



Westfield State University Strategic Enrollment Plan 2022

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INTRODUCTION

This past year has been the perfect storm of enrollment challenges for many public and private institutions – and especially for those without national brands. With the entire recruitment and yield cycle impacted by the pandemic, institutions were unable to offer any on-campus experiences or recruit students at in-person college fairs and high school visits. The financial impact of the pandemic caused job loss for many parents of college-aged students requiring them to use savings originally planned for college expenses. A particularly troubling metric was the dramatic decline in FAFSA submissions for this recruitment cycle – estimated between 10 - 15% nationwide. This decline would indicate that a large number of student and families did not participate in the process at all.

The pandemic also dramatically changed the enrollment behavior of applicants, which in turn changed the higher education marketplace. Most institutions waived the SAT/ACT requirement which expanded options for students and increased the number of colleges students applied to. Institutions concerned about pandemic-related decreases developed larger than usual waitlists and offered substantially bigger financial aid awards – both from institutional budgets and the CARES Act. This all comes at a time when student demographics (especially in New England) are predicted



to decline and families are questioning the value of a college education more than ever before.

It's a challenging time for tuition-dependent institutions, but there is reason for hope – and specifically at Westfield State. Current junior/rising senior inquiries are growing, digital engagement metrics are strong (as measured by our current vendor 3E), and joining the Common App should result in an increase in applications. A new admission director will lead the team alongside 2-3 new admission counselors, and on-campus events will return this fall. A new website will better serve a prospective student audience and enhance current retargeting and tracking capabilities. And despite the challenges of the pandemic, the ways the Westfield State admission team adapted to a virtual strategy could serve us well in reaching new out-of-state audiences.

Our new President Dr. Linda Thompson will join us in July. This transition is an opportunity to forge new relationships in our surrounding communities and the state, and the opportunity to tell the Westfield State University story to an entirely new class of students.

The following plan represents both new and continuing efforts within the Enrollment division to address the pandemic related challenges and look ahead to reverse the related declines. While it is not intended to be a comprehensive document of all efforts, it provides a top level view of plans



already in place, new strategies, and proposals for future enhancements of the division's operations.

HIGH SCHOOL VISITATION AND TRAVEL

Admission recruitment travel affords Westfield State the chance to meet students where they are, as well as forge relationships with guidance counselors. Recruitment events off campus allow for the Admission staff to promote the value of a Westfield State education to families and personally connect to students' interests and career goals.

GOALS

- Admission staff will increase the number of high school visits by 5% this fall through a combination of virtual and in-person visitation. Pre-pandemic, the counseling and EM staff increased our presence in high schools in Massachusetts and out of state in the prior two years by attending 100 additional events.
- Strategically expand reach to areas of NY, southern CT, and NJ if budget allows (determined by historical application count).

STRATEGY

- Counselors will be reviewing application volume and deposit volume by high school to track their goals by territory.

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- Evaluate the effectiveness of the secondary school relationship and resources devoted to each visit.
- Determine budget limitations for attending all events and prioritize accordingly.

DELIVERABLES

- Complete travel schedule, office coverage, and priorities by August 15th.

CAMPUS EVENTS

Campus visitation is the most important affinity measure and one of the best indicators of matriculation intent from the student and their family. Campus visits allow for students to see themselves as part of the campus and experience the welcoming atmosphere first hand. Additionally, visitors will have the opportunity to interact with current students and learn how Westfield can help them achieve their educational goals.

GOALS

- Create additional opportunities for BIPOC attendance and specific affinity groups like Athletics.
- Campus visits will continue to be the first “call to action” in our communication plan for all five modes of contact.

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- School visits will specifically message the importance of touring the campus and attending a fall Open House Event and to apply early.

