



Board of Trustees

Advancement & Enrollment Management Committee

8:30 AM
December 11, 2019
President's Boardroom

-
- | | |
|---|--------------------------|
| 1. Call to Order | Trustee Martinez-Alvarez |
| 2. Approval of Minutes
October 10, 2019 | Trustee Martinez-Alvarez |
| 3. Items for Discussion
Draft Case for Support-Feedback | Erica Broman |
| 4. Items for Action
Motion: Staff Emeritus/a Status | Erica Broman |
| 5. Items for Information | |
| a. Marts & Lundy benchmarks on adding staff vs. fundraising | Erica Broman |
| b. Faculty/Staff Appeal | Erica Broman |
| c. Board Appeal | Erica Broman |
| d. Institutional Advancement Dashboard | Erica Broman |
| e. Admission Projections | Dan Forster |
| f. Financial Aid Packaging | Dan Forster |

Attachment(s):

- a) Minutes, October 10, 2019
- b) Draft Case for Support
- c) Staff Emeritus/a Justifications
- d) Motion: Staff Emeritus/a Status
- e) IA Dashboard
- f) Admission Projections
- g) Financial Aid Packaging



Board of Trustees

Advancement and Enrollment Management Committee Minutes

President's Boardroom, The Horace Mann Center
October 10, 2019

MEMBERS PRESENT: Committee Chair Martinez-Alvarez, Vice Chair Hagan, Secretary Boudreau and Trustees Magovern, Martin and Neves

MEMBERS EXCUSED: Trustee Hill

TRUSTEE GUESTS PRESENT: Trustees Queenin and Sullivan (entered at 1:07 PM).

Dr. Ramon S. Torrecilha, President of Westfield State University, was also present.

The meeting was called to order at 12:31 PM by Committee Chair Martinez-Alvarez, who stated that Ms. Myrna Ghorayeb from Marts and Lundy was joining the meeting remotely.

MOTION made by Trustee Martin, seconded by Trustee Neves, to approve the minutes of the June 20, 2019 meeting. There being no discussion, **Motion passed unanimously.**

Dr. Erica Broman, Vice President of Institutional Advancement, introduced Ms. Kathy Howrigan of Marts and Lundy, the fundraising consulting firm that assessed how Institutional Advancement is structured and how a capital campaign could work for Westfield State. Ms. Howrigan shared the Phase I Overview with their detailed recommendations, and stated that Phase II would consist of external communications. Points from their internal assessment include:

- Institutional Advancement is under resourced for a campaign
- There is significant improvement in data quality, yet challenges remain
- A comprehensive multi-year plan is needed for Advancement
- Westfield State has had significant growth in leadership and major gift revenue in the past three fiscal years but also a significant decrease in alumni donors
- Westfield State has 16,014 prospects with major gift capacity at \$10,000 or over
- \$7 to \$11 million could be raised in a 5-7 year campaign (which would include a quiet and a public phase)
- Scenarios for a \$10M gift pyramid and a \$20M gift pyramid were shared
- The staffing analysis shared is the industry standard. If Westfield State could implement these levels of productivity, it would need 5 FTEs (gift officers) for a \$10M campaign. It was recommended that fundraising funds not be used to pay for additional staff
- It was questioned what the benefit of adding Assistant/Associate Vice Presidents were instead of gift officers. It was explained that each function is in a silo. The Vice President for Institutional Advancement should not be involved in the day-to-day activities. The most critical position is the

Assistant Vice President for Development.

- Since Dr. Broman has been here, there have been two major gift officers and one director that have been hired and donations went from \$800,000 to more than double that amount.
- Realistically, positions could be added over multi years
- Marts and Lundy will give benchmarks on adding staff vs. fundraising and send to the assistant to the Board of Trustees to distribute to the Trustees

Dr. Broman shared the following informational items:

- Philanthropy Friday survey form was created to help bring social media awareness of why donors give back to the University
- The Institutional Dashboard has been revised per industry best practices. In an effort to compare accurately throughout each year, the office will produce monthly dashboards
- There is a donor thank-you event with a musical presentation on November 12

Mr. Daniel Forster, Vice President for Enrollment Management, shared the following informational items:

