
- Financial aid: 36% said we cost more, 28% said the same, and 36% said we cost less than those they chose to attend.

Recruitment Plan for 2022-23. Mr. Mazeika stated that people buy into why we do what we do. Students want to feel connected, valued, and wanted at their university. The goals for this year are to increase the number of first-year students by 850, which is ambitious. It will take a total community effort to reach that goal by collaborating with departments, increasing diversity, recruiting students from outside Massachusetts, and increasing outreach to local school students. The new Customer Relationship Manager (CRM) software is slated to be in operation before the current CRM ends on June 30.

- To help with the recruitment plan, everyone on campus needs to know what the plan is and the role they can play in it.
- Visits are down compared to last year but those attending have provided very positive feedback. The online presence needs to be improved because half of students do not come for a visit. To improve yield and retention, Admissions is creating incentives to encourage student visits to campus, such as waiving a portion of the deposit.
- The Reach to Teach program recently hosted 51 students on campus which received positive feedback. The goal is to get more local students onto campus.

Marketing and Communication Investment. The investment in Marketing will have an effect in the community by packaging the University and getting it in front of people and on their minds.

Institutional Advancement Update/Quarterly Dashboard. Ms. McMahon shared that last year was a year of engagement resulting in increased donors and alumni connections. Just over \$1.5 million has been raised, which does not count grants. The Foundation had a clean audit in September with no findings. Three reunions have taken place and the Sweet Success for Scholarship Reception was back in person this year.

Student Philanthropy. Ms. Blajda spoke about TAG days (talk about giving). She hosted a table on campus that included President Thompson, a musician, coffee with a cop, and a raffle for students who wrote a note to thank a donor, receiving 48 thank you notes to first-time donors. A senior gift campaign will be launched asking for a \$20.23 gift to the University. Upcoming events are the 100 Days till Graduation and Give a Hoot, and there is excitement to get students educated about philanthropy. Alumni participation increased from .90% last year to the current figure of 1.87%.

Planned Giving Website. Mr. Hynes stated strategic funds were used to launch a planned giving website of <https://westfieldma.planmygift.org>. Planned giving newsletters were sent to 1,000 donors aged 55 and above who have given a gift in the last five years. In November, a second mailing focusing on IRAs and required distributions will be sent to those age 70 and above. Analytics from the website will be brought to the next meeting. It is actually through a planned gift received in 2021, the Foundation is able to give \$300,000 to the University for recruitment and retention initiatives in this current fiscal year.

Alumni Update/Homecoming. Mr. Meersman shared the homecoming theme of “Come Home to the Nest” which has campus-wide engagement from Thursday, October 20 through Sunday, October 23. There will be a Homecoming Scholarship Dinner honoring Dr. Liz Preston and the distinguished alumni of Dr. Robert Enright '73 (Distinguished Alumnus), Dr. Terrell Hill '92 (Excellence in Education), Alison Rheaume '09 (Alumna of the Year), and Ashley Weisse '19 (Excellence in Healthcare).

There being no further business, **MOTION** made by Trustee Alvarado, seconded by Trustee Sanfacon, to adjourn. There being no discussion, **Motion passed unanimously.**

Meeting adjourned at 11:50 AM.

Attachments presented at this meeting:

- a) Draft June 28, 2022, Minutes
- b) Tuition Discount Modeling
- c) Tuition Discount Modeling – Student Sample
- d) Class Profile
- e) CGCE Update
- f) Recruitment Plan
- g) Marketing and Communication-Our Story
- h) Marketing and Communications Investment-Goals-Budget
- i) Quarterly Dashboard
- j) Student Philanthropy Table Flyer
- k) Planned Giving Web Site <https://westfieldma.planmygift.org>
- l) WSAA Dinner & Awards
- m) Homecoming Poster

Secretary's Certificate

I hereby certify that the foregoing is true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement and Enrollment Management Committee meeting held on June 28, 2022.

Melissa Alvarado, Secretary

Date

Fall 2023 Funnel – First Year

Fall 2022



Fall 2023



Fall 2023 Funnel – Transfer

Fall 2022



Fall 2023



Spring 2023 Funnel – First Year

Spring 2022



Spring 2023



Spring 2023 Funnel – Transfer

Spring 2022



Spring 2023



Visitation Update

Summer Tours

- Down 10 students from Summer 2021 (468 vs 457)

Fall Tours

- Daily Tours are running about even (247 vs 249)
- Saturday Tours are down compared to last year (143 vs 110)
- Open Houses finished even with Fall 2021

Highlights

- Reach to Teach Event
 - Approximately 70 students from Springfield Public Schools
- SOAR Westfield
 - 120 Students from Springfield & Holyoke Schools
- Athletics Recruitment Day
 - 40 prospective athletes

Spring Plans

- Accepted Student Days
 - Working closely with Academic Depts. once again
- Junior Discover Days

Key Takeaways

1. **Students are not visiting as frequently as they have pre-pandemic**
2. **Coordinating with schools to bus students to campus is one way to combat the drop in attendance**
3. **Virtual events still have a place in the post-pandemic world**
4. **Accepted Student Days will be vital to enrollment**

Spring 2023 Event Yield Goal: 68%

Spring 2022 Event Yield: 63%

Spring 2019 Event Yield: 67%

Admission Initiatives

1. Increased financial aid with new discount rate strategy
 - Allows for continuous awarding of merit aid
 - Financial aid is able to award need-based aid earlier and consistently
2. 3E Conversion Deposit Campaign
 - Shifting digital and direct mail communication from our awareness campaigns to a deposit “call to action” campaign
3. Expanding NEBHE price to all of New England
 - Moving from a model where certain towns and programs qualified to all of New England qualifying
4. Marketing awareness campaign
 - Investment in advertising for Massachusetts and immediate region to bring awareness of undergraduate, graduate, and online programs
5. Increased focus on recruiting local market
 - Higher engagement with Reach to Teach applicants through partnership with Springfield Public Schools
 - Re-starting SOAR program to bus students to campus for a tour, panel, and event
 - Increased follow-up with local schools and students, specifically underrepresented communities