STRATEGY

- Develop consistent, thematic points of distinction and areas of differentiation from competitors for Westfield State.
- Reinforce messaging that the residential campus has a vast inventory of different living styles including, suite, semi-suite, traditional, and apartment-style residence halls.
- Locate Westfield State as perfectly situated between large urban areas (Springfield, Hartford, Boston, New York City) and the beauty of western Massachusetts and its access to hiking and biking trails, and cultural areas of the Berkshires and Northampton.
- Located between an hour and two hours from population centers it defines the understanding of “just far enough away.”
- Remind prospective students that Westfield State is back for the full on-campus and residential experience, while remaining committed to students’ health and safety.

DELIVERABLES

- Increase attendance to campus events and tours by 10% over our Fall 2019 and Spring 2019 totals.

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- Integrate campus events with other activities to increase the campus activity (Homecoming/Parent Weekend, CURCA events, Career Fairs, Athletic events, etc.). Coordinate with Deans and Department chairs to provide ample opportunity for students to participate in the academic experience (open classrooms, discussions, presentations).
- Increase the percentage of BIPOC student attendance by 5%.
- Schedule and agenda completed and communicated to the campus by August 1, 2021.

YIELD EVENTS

Yield events are among the most important recruitment experiences for increasing student commitments to Westfield State. These events allow for students to experience all Westfield has to offer, both in and out of the classroom. These events are designed to showcase why Westfield is the right fit for a wide audience of students and an incredible educational value.

GOALS

- Convert accepted students to paid students by providing early opportunities for faculty, staff interaction with admitted students.
- First event should be scheduled no later than February 27, 2022.
- Provide distinct activities different from fall events including the opportunity for smaller, personalized interactions.

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- Call to action “deposit” for all communications in this cycle.
- Provide opportunities to deposit throughout the day – ie. A deposit station.
- Review swag inventory and other items for student gift bags so that students take the Westfield brand back to their communities.

STRATEGY

- Schedule will be confirmed, set and communicated by September 1, 2021.

DELIVERABLES

- Increase attendance by 10%. Increase deposits to 1,100 for FTFY.
- Increase BIPOC attendance and deposits by 5%.

FACULTY INVOLVEMENT

Faculty play crucial role in the recruitment of prospective students and families. Students want to engage with faculty earlier in the process and receive affirmation that Westfield State can help them meet their educational goals. Faculty are a valuable resource and their support and expertise are major factors in a student’s decision to attend.

GOALS

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- Increase faculty involvement in recruitment efforts including outreach to prospective and accepted students to increase the number of applications received and the deposit yield.
- Faculty will share highlights and outcomes of their majors so the Admission counselors can better represent the majors at recruitment events.

STRATEGY

- The Admission staff will advise faculty/department chairs on best practices used to promote their majors and programs to students and parents/champions.
- Admission will coordinate with faculty who have previously conducted outreach to prospective and accepted students to assist with training faculty.

DELIVERABLES

- Increasing the participation of faculty in recruiting students is critical to the university meeting its enrollment goals.
- Faculty/chairs will be trained on how to promote/market their majors and programs will have a significant impact on the number of applications received as well as increasing the deposit yield.



COMMUNICATION PLAN

The next nine sections represent specific areas within a comprehensive communication plan for Enrollment Management. Elements of the plan are managed by both current staff and outside vendors – and are coordinated to deploy the right message to the right audiences at the right time within the cycle. The goal of a strong communication plan is to create multi-channel pathways to connect and engage with students, parents, guidance counselors, and influencers – while also generating trackable engagement data necessary for continuous improvement and refinement of the overall plan.

EMAIL

Email remains a standard method of communication for students and families. While not as popular as other modes of communication, email is still a critical component to deliver our message and promote Westfield State.

GOALS

- CRM email communication plan should be designed to support each step of the enrollment strategy and recruitment cycle.



- High level themes should focus on the themes of “Fit” “Affordability” and “Outcomes”.
- Plan will transition leads from 3E Awareness and Conversion campaigns and drive students to deposit.

STRATEGY

- Refresh and update content to coordinate with the rebranding of website, social media, and direct mail.
- Messaging should segment whenever possible – especially post-application.
- Ensure consistent, timely messaging throughout the full recruitment cycle.