- Opening number funnel report (official numbers will be obtained after October 15 census):
 - 85% of first-year prospects are from Massachusetts
 - Improved in all the conversion rates, review of applications and operational work
 - Visited more high schools, attended more fairs, and provided good support for on-road counselors
 - After hitting the mark in transfers for the last two years, the numbers dipped this past year
- Financial Aid Optimization Analysis from EAB:
 - Consultant looked at the way we award aid. We aim to assist students who need the most help and have a small amount of merit-based aid. We are close to 40% yield for those A-/B+ students offered a \$2,000 merit award.
 - Proposed Policy Option #1 does not interest us
 - Proposed Policy Option #2 shows the more you invest in financial aid the better your enrollment.
 - Proposed Policy Option #3 is a larger investment, meeting 20% of need for students and increasing merit amounts considerably to students with higher academics.
 - These options were modeled on meeting no need, 10-20-30% of need, or merit
 - Other universities are meeting higher percentages of need than we are
 - We have been consistently adding to financial aid over the last three years, increasing it by \$100,000 per year
- Plans for Social and Digital Media:
 - Working with the most diverse population in history
 - Biggest enrollment growth is those over 25 years of age
 - Education quality is the highest influencer to college selection
 - Family is also a top influencer
 - Communication weighs heavily in the enrollment decision
 - Requesting a bid for a third party vendor to promote Westfield State's social media

There being no further business, **MOTION** made by Trustee Martin, seconded by Trustee Neves, to adjourn. **Motion passed unanimously.**

Meeting adjourned at 1:41 PM.

Attachments presented at this meeting:

- a. Minutes, June 20, 2019

- b. Marts & Lundy PowerPoint
- c. Philanthropy Friday Form
- d. IA Dashboard
- e. Opening Numbers
- f. EAB Review
- g. Plans for Social & Digital Media

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 October 10, 2019.

Paul Boudreau, Secretary

Date

Experience. The Westfield State Difference.

Seeking \$10 Million in Philanthropic Support
To Fund Three Transformative Student-Experience Initiatives



Confidential Consultative Draft
Revised November 18, 2019

Experience. The Westfield State Difference.

Seeking \$10 Million in Philanthropic Support To Fund Three Transformative Student-Experience Initiatives

Westfield State offers innovative, life-changing experiences for our students.

It's been that way for 180 years. Founded in 1839 as America's first public college open to any qualified applicant—regardless of gender, race, religion or income—WSU has always welcomed a broad range of students, and we've always focused on helping them succeed, in school and in life.

Now, at a unique moment of opportunity, we're seeking funds to further strengthen what is one of the most innovative and effective educations in the nation: an education focused, for all four years, on experiential learning.

Study after study shows that compared with traditional classrooms, experiential learning delves deeper, lasts longer, and better prepares students for successful careers and lifelong growth.

It's the kind of high-impact learning Westfield State's dedicated faculty excel at providing.

And it's the kind of learning that, with your help, we can take to a new level of excellence, opening minds, broadening horizons and transforming lives as never before.

For more about how the **Experience** campaign's three signature initiatives will support our students, and how you can help, please read on.

Building on a Tradition of Innovation and Transformation

At WSU we embrace and champion the life-changing power of higher education. As an affordable public university situated in beautiful Western Massachusetts, we play a pivotal, transformative role, making higher education accessible to families throughout the region—including many first-generation students, veterans, lower-income students, and students with different learning styles.

With a long, proud tradition as a teacher's college and a school committed to opening doors for all—we were the nation's first college to accept co-ed students of any background—we're uniquely positioned to lead educational innovation.

Our influence extends far beyond our immediate area, though. Westfield State attracts students from throughout Massachusetts and beyond. They're drawn by our unwavering commitment to providing high-quality education ... and our signature, life-changing educational *experience*. Called the **Westfield State Experience**, it combines multiple dimensions to help our students grow to their full potential:

A close-knit residential environment, with 84% of first-year students living on campus: one of the highest percentages at any state university in Massachusetts.

Unsurpassed faculty and staff dedication to student success. Our faculty and staff mentor, advise and encourage students continually, within and outside the classroom.

The state's most vibrant integration of academics and athletics, with 50% of students participating in one or more sports at the intercollegiate or intramural level.

Abundant extracurricular activities that enrich the experience of all students, whether they live on campus or off. We have nearly 100 student clubs, an active Student Government Association, and scores of cultural, sports, and entertainment events each semester.