Fall 2023 Funnel

Part-Time Undergraduate/Second Bachelors

Fall 2022



*Data as of
12/16/2021*

Fall 2023



*Data as of
12/5/2022*

Fall 2023 Funnel Graduate and Post-Baccalaureate

Fall 2022



*Data as of
12/16/2021*

Fall 2023



*Data as of
12/5/2022*

Spring 2023 Funnel

Part-Time Undergraduate/Second Bachelor

Spring 2022



*Data as of
12/16/2021*

Spring 2023



*Data as of
12/5/2022*

Spring 2023 Funnel Graduate and Post-Baccalaureate

Spring 2022



*Data as of
12/16/2021*

Spring 2023



*Data as of
12/5/2022*

Graduate/Part-time Initiatives

Current Initiatives:

1. Master of Social Work early decision deadline of December 1, 2022
2. Increasing communication from graduate and specialty program coordinators being sent to prospective students.
3. Adding QR codes to materials and posters to increase traffic to the website with goal of boosting conversions of prospective students to active inquiries.
4. Exploring external partnerships such as Academic Partnerships to boost enrollments.

Looking Ahead:

1. Collaborating with International Programs office to offer virtual information sessions for international students.
2. Building stronger relationships with community colleges offering online programming to transfer to WSU online programming.
3. Working with current programs on exploring course modalities and offerings to meet students where they are in their academic careers.

2023-2024 Financial Aid Awards

The Office of Financial Aid is in the process of getting ready to award financial aid to new students for the 2023-2024 award year.

Notes:

- Admissions has started to award merit-based scholarships. With the new discount model, Admissions will be able to award these funds continuously throughout the cycle.
- Based on FAFSA data, Financial Aid will award need-based financial aid (federal, state, and institutional) and send financial aid award letters to all accepted students.
 - We will continue to use an “equity” model to award students a % of their “unmet need” based on their EFC.
 - We are working with marketing to make the delivery of financial aid award guide and letter more dynamic

Current Projects

Project One: Automation, process streamlining, and review of current financial aid award set-up

Financial Aid is moving towards automating processes to provide student support and accuracy in aid processing.

- The goal is to move FAFSA data and other federal file downloads to an automated process.
- We are reviewing current financial aid “grouping” processes and aid year set-up with the goal of streamlining systems.

Project Two: Review of summer financial aid set-up, R2T4 with Modules, and SAP policy

Financial Aid wants to make sure our current summer set-up and Return to Title IV (R2T4) with modules policy is compliant. We also are reviewing our Satisfactory Academic Progress (SAP) Policy.

- Summer Pell mandates a summer aid period and summer courses are considered to be offered in modules. If the university moves to course modules for fall and spring, we will be better prepared.
- Satisfactory Academic Progress (SAP) policy being reviewed and re-written.

Hall Programs to Date:

- 7 programs - Academic and Career Development – Total Attendance 340
 - Its Time to Manage Your Time – Time Management
 - Plan Your Semester - Intro to Bullet Journaling
- 7 programs - JEDI: Justice, Equity, Diversity, and Inclusion – Total Attendance 145
 - Central Park Five Movie Night – Movie showing and discussion
 - Community Potluck – Discussion/celebration of different heritages and cultures
- 7 programs - Life Skills – Total Attendance 336
 - There are Voters Among Us! – Voter Registration
 - Under the Influence – Alcohol Education – Collaboration with Public Safety
- 21 programs - Physical/Mental Health and Wellness– Total Attendance 759
 - Men's Mental Health Kahoot – Men's mental health awareness month program
 - Fall in Love with Yourself – Self-Care and stress management program
- 25 programs Community Building Programs – Total Attendance 1168
 - Courtney Chalk Talk – Community builder that allowed residents to add their mark to the Courtney sidewalk
 - Welcome Westy BBQ – Welcome Back BBQ
 - Costume Karaoke – Students in costumes performed and cheered for each other.

Programming Highlights:

- Wicked Week – Weeklong program covering a variety of topics covering sexual health, alcohol awareness, student loans, and social activities. Included collaborations with Financial Aid, Health Services, and Tapestry Health
- NSO Residence Hall Crawl – Collaboration with SAIL - Each first-year building hosted a community builder which included education events during opening weekend.

Student Engagement-SAIL

SGA Welcomes:

- Morgan's Message: supports student athletes' mental health
- Asian & Pacific Islander Student Union: supports WSU students of Asian/ Pacific Islander Decent

The Network:

- 115 events & counting (Bingos, DIYs, Karaoke, Guest Speakers, Socials, and more) [28% of student body has checked into events \(where scanning occurred\)](#)
- Over 50 clubs attended [the Fall Club Fair](#)

Student Wellness

Counseling Center:

- Counseling Center Appointments:
 - 587 regular scheduled appointments
 - 156 students
 - 24 daytime crisis appointments
 - 3 after-hours crisis
 - 2 suicide attempts
 - 3 crisis team evaluations
 - 4 hospitalizations

Outreach:

- 42 outreach programs, 2,277 outreach interactions

My SSP Appointments:

- 75 encounters
- 28 individual students
- 9 calls indicated risk of harm
- 1 hospitalization resulted