DELIVERABLES

- Refresh and update content with input from 3E channel reports.
- CRM Communication plan submitted by August 1, 2021.

SOCIAL MEDIA

Social media provides the opportunity for Westfield State to directly connect with students in an authentic, student-centered medium. Social media allows for direct engagement with students and families and provides the most updated content.



GOALS

- Engage with audiences to generate leads and increase brand awareness.
- Put students at the center of messaging.
- Underpin the themes found within email communications and digital marketing.
- Increase followers and likes.
- Build and strengthen brand themes.

STRATEGY

- Utilize multiple platforms (Instagram, Facebook, YouTube, TikTok).
- Encourage action (explore, sign up, apply, visit, accept).
- Post engaging content to increase views.
- Respond to comments and questions in a timely manner; monitor activity.
- Share live videos as often as possible.
- Staff should maintain social media accounts to interact and comment and direct prospective students.
- Provide a platform for faculty and staff to share accomplishments and information.



DELIVERABLES

- Increase followers on Instagram, Facebook, YouTube, Twitter, TikTok.
- Increase organic content with student, faculty, and staff “takeovers”.

VIDEO MARKETING

In order to reach prospects where they are, we need to create entertaining ways for students to digest information. We will continue to expand our video content this year.

GOALS

- Inform and entertain.
- Provide easy-to-digest information in creative ways.
- Lead generation.
- Build and strengthen brand awareness.

STRATEGY

- Utilize multiple platforms (YouTube, Facebook, Instagram Reels, TikTok).
- Answer common questions (counselor videos).
- Feature student life (Day in the Life series).
- Feature campus (Touring Time series).

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- Create 10-20 short student and faculty videos per semester.
- Encourage action (explore, sign up, apply, visit, accept).
- Implement a student/faculty advisory committee to review content and provide feedback.
- Social media policy (to be reviewed and approved by the Board of Trustees).

DELIVERABLES

- Increase total video views on YouTube, Facebook, Instagram, TikTok.
- Increase conversion activity.
- Improve video searchability through keyword research.

DIGITAL MARKETING

Digital marketing allows for Westfield State to broaden their outreach in a more trackable way. The most effective method to reach new audiences is to be present on digital media platforms (i.e. social media, websites) and have a strong retargeting strategy.

GOALS

- Create relevant sustained digital presence throughout cycle.
- Drive students to microsite.



- Maintain “call to action” for each conversion activity.
- Segment and score inquiries.

STRATEGY

- Create digital ads that highlight “Fit, Affordability and Outcomes.”
- Align with email, direct mail, and visitation messaging.
- Compile and update student interactions across all modes to create actionable activity for counselors, faculty, and staff.
- Measure behavioral engagement rates (3E engagement scoring) to assess strength of student affinity.

DELIVERABLES

- Increase inquiries by 10%.
- Increase application total to 5,000.
- Increase deposits to 1,100 for FYFT.
- Increase diversity of applicants by 5%.

WEBSITE

The University website is the primary hub of information about the application process, campus life, majors, and much more. It is the front door for our prospective students and their families and serves as the most influential element in presenting the campus. Currently, a new redesign is



in the works and will be implemented by fall 2021. The University website's primary purpose is to recruit prospective students.

GOALS

- Primary source of admissions and application information.
- Lead generation (easy-to-use inquiry forms).
- Deliver a quality user experience.
- Provide easy access to relevant information and make it easy to find (application, inquiry, event and visit information, athletics, program and major information).
- Enable easy navigation and completion of tasks.
- Build and strengthen brand awareness.

STRATEGY

- Expand academic major content.
- Improve conversion paths.
- Better communicate the student and campus experience.
- Effectively express and address diversity and inclusion.
- Provide access to one campus calendar to maintain a central database for all campus activities.



- Pages should reflect the intention of the University to position itself as the best fit, most affordable institution that provides the best outcome for its graduates.

DELIVERABLES

- Increase application starts.
- Increase campus visit (or other Admissions event) registration.
- Increase requests for information.
- Increase organic traffic and coordinate retargeting plan.
- Improve on average time on site and sustained activity on site.