Seizing a Unique Opportunity

In 2018 Westfield State was given a remarkable opportunity to renovate Parenzo Hall, our oldest, largest, and most iconic facility. The \$40-million project is an innovative state-WSU partnership, with \$21 million provided by the state and \$20 million in University funding. The sweeping renovation will allow us to transform Parenzo into an efficient exciting, and inspiring 21st-century facility.

More than merely modernizing, the project also affords us a rare and greater opportunity as well: to utilize the renovations as a springboard—a chance to design and create visionary new ways to serve our students and launch them toward success. To reshape not just the building, but also the educational experiences that can transform lives within it.

We continually review and refine our four-year curriculum in ways that deliver on our commitment to students, making innovative learning experiences central to every student's WSU education.

Now, capitalizing on the opportunity the Parenzo Hall project presents, we're seeking an additional \$10 million in philanthropic support for **three bold, student-focused initiatives** that prepare and empower our students as never before, equipping them with the experience and tools they need to succeed, here at Westfield State and in their lives and careers afterward.

180 Years of Excellence, Opportunity and Innovation

79 *Percent of WSU students who receive financial aid*

Proportion of our students who are their family's first to attend college

30 *Years in a row the TRiO program has supported students from underserved backgrounds*

300+ *WSU students who participate in student-faculty research each year*

1500+ *Student extracurricular activities offered each year*

1 ***Our rank among Massachusetts universities for “Best value in education”***

Initiative 1: Increase Support for Student Success

Our students are inspiring. They're eager. They're hardworking and ambitious.

And sometimes, to be honest, they're challenged:

Challenged by the steep learning curve, when they're the family's first to attend college.

Challenged by the rising cost of higher education—and the burden of student debt.

Challenged by the competing demands of classes and a part-time (or even full-time) job.

Challenged by the obstacles that come with language, learning, and physical differences.

Challenged by the daunting pressures of seeking and securing work after graduation.

To help students master these and other challenges, we're creating a comprehensive new **Center for Student Success and Engagement**. Conveniently and prominently sited in the renovated Parenzo Hall, the Center will focus on increasing retention and graduation rates, as well as reducing achievement gaps.

We already provide numerous support services: academic counseling, coaching and tutoring for students from underserved backgrounds, and support for the 1,100 WSU students with learning, mental health, and physical disabilities. But those services are underresourced, and they're also targeted to specific groups, rather than to all students who might need them. The new Center for Student Success and Engagement will coordinate and co-locate these services, along with career services, making help easier to access, better coordinated, and more effective. In addition, we look to acquire software and assistive technologies that increase accessibility for students.

—PHOTO OF PIERRE CONFERRING WITH ADVISOR—

Teamwork Helps a Student Master Academic Strategies and Succeed

Attending college was rare in Pierre Thomas's family—they had immigrated from Haiti when he was a baby—so along with gratitude for the opportunity, Pierre felt pressure to do well.

He had enrolled in WSU's Urban Education Program, created to help first-generation students succeed. But when he began struggling in difficult courses, he was reluctant to seek help.

Eventually he overcame his reluctance. "My family is working hard to send me here," he recalls, "so I needed to be willing to ask for help." Pierre's Urban Education advisor, Rob Thornton, met weekly with Pierre to set goals and strategize. Bill Pass in WSU's Office of Academic Advising & Transfer Transition arranged for tutoring and study-skill coaching in the Banacos Academic Center. Pierre talked with his professors, too, "to make sure they knew I was trying hard."

The combined efforts "worked wonders," Pierre says. On track to graduate in 2020, he's working with Career Services to explore post-graduation options. "I'm nervous but excited," he says. "Opportunities await!"

Philanthropy will enable the new Center for Student Success and Engagement to expand services that help promising WSU students meet challenges—and prevail.

We'll also **expand scholarships**, to keep WSU affordable and accessible to a broader range of students. Opening doors to additional students from underserved backgrounds—and helping lessen the burden of decades of student-loan debt—is a powerful way we can create pathways to success for deserving students, and forever transform their lives.

WSU's commitment to student success doesn't begin when a student enrolls here. We're reaching out to younger learners across our region to inspire and prepare them for college. Partnering with elementary, middle and high schools, Center staff will help young learners explore career pathways, preparing them for on-the-job training and a focused, experience-based college education.

Similarly, because our commitment to student success doesn't end at graduation, the Center will expand services to prepare WSU students for careers and for graduate school.

Westfield State has always had a strong educational model. Now, by prioritizing experiential learning and increasing services that support student success, we're taking it to a whole new level.