TEXTING PLATFORM

Text messaging is a newer and more direct approach to connect with our students and families. Texting is currently used to alert students to important dates in the cycle, remind about event attendance, and conduct pulse surveys (Yes/No responses). Response rates are consistently higher with texting platforms than with email or phone calls.

GOALS

- Create additional channels for student communication to enhance enrollment and retention outreach methods and increase response rates.



STRATEGY

- Integrate a texting platform into the current communication plan as a supplement to traditional methods and to increase immediate, real-time engagement.

DELIVERABLES

- Our current texting platform is a pay-as-you-go service but doesn't have a robust reporting/tracking feature, SMS chatbot, or multi-user logins. Future consideration should be given to acquiring a platform that could support both enrollment and retention efforts and has integration capabilities (Cadence, EdSights).
- Schedule a demo with Student Life (by mid-August) to consider several platforms and propose a budget sharing agreement.

DIRECT MAIL (PRINT)

Direct mail offers Westfield State the opportunity to personalize our message and reach a broad audience. Our print messaging embodies our brand and is a tangible way for students to absorb our messaging. Print is still used during events and at college fairs as well.

GOALS

- Building and strengthening brand awareness.



- Provide memento materials (quality admit letters, stickers, etc.).
- Encourage and promote actions (explore, sign up, apply, visit, accept).
- Inform audiences about Westfield State and the application process.
- Share stories and brand personality in well designed pieces.
- Appreciate and show interest in students.

STRATEGY

- Refresh all print pieces for 21-22 to reflect new website brand themes.
- Create several new pieces including an outcomes piece for parents.

DELIVERABLES

- Assess effectiveness through focus groups, surveys.
- Increase mail sent to African American and Latino/a students.

ONLINE VIEWBOOK (RECOMMENDED FOR 2022)

Traditional printed materials are no longer the only way of reaching high school students. With students becoming more and more connected to technology, it is important for us to meet them where they are. Online viewbooks offer the personalization students expect, while using a mode



they are most comfortable with. In addition, online viewbooks provide Westfield State access to download metrics and personalization data we can use to track and attract the students who engage with the platform.

GOALS

- Provide a custom digital viewbook platform to connect with prospective students.
- Capture and increase the most highly qualified leads.
- Create instant, customizable engagement.
- Access to valuable insights.
- Keep prospects engaged throughout the recruitment cycle on their own timeline.

STRATEGY

- Prospects instantly receive a PURL.
- Prospects are emailed their custom viewbook with the opportunity to share.

DELIVERABLES

- Increase conversion rates.
- Increase yield.



ADDITIONAL MATERIALS & HANDOUTS

While traditional printed materials are not always the most efficient way to engage high school students, they are not inconsequential to the recruitment process. Parents, guidance counselors, and influencers still utilize these materials to gain quick information about the University and programs offered. These materials can offer a snapshot into Westfield State and allow families to quickly understand that Westfield is a great fit for their student.

GOALS

- Design additional takeaway materials for future reference.
- Make campus visits with giveaways enticing for students and their families.
- Promote actions (explore, sign up, apply, visit, accept).
- Build and strengthen brand awareness that students will take back into their communities.

STRATEGY

- At campus visits, college fairs, counselor articulations, and high school visits, distribute print- and swag-related materials.



DELIVERABLES

- Engage in direct interactions to obtain feedback.
- Focus groups and surveys will be used to assess effectiveness.

INTERNATIONAL RECRUITMENT

As restrictions on student visas are relaxed and as the Covid-19 pandemic is less of a concern for international travel, there is an opportunity for Westfield State to increase its marketability to the international market. International students represent an area of potential growth for Westfield State University, and will serve to increase the diversity of Westfield State.

GOALS

- Create new revenue stream for Westfield State
- Expand the Westfield State brand to a global market

STRATEGY

- Develop relationship with EDUCo, an international student recruitment firm based in Australia, and with 150 agents in over 100 countries worldwide.
- Accelerator is a platform that is used by international students to find and apply to programs in the United States.