Philanthropic support is crucial. With your generous help, we can put success within the reach of additional WSU students: our existing students, yes, but also the broader range of students we seek to serve—and *need* to serve—across Western Massachusetts and beyond.

Initiative 2: Expand Undergraduate Research Opportunities

There's no better emblem of WSU's focus on experiential learning than CURCA, the Center for Undergraduate Research and Creative Activity.

Created in 2016, CURCA promotes and provides strategic, cross-disciplinary support for students, faculty, and staff who wish to engage in creative scholarship. Located in the Ely Library Mezzanine, CURCA provides incubator space for multi-disciplinary collaborations, speaking engagements, classroom activities, and professional development workshops.

CURCA also provides funding for student research and creative activity, within and outside the classroom: stipends that enable students to conduct summer research and accept career-building internships; the purchase of research materials; travel to conferences, where students and their faculty mentors present their research findings, gain confidence, build networks.

CURCA's results are on impressive display on campus every spring and fall, at showcases that feature TED Talk-style presentations by students, distinguished outside speakers, and hundreds of student-produced posters highlighting their endeavors and results. One exciting result: by providing exciting, problem-solving research opportunities, CURCA shows strong potential to boost student retention and to help graduates land good first jobs.

Currently hundreds of WSU students participate in one or more CURCA projects each year. With additional philanthropic support for internships, materials, travel, and other needs, we hope to make a

CURCA experience available to every interested student.

Philanthropy funds a deep dive into the secrets of the fish that walks

Some biologists spend years—careers—without making a significant discovery. Jarrod Petersen made one as a Westfield State undergraduate. Working with Assistant Professor Jason Ramsay on a CURCA project, Jarrod studied the anatomy of the striped sea-robin—an odd fish that walks the ocean floor, using fin-rays that resemble spider legs. Jarrod discovered that the rays themselves contain no muscles, only bones and ligaments. Instead, the muscles—which adjoin each ray—tug on ligaments, which move the ray’s bones and joints like cables and pulleys. That finding could someday help humans, by advancing the design of prosthetic limbs.

CURCA provided crucial support for Jarrod’s research. Your donation can provide students with experiences that deepen their knowledge, hone their problem-solving skills, and equip them to compete strongly for career-track jobs or graduate school.



Learn more: <https://www.youtube.com/watch?v=FsnIM1chTJI>

Initiative 3: Build Real-World Partnerships through CoLab

Many universities may talk about the importance of collaborative learning. At Westfield State, we’re taking action to provide real-world experiences and create working-world partnerships.

The third key piece of the ***Experience*** campaign is support for the WSU **CoLab**. CoLab is a new program we’re creating to partner with Western Massachusetts industries, community colleges, businesses, K–12 schools, local organizations, and other partners. CoLab’s mission is to expand educational experiences in exciting and productive new ways.

CoLab will leverage technology—online learning, teleconferencing, and other 21st century tools—to create a high-tech nexus at WSU, one where students and community partners engage productively in online-hybrid environments that increase flexibility for students, facilitate co-enrollment, expand course choices, and provide a bridge to employment.

To smooth the transition from community college to WSU, the CoLab will offer free or low-cost hybrid-style programs and boot camps. CoLab will work with chambers of commerce and economic development boards to create networks and relationships, to guide development of relevant courses, and to secure support

In tandem with the Center for Student Success and Engagement, CoLab will offer students the opportunity to engage with industry professionals, to apply their knowledge and skill sets in real-world settings, and to explore career opportunities. To further leverage the benefits of workforce partnerships, WSU will offer new certificate programs in high-demand fields, as well as high-tech graduate study options for employees at businesses we partner with.

We're seeking engagement-minded donors to fund the launch of CoLab: funding for technology, for outreach staff, for boot-camp scholarships, and the other infrastructure, staffing and programmatic resources. With your help we'll build bridges, forge partnerships, and expand learning experiences in exciting new ways for WSU students.

Adding Real-World Mastery to a Master's Degree

Charles DiStefano wasn't content with just classroom theory for his students in Organizational Behavior, a pillar of WSU's Master's in Public Administration program. From his own pre-academic career, he knew that there's no substitute for real-world experience.

DiStefano reached out to two organizations: the town of Templeton, and the Westfield Education to Business Alliance (WE2BA, pronounced "we tuba"), a partnership between the Chamber of Commerce and K-12 schools. When he asked if his students might be helpful partners, he got an enthusiastic "yes" from both groups.

Templeton, a town of 8,000 located 50 miles northeast of Westfield, hopes to expand recreational programs, but faces financial constraints. WE2BA seeks innovative ways to better prepare students for the workforce.

DiStefano split his 14 students into two teams. The Templeton team sought fun, low-cost recreation in other towns. The WE2BA team explored ways to tap business experts to create skill-building, sustainable programs that can benefit local students—and serve as models for other communities.

"It's exciting to see my students grow," says DiStefano. "At first they were apprehensive. Now, they know how to do the research, they're confident they can succeed, and they're getting real-world, practical experience they wouldn't get in a traditional classroom."

The Experience of a Lifetime

For many of our students, past and present, the Westfield State Experience is life-changing.

It's a portal to new knowledge, to broader horizons, to unexpected journeys to fulfillment. It's the beginning of lifelong learning and enduring relationships.

That's been true ever since 1839. Now, to keep it true for generations to come, we're creating powerful new ways to make WSU and the Westfield State Experience relevant, empowering, and transformative.

We can't do that without substantial support. *Your* support. It's crucial to providing new experiences that will spark curiosity, unleash intellectual passion, fund research, build teamwork and problem-solving skills, remove barriers to graduation, and provide a launch pad for post-graduation success.

Donations to WSU make an immediate, meaningful contribution to our students' experience here—far more meaningful, dollar for dollar, than donations to universities that put polishing their pedigrees and enriching their endowments ahead of serving their students.

These three campaign initiatives—the Center for Student Success and Engagement, CURCA, AND CoLab—focus strategically and exclusively on elevating the Westfield State Experience. By supporting them, you support our highest priority: our students.

We invite you—we urge you: Join us, and share the ***Experience***.

Experience. The Westfield State Difference.



Board of Trustees

December 11, 2019

MOTION

To approve the granting of Staff Emeritus/a status, effective December 11, 2019 to the following individuals:

Ms. Deborah Adams
Ms. Susan LaMontagne
Ms. Maureen McCartney
Dr. Carlton Pickron
Ms. Catherine Ryan

Kevin Queenin, Chair

Date

STAFF EMERITUS/A JUSTIFICATIONS

December 3, 2019

In December 2010, the Board of Trustees approved the development of a Staff Emeritus/a program for Westfield State University. The intent of the program is to honor and recognize retirees of the university whose careers at Westfield State were marked by distinguished and substantive achievement. To be eligible, employees must have been retired with a minimum of ten years of full-time service, and must not be currently employed as a full-time employee at any other college, school or university.

The Staff Emeritus/a Committee requested nominations from the campus community to be considered for Emeritus/a status. The committee met recently to review the submissions received this year from the campus. On behalf of this committee, I am delighted to submit the following names as their recommendations for staff emeritus/a status:

Deborah Adams

Deborah Adams was a dedicated employee of Westfield State for over two decades. She began as a Clerk IV in 1997 in the Graduate and Continuing Education Department. In 2006, she was appointed to a position in Payroll and in 2008 was promoted to an accountant position in Accounts Payable. She concluded her career as a Senior Accountant III position in 2013. She was responsible for the payment of vendors for the entire university and worked closely with all departments to ensure that bills were paid in an accurate and timely fashion.

Whether in Continuing Education or in Administration and Finance, she was committed to taking the extra step needed to help students and employees. Outside of the University, Deborah was a committed community volunteer, particularly with her work at the

Westfield Soup Kitchen.

Susan LaMontagne

Susan served Westfield State for over three decades in a variety of capacities within Student Affairs including two stints as Interim Vice President for Student Affairs. She was a tireless advocate, mentor and counselor for students and advocated on behalf of families during times of crisis. She was and is considered a leader both statewide and on campus in the areas of Student Conduct, FERPA, TITLE IX, Student Government and Affirmative Action. Her service to the institution goes beyond the strengths exhibited above to encompass the chairing or co-chairing of numerous campus wide committees, including accreditation, the Westfield State Experience, the First Year Experience, the crisis team and faculty/staff development. Beyond the campus borders, her positive influence was felt in her work with the Westfield Police, downtown landlords and students who live off-campus.