- 17% royalty fee for every student that is enrolled through the platform.
- Low cost, low risk strategy to increase international enrollment.
- Establish market position in various countries without investment in travel.

DELIVERABLES

- Increase international recruitment by 100%.

FINANCIAL AID

Financial aid is an essential part to enhancing the enrollment at Westfield State University. Based on Common Data Set information from 2019-2020, 85% of students at Westfield State applied for financial aid, with 93% of First Year students doing so. Two-thirds of the incoming First Year class were determined to have financial need, demonstrating that our students and families are dependent on financial aid to be able to make Westfield State an option for their education.

GOALS

- Improve yield.
- Provide greater access to underserved populations.

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- Increase revenue by leveraging institutional merit and need-based awarding.
- Create institutional discount rate goal, instead of fixed budget awarding for financial aid.
- Drive students to apply for aid and filling out FAFSA.

STRATEGY

- Target underperforming populations of the prospective student pool and improve yield.
- Employ merit strategy to help maintain academic profile, market position, and improve yield on high achieving students.
- Improve outreach to students and families to assist with financial aid processing.

DELIVERABLES

- Improve student yield by 3%.
- Increase outreach communications across all modes BY 5% (email, phone, texting, in-person).
- Coordinate with segments of Westfield State enrollment cycle to offer additional incentives (scholarships).



APPLICATIONS/DOCUMENT WORKFLOW

Westfield State has seen a drop in applications each year over the past 3 years. To counter this drop, we simplified our application and partnered with 3E to create a 3 Step application. Moving forward, we will also improve our market presence by becoming part of the Common Application and allowing for students to more easily apply to Westfield State. Improvements will then be targeted to increase our productivity and workflows to turn around decisions much faster.

GOALS

- Improve student experience in applying and completing application process.
- Provide Common Application access to prospective students.
- Initiate electronic submission of application and supporting documents through Parchment.
- Improve tracking and missing item communications.
- Establish published deadlines for response time for acceptances, financial aid award letter.

STRATEGY

- Improve access to Westfield State by eliminating separate application process.



DELIVERABLES

- Increase applications to 5,000
- Decrease response time for decisions for acceptance and financial aid awarding under two weeks after completion.

ADDITIONAL RECOMMENDATIONS FROM INTERIM DIRECTOR OF ADMISSIONS

Although I have not participated in a full Westfield State recruitment cycle or a Westfield State cycle outside of the pandemic, I have asked many questions and worked closely with the admission team's associate and senior assistant directors, the director of financial aid, and the director of marketing. My recommendations are made with the understanding that I've not witnessed a full cycle, but have been informed by many discussions with the staff and the Vice President. Having been in enrollment management for over 25 years, I can assure the Westfield State community that there is a strong, engaged and hard working enrollment team in place. While you could certainly use more of them, the staff members you currently have are committed to their prospective students and to meeting future enrollment goals despite the challenging recruitment environment.

STAFFING STRUCTURE

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- Create a clearly aligned operations structure, moving that team under the current associate director. This will allow for more strategic use of operations staff, expand support for reporting under the associate director, and ensure a more seamless transition to the Common App and its anticipated volume increase.
- Keep counselors under the senior assistant director, but move the transfer counselor to report to the director.
- Hire a communications/data position that will report to the director, run standard reports, manage the email comm plan and texting platform, and support event planning and execution.
- Consider cross training current admission counselors to understand the basics of aid packaging and awarding. This will enhance their ability to have significant counseling discussions with families and take some extra pressure off a small aid team that has to serve both new and returning students.

TRAVEL

- Map out this year's travel season to include as many in-person visits as possible (given no NACAC in-person nationals), but with supplemental virtual evening events for feeder schools. Counselors should book these evening virtual events as early as possible, and develop close relationships with feeder school guidance counselors.

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If possible, share numbers/names of prospective students already in the funnel at each feeder. This type of relationship management with guidance counselors will be useful in enhancing already strong pipelines and get Westfield State in front of more students despite fewer visit options.