Maureen McCartney

Maureen McCartney began working at Westfield State in the President's office in 1983 handling a variety of activities with a number of permanent and interim presidents. From there she moved into service as the Executive Director of Experiential Education and Career Services. In this capacity, she helped to grow the University's involvement in The Washington Center in Washington, DC, where numerous students gained internship experience working at non-profits and government agencies in our nation's capital. This position led to her final one at the institution as Associate Dean of Academic Achievement, a position she held for nearly a decade. She oversaw the administrative departments dedicated to student success including Urban Education, TRiO Student Support Services, Academic Advising, Tutoring, the Learning Disabilities Program, Disabled Student Services, Reading and Writing Center and Supplemental Instruction. She over saw first-year initiatives including the First-Year Common Read, first-year only courses, and film and lecture series.

Carlton Pickron

Dr. Pickron began working at Westfield State University in February 1983 as a counselor in the Urban Education program, a role he fulfilled for six years. He then moved into the position of Associate Dean of Academic Affairs from 1989 until 2005 where he was instrumental in the creation of the Office of Academic Advising and Disabled Student Services. Dr. Pickron assisted hundreds of students in his many roles with the institution before becoming Vice President of Student Affairs where he oversaw Admissions, Athletics, Career Services, Counseling, Diversity and Inclusion, New Student Orientation and Residential Life.

His positive influence extended to serving on several dissertation committees for those pursuing doctoral degrees, authoring several publications on the doctoral process, preparing students for success and peer mentoring for students of color. Beyond academic support, Dr. Pickron served on numerous committees and even became assistant men's track and field coach. Beyond the campus, Dr. Pickron was a volunteer at the Boston Marathon, served on high school advisory boards and was District Representative for Omega Psi Phi.

Catherine Ryan

Catherine Ryan began her service to Westfield State in September of 1986 and served in the Financial Aid for her 33 years at the University. In her many years of service, Catherine helped countless students with making their goals of and education a reality. She worked tirelessly to ensure that the most deserving students received funding and routinely advocated for additional monies for students. She was involved in a variety of financial aid affiliates throughout the state. She was also committed to committee work here at Westfield including her service on the NEASC committee, the Enrollment Management Committee, and Administrative Council. Her knowledge and years of experience made her an invaluable member of every committee she served. She worked hand-in-hand with other campus departments on behalf of students and was an integral

part of the Last Mile Scholarship process ensuring that graduating senior were able to finish their degrees and not incur more debt doing so.

Institutional Advancement DASHBOARD

July 1, 2019–October 31, 2019

Highlights

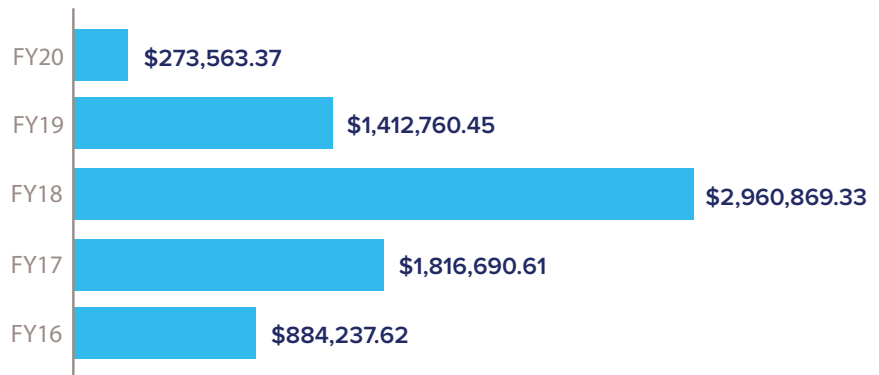
Institutional Advancement staff, working with multiple donors, have recently confirmed over \$2 million in planned gifts.

A successful donor appreciation event was held prior to the Wind Symphony concert on November 12. In addition to re-engaging a number of lapsed donors, George and Merian Rogers were recognized with the naming of the music education classroom in the Catherine Dower Center in honor of their establishment of the first four year scholarship for a WSU music major.