- Redouble efforts to recruit in your backyard – while simultaneously finding new pockets of out of state students with similar affinity profiles. Westfield State’s first year applicant pool is overwhelmingly from Massachusetts (87% average last three years), and also where the institution saw its largest decline in volume (950 apps down since 2019). With declining demographics in New England and a densely packed marketplace the competition will only increase. Relationships with students, families and guidance counselors will need to be developed early and often. A clear proposition for the value of a Westfield State education will go a long way here too. Developing this “elevator pitch” for the entire enrollment division is crucial.
- Develop saved reports by counselor that they can access on their own in Recruit. They need a way to track progress towards goals within their territories and feeder schools. Ideally, set goals by territory so counselors understand what outcomes they are responsible for. This work can take place during a summer retreat.

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EVENTS

- Fall Open House dates are set – but need to be shared with the full community, especially academic leadership so that they can plan for faculty attendance.
- Virtual panels, Q&As, and mock classes should be planned by affinity grouping (ie. Largest majors, athletics, arts, student activity, financial aid nights).
- Consider other ways of having student-led virtual experiences like live dorm tours.
- Determine new president's interest in joining open houses and other recruitment events to reserve those times on her calendar early.
- Begin post-event surveying – especially after large events like open houses. Have a quick survey included in every packet and offer a Westfield State gift for turning it in at the end of the event. This will help gauge success of new event structure and offerings.

DATA/TECHNOLOGY

- Have IT assist with importing 3E engagement data – including the weekly updates as engagement scores change. Until that happens, there should be counselor outreach to students with high engagement scores as the fall begins.

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- IT support is also needed as the Common App launches and requires integration with Recruit. The extra volume of applications needs to be planned for now – and IT does not currently have the infrastructure to even support Recruit well. A dedicated IT investment for Enrollment Management is essential to support enrollment growth, better access to better data, and a more seamless customer experience for prospective students. This must be a commitment from the executive level of the institution.
- Design and execute a comprehensive admitted student survey to better understand any shifts in the competitor set and learn more about the reasons students do and don't choose Westfield State. Ideally this would be outsourced or added to the 3E contract so that the survey is well designed to give you actionable results. If this isn't financially possible, Qualtrics could be used.
- Any strategic enrollment plan must make the case for a new CRM that is built to recruit in this intense environment. Ideally the pitch could be made to move to Slate in 2-3 years, allowing for less of an IT resource drain (post implementation) and provide seamless integrations with more cutting-edge recruitment platforms. Additionally, there is a vast network of Slate users across the country and the platform's user group is the most robust I've seen in my 25+ years of CRM use.

ADDITIONAL RESOURCES NEEDED

- \$100,000 NEEDED TO COMPLETE DIGITAL CAMPAIGN FOR 12 MONTHS
- \$60,000 NEEDED TO SUPPORT ADDITIONAL APPLICATION FLOW FROM COMMON APPLICATION IMPLEMENTATION
- \$25,000 FOR ADDITIONAL NAME PURCHASE
- \$17,000 TEXTING APP
- \$20,000 ONLINE VIEWBOOK
- ADDITIONAL IT SUPPORT FOR COMMON APPLICATION AND SUPPORT FOR ENROLLMENT MANAGEMENT (Data Analyst position still open)

PROGRAM DEVELOPMENT NEEDED

Additional fully online programs. This is the greatest need for non-traditional students and working adult degree completers.

- Criminal Justice
- Psychology
- Communications
- Social Work (BSW)
- Business
- MBA



- Additional Program suggestion--Digital Media

RESTRUCTURING PLAN

The Interim Director of Admission contract expires on June 21, 2021.

The Restructuring plan should be implemented as soon as possible.

ATTACHMENTS

1. EDUCo PROPOSAL FOR INTERNATIONAL RECRUITMENT
2. SEASONAL TALKING POINTS FOR CAMPUS COMMUNITY
3. WESTFIELD STATE 3E PARTNERSHIP OVERVIEW