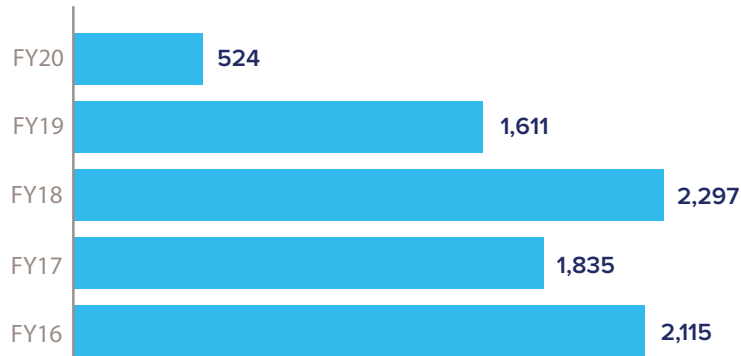
The recently inaugurated Philanthropy Fridays have met with great success. A combination of donor quotes and facts regarding philanthropic support have helped spread the word on private giving to Westfield State.

The Beveridge Foundation recently notified the WSF that we would be receiving \$32,000 in support of the Westfield Pride scholarship.

TOTAL DOLLARS



TOTAL DONORS



* In the two bar charts above, the data in FY19 and FY20 ONLY includes donations. The data for FY18, FY17, and FY16 includes donations and non-gift income.

	Gifts of \$5,000+	Median Gift	Average Gift
FY20	11	\$25.00	\$254.00
FY19	61	\$25.00	\$368.48
FY18	48	\$40.00	\$993.81

Volunteer Boards	Population	Dollars	Donors	Average Gift	Participation
Board of Trustees					
FY20	10	\$0.00	0	\$0.00	0.00%
FY19	11	\$15,065.00	8	\$1,369.55	72.73%
Foundation Board					
FY20	26	\$1,450.00	4	\$55.77	15.38%
FY19	27	\$17,513.86	23	\$648.66	85.19%
Alumni Association					
FY20	15	\$100.00	1	\$6.67	6.67%
FY19	17	\$3,420.08	17	\$201.18	100.00%
Cabinet					
FY20	8	\$2,428.00	5	\$303.50	62.50%
FY19	9	\$14,345.00	9	\$1,593.89	100.00%

PLEASE NOTE: Single gifts that are exceptionally large or exceptionally small in comparison to the majority of the data are called outliers. These outliers are included in the calculations of the Average Gift and Median Gift in the two tables above, and thus may skew the results.

Admission Funnel Report

11/20/2019

Fall 2020									
First Years					Transfers				
	Fall 2019	Fall 2020	Goal	% to Goal		Fall 2019	Fall 2020	Goal	% to Goal
Prospects	64671	47946			Prospects	n/a	n/a		
Inquiries	12581	12780	13000	98.3%	Inquiries	280	300	1350	22.2%
Applications	2056	2119	5500	38.5%	Applications	56	57	800	7.1%
Complete Applications	226	1131	4820	23.5%	Complete Applications	3	8	600	1.3%
Accepts	3	0	4100	0.0%	Accepts	0	0	575	0.0%
Deposits (Total)	0	0	1189	0.0%	Deposits (Total)	0	0	380	0.0%
Deposits	0	0	1050	0.0%	Deposits	0	0	340	0.0%
Denied	0	0			Denied	0	0		

Spring 2020									
First Years					Transfers				
	Spring 2019	Spring 2020	Goal	% to Goal		Spring 2019	Spring 2020	Goal	% to Goal
Inquiries	160	118	150	78.7%	Inquiries	380	340	400	85.0%
Applications	56	38	60	63.3%	Applications	215	204	300	68.0%
Complete Applications	30	21	40	52.5%	Complete Applications	112	121	230	52.6%
Accepts	29	18	30	30.0%	Accepts	108	117	200	58.5%
Deposits	26	9	20	0.0%	Deposits	48	44	130	33.8%
Denied	0	0			Denied	4	3		

Tour Numbers					
	Fall 2019	Fall 2020	Goal	% to Goal	
Summer	5/30 - 8/18	6/4 - 8/24			
Daily Tours/Info. Sessions	792	764	850	89.9%	
Fall	9/10-12/14	9/16-12/13			
Daily Tours/Info. Sessions	616	466	835	55.8%	
Saturday Tours	141	69	140	49.3%	
Totals	757	0	975	0.0%	
Open House 1	181	146	175	83.4%	9/28/2019
Open House 2	121	158	210	75.2%	10/19/2019
Open House 3	252	211	210	100.5%	
Totals	554	512	595	86.1%	

Summer 2019 Enrollment Data in Comparison to Summer 2018

For Summer I 2018

STUDENT TYPE	STATUS	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
CGCE Undergraduate	MATRIC	223	328	1,072.0	1.47	89.33
	NON-MATRIC	156	174	606.0	1.12	50.50
SUBTOTAL		379	502	1,678.0	2.59	139.83
CGCE Graduate	MATRIC	146	171	513.0	1.17	57.00
	NON-MATRIC	61	66	172.0	1.08	19.11
SUBTOTAL		207	237	685.0	2.25	76.11
CGCE TOTAL		586	739	2,363.0	4.84	215.94
Day Undergraduate	MATRIC	506	657	2,027.0	1.30	168.92
TOTAL		1,092	1,396	4,390	1.28	384.86

For Summer II 2018

STUDENT TYPE	STATUS	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
CGCE Undergraduate	MATRIC	138	189	579.0	1.37	48.25
	NON-MATRIC	130	140	478.0	1.08	39.83
SUBTOTAL		268	329	1,057.0	2.45	88.08
CGCE Graduate	MATRIC	119	126	379.0	1.06	42.11
	NON-MATRIC	159	162	385.0	1.02	42.78
SUBTOTAL		278	288	764.0	2.08	84.89
CGCE TOTAL		546	617	1,821.0	4.52	172.97
Day Undergraduate	MATRIC	340	433	1,317.0	1.27	109.75
TOTAL		886	1,050	3,138	1.19	282.72

Summer 2018 PA program

STUDENT TYPE	STUDENT_TYPE	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
PA	MATRIC	24	168	480.00	7.00	53.33
*TOTAL TERM 201845		24	168	480.00	7.00	53.33

PA Summer Term is unique to the PA program, including both Summer I and Summer II

*Day Undergraduates pay CGCE tuition during the summer terms and are included in the FTE conversion.

Undergraduate FTE=# of credits/12 credits; GR FTE=# of credits/9 credits

*Data includes all courses; including remote course enrollments, courses subject to discounting, all registered, withdrawn, and

For Summer I 2019

STUDENT TYPE	STATUS	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
CGCE Undergraduate	MATRIC	226	304	953.0	1.35	79.42
	NON-MATRIC	174	192	649.0	1.10	54.08
SUBTOTAL		400	496	1,602.0	2.45	133.50
CGCE Graduate	MATRIC	163	192	576.0	1.18	64.00
	NON-MATRIC	52	55	135.0	1.06	15.00
SUBTOTAL		215	247	711.0	2.24	79.00
CGCE TOTAL		615	743	2,313.0	4.68	212.50
Day Undergraduate	MATRIC	451	567	1,741.0	1.27	145.08
TOTAL		1,066	1,310	4,054	1.23	357.58

For Summer II 2019

STUDENT TYPE	STATUS	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
CGCE Undergraduate	MATRIC	155	193	582.0	1.2452	48.50
	NON-MATRIC	147	175	586.0	1.1905	48.83
SUBTOTAL		302	368	1,168.0	2.4356	97.33
CGCE Graduate	MATRIC	108	111	333.0	1.0278	37.00
	NON-MATRIC	164	174	458.0	1.0610	50.89
SUBTOTAL		272	285	791.0	2.0888	87.89
CGCE TOTAL		574	653	1,959.0	4.5244	185.22
Day Undergraduate	MATRIC	277	322	975.0	1.21	81.25
TOTAL		851	975	2,934	1.15	266.47

Summer 2019 PA program

STUDENT TYPE	STUDENT_TYPE	DISTINCT STUDENT COUNT	SEAT COUNT	CREDITS	AVG SEATS TAKEN	FTE Conversion
PA	MATRIC	52	287	842.00	5.52	93.56
*TOTAL TERM 201845		24	168	480.00	7.00	93.56

no-shows.

Financial Aid Packaging

	Enrolled	Inst Grant	Net Rev.	Discount
2019-20 census results:	1020	\$1,795,377	\$9,651,893	15.7%
Merit (by increasing academic rank)=500/1k/1k/1.5k/2k, at 15% of need met for all:	1136	\$2,152,134	\$10,855,851	16.5%
Difference compared to 2019-20 census results:	+116	+\$356,757	+\$1,203,958	+0.9%
Merit (by increasing academic rank)= 500/1k/1k/2K/2K, at 15% of need met for all:	1155	\$2,270,253	\$10,948,157	17.2%
Difference compared to 2019-20 census results:	+135	+\$474,876	+\$1,296,264	+1.5%